



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						
(Narnings					ACTI	
Client ID: 526	Name(First,Middle,Last Kurt JS-Koala / Male)/Gender:	Health Card No:		Birth / Age: ay 12 / 14 yrs 3 mos	
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoo	n RHA		Additional ID Type / Additional ID: Provincial health service provider identifier / -		
Client Warnings	Click on radio button to se	lect Client War	ming, Adverse Drug Reaction or Ad	Iverse Event Type, Only Cli	ient Warning Type can be de	
Client Warnings	Click on radio button to se	lect Client War	ning, Adverse Drug Reaction or Ad Click on Client Warning Type			
I warnings Row Actions: Upda	Delete	lect Client War	Click on Client Warning Type		pes to update source inform	
I warnings		lect Client War			pes to update source inform	
I warnings Row Actions: Upda Effective	te Delete Effective Type To	lect Client War	Click on Client Warning Type	e to view details or other Ty	pes to update source inform Create Warni Last Edited By user1, panorami	



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.

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.

Marnings				ACTIV
Client ID: 526	Name(First,Middl Kurt JS-Koala / Ma	le,Last)/Gender: ale	Health Card No:	Date of Birth / Age: 2000 May 12 / 14 yrs 3 mos
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Sa		Additional ID Type / Additional II Provincial health service provider i	
ilient Warnings		on to select Client Wa	arning, Adverse Drug Reaction or Adv Click on Client Warning Type	verse Event Type. Only Client Warning Type can be delo to view details or other Types to update source informa-
		on to select Client W	arning, Adverse Drug Reaction or Adv Click on Client Warning Type	verse Event Type. Only Client Warning Type can be delo to view details or other Types to update source informa Create Warnin
warnings	ate Delete	on to select Client Wa	arring, Adverse Drug Reaction or Adv Click on Client Warning Type Message	to view details or other Types to update source informa
warnings Row Actions: Upd	ate Delete Effective To		Click on Cliënt Warning Type Message Influenza (Inf)	to view details or other Types to update source informa Create Warnin

2. 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.

	ame(First,Middle urt JS-Koala / Mal		Health Card No: -	Date of Birth / Age: 2000 May 12 / 14 yrs 3 m	nos
Effective From	Effective To	Туре 🔺	Message		Last Edited By
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Ana Aluminum	aphylactic reaction to:	user1, panorama
Total: 1	Page 1 d	of 1 🕨 🗎		Jump to p	age:



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						ACTIV
Client ID: 526	Name(First,Mide Kurt JS-Koala / N	dle,Last)/Gender: //ale	Health Card No:		e of Birth / Age: 0 May 12 / 14 yrs	
Phone Number: -(-)	Jurisdiction Info Saskatchewan,S		Additional ID Type / Additional ID: Provincial health service provider identifier / -			
lient Warnings warnings		on to select Client W	/arning, Adverse Drug Reaction or Ac Click on Client Warning Typ			te source informa
warnings		on to select Client W				
warnings		on to select Client W				te source informa
warnings ow Actions: Upd Effective	ate Delete		Click on Client Warning Typ	e to view details or oth	er Types to upda	Create Warnin

2. Click the Create Warning button.

The Create Client Warning screen displays.

Warnings							ACTIV
Client ID: 526	Name(F Kurt JS	First, Middle, La Koala / Male	ast)/Gender:	Health Card N	o:	Date of Birth / Age: 2000 May 12 / 14 yrs 3 m	105
Phone Number -(-)		ction Info: hewan,Saskat	toon RHA	Additional ID Provincial heat	Type / Additional ID: th service provider identif	fier / -	
Arning ID: Required fields ffective: * From:	Type: Client V			To: / _	/		
Message:	yyyy		20 🔲 dd		nm dd		
						(250 characters)	ear Cano



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.

Client Warr	nings				0 🗏
(Warnings					ACTIVE
Client ID: 526	Name(First,Mic Kurt JS-Koala /	ddle,Last)/Gender: Male	Health Card No:	Date of Birth / A 2000 May 12 / 14	
Phone Number: -(-)	Jurisdiction In Saskatchewan,	fo: Saskatoon RHA	Additional ID Type / Add Provincial health service p		
The Client Warning da	ita has been saved				
Client Warnings					
2 warnings	Click on radio bu	tton to select Client Wa		n or Adverse Event Type. Only Client Warr ng Type to view details or other Types to u	
Row Actions: Upo	late Delete				Create Warning
Effective From	Effective To	<u>Type</u>	A Message		Last Edited By 🔻
2014 Aug 20		Client Warning	The client may faint or	r feel queasy at the site of needles.	user1, panorama
2010 Nov 15		SC: Contraindicatio		vity / Anaphylactic reaction to: Aluminum	user1, panorama
Total: 2	Page 1 of 1	▶ H		Jum	p to 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.

	nings			? 4
(Marnings				ACTIVE
Client ID: 526	Name(First,Middle,Last)/Ge Kurt JS-Koala / Male	ender: Health Card No:	Date of Birth / 2000 May 12 /	
Phone Number: -(-)	Jurisdiction Info: Saskatchewan,Saskatoon RI	Additional ID Type / Addition HA Provincial health service prov		
warnings	Click on radio button to select	Client Warning, Adverse Drug Reaction of		
Effective	date Delete		or Adverse Event Type. Only Client W Type to view details or other Types to	
Row Actions: Up	date Delete	Click on Client Warning		c update source information
Row Actions: Up Effective From	date Delete Effective Type To	Click on Client Warning Message The client may faint or fe aindication Influenza (Inf)	Type to view details or other Types to	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	ient Warning Details			0 🗏
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 identifier / -		
Warning ID: 309	Type: Client Warning			
*Required fields				
Effective: * From:	2014 / 08 / 20 To	yyyy mm dd		
*Reason:		\$		
Comments:				
* Message:	The client may faint or feel queasy at the s	ite of needles.		
			(191 characters)	
			Submit Reset	Cancel
L				



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	
Phone Number: -(-)	Jurisdiction In Saskatchewan,	fo: Saskatoon RHA	Additional ID Type / Addition Provincial health service prov			
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			
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		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	ent Warr	nings				? =
1	Warnings					ACTIVE
CI 52	lient ID:	Name(First,Mid Kurt JS-Koala / M		lealth Card No:	Date of Birth / Age 2000 May 12 / 14 yr	
Ph -(-)	one Number:	Jurisdiction Infe Saskatchewan,S		Additional ID Type / Additional ID: Provincial health service provider iden	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 Adverse Click on Client Warning Type to v		
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 queasy	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
Warnings						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		Additional ID Type / Additional ID: Provincial health service provider identifier / -				
Client Warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adv Click on Client Warning Type Row Actions: Update					pe. Only Client Warnin s or other Types to upda	g Type can be de ate source inform Create Warn	natior
Effective From	Effective To	Туре	Message			Last Edited By	ι 🔻
2010 Nov 15		SC: Contraindicatio		Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum			na
Total: 1 Repage 1 of 1 PM Jump to page:							
* SC = Special Conside	eration						