Public Health Information Management System (PHIMS)

PHIMS 3.2.3 – Next Gen Overview and Indexes Module Changes

Table of Contents

Next Gen:

1. Key changes summary

2. What indexes screens have been converted in 3.2.3

3. Review of the new Next Gen interface and updated components

4. A note about "Classic" screens

New Indexes screens functions available in 3.2.3:

1. Client Search

2. Notes

3. Client Warnings/Alerts

4. Upload Clients/Cohorts

5. Risk Factors – this will be a separate deck

Key Next Gen Changes Summary

- **Simplified pages**: without affecting processes, pages are simplified through better layout and standardization.

- **Page actions are** grouped on the page header and **visible at all times**. No more searching for the Save button.

- **Improved components**: many components have been improved, ensuring every instance works the same way.

- **Yes/no drop lists changed** to radio buttons for ease of use.

- **Complex pages simplified**: reduced navigation to other page by providing add and update functions through modal windows within the page. This makes data entry on complex pages clearer, simpler.

- **In page "adaptive" content**: components that offer several options will have the ability to change the fields and validations on the fly without sending additional requests to the server.

- **Future proofed**: a new framework and new library of components supports the latest standards (HTML5, CSS3). Once all the pages are converted, Panorama will support "responsive design" which provides a consistent page at different resolutions, accommodating different screen sizes and user habits around browser usage. This is also a great foundation to support future expansion to tablet formats.

Next Gen Indexes Screens

- The Next Gen conversion focused mainly on Immunizations screens and some Client screens

- The graphic to the right depicts the Indexes screens that have not been converted to Next Gen based on what is available in the left-hand navigation menu.

- Your role may or may not have access to all the screens listed.

- .

▼ Client
  Search Clients
  Client Details
    Client Demographics
    Occupation/Education
    Health Services
    Financial Assistance
    Indigenous Information
    Immigration Information
  Client Warnings
  Client Relationships
  Client Households
  Consent Directives
    Immunization Service
    All Directives
  Allergies
  Risk Factors
  ~~Travel History~~
  ~~Imms History Interpretation~~
  ~~Upload Clients~~
  ~~Client Merge~~
  ~~Resolved Client Matches~~

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New Next Gen Features Summary

- **Navigation Look and Feel**: The left-hand navigation pane has been updated; module tabs across the top are no longer present in next gen. The client context header has been updated and includes a quick way to pop-up the view client screen or search and select a new client.

New Next Gen Features Summary

- **Recent Work**: The current client is now part of the recent work list. Selecting the current client will remove any unwanted contexts and leave just the client context header present. The last 10 contexts will be in the list.

Current client

- **Standardized headers and buttons:** Save (& other action buttons) are now in a header that 'floats' at the top of the screen. Button naming is consistent. Buttons will be in the same place on all the screens.

Floating header

New Next Gen Features Summary

- **Modal/Pop-Up Windows**: Space saving design, replaces classic 'add to table' design. First click [Add] to open the modal, enter data and [Apply]. Before leaving the page click [Save] in the floating page header. Icons will indicate if the data has saved or not.

Click to open the modal

Icon indicating record is not yet saved
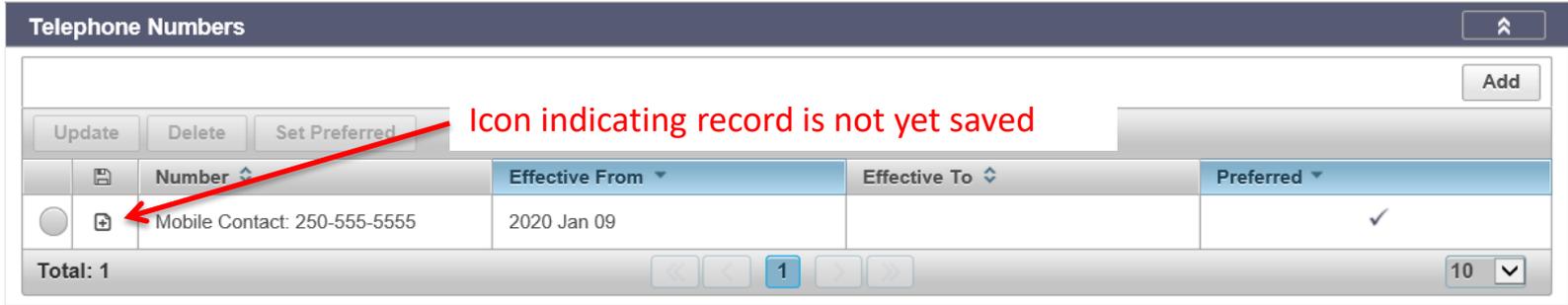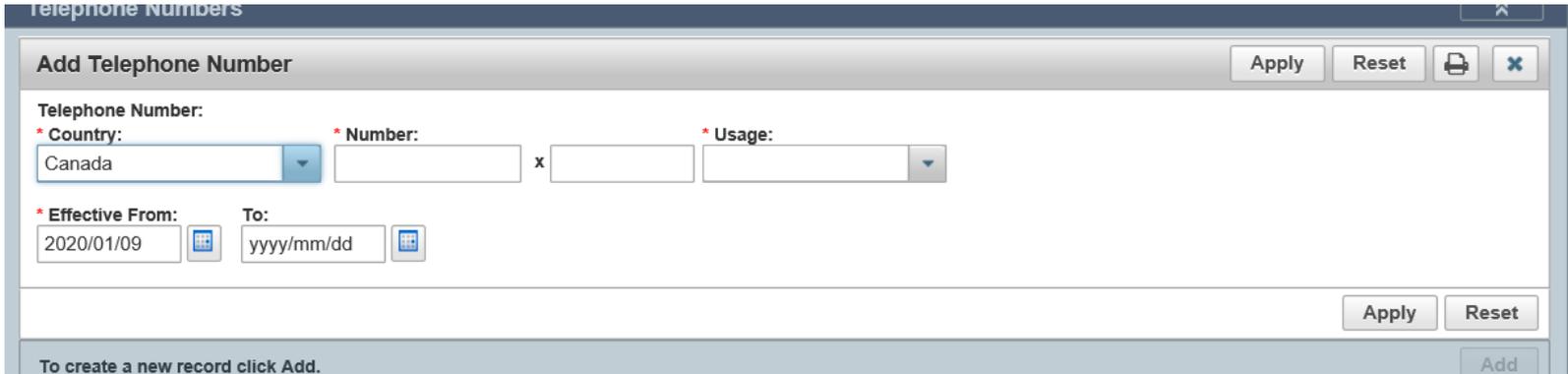
New Next Gen Features Summary

