P16-0371 Panorama Project

Panorama Investigation Management User Manual

PNS CLT 101 Client Records Management Addendum

Version 1.0

Dated: 2018-10-16

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1 COURSE UPDATE

The Client Records Management course was originally designed for Immunization Training and this addendum has been created to include additional client screens used for Investigation & Outbreak Management. These new sections are:

1. Immigration Information
2. Aboriginal Information
3. Health Services
4. Risk Factors

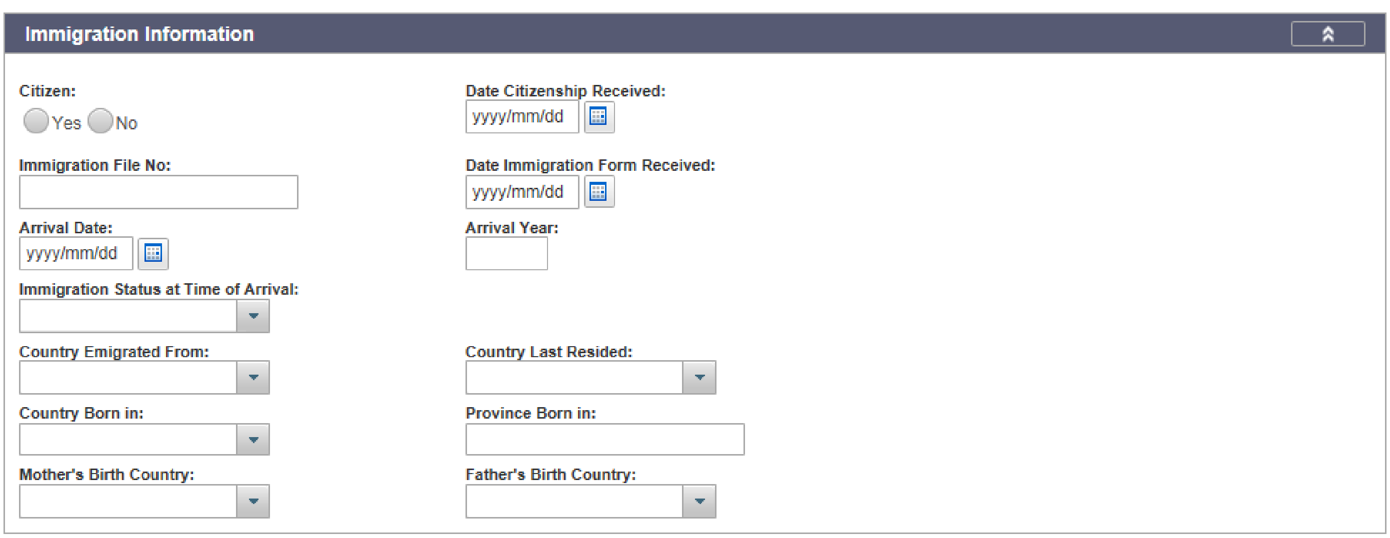
2 IMMIGRATION INFORMATION

The Immigration Information screen allows users to create and update immigration information related to a client. There are no Panorama mandatory fields on this screen which must be completed in order to save the record.

2.1 Create Immigration Information Record

1. After setting a client In Context, go to the **Left-Hand Navigation** menu.
2. Under the Client/Subject/Client Details section, click **Immigration Information**.

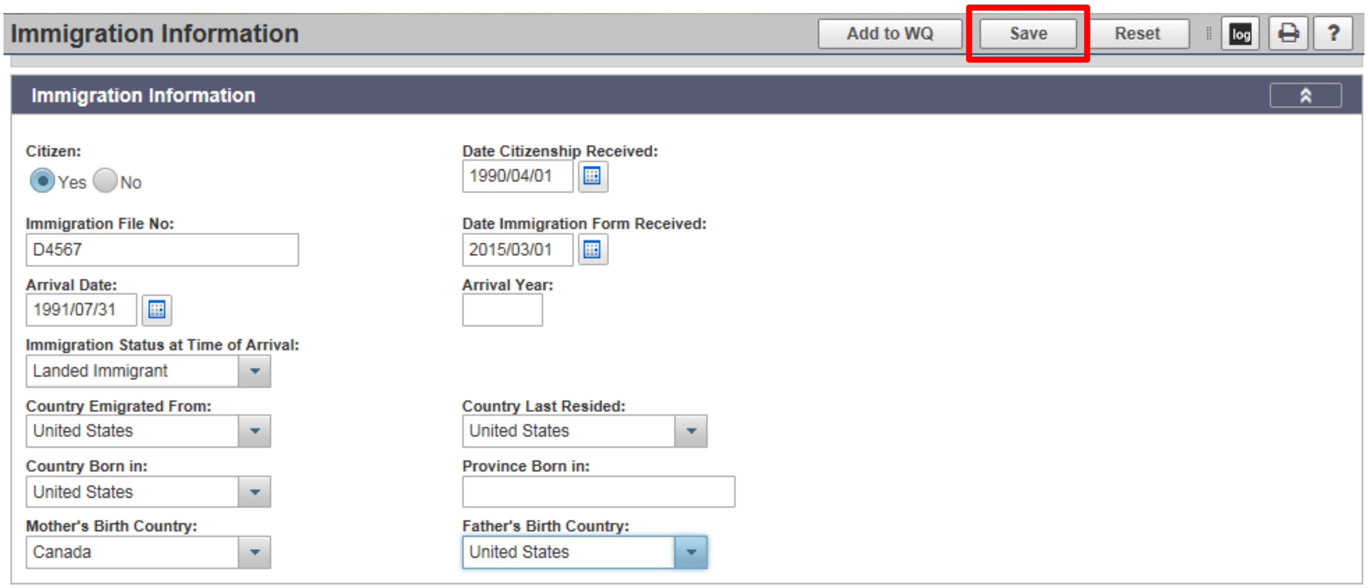
The Immigration Information screen is displayed.



3. Select the appropriate radial button for **Citizen**.
4. Complete fields with available information.

Note: there are no Panorama mandatory fields on this screen.

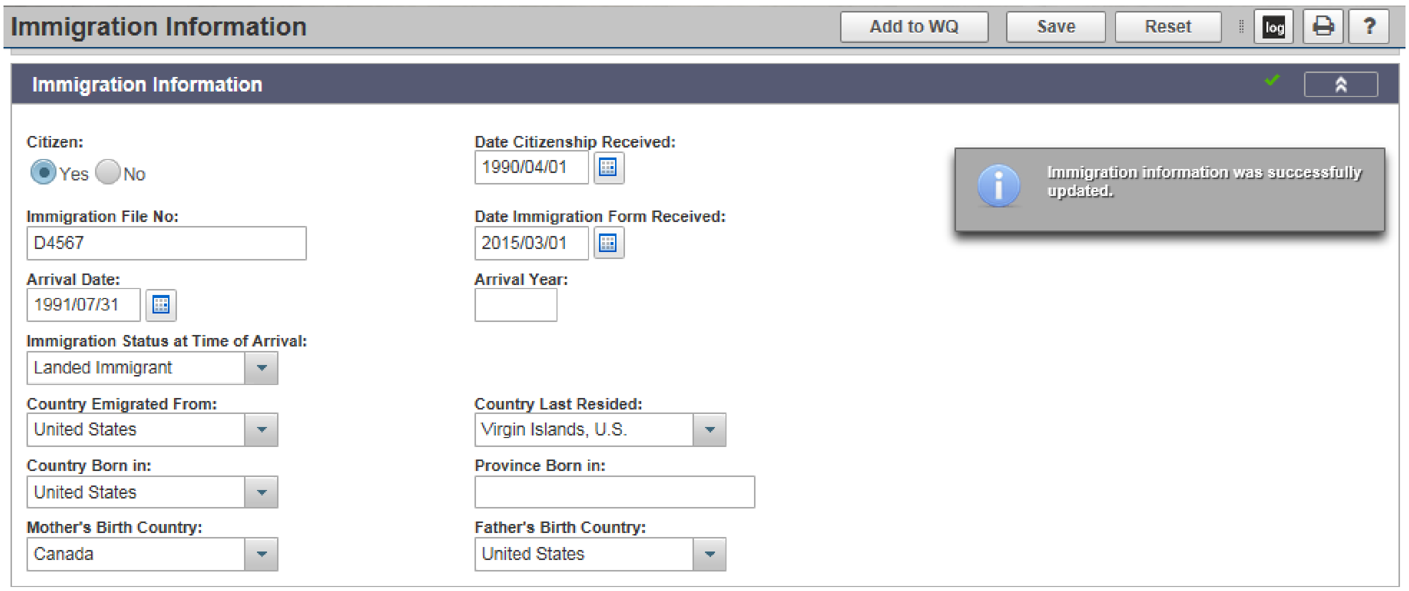
5. Click **Save** button.



A message will display indicating the record was successfully saved..

2.2 Update Immigration Information Record

1. With the client in context, navigate to the **Immigration Information** screen.
2. Update the relevant fields.
3. Click **Save** button.



A message will display indicating the record was successfully updated.

Note: There is no history table to track changes made to Immigration Information.

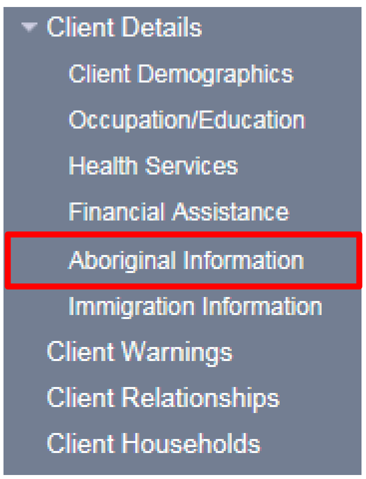
Note: Immigration Information records cannot be deleted.

