Chlamydia Case Management

1. Search for Client

2. Update Client Phone Number and Address- Create Temporary Address

3. Create Chlamydia Investigation

4. Making a Lab Pertinent to an Investigation

5. Completing Investigation Information

6. Disease Event History- Including Site and Staging

7. Signs and Symptoms

8. Documenting Risk Factors

9. Adding an Outcome

10. Recording a Medication Other Than a TB or HIV Drug- Other Meds

11. Indicate Course Complete- Other Meds

12. Uploading a Document to an Investigation

13. Adding a Clinical Note to an Investigation

14. Update the Investigation Disposition and Close Investigation

15. Adding a Secondary Investigator

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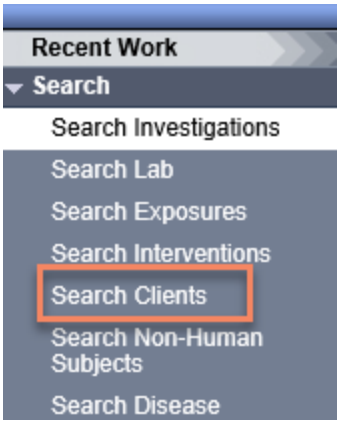
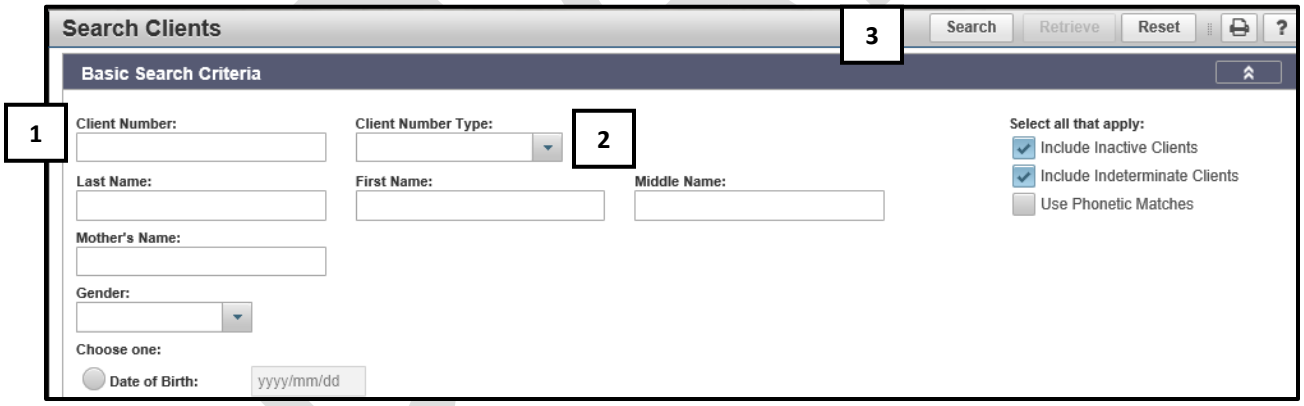
Search for a Client

Search for a client



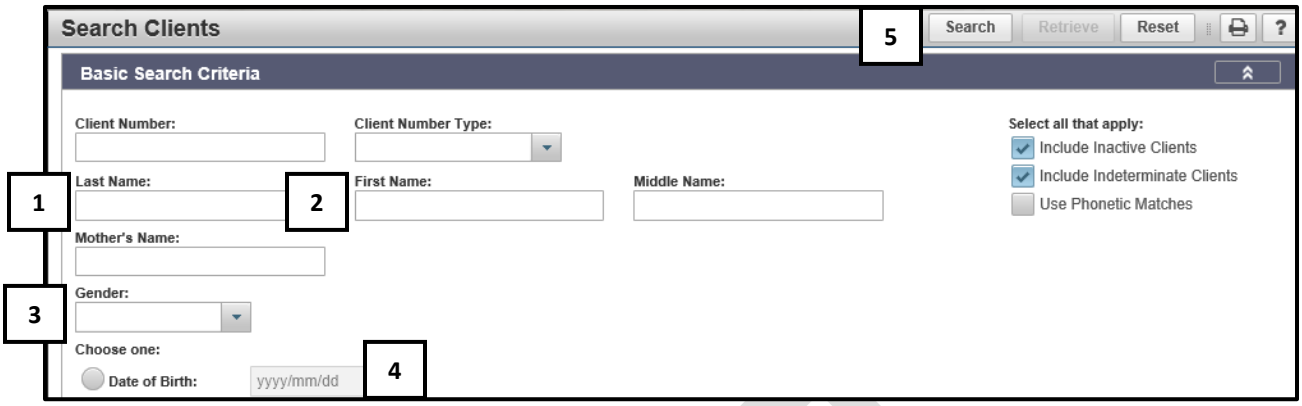
From the left-hand navigation bar, click on **Search Clients**



Health Card Number is the preferred search for a client

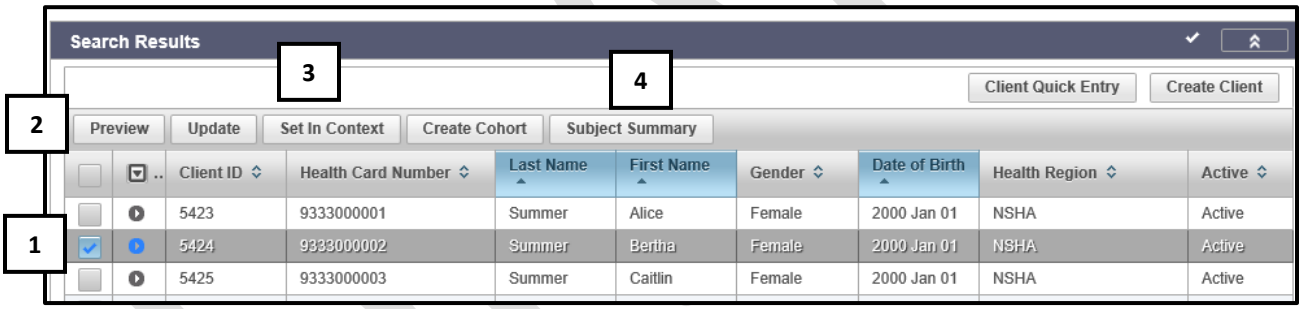
1. **Client Number** - Enter the client's Health Card Number. You need to enter all 10 digits
2. **Client Number Type** - Select **Health Card Number** from the drop down list
3. Click on the **Search** button

If you do not have the client's Health Card Number, you can search by client name, gender and date of birth



1. **Last Name** - Enter client's last name
2. **First Name** - Enter client's first name
3. **Gender** – Select the client's gender from the drop-down list
4. **Date of Birth** - Enter client's DOB
5. Click on the **Search** button

The results of your client search will be displayed in the Search Results table



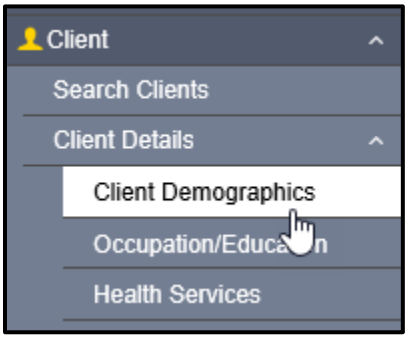
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations, click the **Subject Summary** button

If no search results are returned:

- Remove first name and complete search. The client may not have provided their legal name
- Remove DOB and complete search. The client's mm/dd may be reversed.

Update Client Telephone Number and Create a Temporary Address

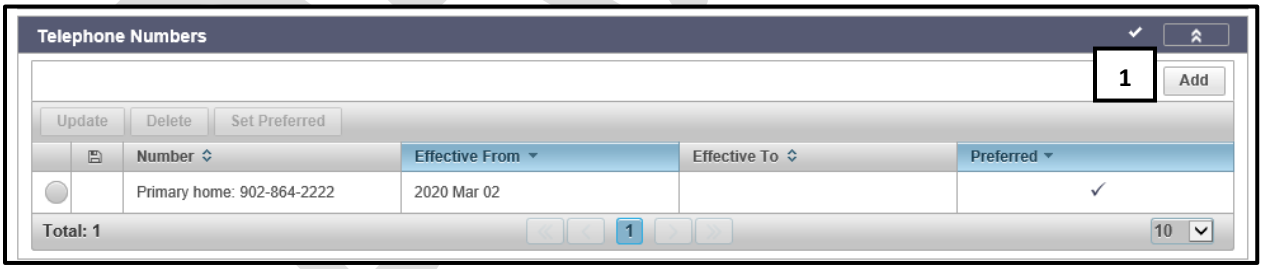
Note: The nightly Provincial Client Registry load updates the **Primary Home** and **Workplace** telephone numbers & the **Postal Address** and **Primary Home** addresses in Panorama.



From the left-hand navigation, click on **Client Demographics**

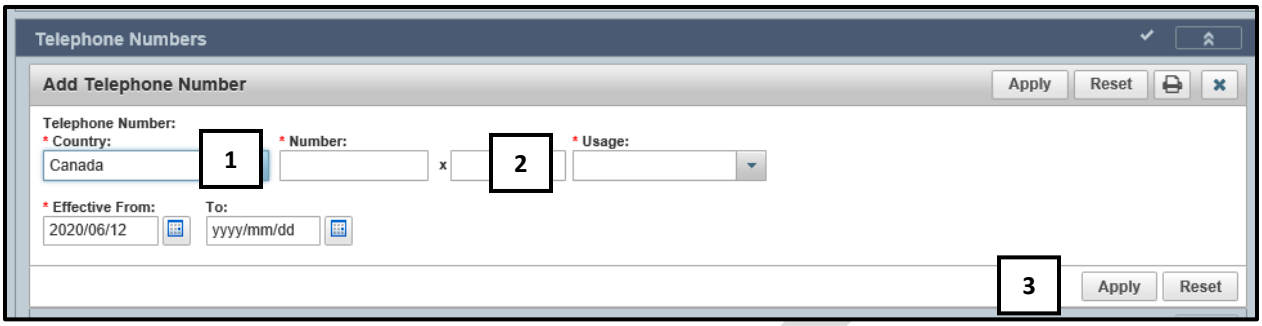
Telephone Number

View the client's telephone numbers.



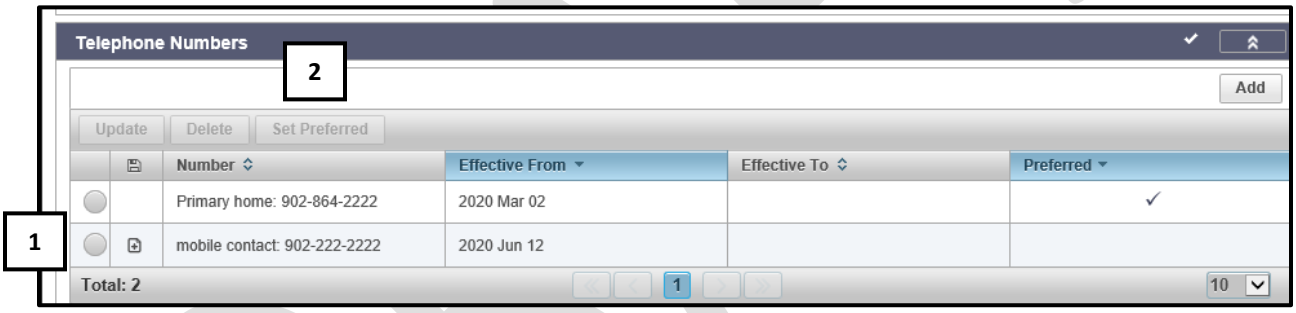
If the telephone number the client provided is different than what is in Panorama, you will need to add the telephone number.

