

Deleting/Invalidating Documentation Errors – IOM WS V4.4	Name of Activity: Deleting or Invalidating Documentation Errors		
	Role performing Activity:		
Panorama – IOM WORK STANDARD	Location:		Department:
	Document Owner:		
	Date Prepared: June 5, 2018	Last Revision: Feb 2022	Date Approved:

Principles

1. Delete data that was entered in error (i.e. on the wrong client or clicked the wrong risk factor)
2. Certain data deletion options will be limited to users with the Designated Panorama Administrator (DPA) role in order to protect certain documentation. (Intervention/investigation)
3. General rule is to update, end date or inactivate when new information becomes available
4. Deleted information will not be included on reports.
5. Records and users can and will be audited at regular intervals to review the deletes.
6. Support staff will not delete any data from a record.
7. Deleting data should be done within the same responsible organization that entered the data.

Essential Tasks:	
1.	<p>Delete a LAB TEST RESULT – Note: only the result can be deleted, not the requisition. LHN > INVESTIGATION > LAB > LAB SUMMARY</p> <ul style="list-style-type: none"> ➤ Scroll down to the bottom of the screen and find the lab requisition entered earlier ➤ Click on the radio button beside the test result you wish to update ➤ Click the View/Update Lab Report - The Human Lab Report screen loads ➤ Scroll to bottom click hyperlink for Test ID ➤ Scroll to bottom click radio button beside test ➤ Click on 'Reason for Deletion' at top or bottom left side of the page. Choose entered in error or other ➤ Click on 'delete' button ➤ Pop up - confirming that this lab report and all related results will be deleted. ➤ Lab Summary page opens ➤ Scroll to bottom – Requisition will still be there, but test and result will be deleted from row. ➤ NOTE: In some instances the PHAC Date does not recalculate when Lab Tests/Lab Report are deleted. If this occurs to you, change the date of a "Classification" by one day (higher or lower) and "SAVE" your change. This update forces the PHAC Date Algorithm to recalculate the PHAC Date.

1.1	<p>WITHDRAW A REQUISITION entered in error to prevent it from showing on the lab summary. (DPA role required)</p> <p>LHN > INVESTIGATION > LAB > LAB SUMMARY</p> <ul style="list-style-type: none"> ➤ Scroll down to the bottom of the screen and find the lab requisition that has had the result deleted as above ➤ Click on the radio button beside the requisition you wish to withdraw ➤ Click on View/Update Lab Requisition ➤ Select a reason for Withdrawal from drop down menu and click 'Withdraw' button ➤ A pop up window will ask you to confirm – click 'ok' ➤ The requisition will only be visible if the filter on lab summary is adjusted to include withdrawn reqs.
2.	<p>Expire a RISK FACTOR (if entered in error – do not change pre-existing RF)</p> <p>LHN > SUBJECT > RISK FACTORS</p> <ul style="list-style-type: none"> ➤ Risk Factor Page loads ➤ Click the radio button beside the Risk Factor you wish to expire. ➤ Click on Set Expiry button ➤ Enter Current Date as “Effective To” Date ➤ Click on “End Date Reason” ➤ Select from drop list ➤ Click on ‘Apply’ button ➤ Click on ‘Save’ button ➤ ADD COMMENT ➤ Click the radio button beside the Risk Factor you wish to update ➤ Click on Update button ➤ Add ‘Additional Information’ ➤ Click on “End Date Reason” ➤ Enter Reason for Expiring the Risk Factor (eg entered in error) ➤ Click on ‘Apply’ button ➤ Click on ‘Save’ button
3.	<p>Delete a COMPLICATION</p> <p>LHN > INVESTIGATION > COMPLICATIONS</p> <ul style="list-style-type: none"> ➤ Click on radio button beside complication to be deleted ➤ Select a ‘reason for Deletion’ from the drop down list ➤ Click on ‘Delete’ button ➤ Click on ‘Save’ button

4. **Change an Other MEDICATION to 'Entered in Error' (cannot Delete)**

LHN > INVESTIGATION > MEDICATIONS > MEDICATION SUMMARY

- Scroll to bottom of Medication Summary Page to 'Other Meds' box
- Click on radio button beside the medication that was entered in error
- Find the 'Course Completed' drop list and select 'entered in error'
- The button 'Update Course Completed' will become available – click it

Drug	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction
<input checked="" type="checkbox"/> Cefixime	800 mg / One dose only / Oral	1 Days	2018 Dec 3(est) / 2018 Dec 3(est)	-

- You will see 'entered in error' in the row of the incorrect medication
- **Click on Save**

NOTE: Medications entered using the original process of 'medication' can not be corrected or changed to entered in error once saved.

