Intervention – IOM WS	**Name of Activity:** Interventions with and without Next Follow-up Date Investigator Notes/Narrative **Role performing Activity:**		
Panorama – IOM **WORK STANDARD**	**Location:**		**Department:**
	Document Owner:		
	Date Prepared: **May 14, 2018**	**Last Revision:** **July 25, 2022**	**Date Approved:**

Essential Tasks: Client and investigation are in context.

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1. **LHN > INVESTIGATION > TREATMENT AND INTERVENTIONS > INTERVENTION SUMMARY**
    ➢ Click on " Create Intervention" Button
        o Intervention Details page will load and Encounter group will prepopulate (if does not prepopulate ensure investigation is in context.)
    ➢ Select Intervention Type and Sub-type - drop down lists

    The CD manual and Config Dictionary define the intervention details reducing the need to add notes.

    BASIC INTERVENTION – NO 'NEXT FOLLOW UP DATE' REQUIRED

    ➢ Select Intervention Disposition from drop down list – usually "Completed" will apply.
    ➢ Select Outcome – "DO NOT USE" from drop down list

    ➢ Select Start Date > Definition: Date intervention was provided
    ➢ Select End Date – optional – not needed
    ➢ Next follow Up Date – leave blank

    ➢ Workgroup Organization defaults to the logged in user's organization
    ➢ Select Workgroup – as "Workgroup".
    ➢ User – leave blank
    ➢ Ensure Organization and Location are correct - defaults to user's org and SDL

    ➢ Primary Provider; *The name of the person who <u>actually completed</u> the intervention must be documented*
        o "Use this provider" - Defaults to the logged in user if setup in user profile.
            ▪ If a different public health providers name is needed, click on find and select correct name.
        o "Use Other Provider" - If the person who performed the intervention is not a public health Panorama provider, select - Use other provider
            ▪ Type in the name (and phone number –if available)

    ➢ **Comment – Leave blank - if needed, narrative can be entered as per step 3 below.**

    ➢ Click on "Save" Button

2	**INTERVENTION – WITH A 'NEXT FOLLOW UP DATE'**

➢ Select Intervention Disposition as – "in progress" – change once completed.
➢ Select Outcome – "DO NOT USE" from drop down list

➢ Select Start Date > Definition: Date intervention was provided
➢ Select End Date – leave blank until the intervention is complete
➢ Next follow Up Date – enter the date follow up is due

➢ Workgroup Organization defaults to the logged in user's organization
➢ Select Workgroup – as "Workgroup".
➢ User – leave blank
➢ Ensure Organization and Location are correct - defaults to user's org and SDL

➢ Primary Provider; *The name of the person who <u>actually completed</u> the intervention must be documented*
  o "Use this provider" - Defaults to the logged in user if setup in user profile.
    ▪ If a different public health providers name is needed, click on find and select correct name.
  o "Use Other Provider" - If the person who performed the intervention is not a public health Panorama provider, select - Use other provider
    ▪ Type in the name (and phone number –if available)

➢ Comment – Leave blank - if needed, narrative can be entered as per step 3 below.

➢ Click on "Save" Button

UPDATE INTERVENTION ONCE COMPLETE

LHN > INVESTIGATION > TREATMENT AND INTERVENTIONS > INTERVENTION SUMMARY
➢ Click on the hyperlink under 'Type' of the intervention you wish to change to 'complete' (i.e. Communication screenshot) – Intervention Details page will open.

Interventions

Type ▼	SubType ▼	Disposition ▼	Start Date ▼	End Date ▲	
Communication	Phone call (afternoon)	In progress	2018 Dec 13	-	n

➢ Change Disposition to 'Complete'
➢ Enter an 'End Date'
➢ Click on "Save"
Investigation Summary Page will now display as below.

Interventions

Type ▼	SubType ▼	Disposition ▼	Start Date ▼	End Date ▲	
Communication	Phone call (afternoon)	Completed	2018 Dec 13	2018 Dec 13	nu

3.	**INVESTIGATOR NOTES/NARRATIVE** Note: do not add comments inside any other interventions. Additional narrative notes will be added to this single intervention. **There should never be more than one 'Other investigation Findings – investigator notes' intervention in an investigation.**
	
	Narrative notes that do not have a concise field to record the information in Panorama, will be stacked together in this single intervention (multiple users add notes to the same page.)
	o Details about the phone call attempts, home visits, etc
	o Client response or special requests
	o Anything you would have written in a narrative as documentation that did not have a more precise field to record it in within Panorama IOM.
	
