PHIX Release 4.4 Updated Mar. 26

ISSUE LOG	
AUDIENCE	PHIX Users
REVIEWED BY	PHIX Project Team; M. Kozma
REVIEWED ON	16-Mar-21; 26-Mar-21 – Updated **Known Issues & Remediation** (p.7-8) (J. Munro)
RELATED MATERIALS	PHIX R4.4 – What To Expect Guide; Covid-19 Imms Digital Solution eForm Guide to PHIX Manual Reconciliation
EXPIRY DATE	

Context

PHIX Release 4.4 will be deployed to Production on March 18, 2021 and includes updates to the PHIX User Interface to support PHIX reconcilers in the Dashboard and Submission History Report. PHIX 4.4 also contains fixes to defects found in the previous PHIX releases. This document will also describe any known issues with PHIX Release 4.4 and the remediation plan for the issues.

NEW FUNCTIONALITY:

1. PHIX User Interface (UI) Enhancements to Dashboard and Submission History Report

DEFECT FIXES:

1. PHIX Submissions Not Sent to Manual Review with Deceased Date Predating an Existing Alternate ID Effective To Date (IM-1434)
2. Expired Phone Numbers Effective To Dates Overwritten by Newest Phone Number (IM-812)
3. BC MSP ID Added Twice when Sent Through Manual Review (IM-1435)
4. Gender Identity Other Identity Text Removed when New Submission is Processed by PHIX (IM-1452)
5. Waiting Feature Bug for BCY_eForm Records (IM-1464)

Issue

KNOWN ISSUES AND REMEDIATION

1. PHIX: Address with city = "Pt. Roberts" not added correctly in Panorama UI (IM-1426)
2. Country is Not Added if Incoming Country Code is Two Characters (IM-1459)
3. Phone Number Country Code Appearing as Part of the Phone Number on PHIX Manual Review Screen and Submission History Report (IM-1460)
4. Supplemental Data is Not Processed when the Timestamp is Missing (IM-1470)
5. Warning Message Does Not Appear for Manual Review Submissions with Inactive Deceased Update (IM-1483)
6. Immunization Submission Status 2-4-5-6-11-15-15a Displays Reason as TBD (IM-1486)
7. Inbound Address on Reserve is not applied to PIR if the inbound address has same Postal Code as the PIR Address, and is automatically reconciled by PHIX ARJ (IM-1503)
8. Inbound Address and Address On Reserve is Duplicated to PIR when submitted via PHIX Manual Review (IM-549)
9. In PHIX Manual Review there is a Checkbox for User to Select 'blank' when No Address On Reserve is Submitted and Client has an existing active Address On Reserve (IM-1504)

NEW FUNCTIONALITY IN PHIX 4.4:

PHIX User Interface (UI) has been enhanced to increase efficiency for PHIX users when remediating CIS, eForm and PharmaNet records in the PHIX UI.

PHIX Dashboard

PHIX Dashboard has been enhanced so that it is easier for PHIX users to search, filter and reconcile Client & Immunization data. Here are the summary of changes made to the PHIX Dashboard for PHIX 4.4:
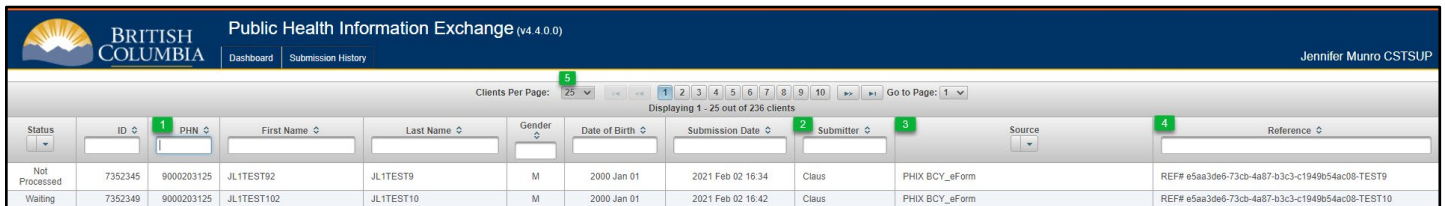