3 ABORIGINAL INFORMATION

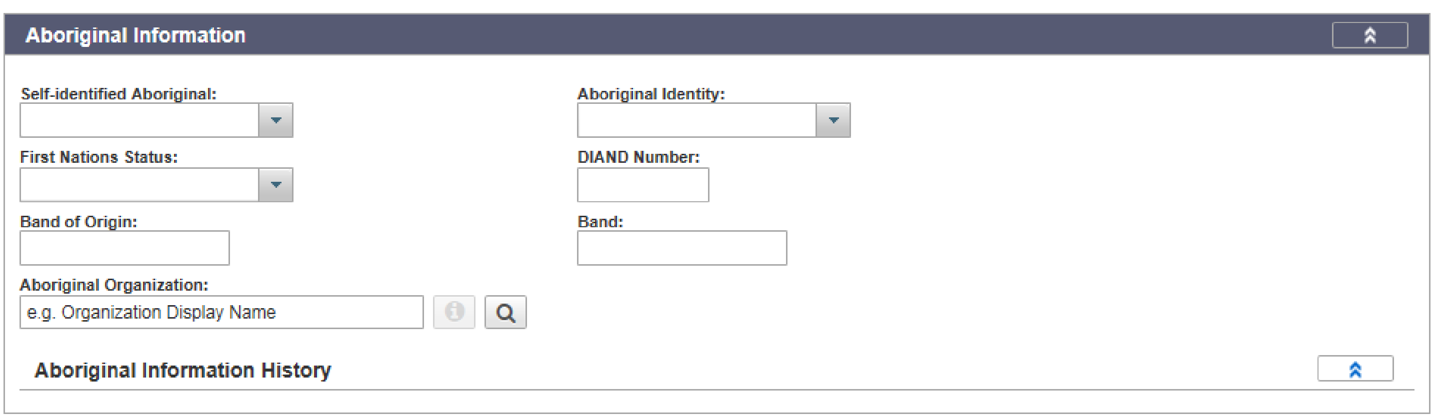
The Aboriginal Information screen allows a user to create or update information related to a client's aboriginal status. There are no Panorama mandatory fields on this screen which must be completed in order to save the record.

3.1 Create Aboriginal Information Record

1. After setting a client In Context, go to the **Left-Hand Navigation** menu.
2. Under the **Client/Subject/Client Details** section, click **Aboriginal Information**.



The **Aboriginal Information** screen is displayed.

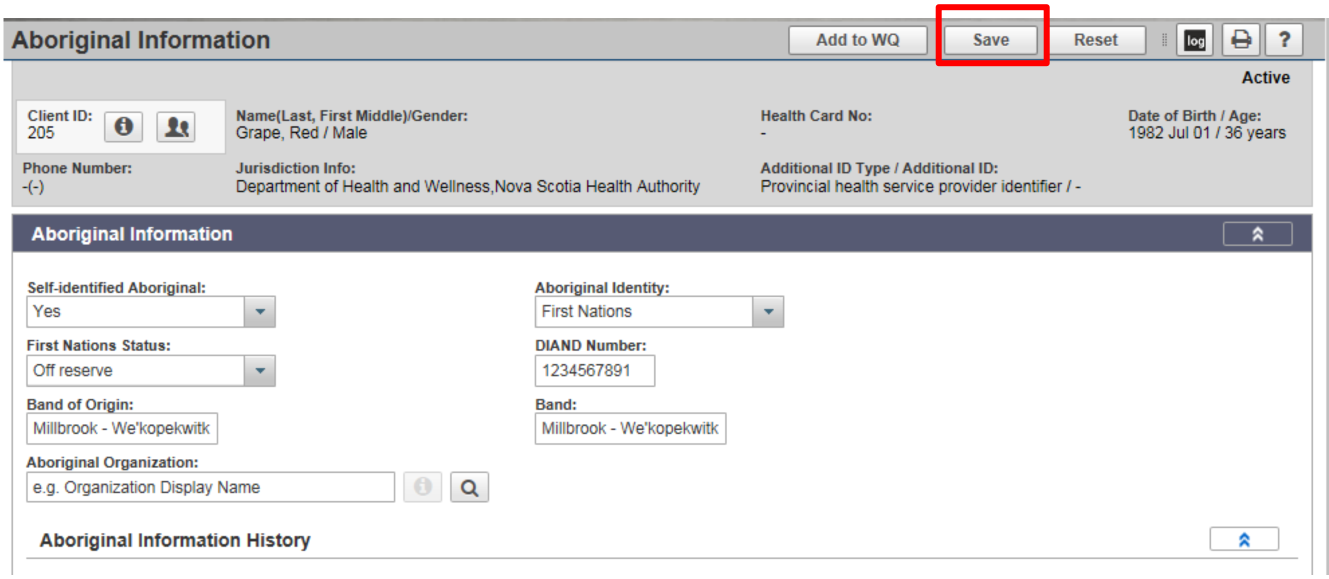


3. Complete the fields with the available information.

Note: there are no Panorama mandatory fields on this screen.

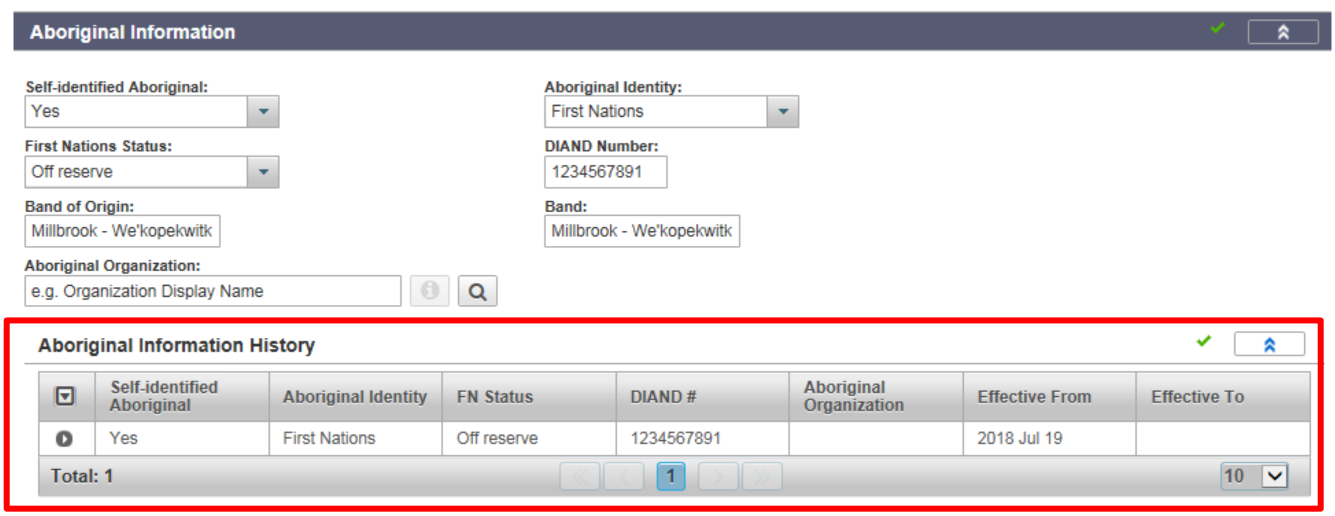
Tip: Band of Origin and Band are auto-complete fields. A selection of options will appear when typing the response – select the appropriate value from the list.

4. Click **Save** button.



A message will display indicating the record was successfully saved.

The record now appears in the **Aboriginal Information History** table, the **Effective From** date of the record defaults to the current date.

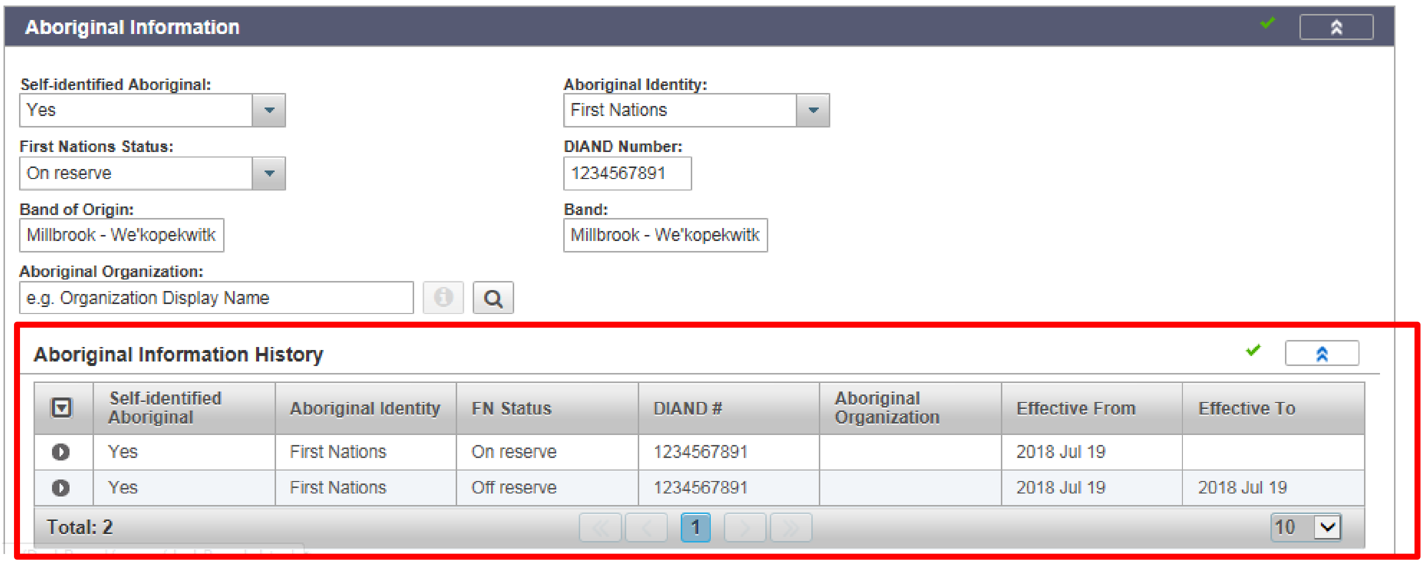


3.2 Update Aboriginal Information Record

1. With the client in context, navigate to the **Aboriginal Information** screen.
2. Update the relevant fields.
3. Click **Save** button.

A message will display indicating the record was successfully updated.

The new record is added to the history table, the **Effective From** date defaults to the current date. The previous record's **Effective To** date defaults to the current date.



Note: Aboriginal Information records **cannot** be deleted.

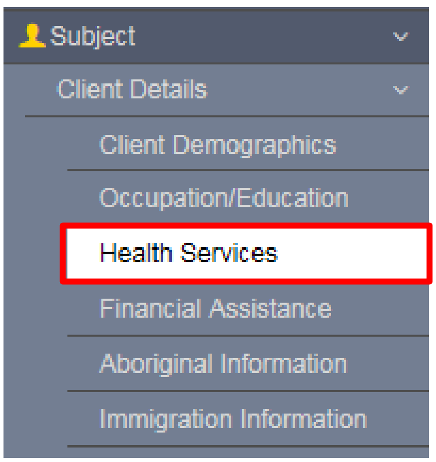
4 HEALTH SERVICES

This page allows users to create and update the health services information related to a client. This includes the providers associated to the client and the service delivery locations associated to the client.

A client **must** be in context to access this screen.

Note: the Service Delivery Location modal will not be used in Nova Scotia.