1. Click on the **Add** button



1. **Number** – enter the telephone number
2. **Usage** – select mobile contact from the drop-down list
3. Click on the **Apply** button

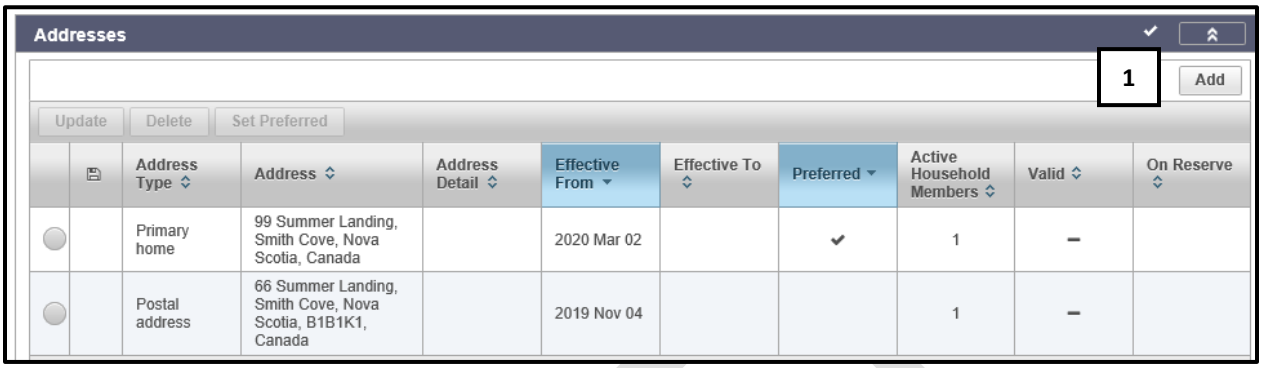
You need to set the mobile contact to preferred.



1. Click on the radio button for mobile contact
2. Click on the **Set Preferred** button
3. Click on the **Save** button (top right-hand area of the screen)

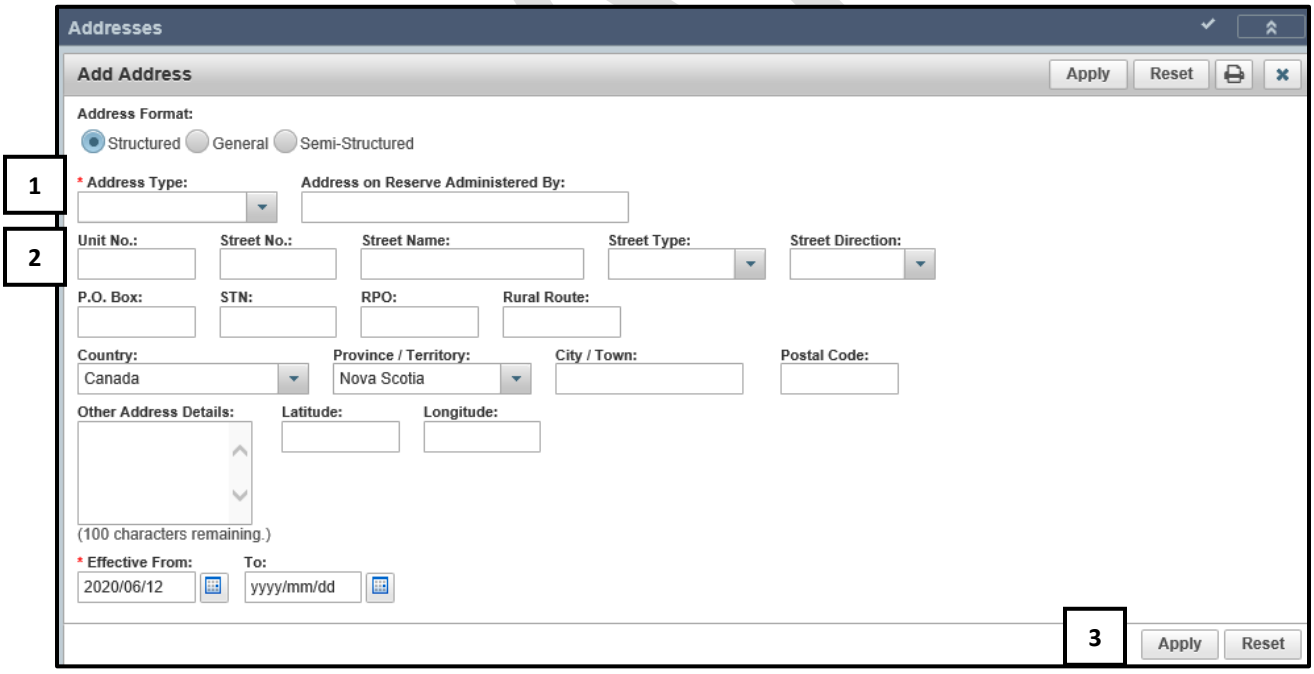
Address

View the client's address (es)



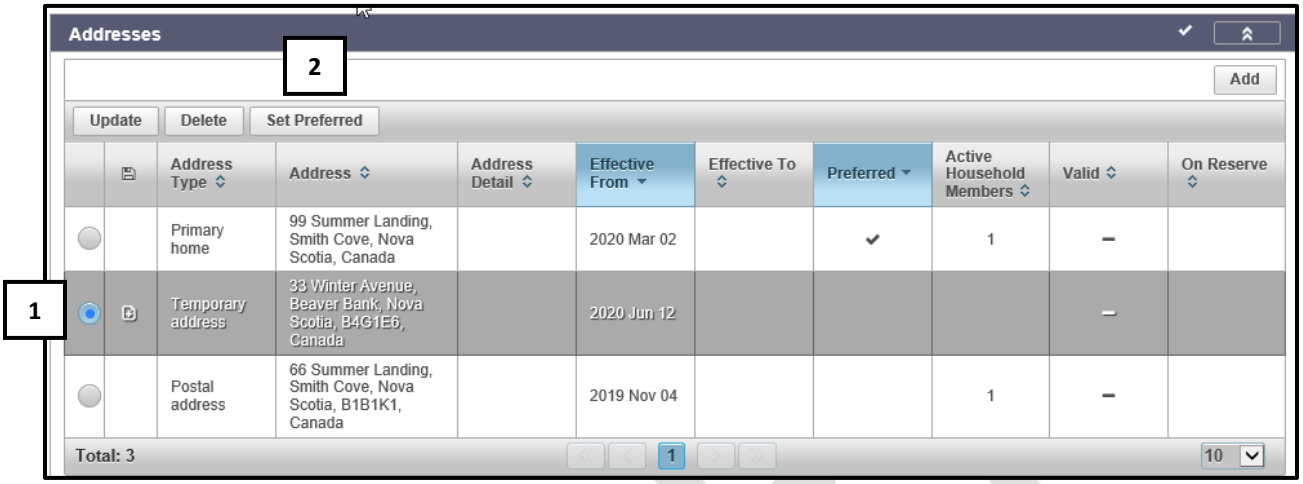
If the client's address in Panorama does not contain a postal code or the address is different than the address the client provided, you will need to add the address.

1. Click on the **Add** button



1. **Address type** – select Temporary address from the drop-down list
2. **Address field** – enter the address including city/town and postal code
3. Click on the **Apply** button

You need to set the temporary address to preferred.



1. Click on the radio button for temporary address
2. Click on the **Set Preferred** button
3. Click on the **Save** button (top right-hand area of the screen)

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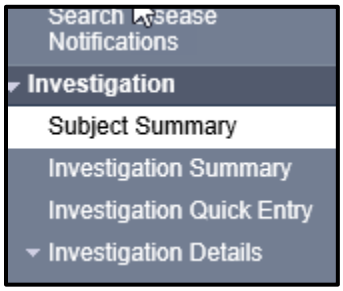
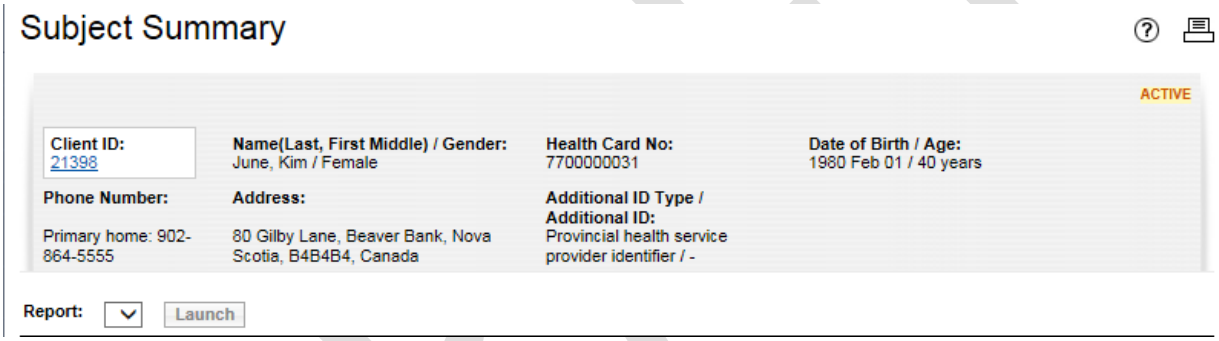
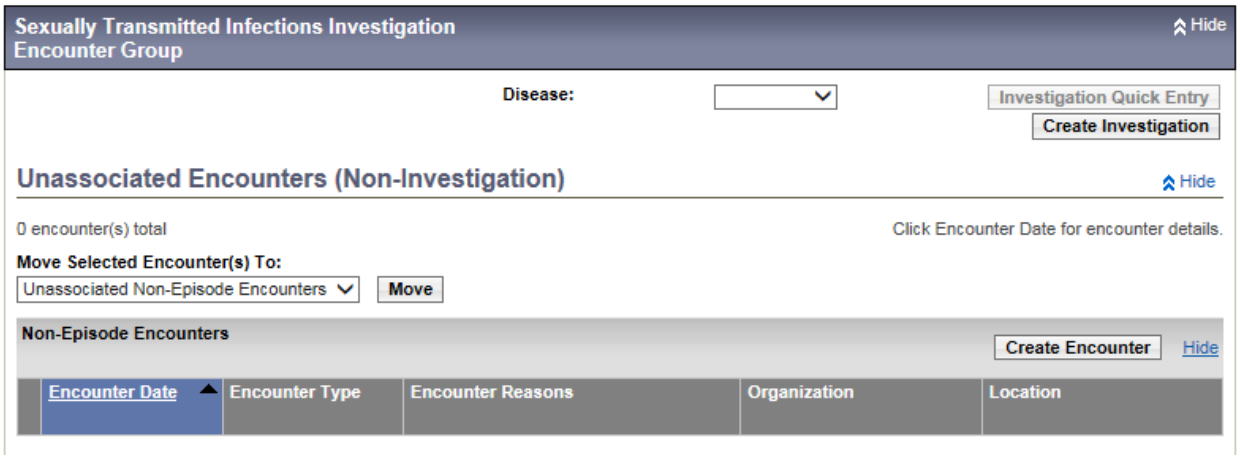
Create a Chlamydia Investigation