5. **Delete an INTERVENTION – Can only be performed by a DPA** (Designated Panorama Administrator)

- Click on hyperlink to intervention from the Intervention Summary screen
- On the Intervention Details screen select Entered in Error from the Reason for Deletion drop list and click the Delete button

6. **Delete a SIGN OR SYMPTOM** (entered in error or wrong client)

LHN > INVESTIGATION > SIGNS & SYMPTOMS

- Sign and symptom page will load
- Click on the radio button beside the Sign or symptom you wish to delete
- In the Row Actions bar, select a 'Reason for Deletion' from the drop down list
- Click on the 'delete' button
- Pop up will ask you to confirm the deletion, click on 'ok'
- Click on Save

7. **Invalidate an EXPOSURE (A/E OR T/E)**

LHN > INVESTIGATION > EXPOSURE SUMMARY

- Click on hyper link under TE or AE ID column you wish to invalidate
- Maintain TE or AE Details page will load
- Under the First section below the 'Exposure Name' click on the radio button beside 'Invalid'
- Type in an 'Invalid Reason' into the free text box
- Click on 'Save'
- Return to Exposure summary and a checkmark will be in the 'invalid' column of the event.

8. **Delete an OUTCOME**

LHN > INVESTIGATION > OUTCOMES

- Click on the radio button beside outcome you wish to delete
- In row actions bar, select a 'Reason for Deletion' from the drop down list
- Click on the 'Delete' button
- Click on 'Save'

9.	<p>Delete ‘DIAGNOSIS’ AIDS AND INDICATIVE DISEASES</p> <p>LHN > INVESTIGATION > INVESTIGATION DETAILS > INVESTIGATION INFORMATION</p> <ul style="list-style-type: none"> ➤ Click on the radio button beside the ‘indicative disease’ you wish to delete ➤ Click on the ‘delete button’ ➤ Scroll up to Diagnosis date and clear the fields ➤ Select the ‘Primary Method of Diagnosis’ drop down to blank ➤ Select ‘Method of Detection’ to blank ➤ Click on Save
10.	<p>UDF (User Defined Form)</p> <p>LHN > INVESTIGATION > INVESTIGATION DETAILS > LINKS AND ATTACHMENTS</p> <ul style="list-style-type: none"> ➤ Scroll to Filled out forms ➤ Click on radio button beside form you wish to delete ➤ Click ‘update’ button ➤ Form will open ➤ Scroll to bottom of page ➤ Click on ‘Delete Form’ button at bottom left ➤ Click on ‘Confirm Delete’ button that appears ➤ Page will reload stating form has been deleted
11.	<p>INVESTIGATION - Entered in Error</p> <p>NOTE: Entire Investigations cannot be deleted when there are Labs, Exposures or Other Medications entered. Change the Investigation classification to “Case – Entered in Error” to inactivate the investigation.</p> <p>LHN > INVESTIGATION > INVESTIGATION DETAILS > DISEASE SUMMARY</p> <ul style="list-style-type: none"> ➤ Click the “Add” button located to the right of “Row Actions” ➤ Scroll to the bottom of the page ➤ Click the radio button beside the current Classification in the row action ➤ Click the Update button ➤ Select the new Classification Case – Entered in Error ➤ Click the Apply Update button ➤ Click Save
12.	<p>An INVESTIGATION may be deleted by a DPA role if entered in error.</p> <p>LHN > INVESTIGATION > INVESTIGATION SUMMARY</p> <ul style="list-style-type: none"> • At top of page select reason for deletion and click on delete • Pop up will ask you to confirm • Certain data elements will be deleted in this step including; <ul style="list-style-type: none"> • Signs and Symptoms • Risk factors • Incubation and communicability • Imms history interpretation <p>Some data types require pre-deleting before the actual investigation may be deleted. You will receive a warning to this effect</p> <p>If an investigation has had a lab entered, an ‘other’ medication entered or an exposure entered, you will not be able to delete the investigation. The only option is to change the disposition to ‘not a case’. A future classification of ‘entered in error’ and ‘duplicate investigation’ has been requested.</p>

13.	Client Warnings, Responsible orgs, Imms History Interpretation and Relationships can be deleted per existing Panorama policy by all users with appropriate role.
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