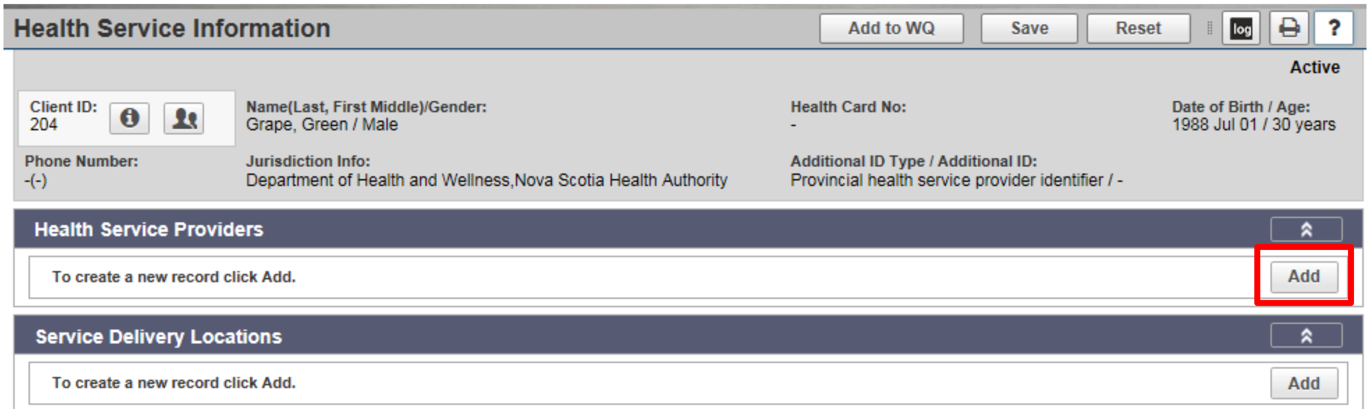
1. After setting a client In Context, go to the **Left-Hand Navigation** menu.
2. Under the **Client/Subject** section, click **Health Services**.



The **Health Service Information** screen is displayed.

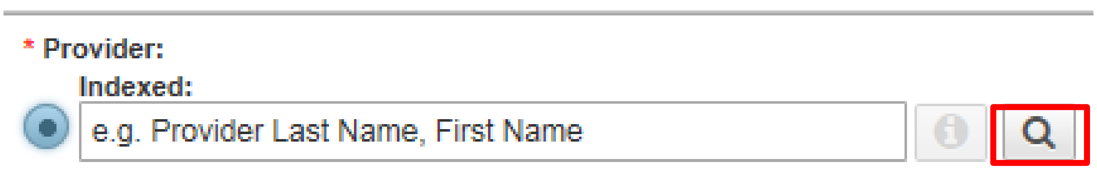
4.1 Add a Health Service Provider

1. Click **Add** button.



The **Add Provider Modal** is displayed.

2. Search and select **Indexed Provider** using the **Advanced Search** button.

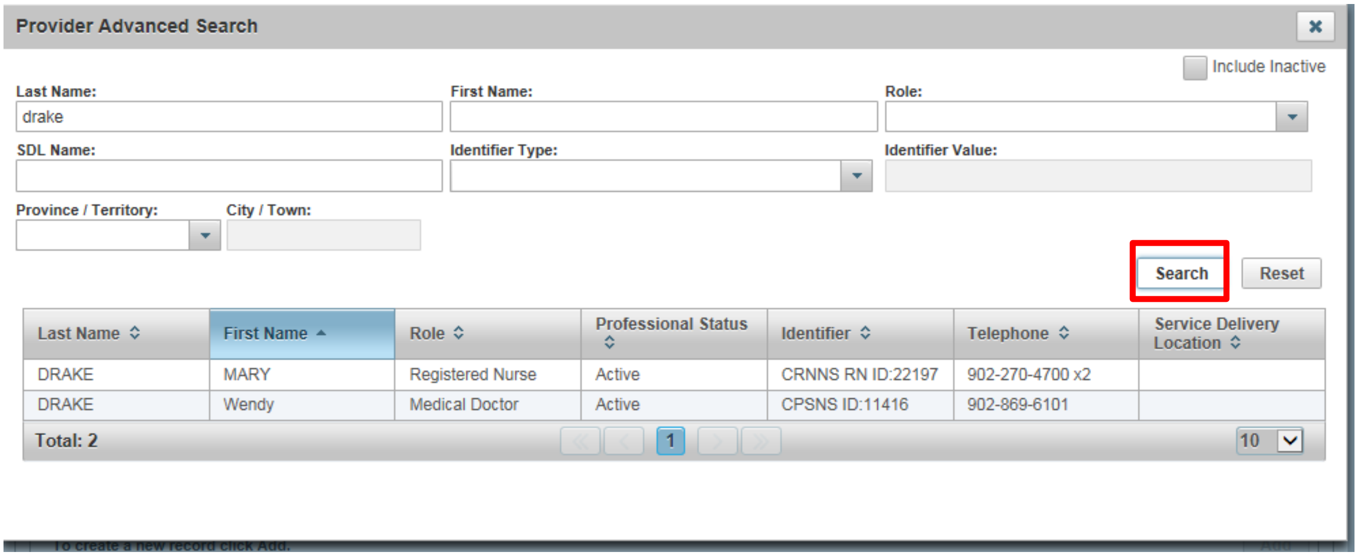


The **Provider Advanced Search** screen is displayed.

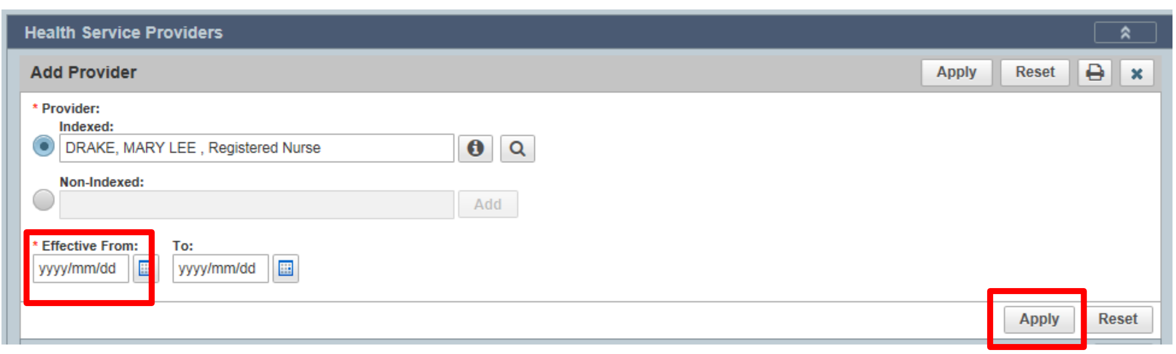
Note: Do not use the type-ahead search function – Panorama will not save the record when that type of search is completed.

3. Enter search criteria and click **Search** button.

The search results are displayed in the table below.



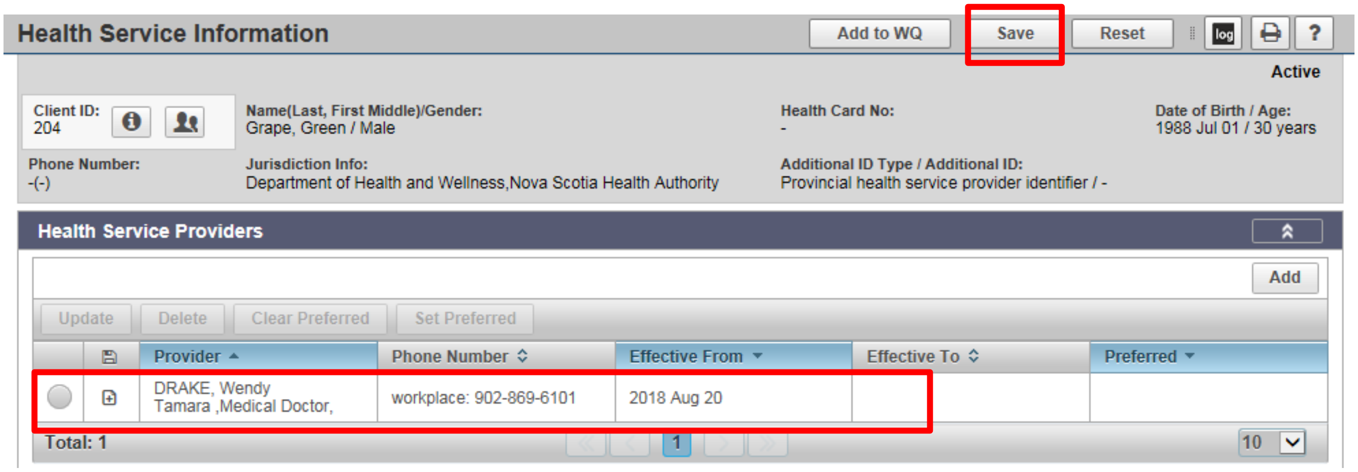
4. Select Provider to be added to the record.
5. Enter **Effective Date**.
6. Click **Apply** button.



The Provider is added to the factory table.

7. Click **Save** button.

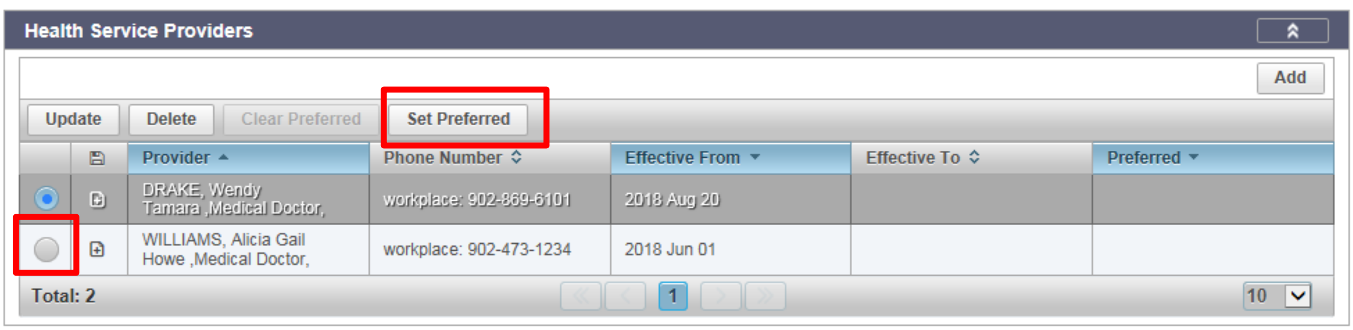
The system responds with a message that the record was saved.