Image 1.0 - Screenshot of PHIX 4.4 Dashboard

	Dashboard Item	PHIX 4.3.1	PHIX 4.4
1	New PHN Column	No column existed. PHN information was viewable only on PHIX Client Review screen.	New 'PHN' column allows users to search for a record by PHN if the inbound submission contains a PHN.
2	New Submitter Column	No column existed. Submitter information was viewable only on PHIX Client Review screen.	New 'Submitter' column allows users to search for a record by the Submitter's last name. This is useful to quickly identify when a record is submitted by EMPI or when records relating to an individual eForm submitter needs to be identified.
3	New Source Column	No column existed. Users previously searched in the free-text field 'Source Reference' to filter by data source.	New 'Source' column allows users to choose from a picklist for the source they want to filter by.
4	Updated Existing 'Source Reference' Column to 'Reference'	Column contained the submitting source and reference ID of the message that was submitted to PHIX. Users could search in the free text field to filter for sending source (i.e. eForm, CIS, PharmaNet)	'Source Reference' column has been renamed to 'Reference' and only contains the reference ID of the message.
5	Updated Clients Per Page Denominations	Users could change the number of clients displayed on the Dashboard page to be 50, 100 or 200.	Users can now choose to display between 25, 50, 100 clients per page. Denominations have been decreased so that users have the option to limit records to just fill their screen.
6	Updated Filtering Functionality	When a user applied a filter in the PHIX Dashboard, and selected a client for manual review, the filter would be return to default settings once the user returns to the Dashboard.	When a user selects a record for manual review and then returns to the Dashboard, the previously selected filters will now remain in-context until the user removes the filters.
7	Removed School / Daycare and Letter Columns	School / Daycare and Letter columns were viewable in the Dashoard but were not being used by submitting Health Authorities, eForm or Pharmanet data sources.	Removed columns to make more space for the fore mentioned additional columns.
8	Removed scrollbar	Scroll bar available in PHIX to view more rows on Dashboard.	Removed scroll bar to make more space for the fore mentioned additional columns. Panorama Viewer/Chrome Browsers will display a scroll bar if a user needs to scroll to view records.

Submission History Parameters Page

PHIX Submission History Parameters Page has been enhanced so that it is easier for PHIX users to generate a Submission History Report. Here are the summary of changes made to the PHIX Submission History Report Parameter page for PHIX 4.4:

Image 2.0 – PHIX 4.4 Submission History Report Parameters Page

	Submission History Report Item	PHIX 4.3.1	PHIX 4.4
1	New search parameter added called 'Health Authority/Parent Organization'	Users could infer the Health Authority for the submitted record by looking at the Branch Level Organization field (called 'Organization' in the SHR)	PPHIS users of PHIX can generate a Submission report and filter based on the submitting Health Authority (HA). Note that HA Users will only be able to view and generate submission reports for records that pertain to their HA.
2	Removed 'Source Type' filter values that are not being used or may be used in the future (Mostly Ontario values not being used by BCY submitters)	Users could view the following source filters in SHR: 1. PHIX Child Care 2. PHIX Health Care Provider File 3. PHIX ICON (Client/Guardian) 4. PHIX ICON (Health Care Provider) 5. PHIX PHU Administered File 6. PHIX PHU Website File 7. PHIX School File 8. Health Care Provider PDF	Users can generate a Submission History Report with the following filters: 1. M-Imms 2. PHIX BCY_CIS (HA Clinicial Information System) 3. PHIX BCY_EMR 4. PHIX BCY_eForm 5. PHIX BCY_PHARMANET (PharmaNet)

Submission History Report

PHIX Submission History Report has been enhanced so that it is easier for PHIX users to review the Submission History Report for troubleshooting purposes. Here are the summary of changes made for PHIX 4.4:

Image 3.0 – PHIX 4.4 Submission History Report – Health Authority/Parent Organization Column

Image 4.0 – PHIX 4.4 Submission History Report – Address On Reserve Columns

	Submission History Report Item	PHIX 4.3.1	PHIX 4.4
1	New column added called 'Health Authority/Parent Organization'	Users could infer the Health Authority for the submitted record by looking at the Branch Level Organization field (called 'Organization' in the SHR)	PPHIS users of PHIX can generate a Submission report and filter based on the submitting Health Authority. Note that HA Users will only be able to view and generate submission reports for records that pertain to their HA due to security measures.
2	Updated the location of the Address On Reserve Columns to be next to the Client Address Columns	Users viewed Client Address and Address on Reserve details in different areas of the Submission History Report	Users can view all address details for the submission in one area: ○ Incoming Address Details ○ Panorama Address ○ Final Address ○ Address Effective From ○ Incoming Address On Reserve ○ Panorama Address On Reserve ○ Final Address On Reserve

PHIX DEFECTS FIXED IN RELEASE 4.4:

1. **Expired Phone Numbers Effective To Dates Overwritten by Newest Phone Number (IM-812)**
   In previous releases of PHIX, an incoming PHIX phone number would overwrite the effective to dates of all older PHIX phone numbers to the same date. This has been remediated and previously expired PHIX phone numbers will retain the correct effective to date when a new phone number is inserted.

