



User Guide

CLIENT WARNINGS

- View Client Warnings
- Create Client Warning
- Update Client Warning
- Delete Client Warning

eHealth Saskatchewan 🔬



Revision History

Document History

Date	Version	Author	Changes / Comments
August 20, 2014	0.1	Josie Salvail	Initial draft
October 6, 2014	1.0	Tracy Forbes	Updates from policy discussions
January 20, 2015	1.1	Tracy Forbes	Remove dates from footers
<u>January 28, 2015</u>	<u>1.2</u>	Tracy Forbes	Apply Dr. Shauna Hudson updates to align with Do Not Use and Documentation of Immunization Refusal Policy

GENERAL

User Guide: Client Warnings





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A. Introduction

NOTE: To ensure that the Client Warnings

section is not cluttered,

only indicator information

should be stored at the client warning level:Client

Warnings are created

Panorama when Special

Considerations or AEFI records are created for

Sensitive Record – see

Communicable Disease

Alert – (displayed as 'See

Investigation notes')

Safety Concern for

Client - see notes

Safety Concern for Staff

see notes

GENERAL

automatically by

the Client.

notes

A Client Warning is a client-specific, manually entered or system-generated notice of **important** information that should be considered when providing services to a client. These warnings, based on system-wide information, can serve many purposes such as the protection of the client (e.g., drug allergies) or the public health worker (e.g., a potentially aggressive client) or the need to consult with the MHO or Immunization Ceordinator. The information contained in the Client Warning is available for all users to view, and the client's privacy and protection of sensitive information should be considered when creating Client Warnings.

Client Warnings can be automatically created from certain screens and may also be created manually from the Client Warnings screen.

Assumptions: The user has the appropriate security permissions to perform the assigned tasks.

Pre-requisites: The user has successfully logged into Panorama. A client is in context.

Related User Guides: Panorama 101 Search Client and Put in Context Maintain Client Risk Factors Add Immunization (Administered and Historical) Add Adverse Event Following AEFI

Menu Access: Client Warnings access is available from the left-hand navigation bar.

 With client in context, select Client > Client Warnings menu from the left navigation bar.



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Comment [SH1]: Do we want to put a reminder here or later if more appropriate that the display of information in warnings cannot be blocked and that users should be recording only what needs to be shared keeping privacy concerns in mind.

Clerical staff can see the warnings... correct TF: Correct – we COULD block it if we made the Consent Block on the actual CLIENT – so I worded as you see. Feel free to change – I agree with you – every opportunity to educate on this is excellent.

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Client Warnings screen displays.

A	-		0 🗆		
<u>Warnings</u>			ACTIVE		
Client ID: 526	Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male	Health Card No: -	Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos		
Phone Number: -(-)	Jurisdiction Info: Saskatchewan, Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider ide	D Type / Additional ID: ealth service provider identifier / -		
onent warnings	Click on radio button to select Client W	arning Adverse Drug Reaction or Adver	se Event Type, Only Client Warning Type can be deleted		
1 warnings	Click on radio button to select Client We	arning, Adverse Drug Reaction or Advers Click on Client Warning Type to	se Event Type. Only Client Warning Type can be deleted. view details or other Types to update source information.		
1 warnings Row Actions: Upda	Click on radio button to select Client Witten Delete	arning, Adverse Drug Reaction or Advers Click on Client Warning Type to Message	se Event Type. Only Client Warning Type can be deleted. view details or other Types to update source information. Create Warning Last Ecited By T		
1 warnings Row Actions: Upda Effective From	Click on radio button to select Client W te Deleto Effective To	arning, Adverse Drug Reaction or Adver Click on Client Warning Type to	se Event Type. Only Client Warning Type can be deleted view details or other Types to update source information. Create Warning Last Edited By		
1 warnings Row Actions: Upda Effective From 2010 Nov 15	Click on radio button to select Client W te Delete Effective Type SC: Contraindicatio	arning, Adverse Drug Reaction or Adven Click on Client Warning Type to Message an Influenza (Inf) Reason: Hypersensitivity / Anaph	se Event Type. Only Client Warning Type can be deleted view details or other Types to update source information. Create Warning Last Edited By T hylactic reaction to: Aluminum		



B. Client Warnings

1.0 View Client Warnings

NOTE: The Client Warnings screen offers richer functionality than the Warning Summary pop-up when reviewing client warnings (e.g. allows sorting).

NOTE: Manually created client warnings will appear with Type "Client Warning". Client Warnings can also be created automatically by the system whenever an allergy, adverse event, special consideration or adverse event following immunization is recorded. Clicking hyperlink within the Type column will take the user to the appropriate details screen where the warning was created.

2.