4.2 Set Preferred Provider

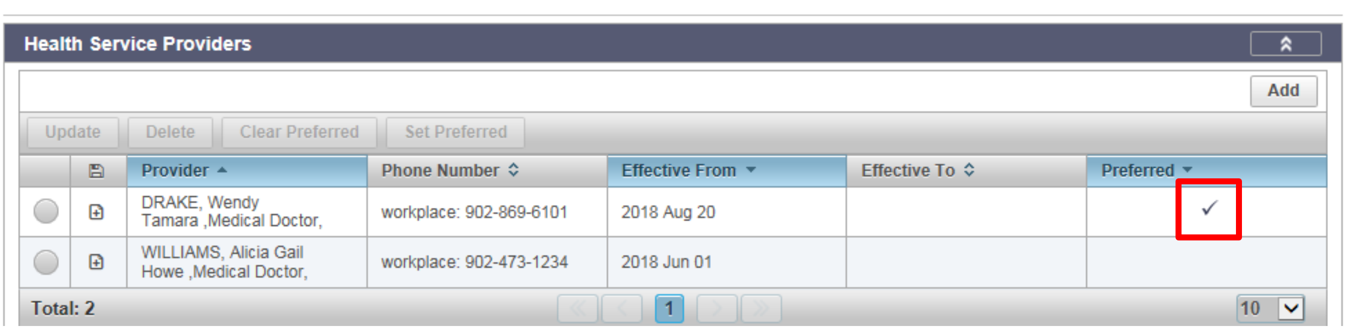
If more than one provider is listed, a preferred provider can be set.

1. Select **Provider**.
2. Click **Set Preferred** button.



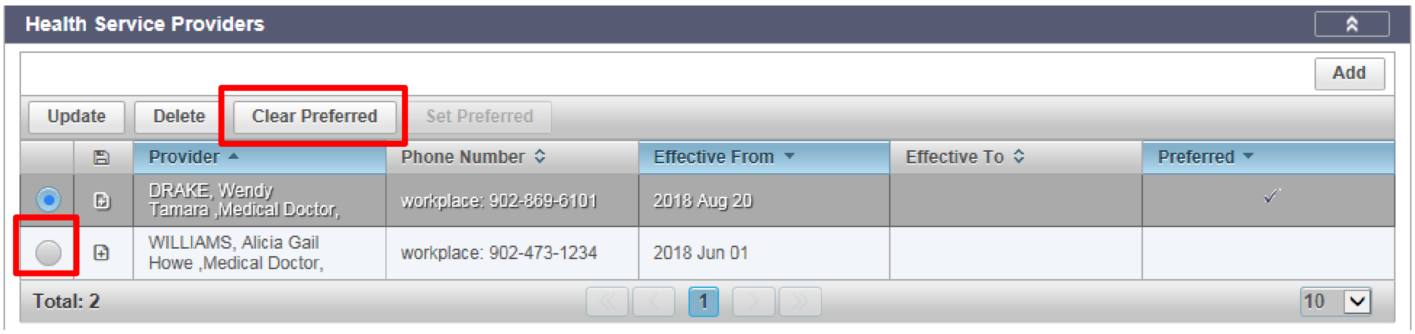
A checkbox appears in the Preferred Column.

3. Click **Save** button



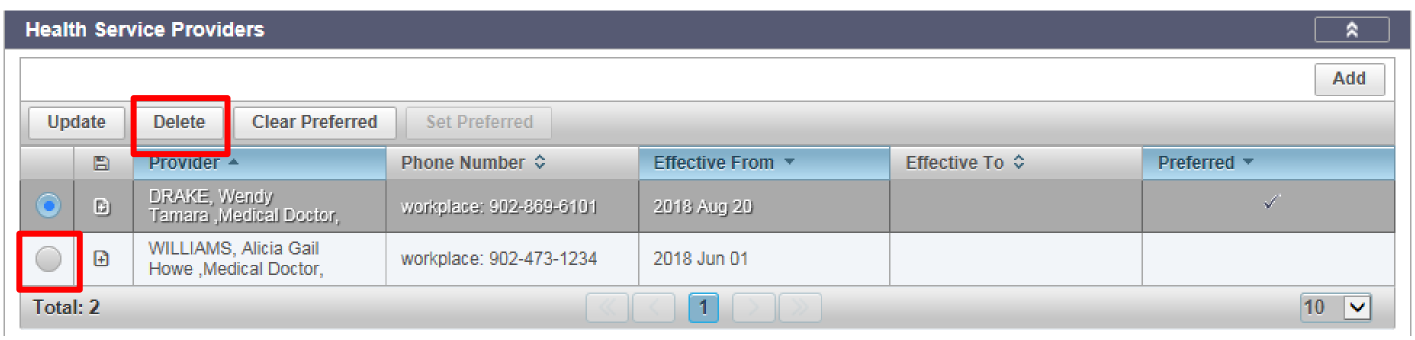
4.3 Clear Preferred Provider

1. Select **Provider**.
2. Click **Clear Preferred** button.
3. Click **Save** button



4.4 Delete Provider

1. Select **Provider**.
2. Click **Delete** button.
3. Click **Save** button.



Tip: Instead of deleting a provider, an Effective To date can be added to the provider [Select **Provider** > Click **Update** button >Add **Effective To** date]. This will maintain a complete list of providers associated with the client over time.

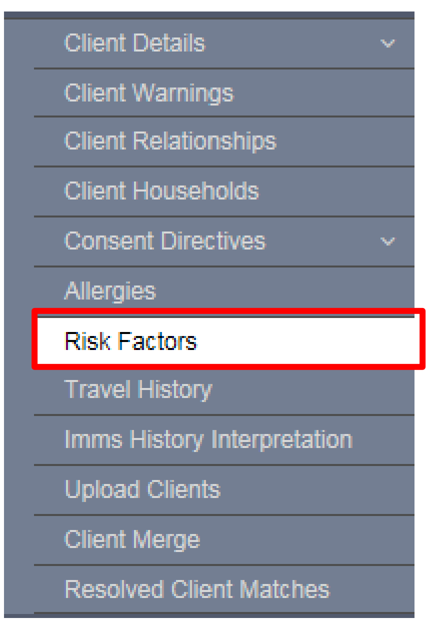
5 RISK FACTORS

Risk factors are any state that increases the probability of transmitting or acquiring a communicable disease, or affecting its course or management. Risk factors usually represent a state that has a span of time, as opposed to exposures that are characterized by subject, place, and/or time. Risk factors are associated directly with the client, however, a user may designate them as pertinent to an investigation.

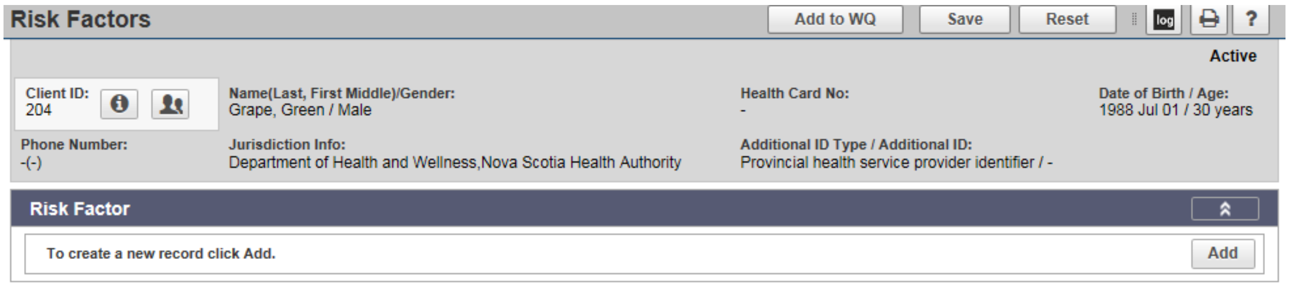
A user may only record risk factors that are available based on the Encounter Group(s) they have access to. When recorded under an investigation, the system will present a list of pre-set risk factors determined by the Encounter Group and Disease(s) associated with the investigation. These pre-set risk factors should be used to guide the client interview. Additional risk factors can be added as applicable.

5.1 Pre-set Risk Factors

1. After setting a client **and** investigation In Context, go to the **Left-Hand Navigation** menu.
2. Under the **Client/Subject** section, click **Risk Factors**.

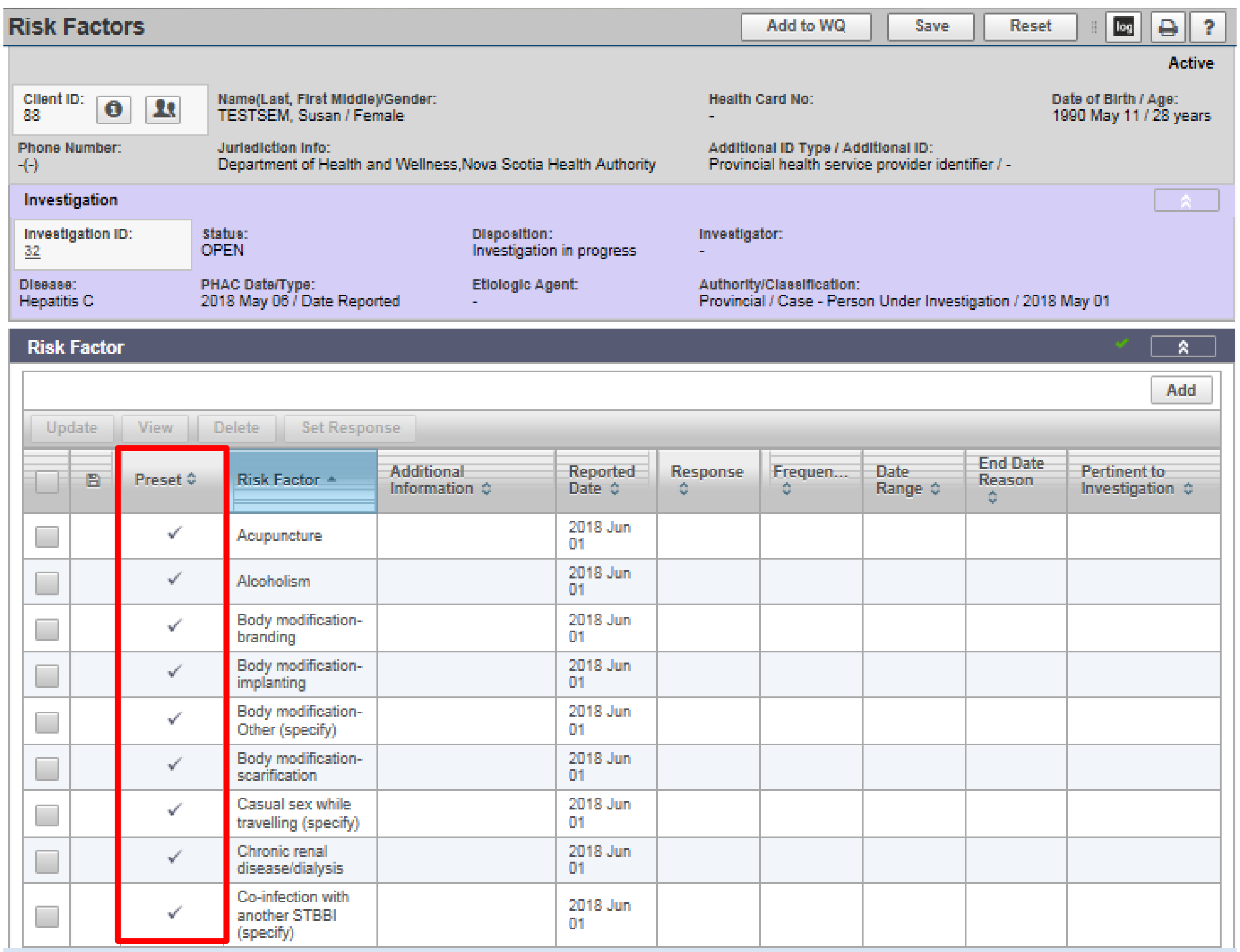


The system displays the Risk Factors screen.



