Panorama Tips & Tricks #14
IOM Defects and Workarounds

Screen	Description	Work Around	Planned For
Search Exposures>Advanced Search	Per Panorama documentation, the Disease list in exposure advanced search must match the disease list for investigations. The actual list matches the indicative disease list. This is a Panorama defect which cannot be resolved through configuration.	An Exposure Report is being developed.	R3.2
`	The system is not allowing the "additional information" text to match between different risk factors. BR 10 indications this only applies to a Risk Factor that is added multiple times.	This field has been disabled for use in Nova Scotia until the defect has been remediated.	R3.2
Risk Factors	Once a user select to [Update], [Apply] and [Save] for a Risk Factor preset, the user must leave the Risk Factor page and then navigate back to update an additional preset.	Update all Risk Factors before selecting [Save] or navigate away from the screen and select Risk Factors again.	The defect has been resolved indirectly in R3.1 or R3.2.
Risk Factors	Client IMMS Profile screen does not fully deploy	At least one risk factor must be configured for the IMMS encounter group and assigned to a category and the preset set as well.	
Document Management > Context Document	A user is not able to Add a Context Document when a Non-Human Subject is in context	Must place an Investigation in context with the Subject until a Panorama improvement is completed.	Unassigned
2. View Client Imms Profile 3. Client Warnings 4. Client Relationships 5. Consent Directives – Immunization Service 6. Consent Directives – All Directives 7. Risk Factors	UI behavior when Non-Human Subject is in context	This behaviour will be corrected when the defect has been remediated in future release.	Release 3.2

Screen	Description	Work Around	Planned For
1. Medications Summary (Classic) 2.Interpretation Summary (Classic)	UI behavior when Non-Human Subject is in context. This has been split out from 114448 as these are Classic screens.	This behaviour will be correct when the defect has been remediated in a future release.	Release 3.2
Maintain Microorganism	There are duplicate coded concepts in the iTerm table, one of each pair with the status retired and one active. This causes a database problem as a coded concept cannot be both retired and active at the same time.	None – a service request has been raised to correct the issue.	Unassigned
Incubation and Communicability	IOM CASE Incubation and Communicability calculations are 1 hour short in some cases	None - this defect will be remediated in a future release.	3.2.013
Incubation and Communicability	IOM CONTACT Incubation and Communicability calculations are 1 hour short in some cases	None – this is a defect which requires remediation.	Unassigned
Transmission Event	IOM Clock usage for representing time is different between Communicability for Case and Transmission Event Date/Time	None – this is a defect which requires remediation.	Unassigned
Acquisition Event	IOM Clock usage for representing time is different between Communicability for Source Case and Contact Acquisition Event Date/Time	None – this is a defect which requires remediation.	Unassigned
Risk Factors iTerm	Not able to modify the Disease description for code 328383001 (Chronic liver disease).	On the Risk Factor screens, Chronic liver disease will appear without the Category prefix of Medical.	
Directly Observed Therapy Details	Overall DOT compliance is miscalculating (X 10,0000)	Calculate manually until defect remediated.	R3.1.012
S & S Summary > Observation Details	Observed By is displaying with the users first name, last name	Select Details Exit hyperlink and [Update] to see correct value; There is no workaround - be aware of the issue.	
Outbreak Team	DDUC 8205 Outbreak Team - Assign Role feature not extending functional permissions to the outbreak team member	Two temporary roles have been created and will be assigned as necessary to assist with an Outbreak as required.	R3.2

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Screen	Description	Work Around	Planned For
TB History Details	Previous Treatment Date required when value of None is selected	Select "Unknown Treatment" if clinically acceptable and provide explanation in Notes.	R3.0.1
Cohort > Update Client List Membership	Not able to search by HCN to add clients to the list using EFC	Use Search (magnifying glass) to perform client search. Alternatively Paste HCN directly into the Client field returns correct results.	
Outbreak Create	Rod Dot Error when creating/saving outbreak.	Complete search before creating new outbreak. If Red Dot error received after Save initiated, the Outbreak may have been saved.	
Outbreak Classification Summary	When parent outbreak is created, the screen may be populated with incorrect data	When child outbreaks are linked, screen values are corrected.	
Risk Factors	Inconsistent display of disease in Pertinent Link applied to a risk factor.	Review values in the lab summary pages or on the investigation summary - lab summary section if required.	
Close Investigation	Close an investigation with all contacts closed - receive message that implies contacts are open.	Ignore the content of the message if you know that you have closed all contacts.	
Non-Human Subject Information	Screen refresh delay when selecting Subject Category, Subject Type and Subject Subtype	Select the Subject Category, Subject Type and Subject Subtype on the Search screen and [Search]. These fields will then be auto populated when the [Create Subject] is selected.	

