Case Investigation – Assign/Transfer to another jurisdiction – IOM WS	**Name of Activity:** Case Investigation – 1. Assigning 2. Transferring responsibility of Case Investigation to a different Responsible Organization within SK. 8. Receiving an investigation. **Role performing Activity:**		
Panorama – IOM WORK STANDARD	**Location:**	**Department:**	
	Document Owner:		
	Date Prepared: May 15, 2018	**Last Revision:** Feb 2022	**Date Approved:**

Lab received in one Org (Organization= Former RHA or First Nation) (follow-up may or may not have begun) and now responsibility is being assigned/transferred to a different Org within SK.

1. Update client demographics, including ORG and physical address/set 'address at time of infection'.
2. Update investigation responsible ORG and investigator Workgroup (see below)
3. Fax notification of Investigation transfer to receiving public health office.

Essential Tasks:	
1.	**Assigning (1st touch) – when a lab is received that is the responsibility of another Org:** ➢ The Org who initially receives the lab will **create the investigation** adding the additional appropriate responsible Org (See Policy – Creation of Panorama investigation and Lab entry), (See – Create Investigation – IOM - WS) o **Note:** select disposition as Pending. ➢ **Enter lab** in Panorama and **upload copy** (See – Lab Quick Entry – IOM WS) ➢ **Send notification to appropriate Org** – (See Fax Notification of CD Investigation within Saskatchewan Health Authority – IOM WS) ➢ **Receiving (New) org will** -**1** change the primary investigator to themselves , **2** delete the sending responsible org (if they did not contribute to the investigation follow up) **3** New Org must change the disposition once the investigation is received/accepted.

2. **Transferring – when an investigation is identified to be the responsibility of a different Org after follow-up has begun:** Set Client in context

LHN > SUBJECT > CLIENT DETAILS >Client Demographics

- Click on radio button to the left of the current health region and click “Update” (if applicable)
    - End date the current org (The end date has to be one day before the new organizations Effective from date)
    - Click on “Apply button then save
    - Click on the“Add” button then type in the new “Health Region Organization”
    - Click on “Apply” button then save
    - This refers to where the client is currently residing
- Click on “Add” Button to enter new telephone and address as needed
    - Click on “Apply” Button
- Click on “Add” Button to enter new address as needed
    - Click on “Apply” Button
    - Click on “Set as Preferred” Button – if applicable

If the Client is no longer residing at an address:

- Click on radio button beside address no longer residing at – If applicable
    - Click on “Update” Button
    - Enter in date client no longer effectively resides at that location

Click on “Apply” Button

- Click on “Save” Button

3. **LHN > INVESTIGATION > SUBJECT SUMMARY**

- Click on Investigation ID hyperlink of investigation to be transferred
    - This will put the investigation into context

4. **LHN > INVESTIGATION > INVESTIGATION DETAILS > RESP. ORG/INVESTIGATOR**

Responsible / Organization Investigator screen will open

To add a new/additional Responsible Organization:

- Select receiving Responsible Organization from drop down list
- Select Responsible Organization Workgroup from drop down list – “Workgroup”
- Select Responsible Organization Date
    - **NOTE:** This will be the date the new responsible organization is assigned
- Click on “Add Organization” Button
- Scroll down to bottom of page

To end date original (transferring) primary investigator:

- Scroll to bottom of page and Select radio button beside current primary investigator
- Click on “Update” button
- Select end date for original investigator organization under “Investigator” Heading
- Click on “Apply Update” Button **(do not save yet!)**

5.	**To Add Primary Investigator Type to receiving Organization:** ➢ Scroll to "Investigator" Heading ➢ Select new Investigator Type from drop down list as "Primary" ➢ Select Investigator Organization name of new primary investigator from drop down list ➢ Select Investigator Workgroup from drop down – "Workgroup" ➢ Investigator Name – **DO NOT USE** ➢ Select Assigned date o **NOTE:** This is the date the new responsible organization is assigned ➢ Click on "ADD" Button ➢ **NOW Click on "SAVE" Button** **NOTE:** There must always be a primary investigator assigned to a case investigation, therefore the end date of one will be the same as the assigned date of the next (ie. can't be the day before).
6.	**NOTE:** When transferring, change disposition to '**PENDING'.** **LHN > INVESTIGATION > INVESTIGATION DETAILS > INVESTIGATION INFORMATION** ➢ Select disposition from drop down list as "Pending" o **NOTE:** New Responsible Organization must change the disposition to something other than 'pending' once accepted. ➢ Enter disposition date as date of transfer – will be prepopulated to today's date ➢ Select appropriate '**Client address at time of the infection**' from drop down list. This is the address for reporting might <u>not be their new or current address</u>. o **NOTE: based on rules of residency -CD Manual Chp 10** ➢ **NOTE: Diagnosis section is to be used for AIDS cases only! For all other diseases – leave blank.** ➢ Click on "Save" Button
7.	Send FAX Notification to new responsible ORG ➢ See: *FAX – Communicable Disease & STBBI Notification* **NOTE:** Change the disposition to pending when transfering responsibilty. See Case investigation – Updating – IOM WS **NOTE:** When the new Org accepts responsibility, they must change the disposition – this will allow searches for investigations with pending as a disposition providing a audit to ensure the transfer was received. NOTE: If referring contacts who do not have an investigation – include the index case inv ID # for the contact follow up work to be uploaded by the org doing the follow up (if they are not documenting an electronic contact record already)

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Receiving a transferred Panorama investigation from a different org in SK

Fax – Communicable Disease & STBBI Notification arrives
Review the fax sheet and any attached documents (NOTE: whenever possible sender will scan and upload documents into the investigation rather than attaching to fax notification. (exceptions include; there is no investigation (contact) or resources (staff or equipment not available to do so.
Search investigation/client using provided ID #.
Change disposition to something other than ‘Pending’.
Review client demographics to ensure up to date
Review Resp/org list and Investigator Org (Primary) is accurate

Receiving a Contact referral (does not qualify for a Panorama investigation)

Fax – Communicable Disease & STBBI Notification arrives with paper contact referral info attached
Complete contact follow up
Scan and upload contact follow up outcomes into index case investigation (index case inv ID # should have been provided on the fax notification form)

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