With an investigation is in context, the pre-set risk factors for the disease associated with the investigation are displayed. The pre-set risk factors are intended as a guide for the investigator to use to confirm whether or not the risk factor is applicable to the investigation.

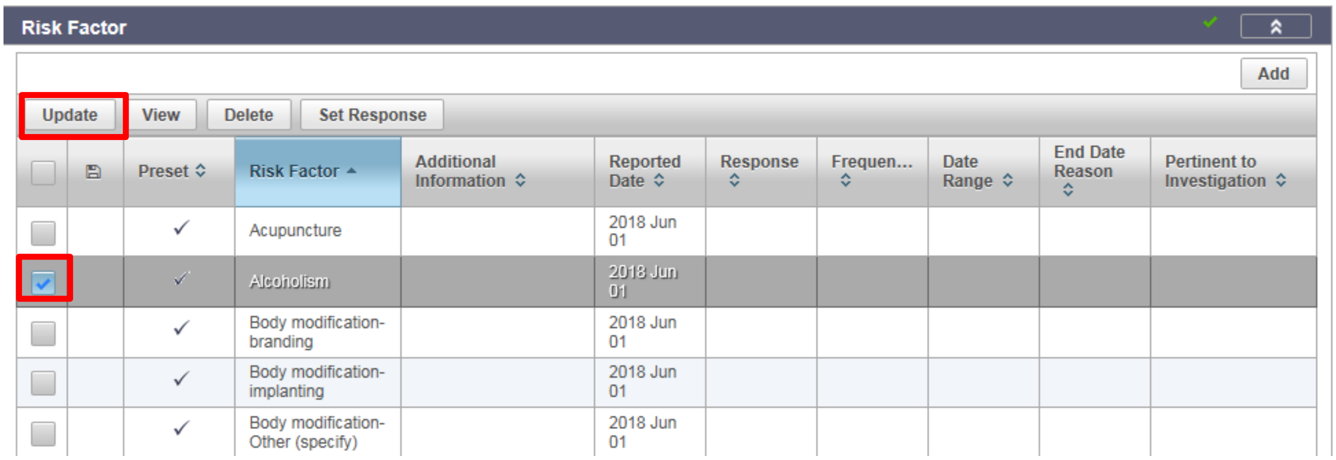
Each pre-set risk factor should be updated indicating if the risk factor is pertinent to the investigation, the client's response to the risk factor and other fields as required.



Tip: At any time click the **Reset** button to clear any unsaved values entered on the screen. The **X** button will close the screen.

5.2 Update/View a Risk Factor

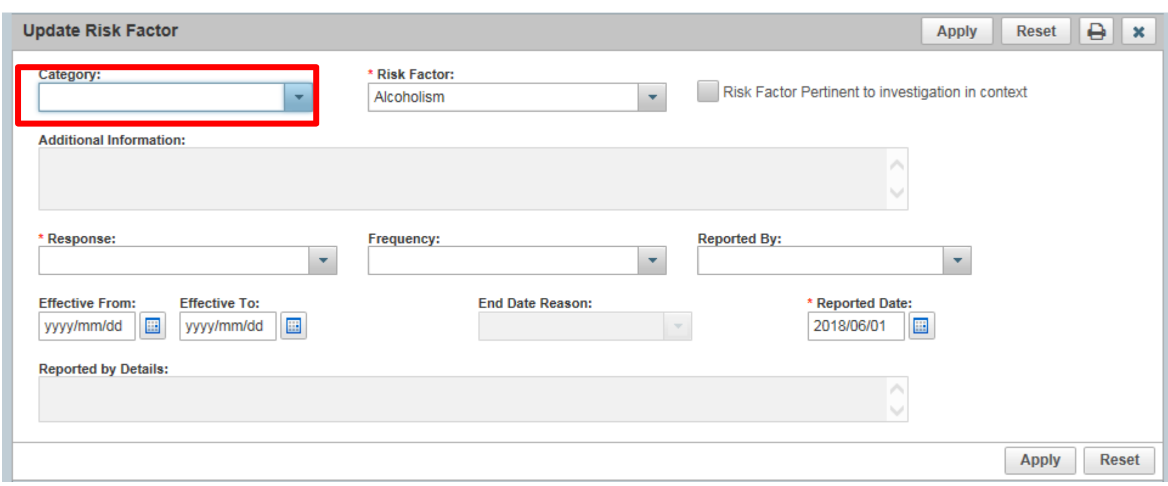
1. Select Risk Factor to be updated.
2. Click **Update** button.



The **Update Risk Factor** screen will be displayed.

The **Risk Factor** field will be pre-populated with the selected Risk Factor.

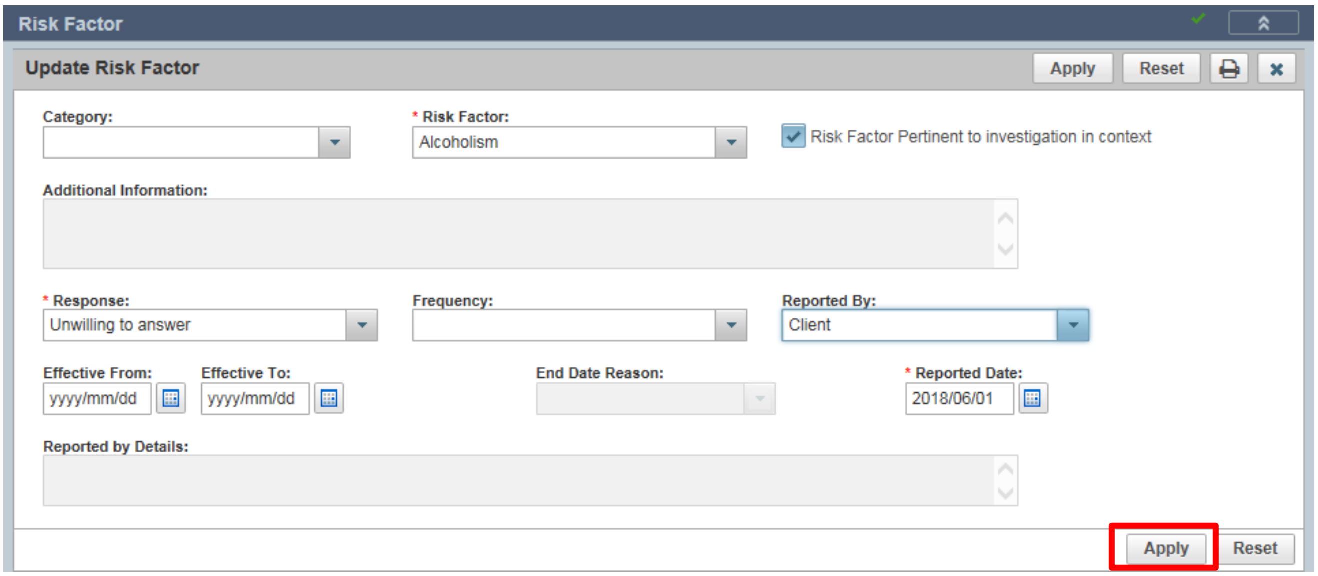
Tip: for **pre-set risk factors**, the category field will be blank in the update risk factor screen. **Do not select a value from this field – leave blank**.



3. Indicate if **Risk Factor is Pertinent to investigation in context**.

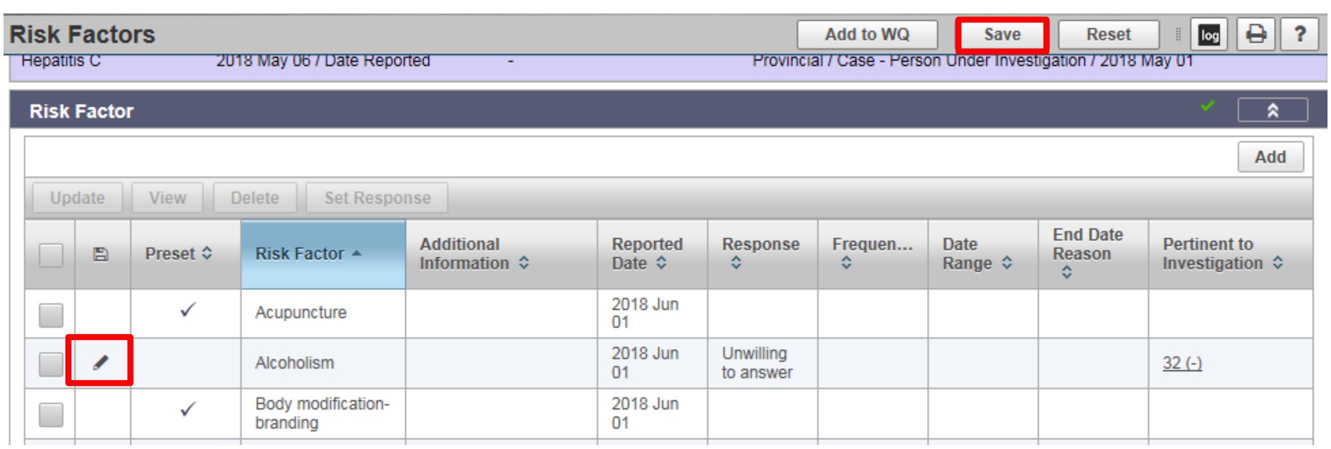
Note: If there is no investigation in context, this field will not be displayed.

4. Select **Response**, **Frequency** and **Reported By.**
5. Select **Effective From** date**.**
6. Select **Reported Date** or leave the default date (current date).
7. Enter **Reported By Details** if field is enabled.
8. Click **Apply** button.



The changes to the Risk Factor are saved in draft form.

9. Click **Save** button



The system displays a message the risk factor was successfully updated.

Note: Click the View button to review a read-only version of the risk factor.

