

Panorama Bulletin

Bulletin #0052: JOrg Assignment of Clients

eHealth Saskatchewan

November 23, 2016

Version 1

Managing Client JOrg Assignment

The Saskatchewan Ministry of Health’s (MoH) policy for Panorama has been updated (see: *Updating JOrg for Clients Moving Within the Province Policy*). A Client’s JOrg (Regional Health Authority (RHA) or First Nations Jurisdiction (FNJ) in Panorama **is now mandatory and based on where the Client resides (fixed address, not mailing)**, regardless of where the Client intends to receive service. Panorama Users should review the JOrg (or Health Region) displayed in the Client Header to ensure it correctly reflects the Client’s Health Region based on their **fixed** address. This may require an update to the client’s contact information; please consider recall practices within your organization and set the preferred flag accordingly.

Personal Information			
 Warnings  Notes		INACTIVE	
Client ID: 1	Name(First,Middle,Last)/Gender: John Doe / Male	Health Card No: 134679852	Date of Birth / Age: 1989 Dec 12 / 26 yrs
Phone Number: (-)	Jurisdiction Info: Saskatchewan,Prince Albert Parkland RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Clients Receiving Services Where Panorama is Not Used (including First Nations Health Centres)

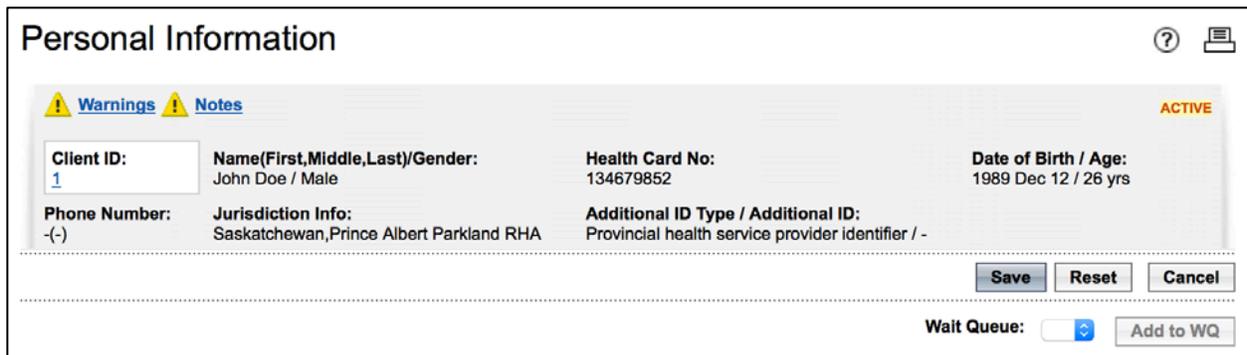
If a Client is receiving services from a RHA, and is known by Public Health to reside within a FNJ, the Panorama User should ensure the JOrg and Address of the Client is updated to reflect the FNJ where the Client resides, even if the FNJ is not using Panorama.

If the Client’s JOrg is changed to a FNJ that is currently not using Panorama, RHAs are encouraged to extend a “notification” when the Client’s JOrg is updated to that FNJ. Conversely, if the Client is moving from a FNJ that is currently not using Panorama, the FNJ is encouraged to extend a “notification” to the destination RHA. The destination RHA will then be able to update the Client’s JOrg in Panorama.

Panorama Steps

Updating the Client's Organization

1. Place the Client into context by conducting a Client Search.
2. From the **Left Hand Navigation**, select **Client Details > Personal Information**.
The Personal Information screen will display.