2. **PHIX Submissions Not Sent to Manual Review with Deceased Date Predating an Existing Alternate ID Effective To Date (IM-1434)**
   If an incoming submission contained an inactive status for deceased with a deceased date older than an existing alternate ID's effective to date, PHIX would not send the submission to manual review. In PHIX 4.4, these submissions will be correctly identified and sent to manual review for reconcilers to remediate.

3. **BC MSP ID Added Twice when Sent Through Manual Review (IM-1435)**
   Previously when a manual review submission containing a BC MSP ID was submitted, depending on the incoming and existing effective from and effective to dates of MSP IDs, PHIX would add the same alternate ID even though the dates overlapped. In this PHIX release, BC MSP IDs will correctly update the effective from and to dates and will not cause duplicate entries to be added to clients.

4. **Gender Identity Other Identity Text Removed when New Submission is Processed by PHIX (IM-1452)**
   If a client had Other as their Gender Identity and the Other Identity text field filled in Panorama, an incoming submission without gender identity would erase the information in the Other Identity field. In PHIX 4.4, incoming submissions which do not contain gender identify will not remove existing gender identity information.

5. **Waiting Feature Bug for BCY_eForm Records (IM-1464)**
   In PHIX 4.3.1, if a user selects the 'Waiting' status on a BCY_eForm record and returns to PHIX Dashboard, they would experience issues when filtering for records and experience error messages unrelated to their workflow. This issue has been fixed and users should now be able to use the Waiting feature without any impacts to PHIX functionality and performance.

Known Issues and Remediation

The following are issues that exist in Build Release 4.4 and the workarounds to remediate the issue until it is fixed in subsequent releases.

1. **PHIX: Address with city = "Pt. Roberts" not added correctly in Panorama UI (IM-1426)**
   When PHIX receives an US address with a city (e.g Pt.Roberts), which is not in Panorama ITERM, PHIX inserts only postal code and country (United States) and as an international address. This issue is specific to city name that has a period as cities are not abbreviated in ITERM (e.g. Point Roberts). In the future release, PHIX will normalize the city names before comparing it with the city ITERM in Panorama.

2. **Country is Not Added if Incoming Country Code is Two Characters (IM-1459)**
   When an address is added by PHIX and has a two character country code (Ex. DE for Germany), the incoming address will be added to the client in Panorama without a country. To workaround this issue, countries in addresses should be sent with the full country name instead of using the two character abbreviation of the country.

3. **Phone Number Country Code Appearing as Part of the Phone Number on PHIX Manual Review Screen and Submission History Report (IM-1460)**
   When the country code (Ex. +1 for Canadian/American Phone Numbers) is present on a phone number in a PHIX submission, it will appear as part of the phone number causing the last few digits of the phone number to appear as an extension. This is a visual issue and does not affect PHIX phone number functionality, therefore a workaround is not necessary.

4. **Supplemental Data is Not Processed when the Timestamp is Missing (IM-1470)**

If supplemental data such as a special consideration or risk factor is submitted to PHIX without a timestamp, the incoming supplemental data will not be processed or added to Panorama. Source systems are currently not submitting supplemental data therefore a workaround is not needed, however this issue will be fixed in the next release of PHIX.

5. **Warning Message Does Not Appear for Manual Review Submissions with Inactive Deceased Update (IM-1483)**
In scenarios where incoming submission contains an inactive deceased update with a date of death preceding the effective to date of an alternate ID, a warning message should appear preventing the user from submitting the inactive update. However, in PHIX 4.4 the user is able to submit the update and no warning message will appear. This issue will be fixed in a later release of PHIX.

6. **Immunization Submission Status 2-4-5-6-11-15-15a Displays Reason as TBD (IM-1486)**
When an immunization is processed by PHIX and is processed through workflow 2-4-5-6-11-15-15a, the immunization record status reason will display "TBD" instead of "Panorama Administered, Incoming Administered". This issue does not affect PHIX immunization processing functionality and is a visual bug. This issue will be addressed in a future release of PHIX.