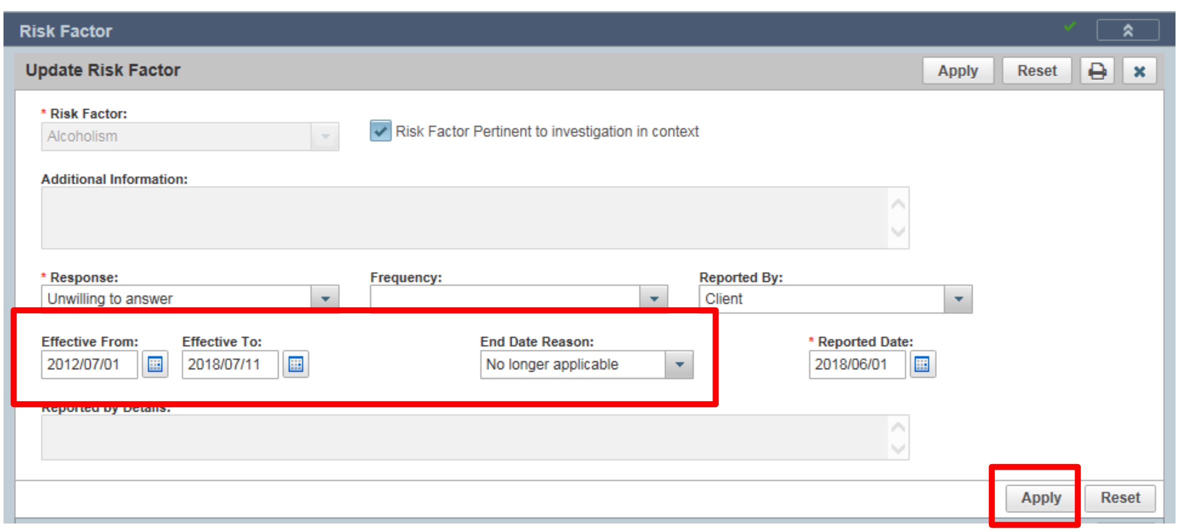
Tip: To display all pre-set risk factors on one page, change the records per page view located at the bottom of the screen to **All.**

5.3 End Date a Risk Factor

Pre-set risk factors cannot be deleted. If the pre-set risk factor previously made effective is no longer applicable, an **Effective To** date can be used to indicate the risk factor is no longer relevant in respect to the client/investigation.

1. Select risk factor.
2. Click **Update** button.
3. Select **Effective To** date.
4. Select **End Date Reason**.
5. Click **Apply** button.

Note: the **Effective From** date field must be completed in order to save the **Effective To** date.



The record will be saved in draft form.

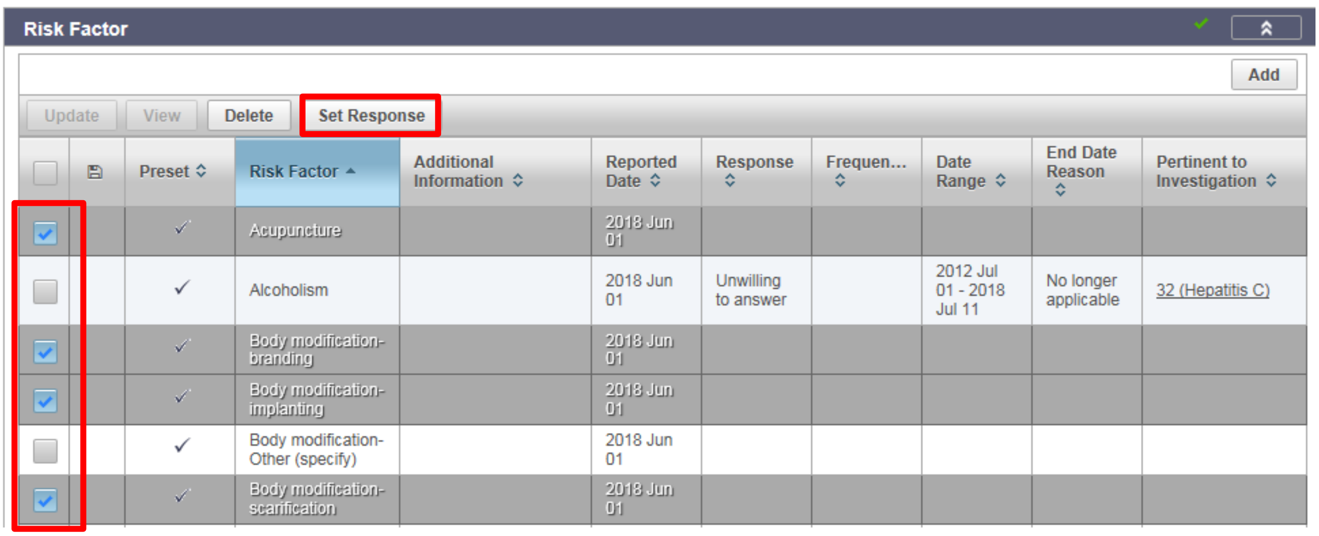
6. Click **Save** button.

The system will display a message that the risk factor has been successfully updated.

5.4 Set Response for Multiple Risk Factors

The **Set Response** button can be used to select a response for multiple risk factors simultaneously. The response for the risk factors must be the same.

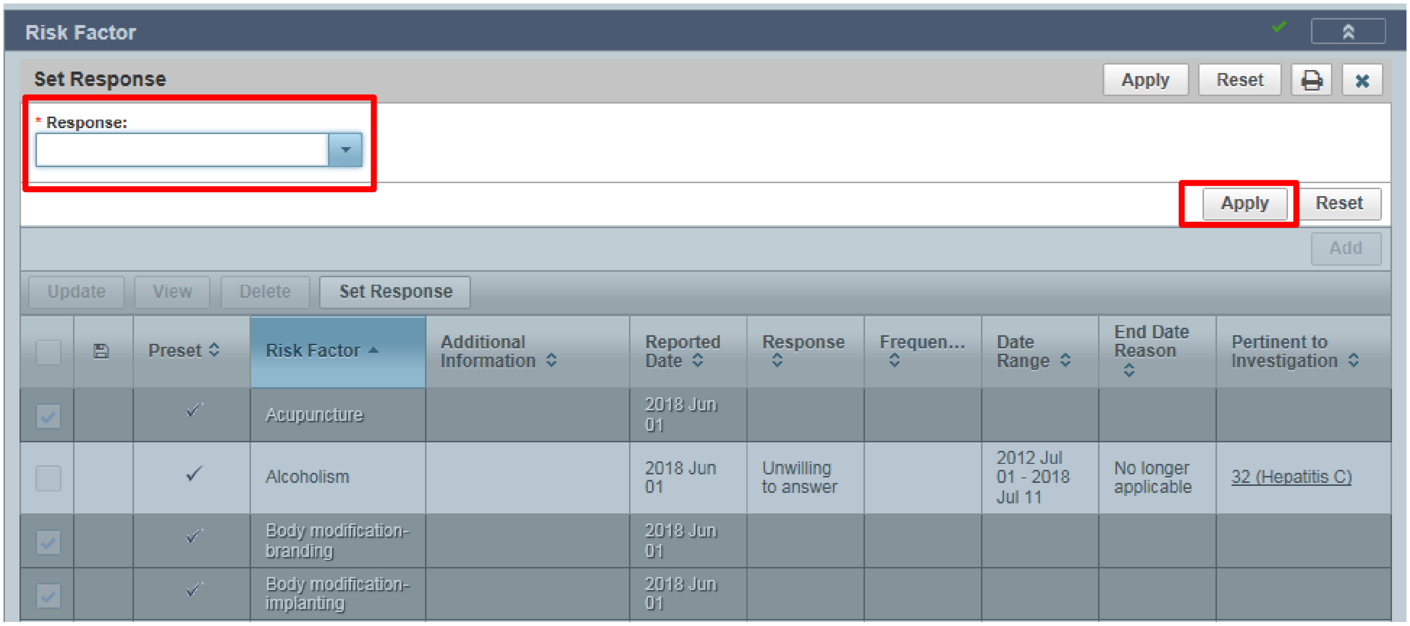
1. Select risk factors to which a single response will be selected.
2. Click **Set Response** button.



		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
☑		✓	Acupuncture		2018 Jun 01					
☐		✓	Alcoholism		2018 Jun 01	Unwilling to answer		2012 Jul 01 - 2018 Jul 11	No longer applicable	32 (Hepatitis C)
☑		✓	Body modification-branding		2018 Jun 01					
☑		✓	Body modification-implanting		2018 Jun 01					
☐		✓	Body modification-Other (specify)		2018 Jun 01					
☑		✓	Body modification-scarification		2018 Jun 01					

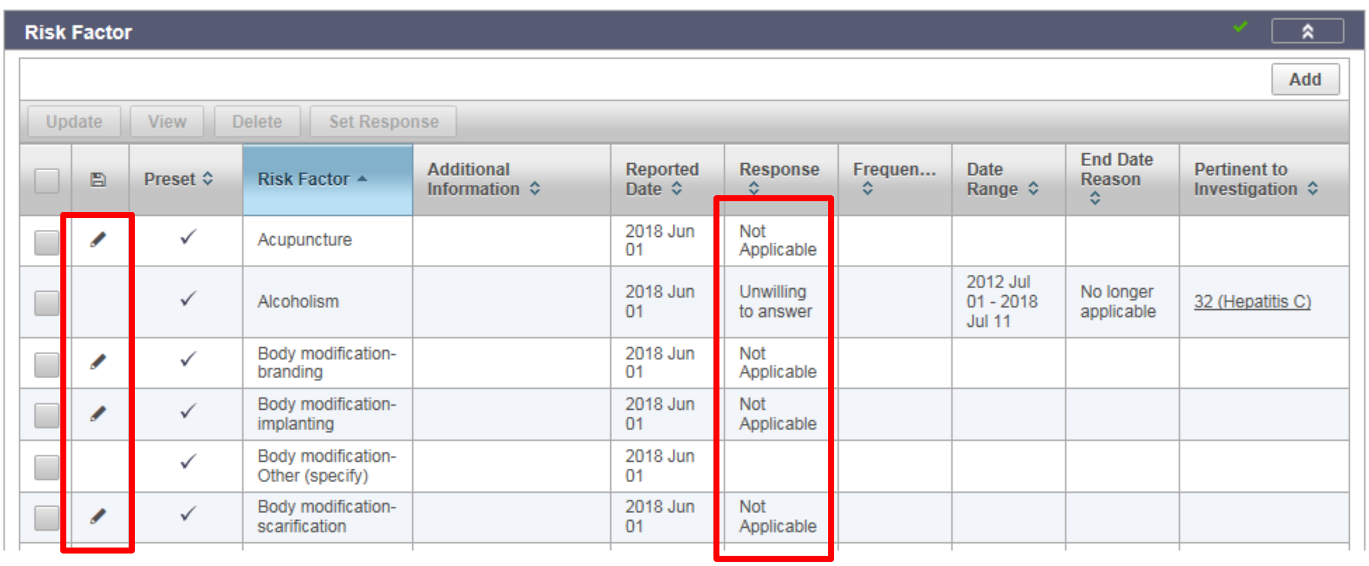
The **Set Response** screen will be displayed.