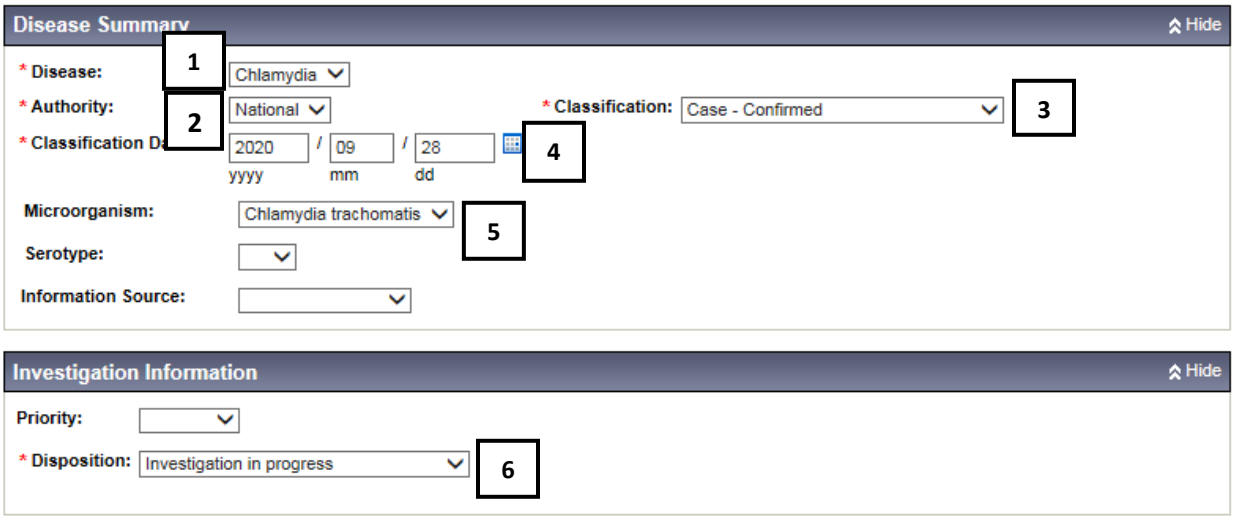
From the left-hand navigation, click on **Subject Summary**





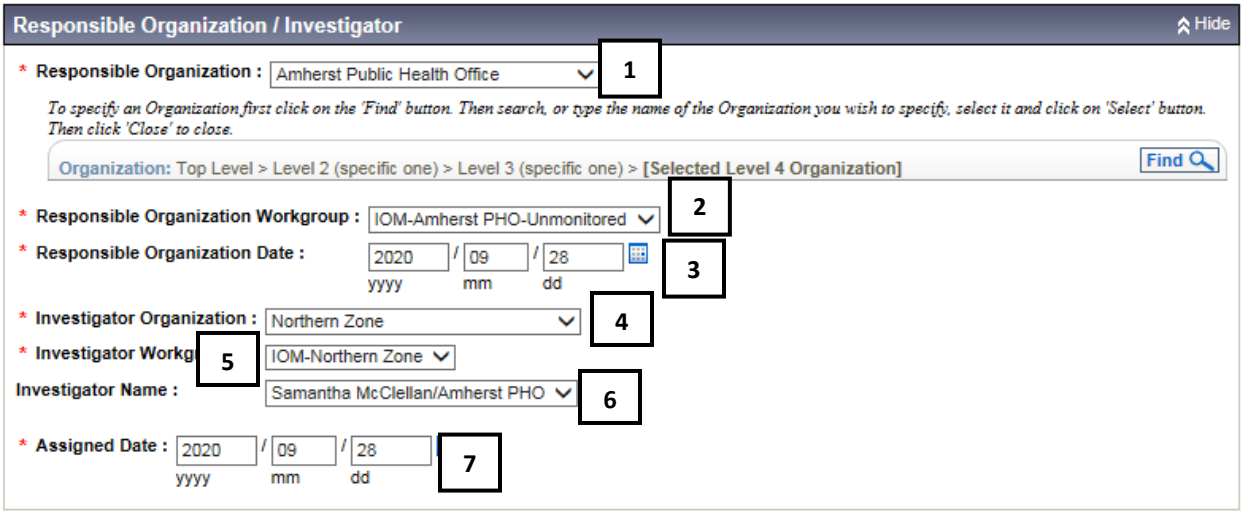
Confirm an open Chlamydia Investigation does not already exist under the Sexually Transmitted Infections Encounter group. If a closed investigation does exist please consult with a CDC nurse to determine if it's a new infection or treatment failure.

Click **Create Investigation** under Sexually Transmitted Infections Encounter Group.



Enter the following information:

1. **Disease**- select Chlamydia from drop-down list
2. **Authority**- select National from drop-down list
3. **Classification -** select the classification which fits current case definition (PUI, Probable, Confirmed) from drop-down list
4. **Classification Date**- will auto populate to current date
5. **Microorganism**- select Chlamydia trachomatis from drop-down list
6. **Disposition**- select Investigation in progress from drop-down list



Enter the following information:

1. **Responsible Organization-** Your Public Health Office
2. **Responsible Organization Workgroup**- select IOM- your
3. **Responsible Organization date-** auto populates to current date and can be changed as needed
4. **Investigator Organization**- your **Zone**
5. **Investigator Workgroup**- IOM **Your Zone**
6. **Select investigator name-** your name
7. **Assigned date-** auto populates to current date and can be changed as needed

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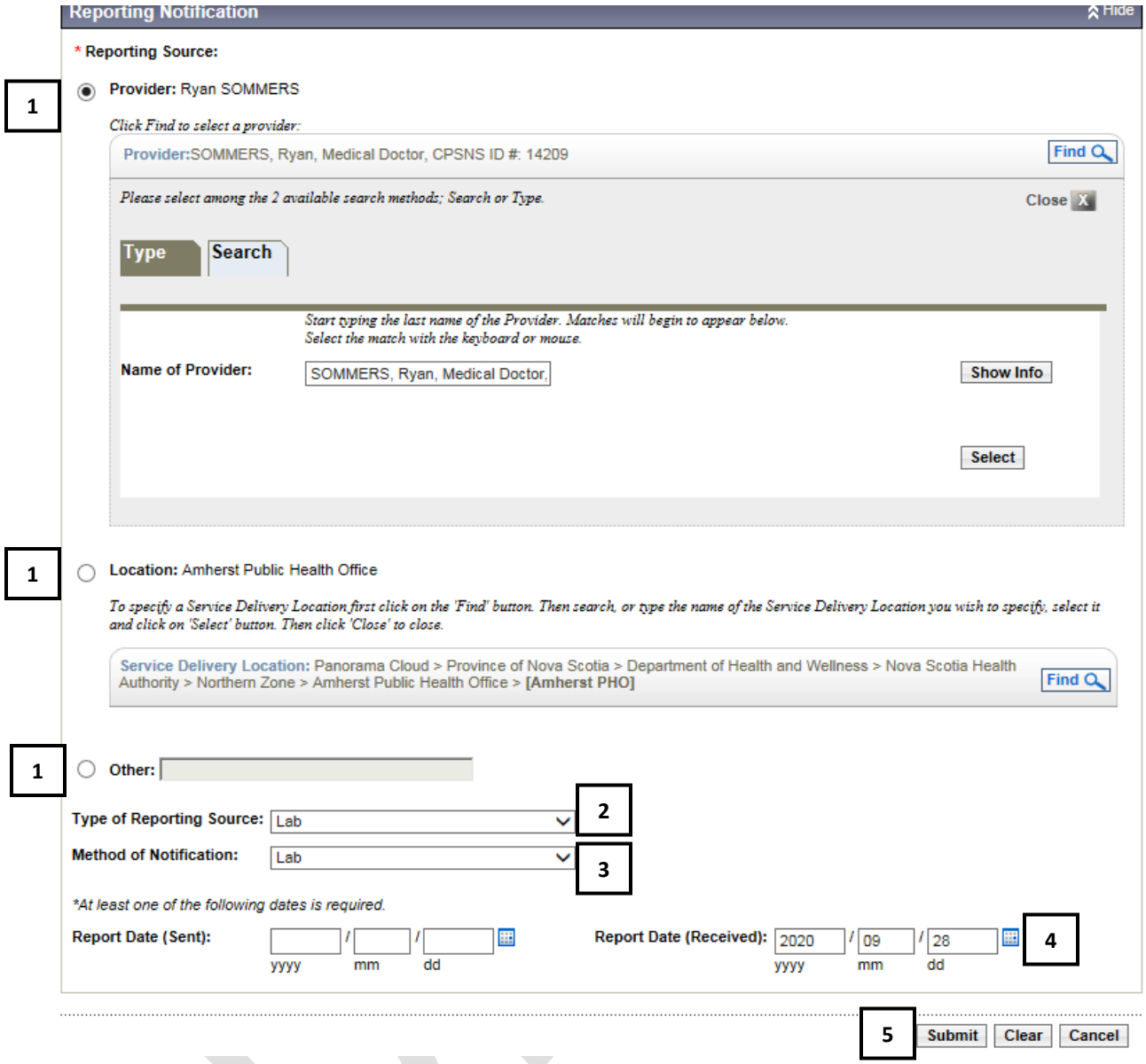


Enter the following information:

1. . **Reporting Source**-will depend on how you were notified of the case.
   - Select **Provider** radio button and search using the **Find** button for reporting HCP if a provider was the first to notify Public Health, ensure to click **Select**
   - Select **Location** radio button and search using the **Find** button for resulting lab if the lab was the first to notify Public Health, ensure to click **Select**
   - Select **Other** radio button and free text if that is the appropriate selection i.e. – DHW or source case etc. was the first to notify Public Health
2. **Type of Reporting Source** – select appropriate response from the drop-down list
3. **Method of Notification**- Select appropriate response from the drop-down list
4. **Report Date (Received)** - auto populates to current date. Change the date to the received date if applicable.
5. **Click Submit**

After creating an investigation, you are taken to the **Disease Summary** screen

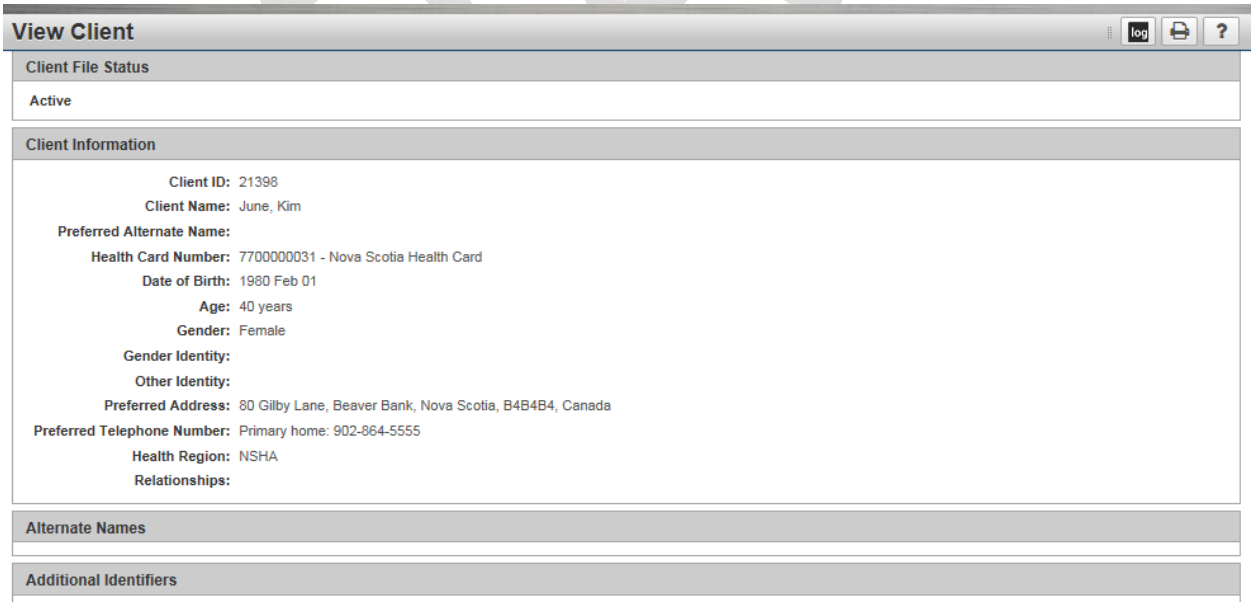
Making a Lab Pertinent to an Investigation

When a lab has been processed from the Electronic Lab Report Inbox, it sits at the **Subject Summary** level until it is attached to an Investigation by an Investigator.

