Panorama Bulletin

Bulletin #0053: Inactivation of Clients

eHealth Saskatchewan   **November 2, 2016**   **Version 1**

Client Status Overview

Clients in Panorama can have a status of either Active or Inactive. Active Clients reside in Saskatchewan, will have an active Panorama Forecast, are included in Reminder/Recall Queries by the system and are included in all regional and provincial reports. **Inactive Clients do not have their Panorama Forecast updated, are not included in Reminder/Recall Queries and are excluded from all regional and provincial reports**.

Panorama Users can identify a Client's status by reviewing the flag found at the top right of the Client Header when the Client is in context.

Automatic Updates

Currently, Clients under the age of 21 whose deceased status has been communicated to the Person Health Registration System (PHRS) are updated to Inactive in Panorama. Future updates will update the status of all Clients in Panorama, but Regional Health Authority and FNJ associations are not maintained in this fashion.

Definition of Inactive

Please see the Updating JOrg for Clients Lost to Follow-Up and Updating the JOrg and Status for Clients Moving Out of Province policies for more information.

A Client is deemed inactive "Moved out of Province" when it is determined by a reliable source the Client is no longer eligible to receive public health services within Saskatchewan. Potential circumstances for when a Client may be deemed ineligible for public health service may include:

- The Client's record is requested by or transferred to another Health Region outside of Saskatchewan;

- The Client or an immediate family member names the province or address where the Client has moved to; or,

- The Client is known to be temporarily residing in Saskatchewan for less than six months and has no plan to live in Saskatchewan permanently.

A Client is deemed inactive "Lost to Follow-up" when three reasonable attempts to contact the Client have returned no response. Reasonable attempts to contact the Client include:

- Letter returned undelivered;

- Home visit reveals there is a new occupant living at the Client's address;

- Phone call indicates out of service or wrong number;

- Texting reply from the Client returns no response, or Client is no longer reachable at that phone number; or,

- Email to the Client returns no response.

Panorama Steps

Ensure the Client's Organization is Set

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

3. Review the **Health Region Information** field to ensure the last Health Region (Regional Health Authority (RHA) or First Nations Jurisdiction (FNJ)) where the Client resided in Saskatchewan is listed.

Updating the Client's Contact Information

4. Review all entries listed under the Contact Information section and end date any Telephone Numbers, Addresses, Email Addresses or Online Names that are no longer applicable to this Client.

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.

Inactivate the Client

5. Scroll to the top of the Personal Information screen and select the **Inactive** checkbox. The system will display a warning: "Are you sure you want to change the client status".

6. Click **OK**.
    The **Reason(s) for being Inactive** field will activate.

7. Select "Lost to Follow-up" or "Moved out of Province" from the **Reason(s) for being Inactive** field.

8. 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.