3. Select **Response**.
4. Click **Apply** button.



The response is added to each of the selected risk factors.

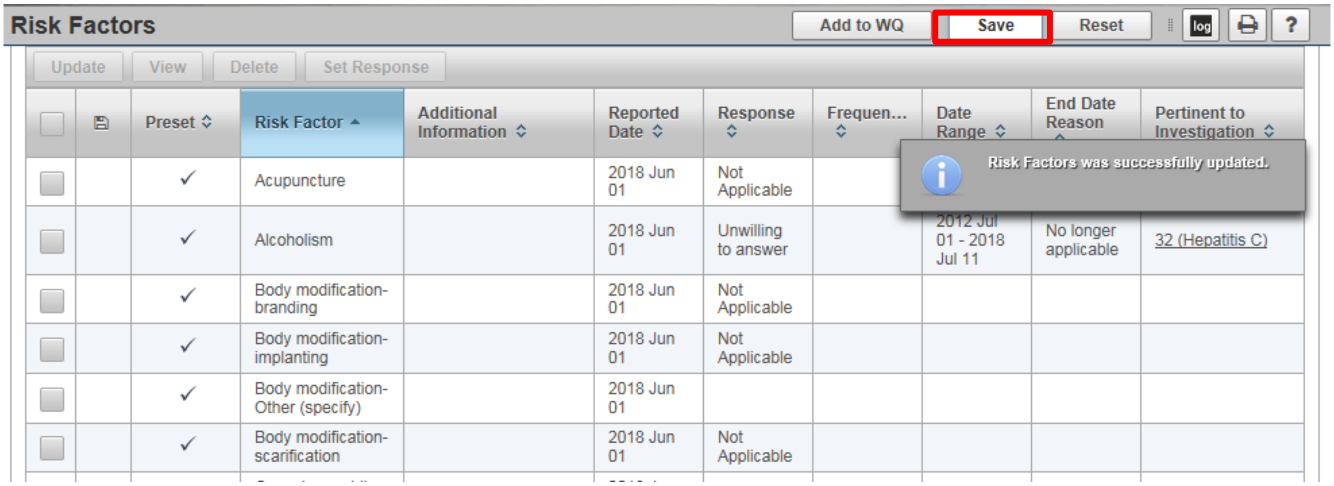
The records are in draft status.



5. Click **Save** button.

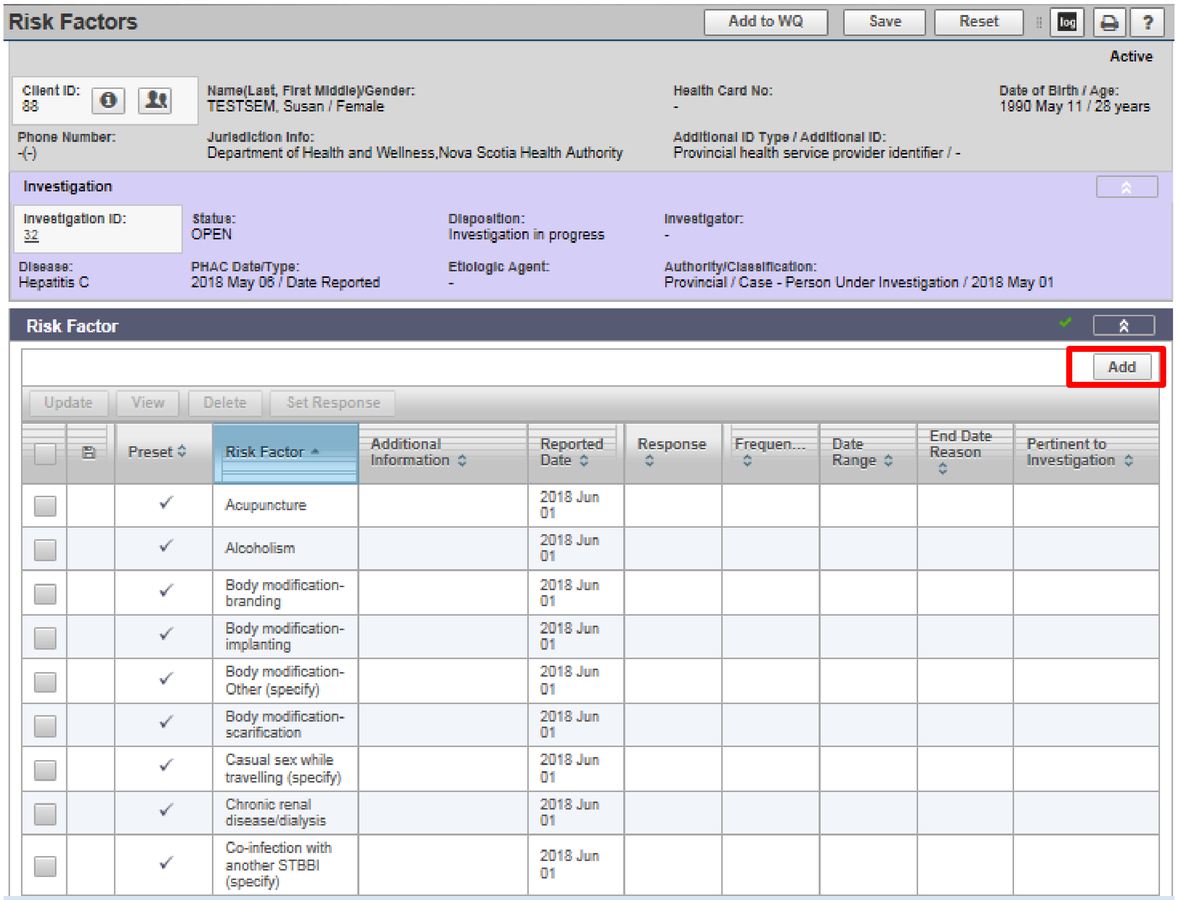
The system will display a message that the risk factors have been successfully updated.

NOVA SCOTIA

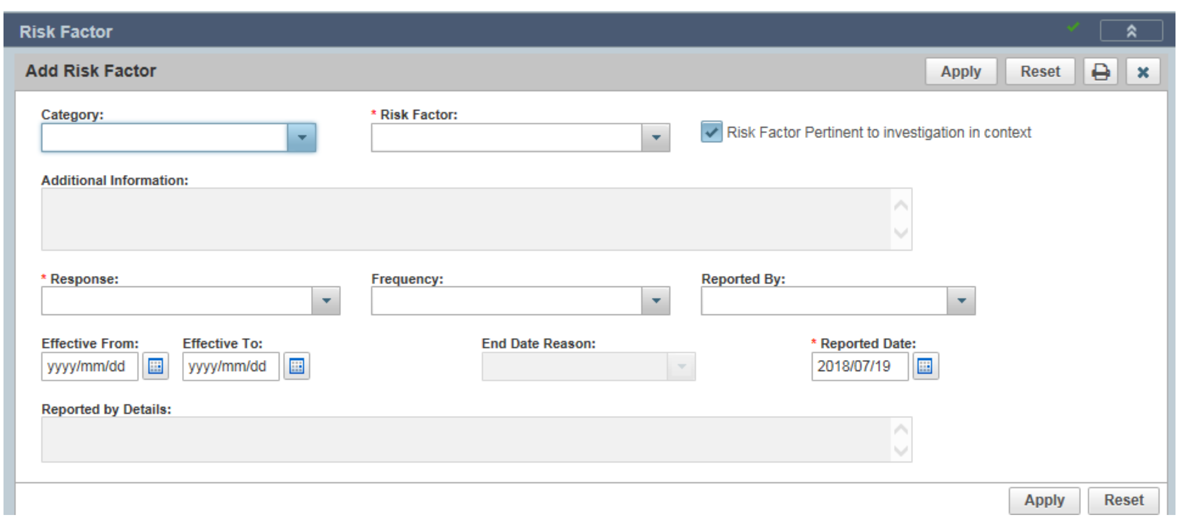


5.5 Add Single Risk Factor

1. With a client, and investigation if applicable, in context, navigate to **the Risk Factors** screen.
2. Click **Add** button to add a risk factor not included in the pre-set list.



The **Add Risk Factor** screen is displayed.

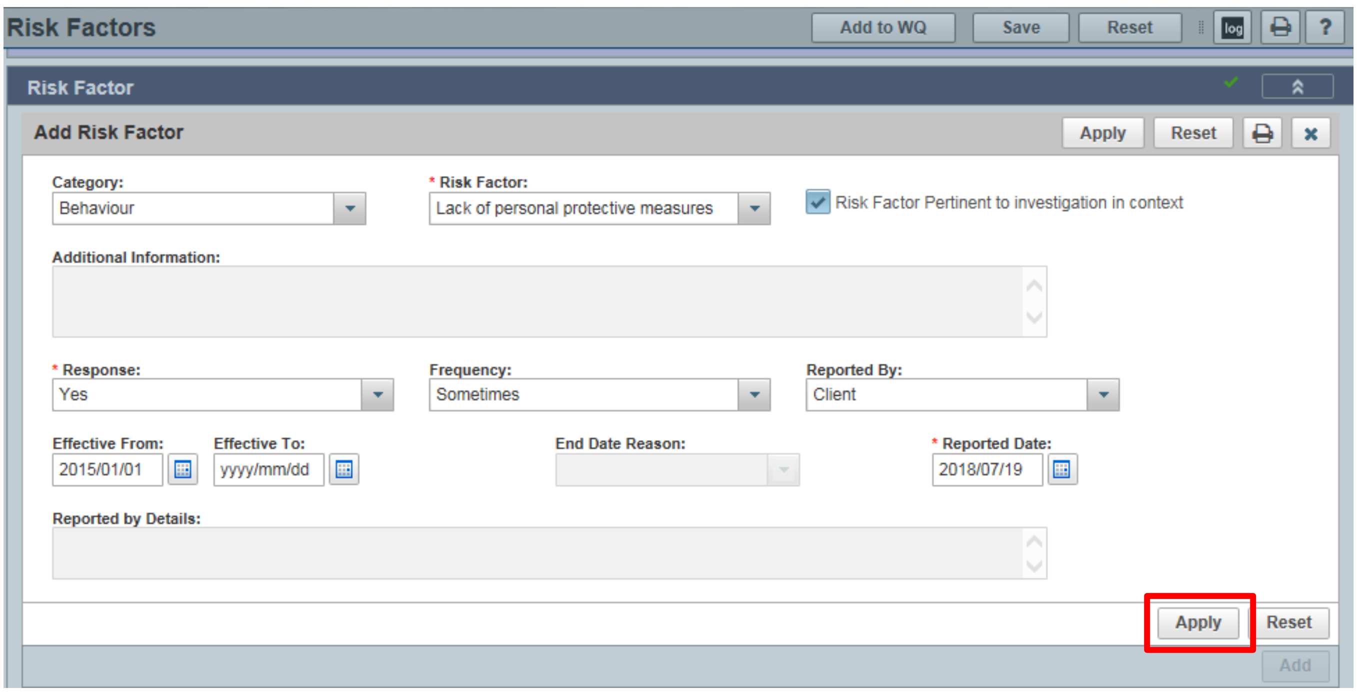


3. Select **Category** and **Risk Factor**.

4. Indicate if **Risk Factor is Pertinent to investigation in context**.

Note: If there is no investigation in context, this field will not be displayed.