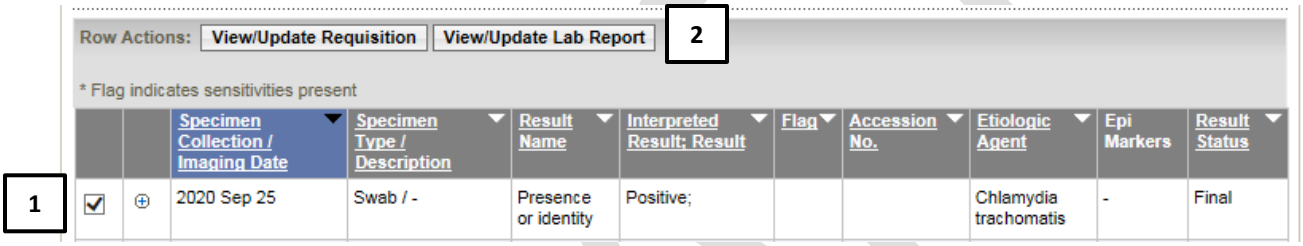
To find this lab, ensure the investigation is not in context. To put the client **only i**n context:

1. Go to Recent Work
2. Click on the client (not the investigation) hyperlink.

This will bring you to the View Client page.

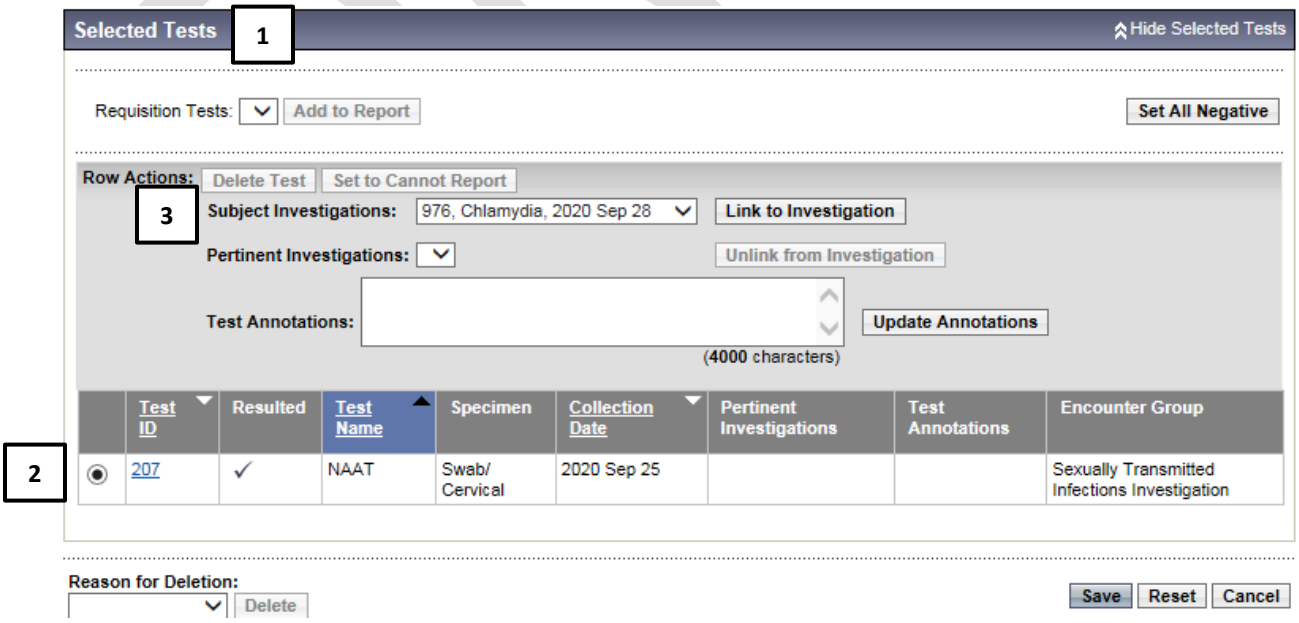


From the left-hand navigation, click on **Lab Summary**



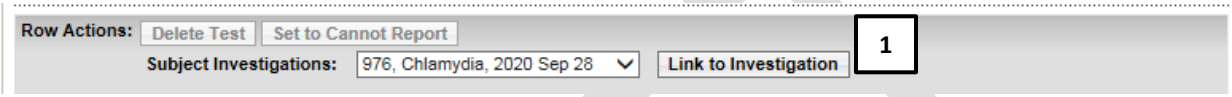
On the Lab Summary screen, scroll down to the summary table

1. Click the **Radio** button for the lab result that you want to make pertinent to the investigation
2. Click the **View/Update Lab Report** button

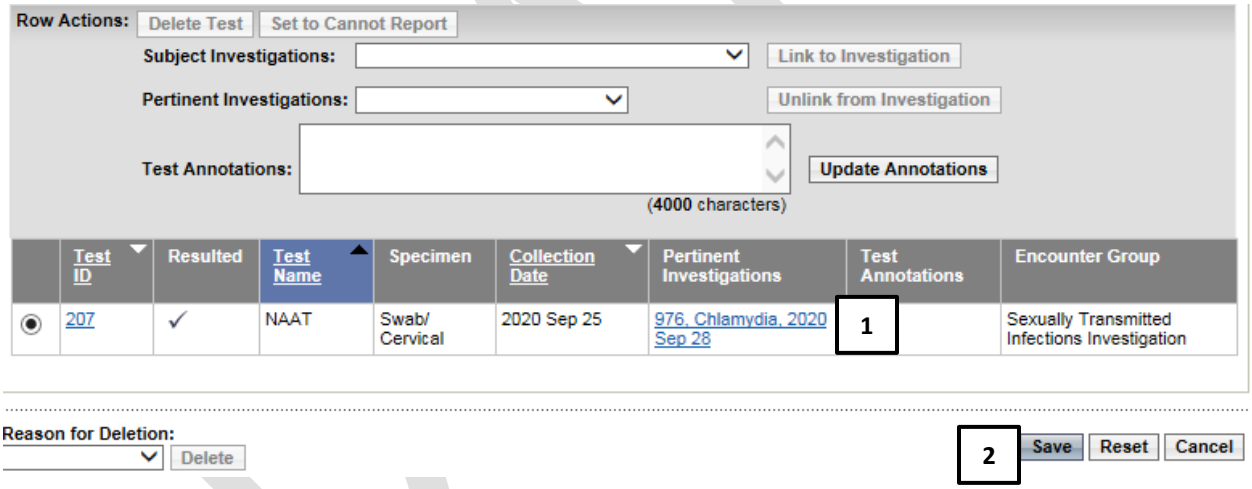


On the Human Lab Report Screen

1. Scroll down to the **Selected Tests** section.
2. Click the **Radio** button for the specific test name.
3. The **Subject Investigations** area will now be activated and the drop down field will contain investigations that you can select from.



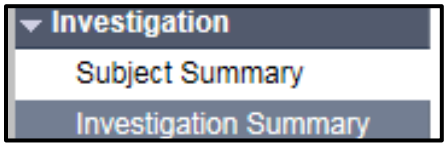
1. From the drop-down list, click on the investigation that you want to make the lab pertinent to and click the "**Link to Investigation**" button.



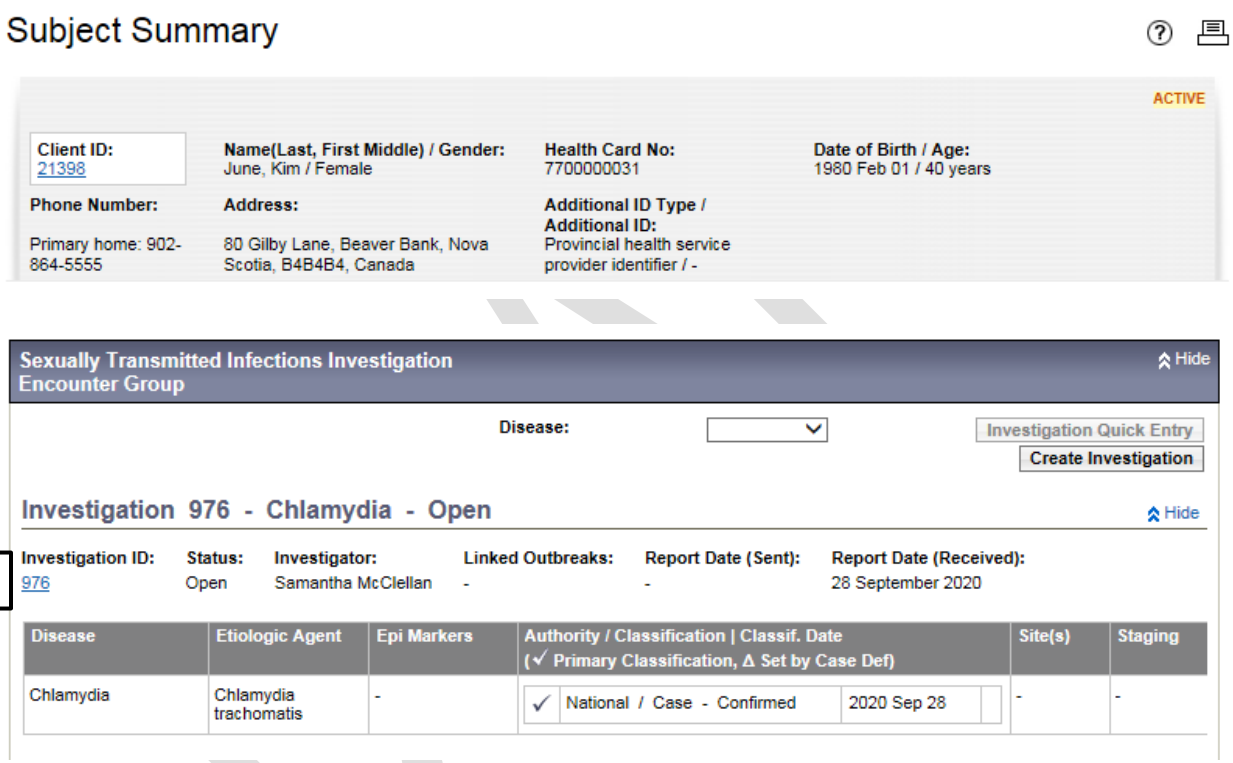
1. The lab is now pertinent to the investigation
2. Click the **Save** button

Note:
You are still at the Subject Summary Level, with only the Client in context. You need to put your investigation back in context.

To put the investigation into context:



From the Left-Hand navigation, click on **Subject Summary**.



