

Panorama Immunization Module Policies

TOPIC:	Updating the JOrg for Clients Lost to Follow-Up		
APPROVED BY:	Saskatchewan Ministry of Health		
DATE APPROVED:	November 2, 2016	DATE REVISED:	N/A

POLICY:

When three reasonable attempts to make contact with the Client have returned no response, the client can be marked as inactive in Panorama.

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.

When setting the Client as inactive, the Jurisdictional Organization (JOrg) will remain as the last JOrg (or Health Region) the Client resided in within Saskatchewan.

PURPOSE:

The Client's inactive status in Panorama will inform Public Health that attempts to contact the Client have been exhausted. Public Health will no longer contact the Client for service, and the Client will no longer be included in regional and provincial reports.

PROCEDURE:

When a Panorama User has exhausted three attempts to contact the Client, the User will perform the following:

1. Ensure the Client's Organization (or Health Region) is set and represents the last JOrg the Client(s) resided in within Saskatchewan.
2. Ensure the Inactive field is enabled, and the Reason(s) for being Inactive field is set to "Lost to Follow-Up".

REFERENCES & RESOURCES:

- Updating the JOrg and Status for Clients Moving Out of Province Policy