

User Guide

CLIENT WARNINGS

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

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
January 28, 2015	1.2	Tracy Forbes	Apply Dr. Shauna Hudson updates to align with Do Not Use and Documentation of Immunization Refusal Policy

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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 automatically by Panorama when Special Considerations or AEFI records are created for the Client.](#)

- Sensitive Record – see notes
- Safety Concern for Client – see notes
- Safety Concern for Staff – see notes
- Communicable Disease Alert – (displayed as 'See Investigation 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 Coordinator. 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.

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

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.

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

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.

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

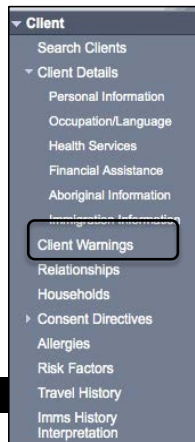
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Related User Guides:

- 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.

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



Client Warnings screen displays.

Client Warnings ? 🖨️

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 / -	

Client Warnings

1 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted.
Click on Client Warning Type to view details or other Types to update source information.

Row Actions: Update Delete Create Warning

Effective From	Effective To	Type	Message	Last Edited By
2010 Nov 15		SC, Contraindication	Influenza (inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 1 Page 1 of 1 Jump to page:

* SC = Special Consideration

B. Client Warnings

1.0 View Client Warnings

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

The Client Warnings Summary screen displays.

Client Warnings

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 / -

Client Warnings

1 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Effective From	Effective To	Type	Message	Last Edited By
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 1 Page 1 of 1 Jump to page: []

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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.



Client Warnings Summary

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

Effective From	Effective To	Type	Message	Last Edited By
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 1 Page 1 of 1 Jump to page: []

* SC = Special Consideration

Close

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.

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

2.0 Create Client Warning

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

The Client Warnings Summary screen displays.

Client Warnings ? 📄

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 / -

Client Warnings

1 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Row Actions:

Effective From	Effective To	Type	Message	Last Edited By
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 1 Page 1 of 1 Jump to page:

* SC = Special Consideration

2. Click the Create Warning button.

The Create Client Warning screen displays.

Create Client Warning ? 📄

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: Type: Client Warning

*** Required fields**

Effective: * From: / / To: / /

Message:

(250 characters)

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. 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 Warnings

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 / -	

The Client Warning data has been saved.

Client Warnings

2 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Effective From	Effective To	Type	Message	Last Edited By
<input type="radio"/>	2014 Aug 20	Client Warning	The client may faint or feel queasy at the site of needles.	user1, panorama
<input type="radio"/>	2010 Nov 15	SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 2 Page 1 of 1 Jump to page:

* SC = Special Consideration

3.0 Update Client Warning

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

The Client Warnings Summary screen displays.

Client Warnings ? 📄

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 / -

Client Warnings
 2 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Row Actions: Update Delete Create Warning

Effective From	Effective To	Type	Message	Last Edited By
2014 Aug 20		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 / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 2 Page 1 of 1 Jump to page:

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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 Client Warning Details ? 📄

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 yyyy mm dd

* Reason:

Comments:

* Message:
 (191 characters)

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.

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 Warnings ? 🖨

⚠ **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 / -	

The Client Warning data has been saved. ←

Client Warnings

2 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Row Actions: Update Delete Create Warning				
	Effective From	Effective To	Type	Message
<input type="radio"/>	2014 Aug 15	2014 Aug 17	Client Warning	The client may faint or feel queasy at the site of needles.
	2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum

Total: 2 Page 1 of 1 Jump to page:

* SC = Special Consideration

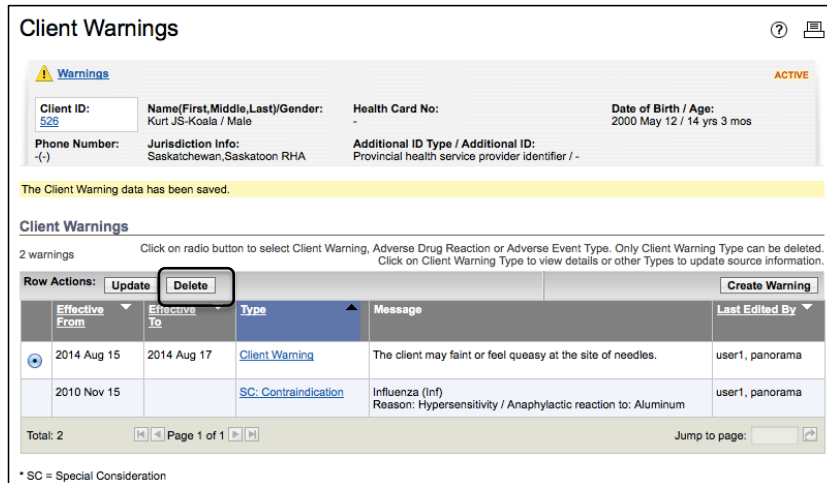
NOTE: Only manually created client warnings (those with type “client warning”) can be deleted.

4.0 Delete Warning

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.



Client Warnings ? 🖨

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 / -

The Client Warning data has been saved.

Client Warnings

2 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Row Actions: Update Delete

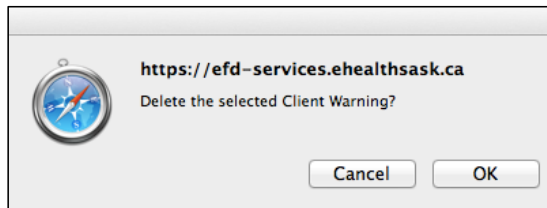
Effective From	Effective To	Type	Message	Last Edited By
2014 Aug 15	2014 Aug 17	Client Warning	The client may faint or feel queasy at the site of needles.	user1, panorama
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 2 Page 1 of 1 Jump to page:

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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 Warnings ? [Print]

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 / -	

The Client Warning data has been deleted. ←

Client Warnings

1 warnings Click on radio button to select Client Warning, Adverse Drug Reaction or Adverse Event Type. Only Client Warning Type can be deleted. Click on Client Warning Type to view details or other Types to update source information.

Row Actions: <input type="button" value="Update"/> <input type="button" value="Delete"/>		<input type="button" value="Create Warning"/>		
Effective From	Effective To	Type	Message	Last Edited By
2010 Nov 15		SC: Contraindication	Influenza (Inf) Reason: Hypersensitivity / Anaphylactic reaction to: Aluminum	user1, panorama

Total: 1 Page 1 of 1

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