7. **Inbound Address on Reserve is not applied to PIR if the inbound address has same Postal Code as the PIR Address, and is automatically reconciled by PHIX ARJ (IM-1503)**
PHIX's address logic compares only the inbound address postal code to the active existing address postal code in order to determine if the address is a match. Due to this logic, in the case where the inbound address matches on postal code and contains an Address On Reserve, and the existing record has ither no Address on reserve/ a different address on reserve, the inbound value for Address on Reserve will be dropped as PHIX believes the address is the same (due to match on postal code) and does not insert a new address. See below for example:

Inbound Client Data via IMMS eForm	Existing Client Data in PIR	PHIX and PIR Result
• 112 Test Street, Victoria, BC, Canada, V7Z 3G2 • Address On Reserve: Quatsino	• 112 Test Street, Victoria, BC, Canada, V7Z 3G2 • Address On Reserve: null	PHIX will not insert inbound Address/Address On Reserve, and client will remain with existing PIR Address (null Address on Reserve)

As an interim solution, a script will be deployed to identify records where the inbound Address on Reserve value has been dropped due to match on postal code and the script will automatically insert the Address On Reserve value into the Client record.

8. **Inbound Address & Address On Reserve is Duplicated to PIR when submitted via PHIX Manual Review (IM-549)**
If an inbound record requires PHIX manual review due to a client discrepancy and contains a different inbound address/address on reserve, and the user selects both check boxes in PHIX Manual Review, the address and address on reserve will be inserted into the Client record twice.

	Submitted Record	Panorama Record
Address	Primary home: 112 Test Street, Victoria, British Columbia V7Z3G2 ☑ ADD to Panorama	Primary home: 112 Test Street, Victoria, British Columbia V6Z9G8
Address Located on Reserve Administered By	Quatsino ☑ REPLACE Panorama value	Ditidaht

Image 5.0 – PHIX Manual review screen where inbound record has a different address/different address on reserve than the Panorama record

Image 5.1 – Panorama Client Demographics Address that was added via PHIX Manual Review and duplicated upon apply to Panorama

Users have been directed to select only the **Address On Reserve** checkbox so that the inbound address and Address on Reserve is added to Panorama correctly. For more details please visit the *Covid-19 Imms Digital Solution eForm Guide to PHIX Manual Reconciliation*.

9. **In PHIX Manual Review there is a Checkbox for User to Select 'blank' when No Address On Reserve is Submitted and Client has an existing active Address On Reserve (IM-1504)**

    If an inbound record requires manual review in PHIX, and there is no incoming address on reserve value, but the client record in Panorama has address on reserve, a check box REPLACE Panorama value will appear. If a user selects the blank REPLACE Panorama value, a duplicate address entry will be added to PIR. As an interim solution, users have been instructed to not select the REPLACE Panorama value when there is no submitted address on reserve value. Please refer to the *Covid-19 Imms Digital Solution eForm Guide to PHIX Manual Reconciliation* for more details.

Image 7.0 – PHIX Manual review screen where the inbound record address on reserve shows as blank, and the existing Panorama record shows an address on reserve value.

10. **Address with Address On Reserve created via PHIX Manual Review results with Client having two Preferred addresses in Panorama (IM-1507)**

    This scenario occurs when a client exists in Panorama with a Panorama created address, and an inbound PHIX record for the client contains an address on reserve and requires manual review. If the inbound address on reserve is submitted to Panorama through manual review, the address will be inserted with the preferred indicator, and the existing Panorama address will also have a preferred indicator.

Image 8.0 – Panorama Client Demographics Address that was added via PHIX Manual Review and incorrectly inserted with Preferred Indicator

As an interim solution, the PHIX team will query Production daily to identity and manually remediate any impacted records. A fix for this defect will be available in the PHIX 4.4.1 patch.

11. **PHIX drops Client Address: City, and Province/State if only City, Province/State and Postal Code are Submitted (IM-1510)**

This issue occurred as a result of the PHIX 4.4 deployment and affects mainly Pharmanet records. If an incoming address update contains only the City, Province/State and Postal Code, PHIX will only add the Postal Code and Country to the Panorama Client Demographics page. To remediate this issue, a fix will be deployed in a patch, PHIX 4.4.1, which will add all the incoming address information and a script will be created to update existing addresses created by PHIX that were affected by this issue.

REMINDER: Please lock your workstations or log off your computer before leaving.

●To lock your workstations: **Ctrl+Alt+Del** or **Windows+L** ● To log off: Click **Start menu > Restart > OK**