Investigations – Sharing Investigations between Orgs - WS	**Name of Activity:** Shared Investigations between multiple JORGs (ie. transient clients, in hospital, etc.) **Role performing Activity:**		
Panorama – IOM WORK STANDARD	**Location:**		**Department:**
	Document Owner:		
	Date Prepared: May 15, 2018	**Last Revision:** Mar 2022	**Date Approved:**

Assumptions: Client and Investigation in context.
Purpose: More than one Public Health office working on an investigation concurrently.
There may be multiple 'responsible organizations' listed on an investigation. When reports are accessed it will pull date from all investigations that include your org as a responsible org.

Essential Tasks:	
1.	**LHN > INVESTIGATION > INVESTIGATION DETAILS > RESP. ORG/INVESTIGATOR** Responsible / Organization Investigator screen will open ➢ Select new/additional Responsible Organization from drop down list ➢ Select Responsible Organization Workgroup from drop down list – "Workgroup" ➢ Select Responsible Organization Date o **NOTE:** This will be the date the additional responsible organization date added to the investigation ➢ Click on "Add Organization" Button ➢ Select Investigator Type from drop down o **NOTE:** The new responsible organization will now need to be assigned as Primary or Secondary Investigator as appropriate. There can only be one primary investigator. ➢ Select new Investigator Type from drop down list - "Secondary" ➢ Select Investigator Organization name from drop down list ➢ Select Investigator Workgroup from drop down – "Workgroup" ➢ Investigator Name from drop down list – DO NOT USE ➢ Select Assigned date – date responsible organization is assigned ➢ Click on "ADD" Button ➢ Click on "SAVE" Button

2.	**To change Primary Investigator type:**
	
	➢ Select radio button beside current primary investigator
	
	➢ Click on "Update" button
	
	➢ Select end date for original investigator organization
	
	➢ Click on "Apply Update" Button (don't save yet)
	
	➢ Select radio button beside current secondary investigator
	
	➢ Click on "Update" button
	
	➢ Select the new Investigator Type will prepopulate
	  o Select from drop down list – "Primary"
	
	➢ Select Investigator Workgroup from drop down will prepopulate
	
	➢ Investigator Name from drop down list – DO NOT USE
	
	➢ Select Assigned date – date responsible organization is assigned
	
	➢ Click on "Apply Update" Button
	
	➢ Click on "SAVE" Button
	  o To add a "Secondary" again repeat process in section 1
	  o **NOTE:** Must always have a primary investigator on the investigation