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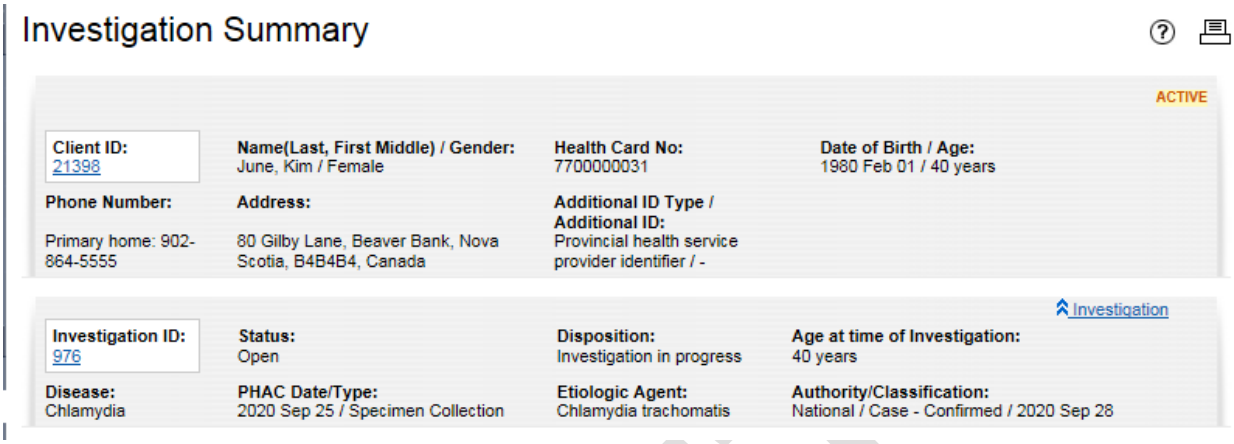
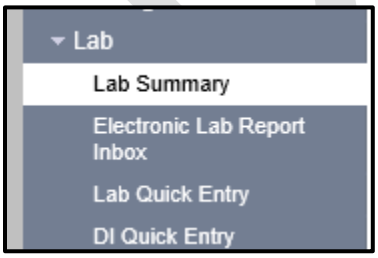
1. Click the Hyperlink associated to the current investigation



Note: The Investigation is now back in Context

You can view the Lab by scrolling down the Investigation Summary screen

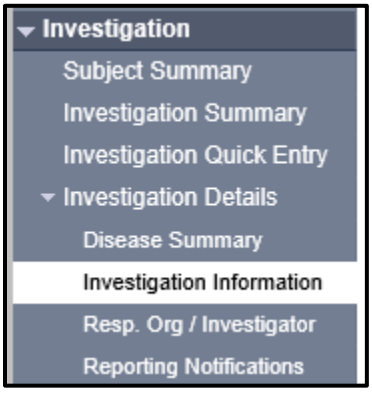
Labs can also be viewed from the **Lab Summary** screen



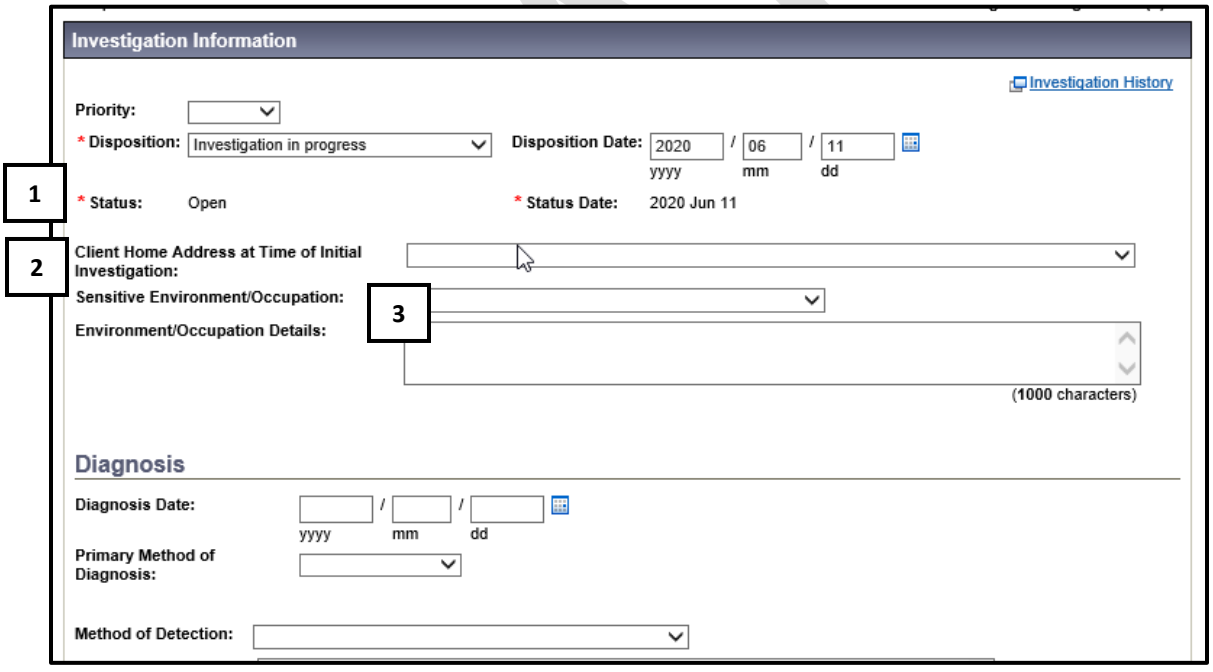
From the left-hand navigation, click on **Lab Summary**

Completing Investigation Information

Additional information needs to be entered into Panorama once the investigation has been created and client interviewed.

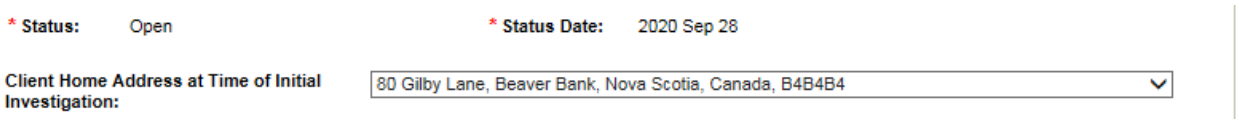


From the left-hand navigation, click on **Investigation Information**

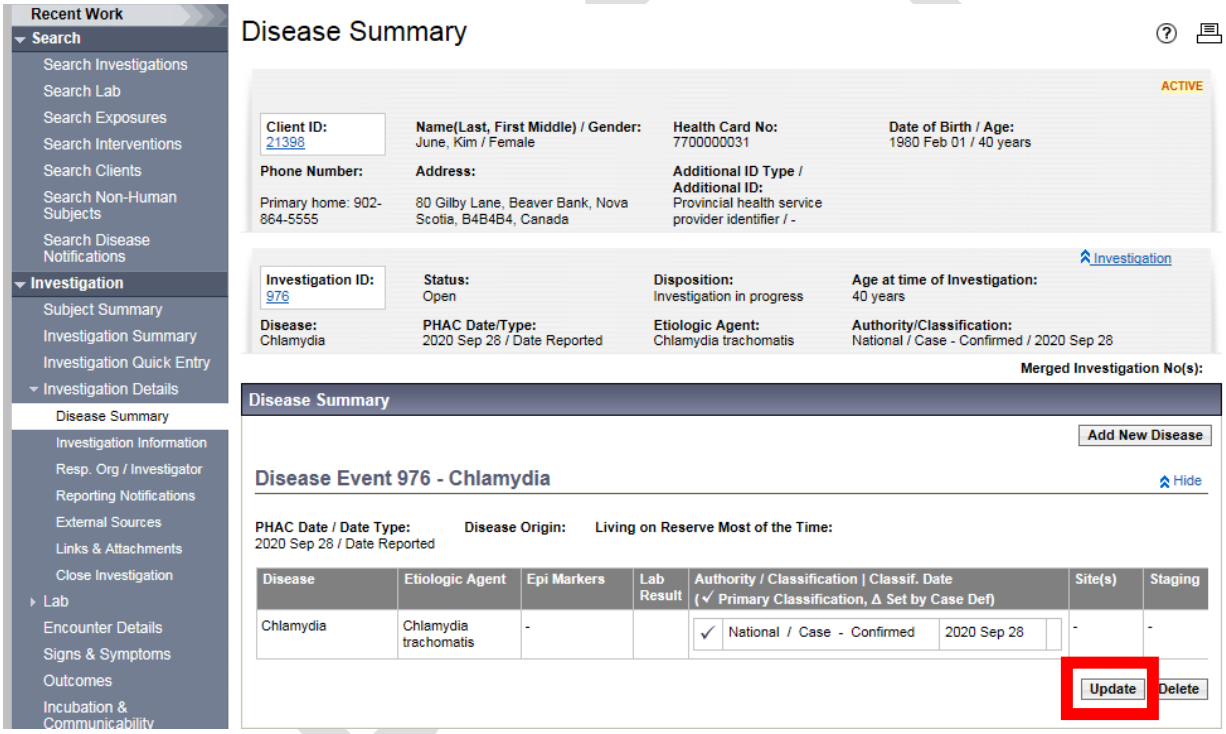


1. **Disposition and Disposition Date** – are auto-populated when the investigation was created And can be changed as needed
2. **Status and Status Date** – are auto-populated when the investigation was created
3. **Client Home Address at Time of Initial Investigation** – select the client's address which includes the Postal Code from the drop-down list. If the drop-down options do not include the correct address with the postal code, you will need to update the address.

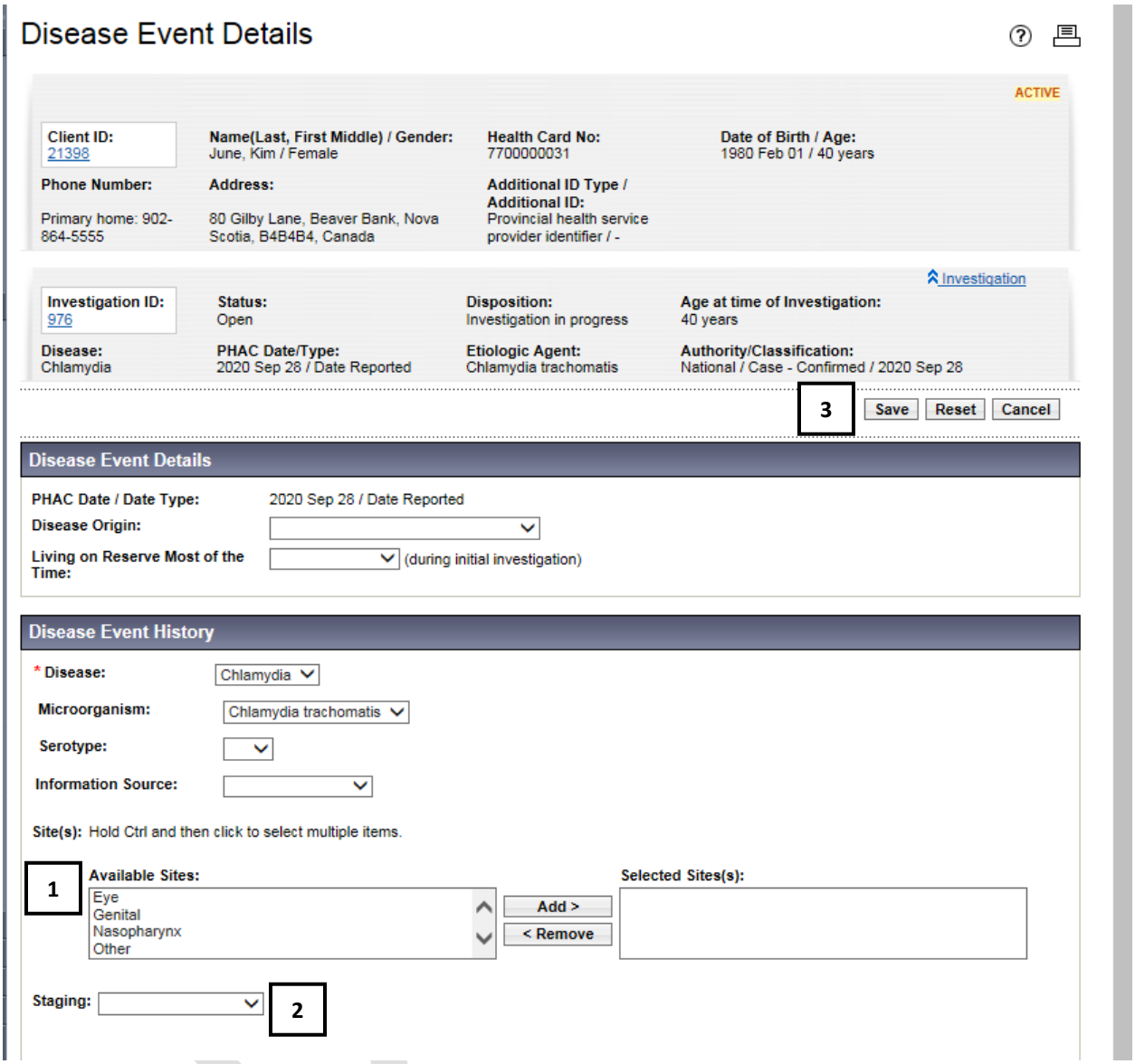
4. See reference material on page 3 for Updating Client Address and return to this screen to select from the drop down.



