

UDF's – User Defined Forms – IOM WS	Name of Activity: User Defined Form		
	Role performing Activity:		
Panorama – IOM WORK STANDARD	Location:		Department:
	Document Owner:		
	Date Prepared:	Last Revision: Feb 2022	Date Approved:

Purpose: User Defined Forms (UDFs) provide a mechanism to collect and maintain supplemental data within Panorama. Supplemental data is data that is collected as specific questions and is likely to change over time.

Assumptions:

- ✓ User is in Investigations tab.
- ✓ Client and Investigation are In Context

What's new: there is a new section on the Investigation Summary screen specifically for Links & Attachments. This will display available documents and provide the user an alternate path to the Links & attachment page.

Essential Tasks:	
1.	Select LHN -> Investigation -> Investigation Details -> Links & Attachments <ul style="list-style-type: none"> ➤ Links & Attachments screen is displayed
2.	Click the radio button beside the appropriate form under Available Forms <ul style="list-style-type: none"> ➤ Click Fill Out Form button ➤ A new window pops up (the UDF)
3.	Go through the form and answer the questions <ul style="list-style-type: none"> ➤ Complete the interviewer name section. <p>If additional interviewer names are needed (i.e. due to updates), add to the Interviewer name section.</p>
4.	Select Submit <ul style="list-style-type: none"> ➤ If you Save As Draft, the UDF will not be included on epi reports. ➤ Submit = everyone with permissions to the investigation can see the document and update it as new info is discovered.
5.	A message will be displayed <ul style="list-style-type: none"> ➤ 'Your data has been successfully save' ➤ 'You may now close this window' ➤ Close the window <p>Note: you will not see your form in the 'filled out form' box until you refresh your page by clicking on LHN 'links and attachments' for the page to reload.</p>

<p>6.</p>	<p>To update or view the filled out form;</p> <p>Select LHN -> Investigation -> Investigation Details -> Links & Attachments</p> <p>The Links & Attachments screen is displayed</p> <ul style="list-style-type: none">➤ The filled out form shows up in the 'Filled Out Forms' table➤ Click the radio button to enable the Update button and click Update to update the form➤ Click on the Instance ID hyperlink to view the form
<p>7.</p>	<p>To Delete your form (if double entered or entered in error)</p> <p>Select LHN -> Investigation -> Investigation Details -> Links & Attachments</p> <ul style="list-style-type: none">➤ Scroll down to Filled out forms➤ Click on the radio button beside the form you wish to delete➤ Click on "update" button➤ Form will open➤ Scroll down to bottom of form and click on 'Delete Form' button at the bottom left➤ Click on 'confirm delete' button➤ Page will reload saying the form has been deleted