The following list are training points raised during user acceptance testing and included here to provide additional information.

Issue Description	Workaround/Response
Investigation	
Selecting client address at time of investigation.	Review client demographics to determine correct address then select address from drop-down list. Note: the address should contain the postal code. The field will default to the preferred address. Ensure the preferred address contains the postal code – change if necessary by using the "set preferred" button.
Attempted to transfer a task between zone workgroups but was unable to complete.	When adding a new primary investigator as part of the transfer of an investigation, Panorama will generate a new task to that workgroup/investigator combination.
When assigning a new primary investigator, expected the system to change the current primary investigator to secondary.	There can be only one primary investigator – the switch from primary to secondary must be completed manually.
Updating "Contact – person under investigation" to "case – confirmed" and received following message: "The classification group of the primary classification has been changed from "contact" to "case". A contact episode has been created. All encounters currently associated to the investigation have been moved to the episode. Investigation details successfully saved."	Both encounter and episode functions generated by the system should be ignored by the users. The update was successfully saved.
Aboriginal Screen – adding living off reserve, effective from/to dates auto-populate and a blank line gets inserted below the first entry. Extra line should not be included, and nurses may need to fill in the effective date instead of accepting default entry.	Effective from and to dates are system generated and there is no ability for the user to change these. These are effective dates for data entry – not effective dates of client's status. Any save on this screen will be documented in the Aboriginal Information History section including blank entries.
Lab	
Tried to generate a task while updating a lab result from the full lab report screen instead of the initial Lab Quick Entry screen.	Lab Result must be saved before the task generation controls will be enabled to be used to generate a new task.

Issue Description	Workaround/Response
A lab was created (likely by a clerk) and then made pertinent to the investigation. The user puts the investigation in context then tries to update that lab - they will get a message indicating they need to remove the investigation from context before it can be updated.	Navigate to recent work and click on the client link to remove the investigation from context.
A lab was created while the user had the investigation in context (likely by the nurse). They will be able to update it while the investigation is in context without an issue, however - if they try to make it pertinent to the investigation they are in – the Investigation will not be available to them in the drop-down list.	As the lab was created with the investigation in context, no further action is required – i.e. no need to make the lab pertinent as it is already "attached" to the investigation. When the lab report is selected, Panorama puts the investigation in context automatically.
Attempting to Update a Specimen Collection to correct a mistake.	Specimen and Specimen collection details are located on a portion of the lab that cannot be updated after their initial entry. If a specimen details is entered incorrectly – delete the lab report portion of the lab and change the status of the Report Requisition to Withdrawn.
Risk Factors	
Attempting to add risk factor already included in presets. Expected a warning would be presented that risk factor already exists.	System will allow multiple instances of the same risk factor to be added to a client's record and made pertinent to the investigation(s). Users will need to take care not to duplicate preset risk factors.
Exposure Summary	
Add task via using the Transmission Event Details section of the Transmissions Event. The only workgroup available was the IOM-PHO unmonitored workgroup was only selection – Exposures/Transmission Event Details Section	This section of that screen is not being used in Nova Scotia.
Treatment & Intervention	
Treatment Profile – only value in Reason for Treatment field is "Confirmed Disease" which is not applicable to the scenario.	The treatment profile screen acts as a dashboard for that portion of the application. The Treatment Profile section of the screen section is not being used in Nova Scotia.
How to identify when a High Risk Immunization has occurred as part of an investigation.	High Risk Immunizations can be started from the Treatment Profile page using the Investigation Related Immunizations section. Adding an immunization Record from that screen will make the actual immunization for that client pertinent to the investigation when It is added using the Add Provider Recorded method.
Recent Work & Encounters	

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Recent entries not showing in recent work.	Recent work populates based on user role. When switching between roles, recent work will change based on the role selected and the work completed using that role. If the issue persists flip between modules to refresh the Recent Work screen.
Add lab, went to recent work to create investigation and user was flipped to IMMS module with client in context.	Ensure correct hyperlinks are selected in recent work.
Unable to access Lab Report from the Report Hyperlink within an encounter.	Encounter functionality will not be used in Nova Scotia. Users should ignore any auto-generated encounters Panorama produces.
Document Management & Cohorts	
Uploaded a file and then received a message: Unable to reach letter" when attempting to open the document	This is a a desktop issue. The solution from the help desk will be to reboot your computer.
Add clients to cohort by HCN. Unable to complete as the system responds with a list before the full number is entered.	Use the search function (magnifying glass) to search for the client. Alternatively, cut and paste the HCN into the search field – the system responds too quickly to type the number.