Disease Event History- Including Site and Staging



In the Left Hand Navigation select Disease Summary and click the update button.



In the Disease Event History box select:

1. Select appropriate site and click **Add** to move to Selected site box
2. Select appropriate staging
3. Save

Signs and Symptoms

Note:

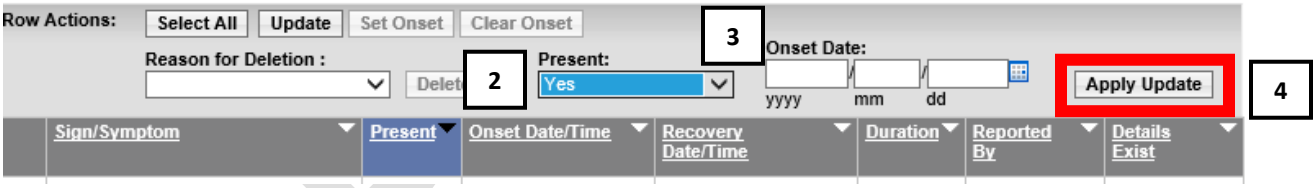
These are the response definitions for risk factors and signs & symptoms. This will help you understand what answers should be entered into Panorama.

No – the question was asked, and the individual's response was no.
Not applicable *– only use in situations where the risk factor is not applicable to the client. For example – pregnancy risk factor for a male.*
Not asked *– there is clear indication from a health care provider that they did not ask the specific question, or the interviewer did not ask because of time or the question is awkward/uncomfortable.*
Unable to answer *– the question was asked, and the individual was unable to answer due to being incapable of understanding the question or communicating an answer.*

Unknown *– that question was asked, and the individual indicated that they do not know. If a healthcare provider has reported on the risk factors or signs & symptom, only those that a specific response is provided for are to be recorded as yes, no, not asked, unable to answer. All other risk factors or symptoms should be recorded with a response of unknown.*
Unwilling to answer *– the question was asked, and the individual indicated that they were unwilling to answer the question.*
Yes *– the question was asked, and the individual's response was yes.*

Select Signs and Symptoms from the Left-Hand Navigation

Add Signs and Symptoms from the information reported by the client or physician report form (repeat for all reported Signs & Symptoms)



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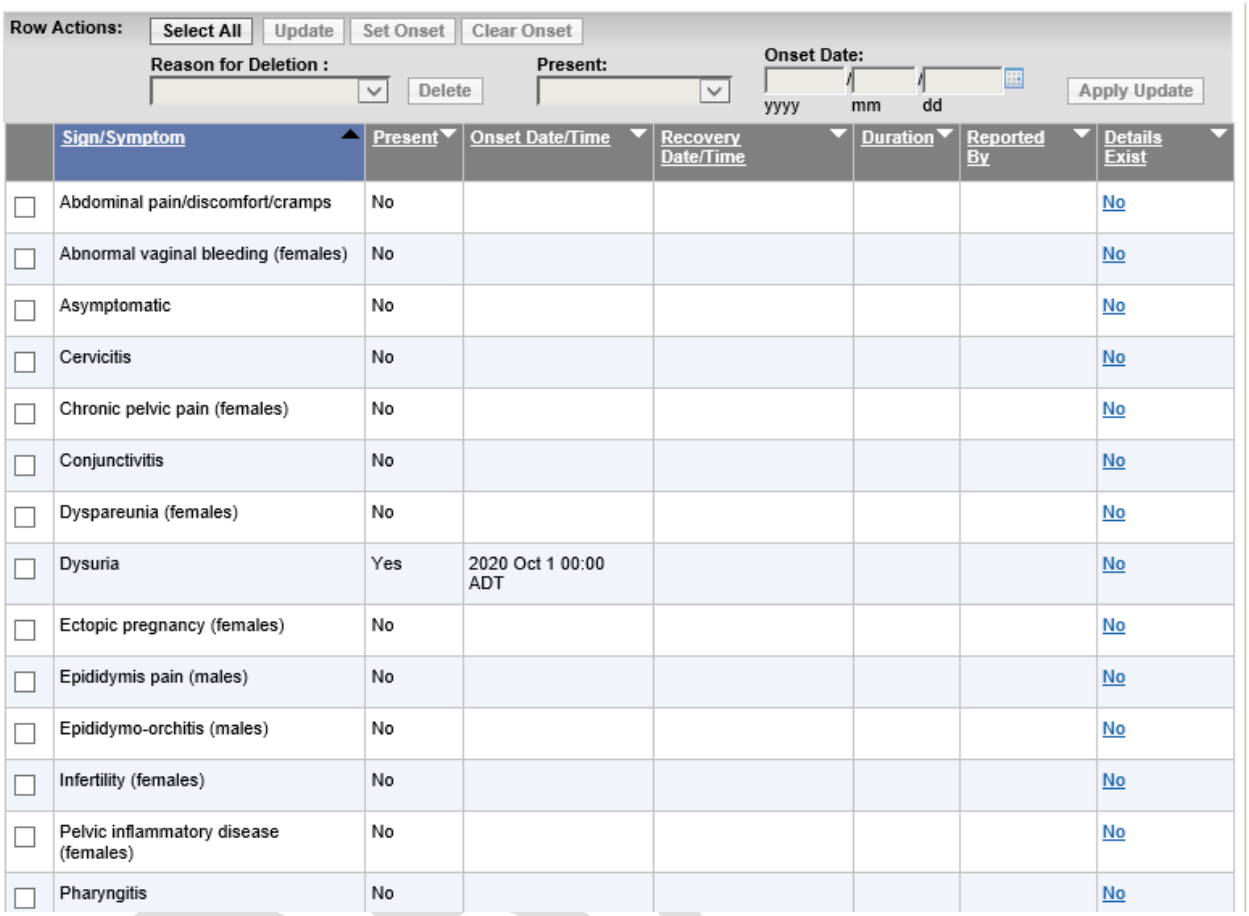
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☑	Abdominal pain/discomfort/cramps						No
☐	Abnormal vaginal bleeding (females)						No
☐	Asymptomatic						No
☐	Cervicitis						No
☐	Chronic pelvic pain (females)						No
☐	Conjunctivitis						No
☐	Dyspareunia (females)						No
☑	Dysuria						No
☐	Ectopic pregnancy (females)						No
☐	Epididymis pain (males)						No
☐	Epididymo-orchitis (males)						No
☐	Infertility (females)						No
☐	Pelvic inflammatory disease (females)						No
☐	Pharyngitis						No
☐	Pneumonia (infants < 6 months)						No
☐	Proctitis						No
☐	Reiter's syndrome						No
☐	Testicular pain (males)						No
☐	Urethral discharge						No
☐	Urethral itch (males)						No
☐	Urethritis (males)						No
☑	Vaginal discharge						No

1. Click **Checkbox(s)** for S&S. You can multi-select S&S that have the same onset date.
2. **Present** - Select Yes from drop-down if symptom reported and select **Apply Update**
3. **Onset Date** - Enter the date the client reported the S&S

Repeat steps #1 and #2 for S&S not present and **Apply Update**

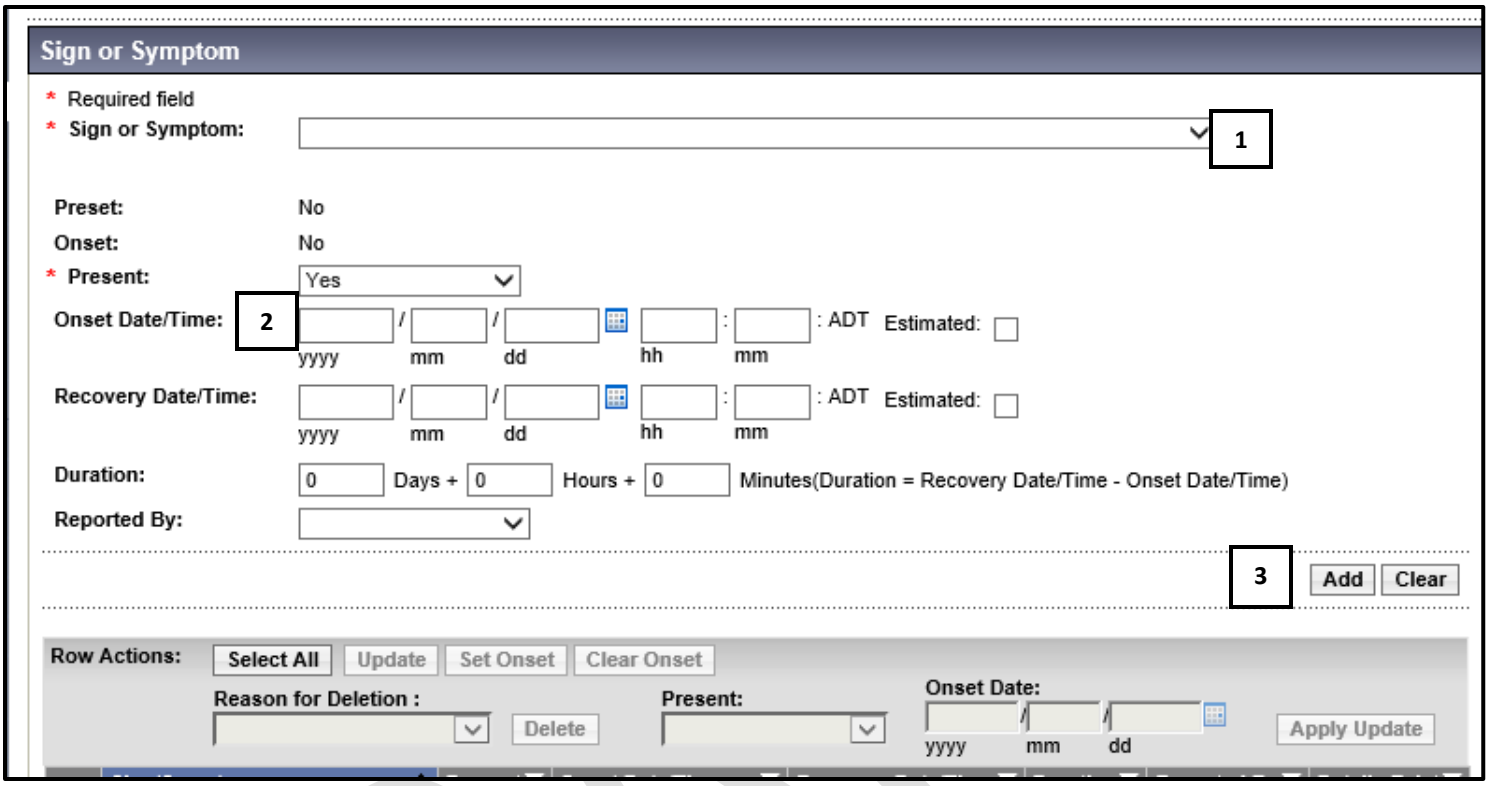
The S&S will now be updated in the table (see below)



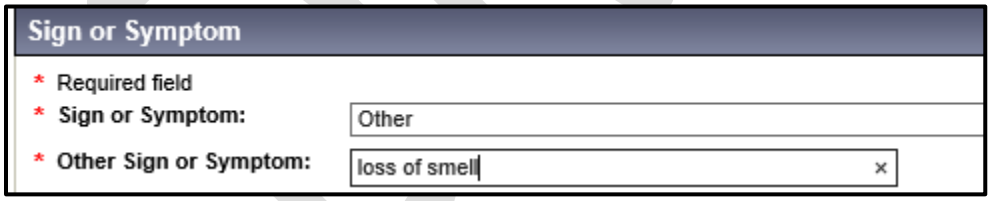
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Abdominal pain/discomfort/cramps	No					No
☐	Abnormal vaginal bleeding (females)	No					No
☐	Asymptomatic	No					No
☐	Cervicitis	No					No
☐	Chronic pelvic pain (females)	No					No
☐	Conjunctivitis	No					No
☐	Dyspareunia (females)	No					No
☐	Dysuria	Yes	2020 Oct 1 00:00 ADT				No
☐	Ectopic pregnancy (females)	No					No
☐	Epididymis pain (males)	No					No
☐	Epididymo-orchitis (males)	No					No
☐	Infertility (females)	No					No
☐	Pelvic inflammatory disease (females)	No					No
☐	Pharyngitis	No					No

Client reports a symptom that <u>is not</u> in the displayed list of Signs and Symptoms,

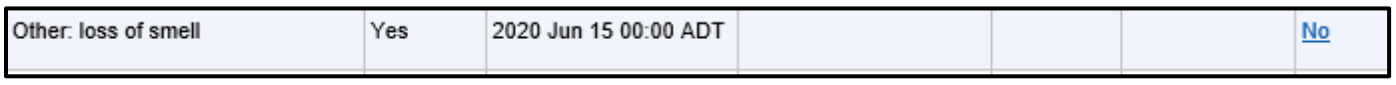
Signs and Symptoms are added through the top section of the screen.