	CREATING THE FIRST NARRATIVE NOTE
	LHN > INVESTIGATION > TREATMENT AND INTERVENTIONS > INTERVENTION SUMMARY
	
	The first investigator to write a narrative note will need to create the intervention first.
	        o Click on " Create Intervention" Button > Intervention Details page will load
	
	➤ Select Intervention Type from drop down list 'Other investigation findings'
	➤ Select Intervention Sub-type from drop down list
	            o 'Investigator notes' or
	            o 'Doc Management' for narrative notes scanned and uploaded.
	
	➤ Disposition = complete, Outcome = select 'do not use', Start date = today, End date = blank, Next follow up date = blank, Workgroup = workgroup, Provider and org = defaults to user
	
	➤ In the comments field of this intervention, each entry will start with the **date of the note YYYY/MMM/DD and the <u>provider's name</u>** within the comment for accurate documentation of who actually wrote the note. (in some situations, narrative notes may be entered by someone else)
	
	➤ Click ADD, then Save**.**
	
	ADDING ADDITIONAL NARRATIVE NOTES;
	
	LHN > INVESTIGATION > TREATMENT AND INTERVENTIONS > INTERVENTION SUMMARY
	➤ Under 'type' Click on the hyperlink to the previously created' other investigation findings – inv notes'
	➤ Intervention details page will load.
	➤ Do not change any of the intervention details.
	➤ Scroll down to 'comments' section and type in your new comment in the box following the standard above (date of original note and name of author).
	➤ Click on 'Add' button
	➤ Click on 'Save' at bottom of page.
	
	The comments will continue to stack as more are added.
	
	This will provide a chronological narrative by multiple users of the investigation progression viewable <u>on a single page.</u>

4.	**COMMON ISSUES**: ⚠️ YIELD

Each new intervention must be started by returning to **LHN > INVESTIGATION > TREATMENT AND INTERVENTIONS > INTERVENTION SUMMARY and** Click on " Create Intervention" Button

Issue: Start date is greyed out - I need to enter another intervention done on a different date.
Panorama automatically creates an 'Encounter' when the first intervention is created. For subsequet interventions, the start date defaults to the first date you originally entered with the first intervention and cannot be changed as long as that 'encounter remains in context. At the top of your page you can see if the encounter is in context;

Client ID: 82083	Name(Last, First Middle)/Gender: Tree, Redwood / Male - Transgender Male to Female	Health Card No: -	Date of Birth / Age: 1960 Feb 04 / 58 years
Phone Number: 1-(306)-555-1212(mobile contact)	Jurisdiction Info: Saskatchewan,Saskatchewan Ministry of Health	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

⌃ Investigation

Investigation ID: 165	Status: OPEN	Disposition: Follow up - In progress	Investigator: -
Disease: Hepatitis B	PHAC Date/Type: 2018 Oct 04 / Date Reported	Etiologic Agent: Hepatitis B virus	Authority/Classification: Provincial / Case - Probable / 2018 Oct 04

⌃ Encounter

Encounter Date: 2018 Dec 13	Encounter Group / Type: 1 - Sexually Transmitted Infections and Bloodborne Pathogens / Intervention		Encounter Activity: -

 Solution: If you need to enter an Intervention with a different start date remove the encounter by clicking LHN > INVESTIGATION > TREATMENT AND INTERVENTIONS > INTERVENTION SUMMARY to return to the intevention summary page then click 'create intervention'.
The Intervention details page will load and you will have a new 'remove encounter' to click on. The Encounter bar will disappear and the start date will be open.

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⌃ Encounter

Encounter Date: 2018 Dec 13	Encounter Group / Type: 1 - Sexually Transmitted Infections and Bloodborne Pathogens / Intervention		Encounter Activity: -
			Remove Encounter

🛑 STOP

IF documents need to be uploaded, use LHN>DOCUMENT MANAGEMENT PROCESS. Do not access Document Management from the field on this page.

> **Document Management (ACCESS FROM LHN ONLY)** – i.e. public health order, CBS form, CD66, letters, exclusion, unusual lab report, non standard letter. See WS – Document Mmgt – Uploading – IOM WS.

Follow-up Summary – DO NOT USE.