

Panorama – IOM WORK STANDARD	Name of Activity: Run Standard Reports - IOM003-Investigation Follow Up Report		
	Role performing Activity:		
	Location:		Department:
Document Owner:			
Date Prepared:	Last Revision: Mar 2022	Date Approved:	

Purpose: The purpose of this report is to detail current days workload in a list of all Investigations for which there is follow-up expected as characterized by one or more associated interventions whose Next Follow-up Date falls on or within the specified date range.

Essential Tasks:	
1.	Select Investigations tab
2.	Select LHN -> Reporting & Analysis -> Standard Reports <ul style="list-style-type: none"> ➤ Select Report Type screen is displayed ➤ Expand Case section
3.	Select IOM003-Investigation Follow Up Report
4.	Select Investigation Status <ul style="list-style-type: none"> ➤ Optional ➤ Open or Closed ➤ Defaults to Open
5.	Select an Encounter Group <ul style="list-style-type: none"> ➤ Optional
6.	Select Disease <ul style="list-style-type: none"> ➤ Optional ➤ This is filtered by the Encounter Group ➤ Multiples can be selected
7.	Select Investigation Disposition (different to the intervention disposition below) <ul style="list-style-type: none"> ➤ Optional ➤ Multiples can be selected
8.	Select Investigation Classification <ul style="list-style-type: none"> ➤ Optional ➤ Multiples can be selected
9.	Select Investigation Type <ul style="list-style-type: none"> ➤ Optional
10.	Select Investigation Sub-Type <ul style="list-style-type: none"> ➤ Optional

Essential Tasks:	
11.	Select Intervention Disposition <ul style="list-style-type: none"> ➤ Optional ➤ Multiples can be selected ➤ In order to filter out those interventions that have been completed, select all dispositions except 'complete'. (move all (except complete) to the filter box)
12	Select Intervention Next Follow-up Date Range <ul style="list-style-type: none"> ➤ At least one of the From/To dates must be populated.
13.	Click the Generate Report button <ul style="list-style-type: none"> ➤ A window pops up asking you to open the report in Excel ➤ Click Yes The report will take a few seconds to open
14.	If the report does not "complete" then you can try to "Schedule" the report. Panorama allows the User to schedule a report to be run rather than generating immediately. To Schedule a report the user will follow the exact same process as they would to "Generate" the report. After filling in the report criteria the user will: Click the Schedule Report button <ul style="list-style-type: none"> ➤ The "Schedule Report Details" window opens up ➤ If the "NOW" checkbox is checked the report will be schedules to run right away ➤ If the "NOW" checkbox is not checked then the user can select the time and date to schedule the report to run ➤ User can also select to have this report run once or recurring by selecting one of the radio buttons ➤ If the recurrence button is selected the user can select the frequency of the report by selecting from the droplist. The user can also select the From Date, To Date and time to schedule the report ➤ Once all the Scheduling Criteria is entered the user will click on "SAVE" To View the Report Status <ul style="list-style-type: none"> ➤ Return to the Reports Page by clicking on the "reports" button on LHN Menu ➤ Click the radio button next to the report scheduled to run ➤ Click on the "View report Status" Button on top left of page ➤ The status column will indicate if the report has completed or is still running ➤ If completed then the user can view the results.

Attribute (Label on Report)	Business Rule(s)
Client ID	1. Both alive (active) and deceased (inactive) clients will be included on the report. 2. Both determinate and indeterminate clients will be included on the report. 3. Non-human subjects will not be included on the report.
Last Name	
First Name	
Date of Birth	4. Format (yyyy-mm-dd)

Investigation ID	
Investigator Org	5. Include all Investigator Organizations on the Investigation
Disease	6. From the most recent row in the disease event history screen. 7. Diseases included on the report must be restricted by the encounter group(s) associated with the logged-in users role.
Classification	8. Where the authority is indicated as the primary 9. Classifications to include: <ul style="list-style-type: none"> • Case – Confirmed • Case – Clinical • Case – Probable • Case – Possible • Case – Suspect • Case – Person Under Investigation • Case – Previously Reported • Case – Does not meet case definition • Contact – Contact • Contact – Not a Contact • Contact - Person Under Investigation
Next Follow-up Date	10. Interventions associated with the investigation that have a next follow-up date that falls within the range provided by the parameters.