1. Sign or Symptom – Select the sign or symptom from the drop-down list. If the Sign or Symptom is not in the list select **Other** and also enter the sign/symptom in the **Other Sign or Symptom** field (see below)

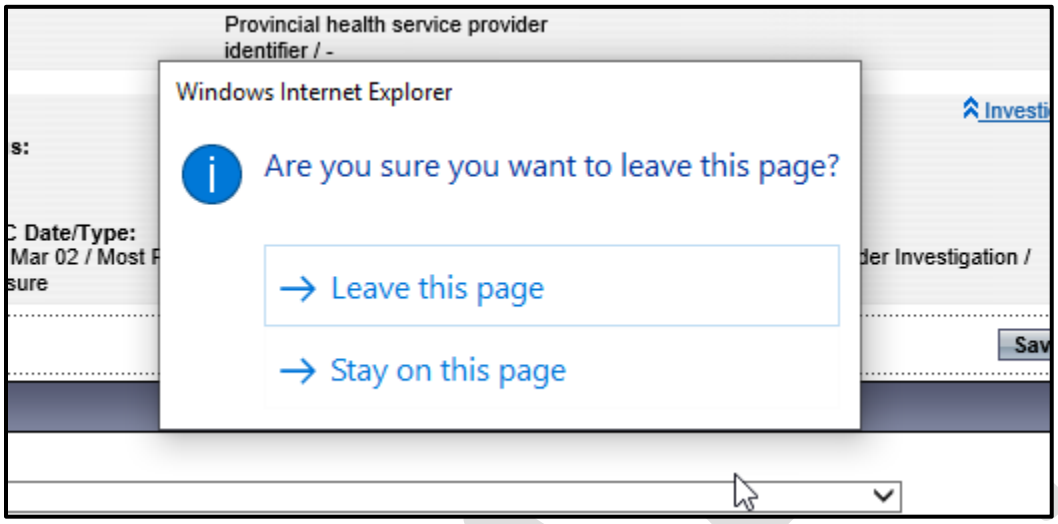


2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button
4. The S&S will now be updated in the table (see below)



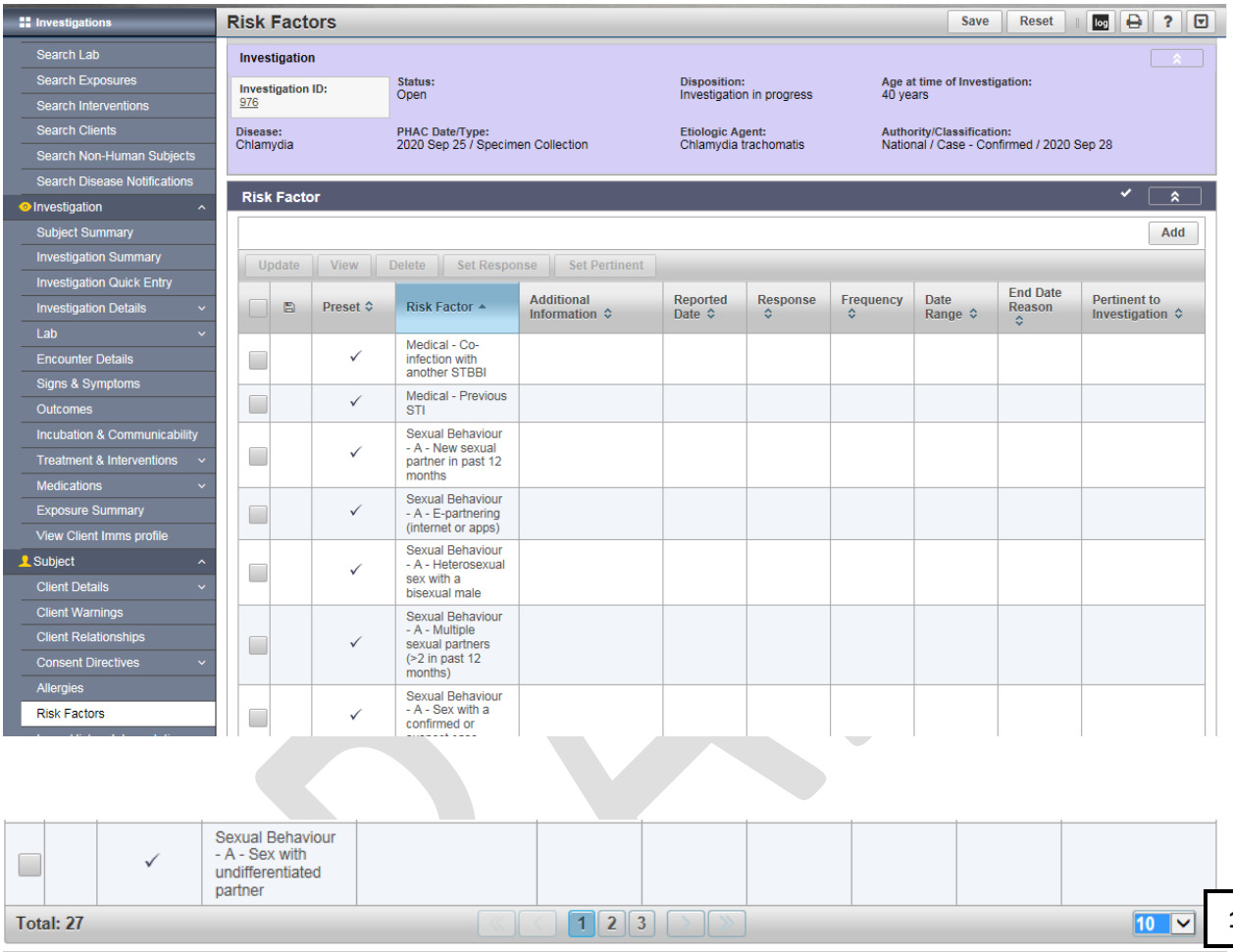
Click the **Save** button (Top or Bottom right-hand area of screen)

Note: If you see this message it indicates that you are leaving without saving your changes.. Click **"→ Stay on this page**" and click the **Save** button.



Documenting Risk Factors

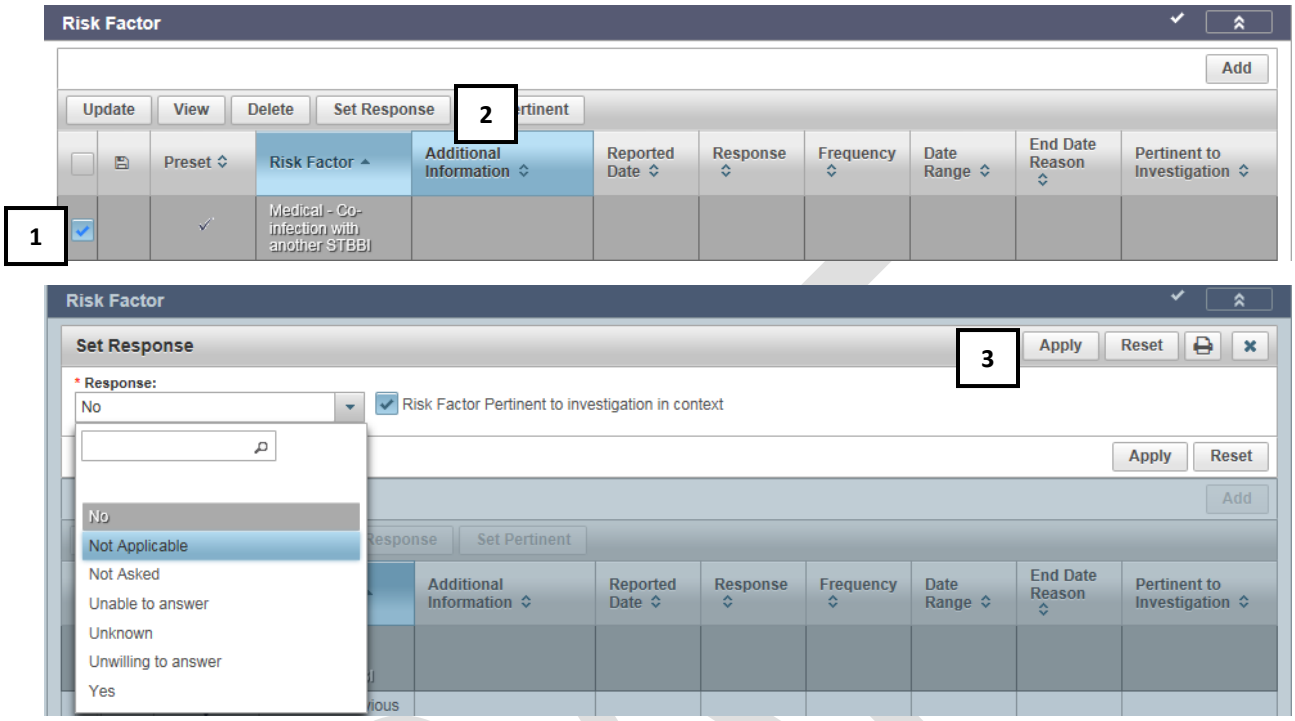
From the left-hand navigation, click on **Risk Factors**



1. The risk factor table is populated with all presets defined for Chlamydia. Ensure all preset risk factors are showing by clicking the **Drop-down** in the right- hand corner and changing from 10 to “all”:

Note: All preset risk factors require a response pertinent to current investigation

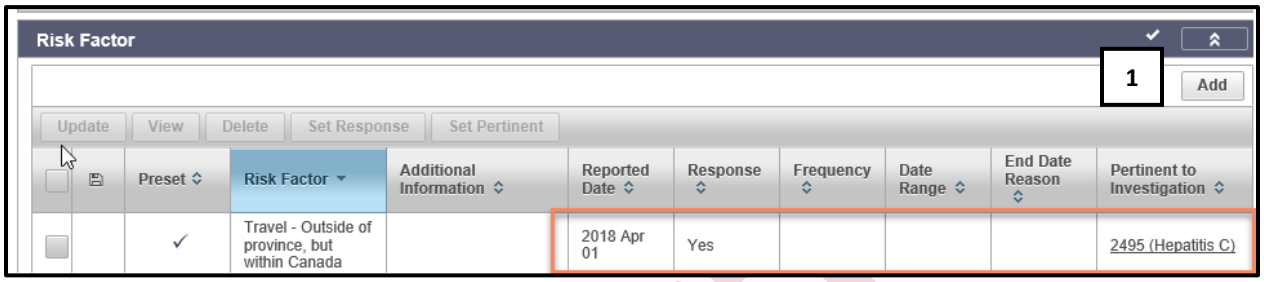
For preset risk factors that do not contain a response Pertinent to another Investigation:



