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.

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

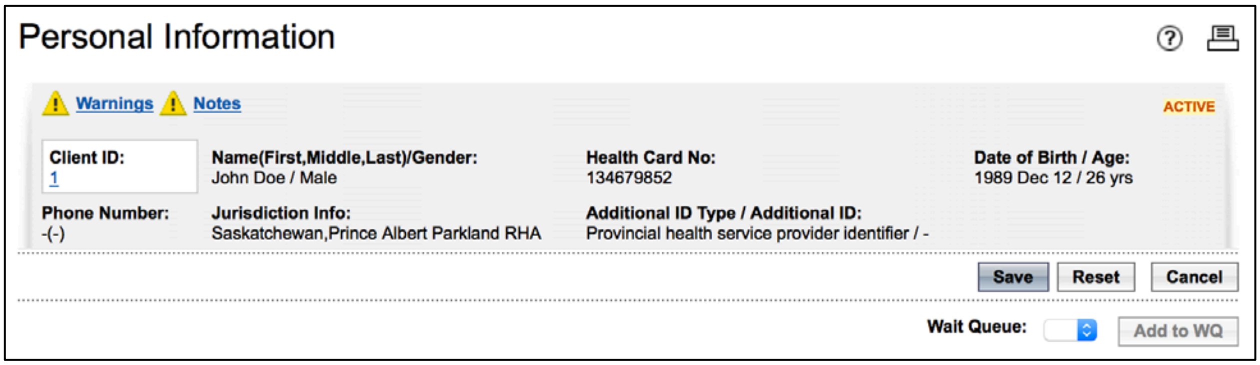
If a Client is receiving services from a RHA, and is known by Public Health to reside within a FNJ, the Panorama User should ensure the JOrg and Address of the Client is updated to reflect the FNJ where the Client resides, even if the FNJ is not using Panorama.

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.

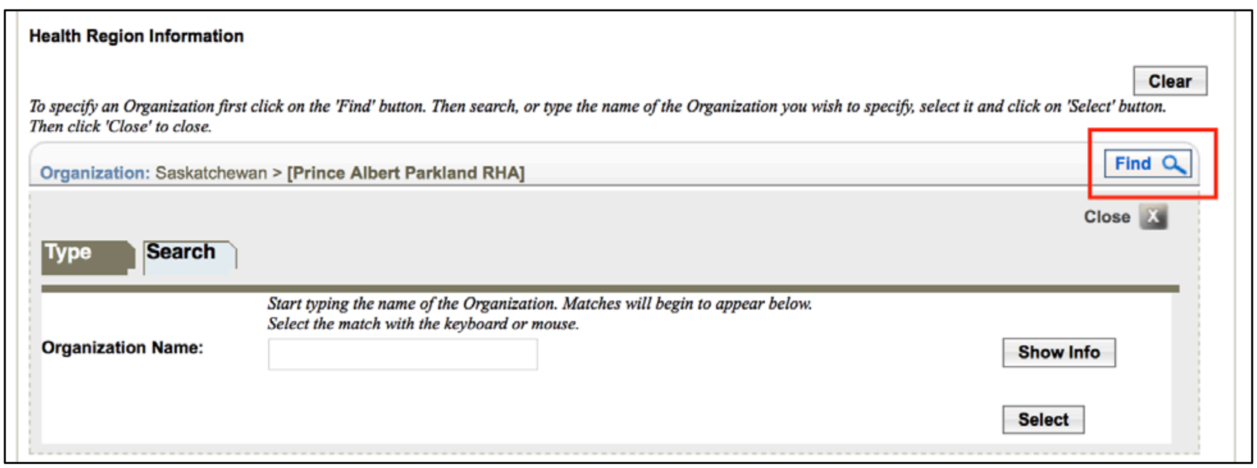
Panorama Steps

Updating the Client's Organization

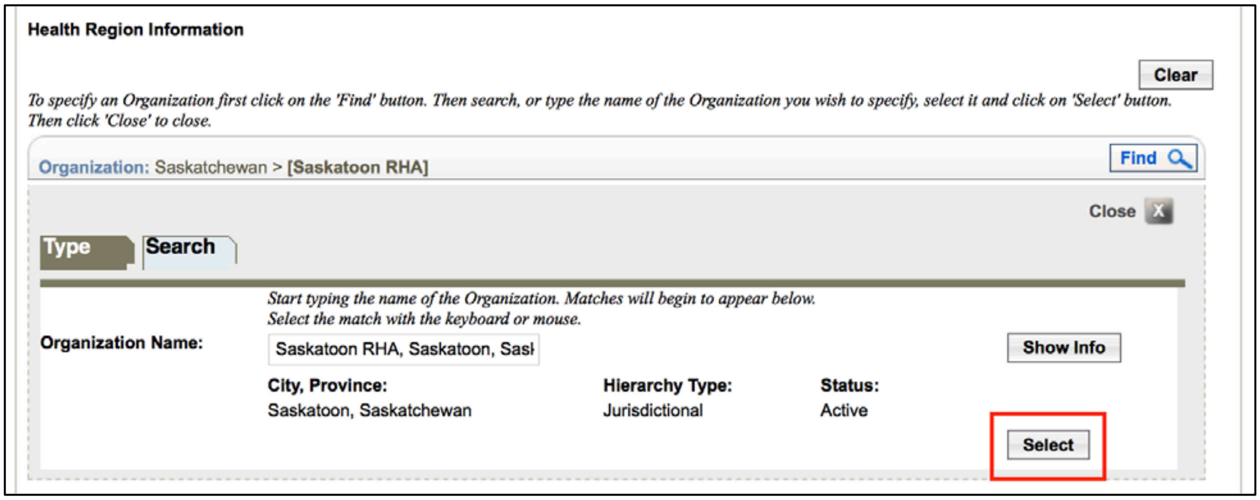
1. Place the Client into context by conducting a Client Search.
2. From the **Left Hand Navigation**, select **Client Details** > **Personal Information**.
   The Personal Information screen will display.