NOTE: As of the February 2, 2015 Go-Live: Allergy functionality is included in the Do Not Use Policy

NOTE: To print the Warning Summary window, use the icon in the top-right corner of the window. Click Close at the bottom of the window to close the screen.

1. Click Client > Client Warnings menu from the left navigation bar.

The Client Warnings Summary screen displays.

Warnings			ACTIVE
Client ID: 526	Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male	Health Card No:	Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider ide	: entifier / -
Client Warnings	Click on radio button to select Client W	/arning, Adverse Drug Reaction or Adver Click on Client Warning Type to	rse Event Type. Only Client Warning Type can be delet o view details or other Types to update source informati
Client Warnings warnings Row Actions: Upd	Click on radio button to select Client W	/arning, Adverse Drug Reaction or Adver Click on Client Warning Type to	rse Event Type. Only Client Warning Type can be delet view details or other Types to update source informati Create Warning
Client Warnings warnings Row Actions: Upd Effective From	Click on radio button to select Client W ate Delete Effective To	Varning, Adverse Drug Reaction or Adver Click on Client Warning Type to Message	rse Event Type. Only Client Warning Type can be delet view details or other Types to update source informati Croste Warning Last Edited By V
Client Warnings warnings Row Actions: Upd From 2010 Nov 15	Click on radio button to select Client W ate Delete To Type SC: Contraindication	Aarning, Adverse Drug Reaction or Adve Click on Client Warning Type to Message on Influenza (Inf) Reason: Hypersensitivity / Anap	rse Event Type. Only Client Warning Type can be delet view details or other Types to update source informati Create Warning Last Edited By hylactic reaction to: Aluminum

Alternatively, click the **Warnings** indicator in the client header (appears in any screen where the client header is displayed and client warnings exist).

The Warning Summary pop-up displays.

lient Warnii	ngs Summary				
lient ID: N 26 K	lame(First,Middl e Curt JS-Koala / Ma	e,Last)/Gender: le	Health Card No: -	Date of Birth / Age: 2000 May 12 / 14 yrs 3 m	os
Effective From	Effective To	Туре 🔺	Message		Last Edited By
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / An Aluminum	aphylactic reaction to:	user1, panorama
Total: 1 Med Page 1 of 1 PP Jump to page:					



2.0 Create Client Warning

NOTE: Immunization Special Considerations also populate Client Warnings when created (see related User Guide for details).

1. Click Client > Client Warnings menu from the left navigation bar.

The Client Warnings Summary screen displays.

A Warnings					ACTIVE
Client ID: 526	Name(First,Mide Kurt JS-Koala / N	dle,Last)/Gender: fale	Health Card No:	Date of Birth / A 2000 May 12 / 14	ge: 4 yrs 3 mos
Phone Number: -(-)	Jurisdiction Info Saskatchewan,S	askatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -		
lient Warnings warnings	Click on radio butt	on to select Client W	/arning, Adverse Drug Reaction or A Click on Client Warning Typ	dverse Event Type. Only Client Warr pe to view details or other Types to u	ning Type can be dele
lient Warnings warnings low Actions: Upd	Click on radio butt	on to select Client W	larning, Adverse Drug Reaction or A Click on Client Warning Ty	dverse Event Type. Only Client Warr pe to view details or other Types to u	ning Type can be dele pdate source informat Create Warnin
lient Warnings warnings tow Actions: Upd Effective From	Click on radio butt ate Delete Effective To	on to select Client W	Varning, Adverse Drug Reaction or A Click on Client Warning Typ Message	dverse Event Type. Only Client Warr pe to view details or other Types to u	ning Type can be dele pdate source informat Create Warning Last Edited By
Ilient Warnings warnings tow Actions: Upd Effective From 2010 Nov 15	Click on radio butt ate Delete Effective	on to select Client W	Arning, Adverse Drug Reaction or A Click on Client Warning Typ Message on Influenza (Inf) Reason: Hypersensitivity / A	volverse Event Type. Only Client Warr pe to view details or other Types to u	ning Type can be dele of ale source informat Create Warnin Last Edited By user1, panorama

2. Click the Create Warning button.

The Create Client Warning screen displays.

Warnings					ACTIVE
Client ID: 526	Name(Fir Kurt JS-K	st,Middle,Last)/Gender cala / Male	r: Health Card No:	Date of Birth / Age: 2000 May 12 / 14 yrs 3 m	os
Phone Number -(-)	Jurisdicti Saskatche	ion Info: ewan,Saskatoon RHA	Additional ID Type / Additional Provincial health service provider	ID: identifier / -	
Arning ID:	Type: Client Wa	ming			
ffective: * From: Message:	2014 / yyyy n	08 / 20 🖬 nm dd	To: / / / yyyy mm dd		
				(250 characters)	ar Canc



3. Enter an Effective From date and warning text in the Message text box. Note: The default is set to the current date. Click the Submit button.