5. Enter **Additional Information** if the field is enabled.
6. Select **Response**, **Frequency**, and **Reported By.**
7. Select **Effective From** date**.**
8. Select **Reported Date** or leave the default (current date).
9. Enter **Reported By Details** if field is enabled.
10. Click **Apply** button.



The risk factor will appear in the risk factor table in draft status.

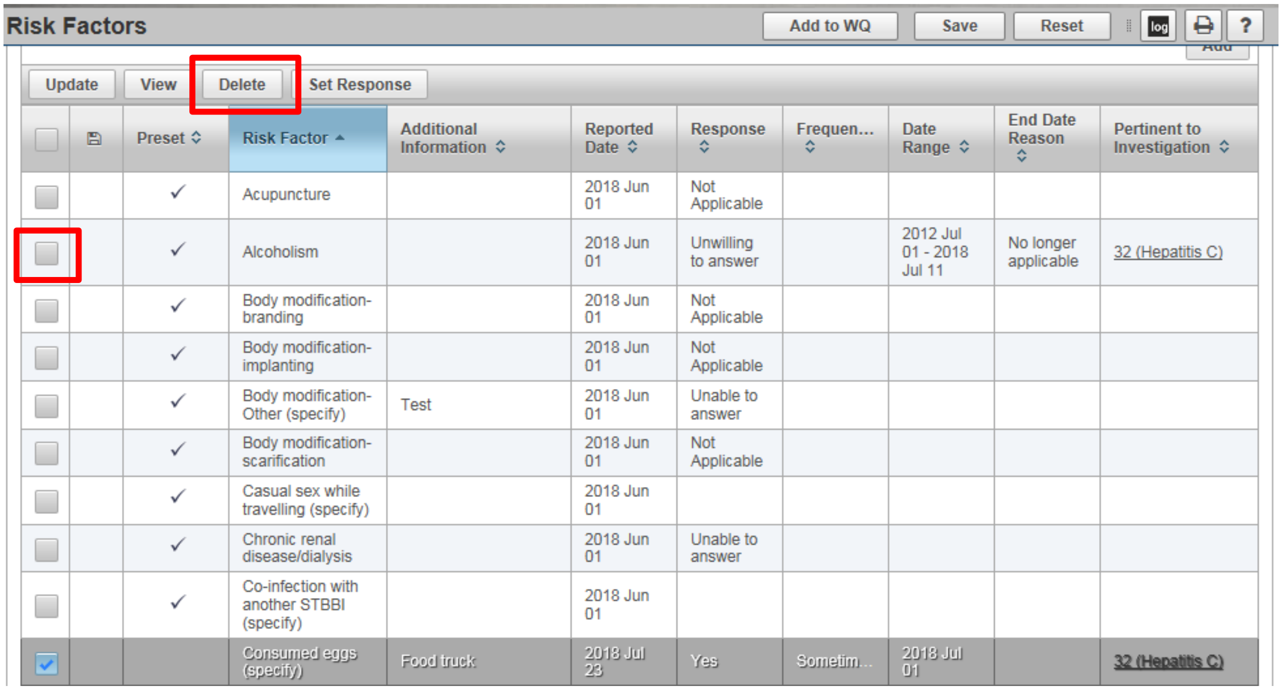
11. Click **Save** button

The system will display a message that the risk factors were successfully updated.

5.6 Delete Risk Factor(s)

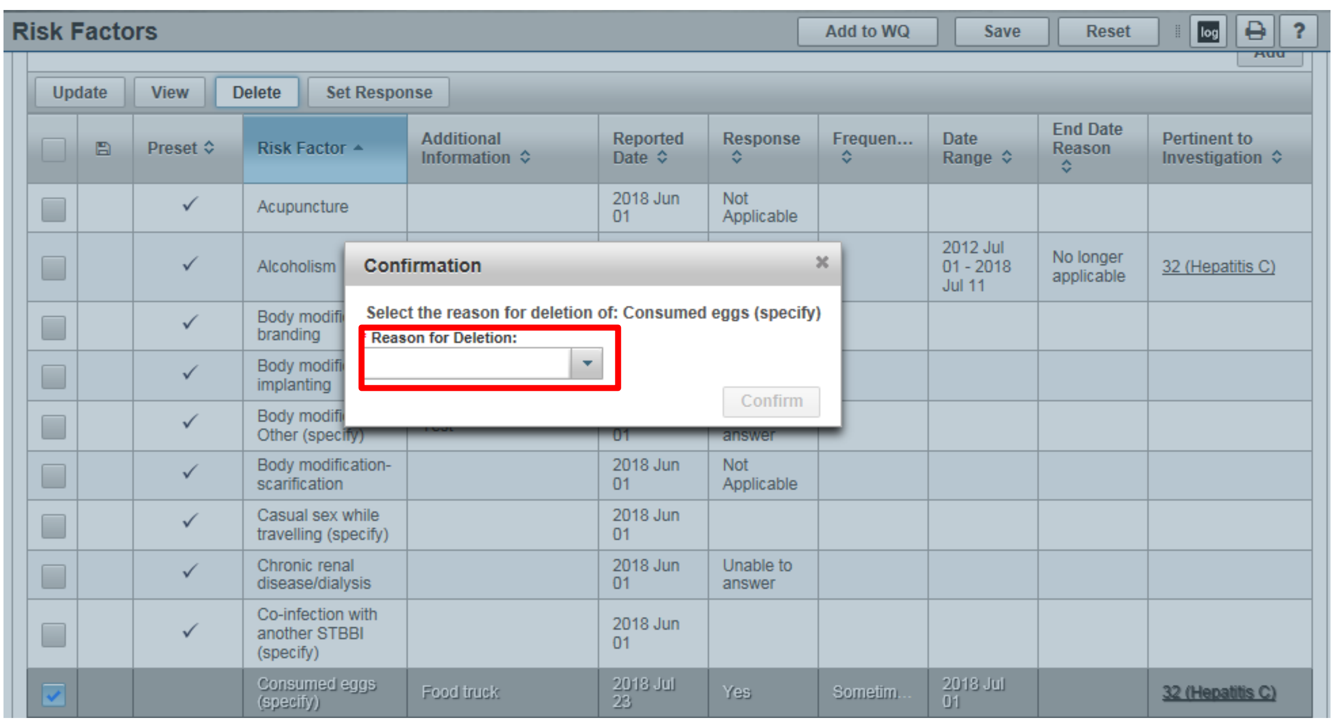
If a risk factor is **not included** as part of the pre-set list, it can be deleted.

1. Select **Risk Factor(s)** to be deleted.
2. Click **Delete** button.

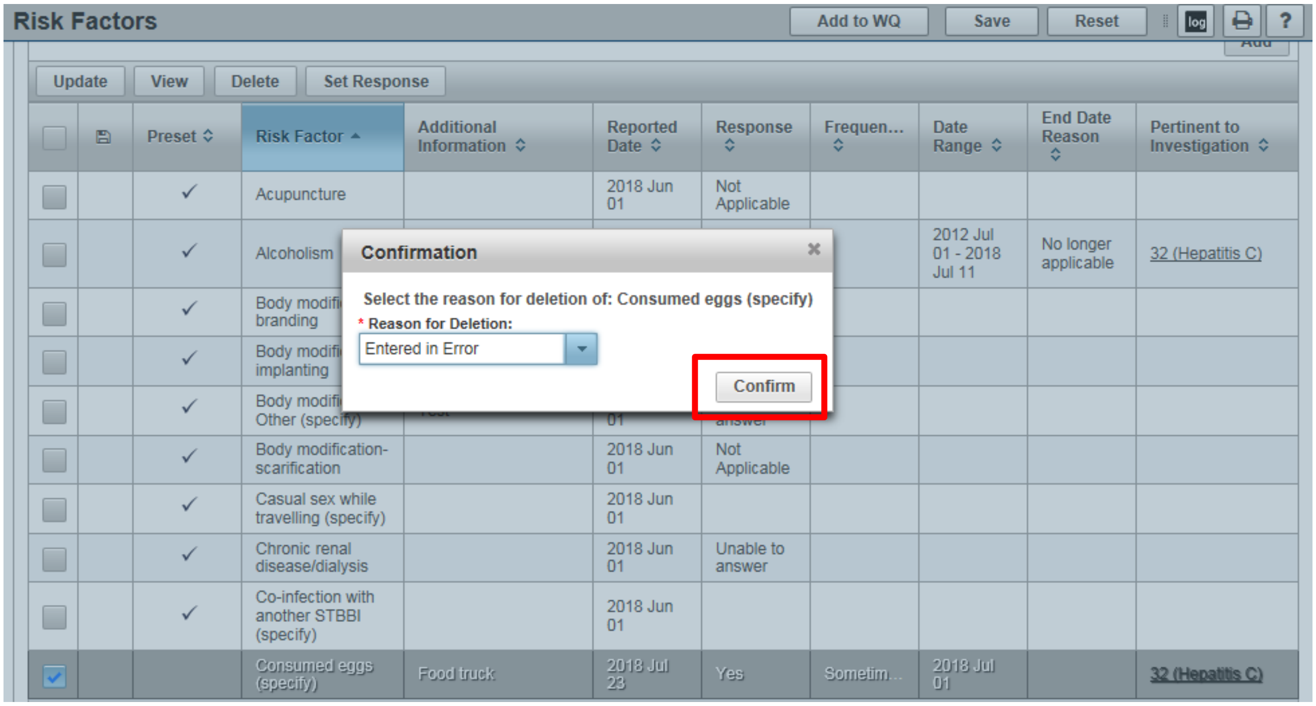


The system displays the confirmation screen.

3. Select **Reason for Deletion**.



4. Click **Confirm** button.



The record is saved in draft status.

5. Click **Save** button.

A message is displayed that Risk Factors were successfully updated.