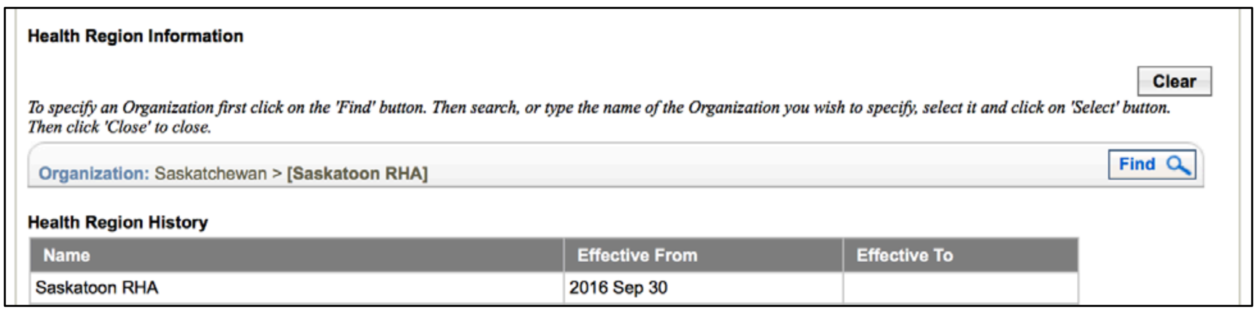
3. From the **Health Region Information** field, select the **Find** button next to the Organization.
   The **Organization Name** field will display in the expanded section.



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.

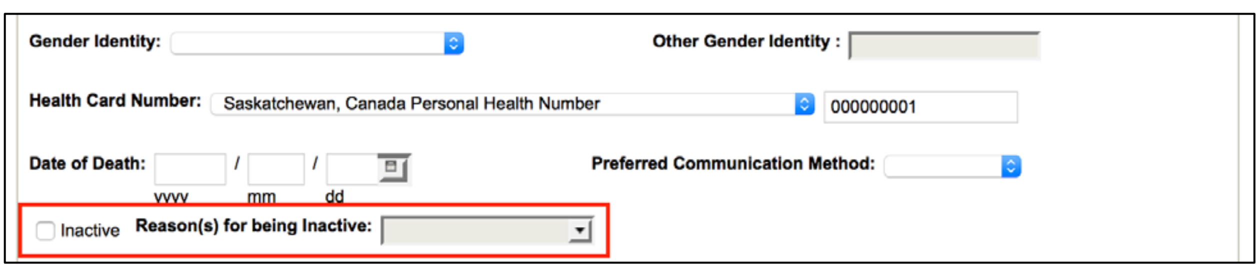


6. Click the **Save** button from the top or bottom of the Personal Information screen to save the changes to the Client's record.
   Note the Client's JOrg history will be captured in the **Health Region History** section.



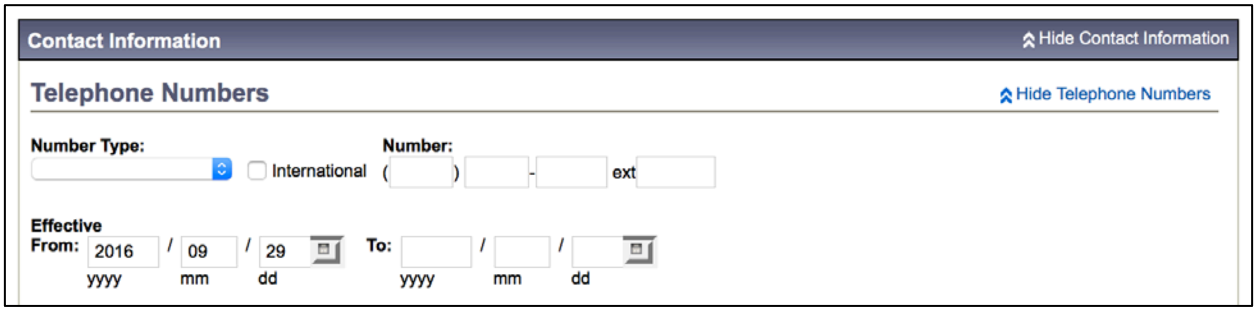
Ensure the Client's Record is Active

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.



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.



   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.