The **Client Warnings Summary** screen is refreshed and a confirmation message is displayed. A **Warnings** indicator in the Client Header is displayed to indicate an active warning record exists.

Warnings Client ID: 526 Phone Number: -(-) The Client Warning dat	Name(First,Midd Kurt JS-Koala / N Jurisdiction Info Saskatchewan,S a has been saved.	dle,Last)/Gender: Male o: askatoon RHA	Health - Additic Provinc	Card No: onal ID Type / Additional ID: ial health service provider iden	Date of Birth / Age 2000 May 12 / 14 yr	ACTIVE : s 3 mos
Client ID: 526 Phone Number: -(-) The Client Warning dat	Name(First,Midd Kurt JS-Koala / M Jurisdiction Info Saskatchewan,S a has been saved.	dle,Last)/Gender: //ale o: //askatoon RHA	Health - Additio Provinc	Card No: onal ID Type / Additional ID: ial health service provider iden	Date of Birth / Age 2000 May 12 / 14 yr	: rs 3 mos
Phone Number: -(-) The Client Warning dat	Jurisdiction Info Saskatchewan,S a has been saved.	o: askatoon RHA	Additio Provinc	nal ID Type / Additional ID: ial health service provider iden	10.00	
The Client Warning dat	a has been saved.	—			titier / -	
Client Warnings						
2 warnings	Click on radio butt	on to select Client Wa	arning, Adv Cli	verse Drug Reaction or Adverse ick on Client Warning Type to v	e Event Type. Only Client Warnin iew details or other Types to upd	g Type can be deleted ate source information
Row Actions: Upda	te Delete					Create Warning
Effective From	Effective To	<u>Type</u>	A Me	ssage		Last Edited By 🔻
2014 Aug 20		Client Warning	The	client may faint or feel queasy	vat the site of needles.	user1, panorama
2010 Nov 15		SC: Contraindication	n Influ Rea	uenza (Inf) ason: Hypersensitivity / Anaphy	lactic reaction to: Aluminum	user1, panorama
Total: 2	Page 1 of 1	► H			Jump to	o page: 🛃 🛃

NOTE: Once the Effective To date is entered and is in the past, the warning will become inactive and the Warnings indicator will no longer be displayed.



3.0 Update Client Warning

NOTE: Clicking the Type hyperlink will display the details of the warning in read-only mode.

NOTE: Preferred business practice is to use the Effective To date to expire client warnings that are no longer applicable. The warning will be removed from the Warning Summary Pop-up as of midnight of the Effective To date.

The **Effective To** date can be removed or changed to a future date to make a client warning active again. 1. Click Client > Client Warnings menu from the left navigation bar.

The Client Warnings Summary screen displays.

Sherit vvai	nings			0 -
Warnings				ACTIVE
Client ID: 526	Name(First,Middle,Last)/Ge Kurt JS-Koala / Male	ender: Health Card No:	Date of Birth 2000 May 12 /	/ Age: 14 yrs 3 mos
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RH	Additional ID Type / Addition HA Provincial health service provide	al ID: ler identifier / -	
warnings	Click on radio button to select	Client Warning, Adverse Drug Reaction or	Adverse Event Type. Only Client W	arning Type can be delete
warnings Row Actions: Up Effective From	Click on radio button to select of the selec	Client Warning, Adverse Drug Reaction or Click on Client Warning Ty Mossage	Adverse Event Type. Only Client W ype to view details or other Types to	farning Type can be delete o update source informatic Create Warning Last Edited By
warnings Row Actions: Up Effective From 2014 Aug 20	Click on radio button to select in the selec	Client Warning, Adverse Drug Reaction or Click on Client Warning Ty Message ming The client may faint or feel	Adverse Event Type. Only Client W ype to view details or other Types to details or other Types to gueasy at the site of needles.	farning Type can be delete b update source informatio Create Warning Last Edited By user1, panorama
warnings Row Action : Up Effective From 2014 Aug 20 2010 Nov 15	Cilck on radio button to select to Deleto Effective IC Cilent War SC: Contra	Client Warning, Adverse Drug Reaction or Click on Client Warning Ty Message The client may faint or feel andication Influenza (Inf) Reason: Hypersensitivity /	Adverse Event Type. Only Client W yee to view details or other Types to queasy at the site of needles. Anaphylactic reaction to: Aluminum	arning Type can be delete o update source informatio Create Warning Last Edited By user1, panorama user1, panorama

2. Click the radio button beside the client warning to be updated, and then click the **Update** button.

The Update Client Warning Details screen displays.