- **Improved EFCs, Droplists & Dates**: Start typing in an EFC to reveal a list of possible matches. The magnifying glass will open the advanced search. The 'I' will display information about the selected value. Double click in date fields to quick populate with todays date. Droplists will filter by the first letter you type.

- **Improved table design:** Resize columns, Ctrl + click to add a secondary sort. There is also better pagination and the ability to display 'all' records from the droplist at the bottom right.

New Next Gen Features Summary

- **Improved Messages and Warnings**: A distinct icon for each type. They will always appear to the upper right of the screen. Some warnings may appear in the header of modal windows when warranted.

Four types of messages:

- Confirmation, success
- Information
- Warning
- Error

Each type of message has an icon indicator

Confirmation message

Information message

Warning message

Error message

Effective To   Preferred

Effective From is a required field
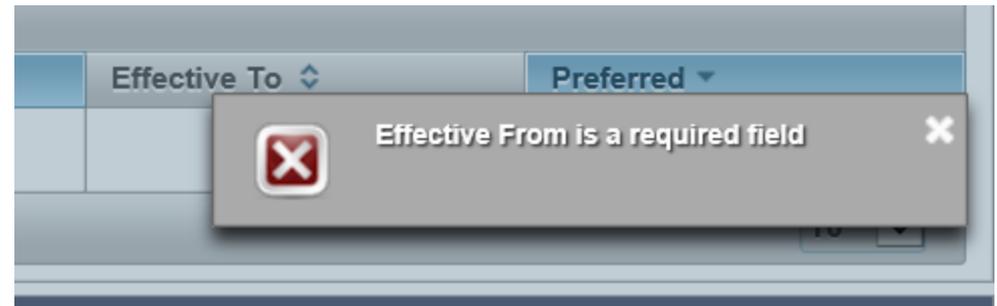
New Next Gen Features Summary

- **New Report Launch Module**: The ability to launch reports from screen headers has been added in selected screens. See the Immunizations and Investigations .ppt decks for more details.

PHIMS Hybrid Interface

A note about the 3.2.3 Hybrid Interface:

- Releases 3.0+ include a number of pages converted to the NextGen platform and layout. This includes many pages of the Immunization module, and some of the client pages. The rest of the application remains in "Classic" mode (like all releases up to 3.0)

Fully Integrated

- All pages of the application, were they NextGen or Classic, work together. Users can navigate between all pages the same way they did in previous releases.
- Users can switch modules by clicking tabs on Classic pages, and using the module selector on converted pages.

Shared Navigation

- The navigation content and links are shared between the 2 versions: menus and commands are the same, and in the same order. The only difference is the styling.
- The layout of the header and the icons in the navigation are clear indicators that you are on a NextGen page.

Navigation between pages:

- The navigation works seamlessly between Classic and NextGen pages. Pages render in their respective style.
- When navigating to other pages as part of a process, a **Return** or **Select and Return** button is provided. This is true regardless of a page being converted or not.

- The **Return** button will be on pages where a user needs to go look and /or update information. Once done, the user saves and has the option to click Return to go back, or choose to navigate elsewhere.

PHIMS Hybrid Interface

- The **Select and Return** button is provided on pages where a user needs to go to select data that is to be brought back to the original screen.

- In NextGen, a **Cancel** button is used to cancel a transaction (meaning clear your entries and leave the page or modal without saving). On a NextGen page, Cancel will never be used to "return" to a previous page. Cancel buttons on remaining Panorama 'Classic' pages remain and function as before.

Clear and Reset

NextGen pages only have a RESET button which does the following:

- removes all entered data
- restores default values

New Features in 3.2.3

Client Search:

- Telephone number is now in the basic search section.
- School information is now in the basic search section.
- Client Preview has been expanded to show all information about a client on a view screen.
- There are default selections (e.g. checkboxes for indeterminate and inactive are by default checked).

Notes:

- Include related entities checkbox is going to auto-check if the 'Display Notes For' droplist is at a level for which there could be related entities below.
- Sorting of values added to the 'Display Notes For' and 'Move selected Note to' droplists

Client Warnings/Alerts:

- In Client context header 'Warnings' has been changed to 'Alerts'.
- On the 3.2 Client warnings screen, only manually entered warnings will display on the screen. Allergies, Special Considerations, AEFI's, and Adverse Drug Reactions warnings will not. To see these you need to click the 'Alerts' icon in the client context header.
- Due to the above, there are some changes to screens such as the allergies screen. Instead of indicating to display as a client warning, it will now say 'Show as client alert'.
- Alerts screen
- Can now enter No Known Allergies
- Some removed fields: Type, Onset Date, Onset Date Accurate

New Features in 3.2.3

Upload Clients:

- Now have the ability to set criteria for creation of clients
- Will no longer create clients if less than 100% match on PHIN; Name; DOB and Gender