Personal Information ? 📄

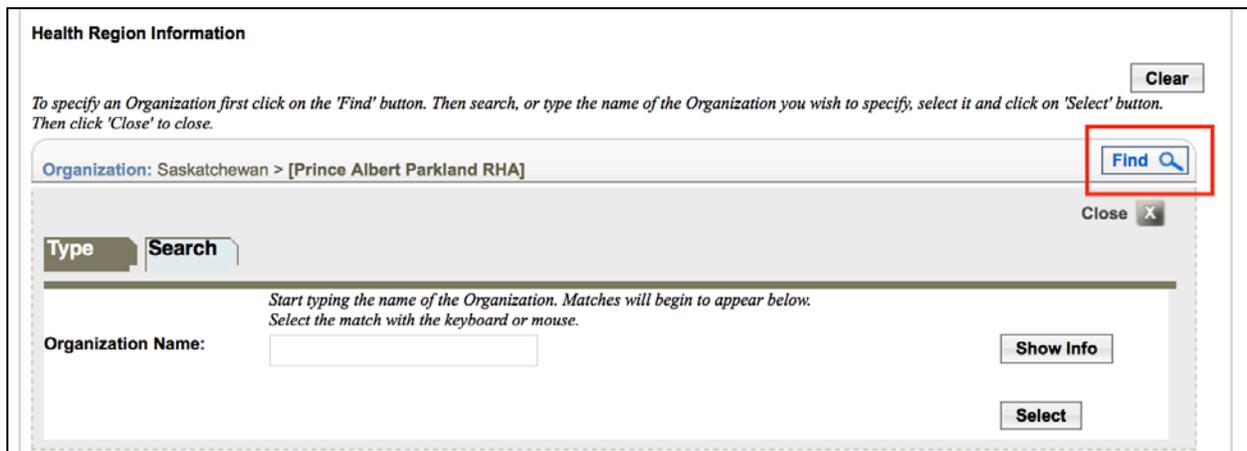
⚠️ **Warnings** ⚠️ **Notes** ACTIVE

Client ID: 1	Name(First,Middle,Last)/Gender: John Doe / Male	Health Card No: 134679852	Date of Birth / Age: 1989 Dec 12 / 26 yrs
Phone Number: (-)	Jurisdiction Info: Saskatchewan,Prince Albert Parkland RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Save **Reset** **Cancel**

Wait Queue: **Add to WQ**

3. From the **Health Region Information** field, select the **Find** button next to the Organization.
The **Organization Name** field will display in the expanded section.



Health Region Information Clear

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Saskatchewan > [Prince Albert Parkland RHA] **Find** 🔍

Close X

Type **Search**

*Start typing the name of the Organization. Matches will begin to appear below.
Select the match with the keyboard or mouse.*

Organization Name: **Show Info**

Select

4. Enter the name of the Health Region (RHA/FNJ) where the Client has moved to. When the name appears, click the Health Region option.
5. Click the **Select** button.

Health Region Information

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Saskatchewan > [Saskatoon RHA]

Close

Type **Search**

Start typing the name of the Organization. Matches will begin to appear below. Select the match with the keyboard or mouse.

Organization Name:

City, Province: Saskatoon, Saskatchewan

Hierarchy Type: Jurisdictional

Status: Active

6. Click the **Save** button from the top or bottom of the Personal Information screen to save the changes to the Client's record.
Note the Client's JOrg history will be captured in the **Health Region History** section.

Health Region Information

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Saskatchewan > [Saskatoon RHA]

Health Region History

Name	Effective From	Effective To
Saskatoon RHA	2016 Sep 30	

Ensure the Client's Record is Active

7. From the Personal Information screen ensure the **Inactive** checkbox is not set.
 - a. If the **Inactive** checkbox is set, deselect the checkbox.
 - b. Click the **Save** button from the top or bottom of the Personal Information screen to save the changes to the Client's record.

Gender Identity:
Other Gender Identity :

Health Card Number: Saskatchewan, Canada Personal Health Number

Date of Death: / /
vvvv mm dd

Preferred Communication Method:

Inactive **Reason(s) for being Inactive:**

Updating the Client's Contact Information

1. From the Personal Information screen, scroll to the Contact Information section and review all applicable sections, including Telephone Numbers, Addresses, Email Addresses and Online Names. Ensure the entries listed in this section are accurate.

The screenshot shows the 'Contact Information' section of the PANORAMA system. The 'Telephone Numbers' subsection is active, displaying a form with the following fields:

- Number Type:** A dropdown menu with a blue arrow icon.
- International:** A checkbox.
- Number:** A series of input boxes for the phone number, including a field for an extension labeled 'ext'.
- Effective From:** A date selection field with the example '2016 / 09 / 29' and labels 'yyyy', 'mm', 'dd' below it.
- To:** A date selection field with empty boxes and labels 'yyyy', 'mm', 'dd' below it.

- a. If an entry is no longer valid, do not delete the record. Instead, select the entry and click the **Update** button.
 - i. Update the **Effective To** date to today's date.
 - ii. Click the **Apply Update** button to save the changes.
 - b. If new contact information is available, enter those details into the appropriate section and click the **Add** button to create the entry. Ensure the **Effective From** date is set to today's date, or the date when the contact information will be active.
 - c. Repeat Steps a through b above for each entry requiring updates.
2. Click the **Save** button from the top or bottom of the Personal Information screen to save the changes to the Client's record.

Contact

If you have any questions or concerns, please contact the eHealth Service Desk at 1-888-316-7446 or by email at servicedesk@ehealthsask.ca.