Update Cli	ent Warning Details			?≞
<u> Warnings</u>				ACTIVE
Client ID: 526	Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male	Health Card No: -	Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos	
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -		
Warning ID: 309 *Required fields Effective: *From: *Reason: Comments:	Type: Client Warning 2014 / 08 / 20 T yyy mm dd	o: / / yyyyy mm dd		
* Message:	The client may faint or feel queasy at the s	site of needles.		
			(191 characters) Submit Reset	Cancel



3. Select a reason from the **Reason** drop-down list and update the remaining fields as required. Click the **Submit** button.

The **Client Warnings** screen is refreshed and a confirmation message is displayed.

Client Warr	nings					? 🗏
Warnings						ACTIVE
Client ID: 526	Name(First,Mic Kurt JS-Koala /	ddle,Last)/Gender: Male	Health Card No:		Date of Birth / Age: 2000 May 12 / 14 yrs	s 3 mos
Phone Number: -(-)	Jurisdiction In Saskatchewan,	fo: Saskatoon RHA	Additional ID Type / Addition Provincial health service prov	onal ID: vider identifier / -		
The Client Warning da	ata has been saved					
Client Warnings						
2 warnings	Click on radio bu	tton to select Client Wa	arning, Adverse Drug Reaction of Click on Client Warning	or Adverse Event Typ Type to view details	oe. Only Client Warning or other Types to upda	Type can be deleted te source information
Row Actions: Upo	date Delete					Create Warning
Effective From	Effective To	Туре	Message			Last Edited By 🔻
2014 Aug 15	2014 Aug 17	Client Warning	The client may faint or fe	el queasy at the site	of needles.	user1, panorama
2010 Nov 15		SC: Contraindicatio	n Influenza (Inf) Reason: Hypersensitivity	/ Anaphylactic react	tion to: Aluminum	user1, panorama
Total: 2	Page 1 of 1				Jump to	page: 🔃 🖻
* SC = Special Consid	leration					



4.0 Delete Warning

NOTE: Only manually created client warnings (those with type "client warning") can be deleted. Caution: Ensure you are following clinical documentation best practice guidelines when deleting records.

1. Click Client > Client Warnings menu from the left navigation bar.

The Client Warnings screen displays.

Clie	Client Warnings ⑦ 4							
1	Warnings					ACTIVE		
CI 52	ient ID:	Name(First,Mid Kurt JS-Koala / M	dle,Last)/Gender: H Male -	lealth Card No:	Date of Birth / Age 2000 May 12 / 14 yr	: rs 3 mos		
Ph -(-)	one Number:	Jurisdiction Infe Saskatchewan,S	askatoon RHA F	Additional ID Type / Additional ID: Provincial health service provider ider	tifier / -			
The C	lient Warning da	ta has been saved.						
Clier	nt Warnings							
2 warr	nings	Click on radio butt	on to select Client Warnir	ng, Adverse Drug Reaction or Advers Click on Client Warning Type to	e Event Type. Only Client Warning view details or other Types to upda	g Type can be deleted. ate source information.		
Row	Actions: Upd	late Delete				Create Warning		
	Effective From	Effective To	Туре	Message		Last Edited By 🔻		
۲	2014 Aug 15	2014 Aug 17	Client Warning	The client may faint or feel queas	y at the site of needles.	user1, panorama		
	2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphy	vlactic reaction to: Aluminum	user1, panorama		
Total	: 2	Page 1 of 1	Þ		Jump te	o page: 🗾 🛃		
* SC =	Special Consid	eration						

2. Click the radio button beside the client warning to be deleted, then click the **Delete** button.

The Delete the Selected item? user confirmation pop-up is displayed.



3. Click the **ok** button.



TIP: Clicking the Cancel button will return the user to the Client Warnings screen without any changes.

NOTE: The user is unable to view a warning once it is deleted. If the warning should remain on file, the user should update the warning with an Effective To date. The Client Warnings screen is refreshed.

Client Warn	ings					?	Ē
(Marnings						ACT	IVE
Client ID: 526	Name(First,Middle,Last)/Gender: Kurt JS-Koala / Male		Health Card No:		Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos		
Phone Number: -(-)	Jurisdiction Info Saskatchewan,S	askatoon RHA	Additional ID Type / Ad Provincial health service				
Client Warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event 1 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Row Actions: Update Delete Delete					Type. Only Client Warnin ils or other Types to upda	g Type can be de ate source inform	eleteo nation
Effective From	Effective To	Туре	Message			Last Edited B	χ 🔻
2010 Nov 15		SC: Contraindicatio	n Influenza (Inf) Reason: Hypersensi	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum			na
Total: 1 Repage 1 of 1 PP Jump to page:							
* SC = Special Conside	eration						