1. Select check box beside risk factors that are present (you may multi-select).
2. Click **Set Response** and select Yes
3. Click **Apply**

Repeat steps #1, #2 and #3 for Risk Factors that are not present

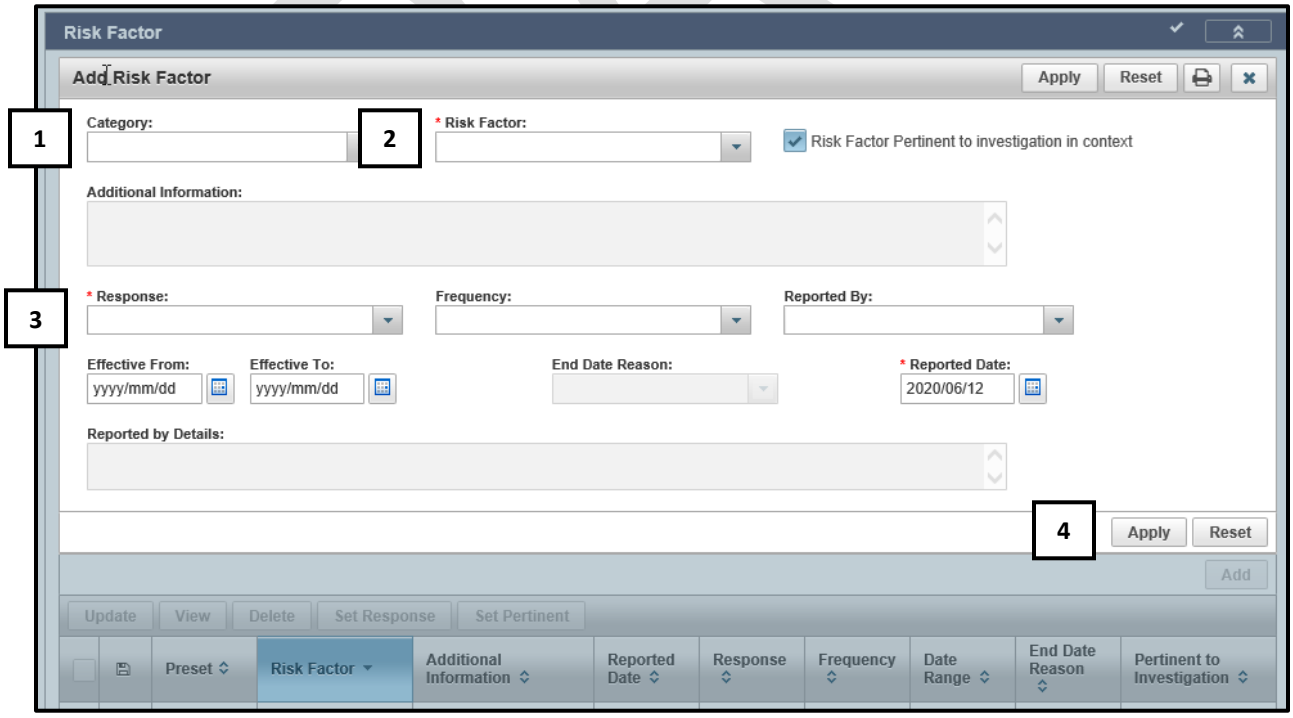
For a preset risk factors that contains a response Pertinent to another Investigation or to add a risk factor that is not a preset:



Do not update a preset Risk Factor that contains a response Pertinent to another Investigation. You will need to add the Risk Factor for the Chlamydia investigation.

1. Click the **Add** button

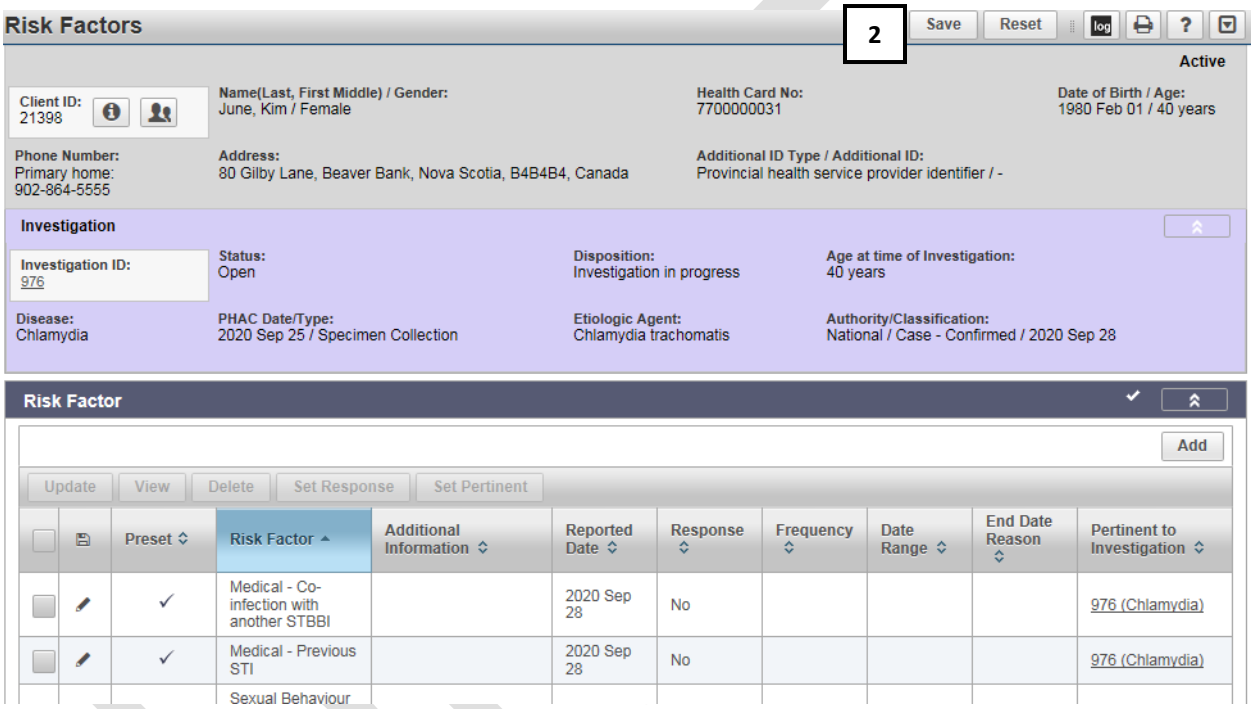
An area will open above the Risk Factor table. This is where you add a risk factor.



1. **Category** – select the category of the risk factor from the drop-down list.

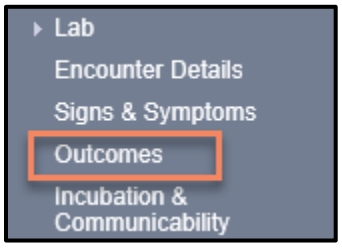
2. **Risk Factor** – select the risk factor from the drop-down list
3. **Response** – select the response form the drop-down list
4. Click the **Apply** button

☐			Travel - Outside of Canada		2020 Sep 28	Yes				976 (Chlamydia)
☐		✓	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)

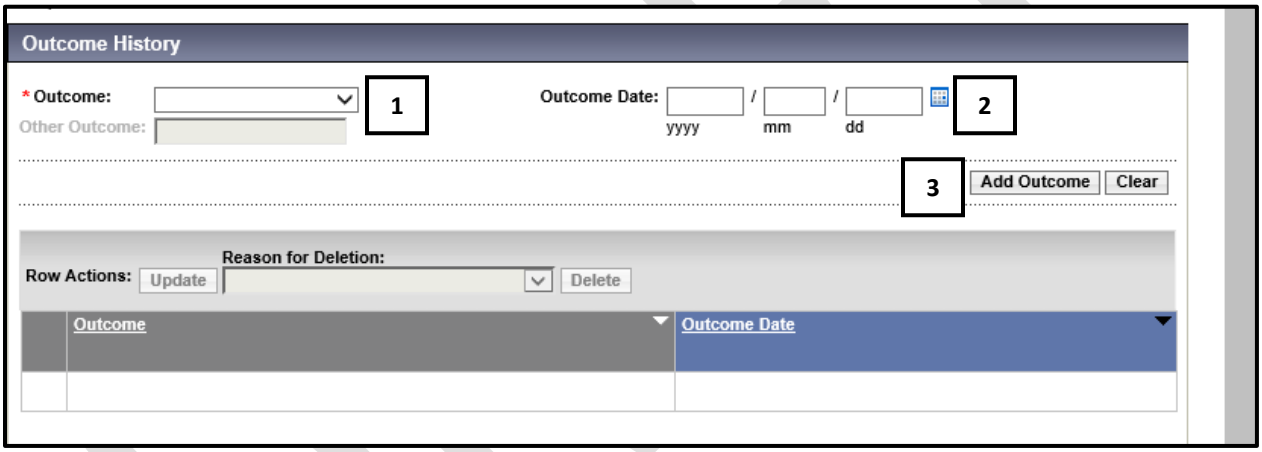


1. Ensure **ALL risk factors** have a response and
2. Click the **Save** button when done adding any additional risk factors.

Adding an Outcome

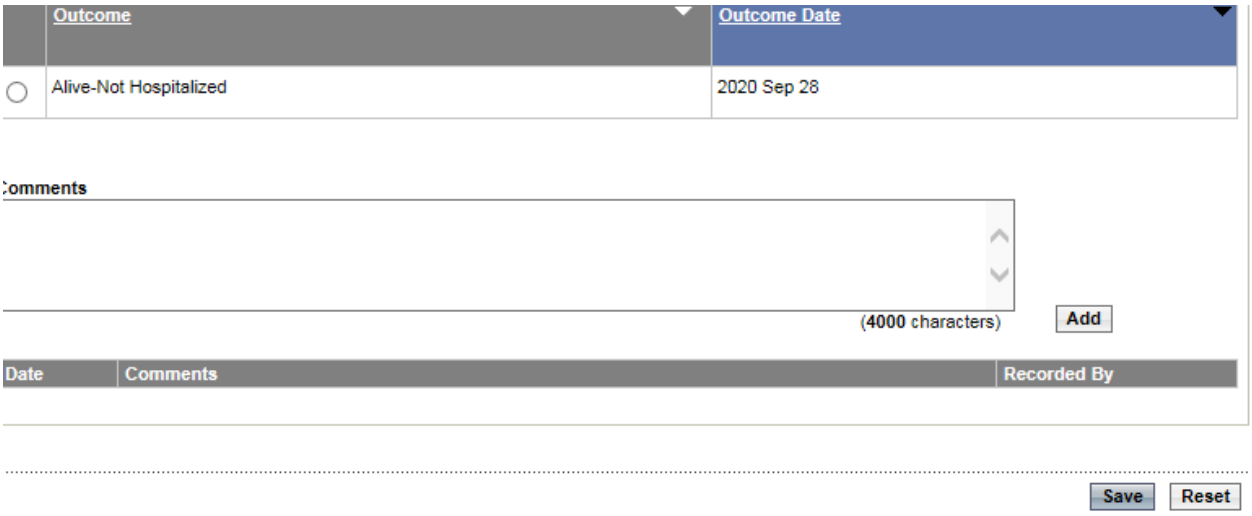


From the left-hand navigation bar, click on **Outcome**



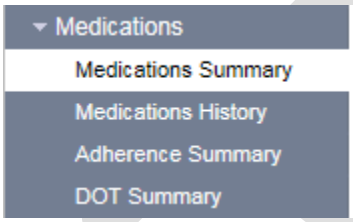
Note: there can be multiple outcomes from throughout the investigation

1. **Outcome** - Select the outcome from the drop-down list, select the highest level of care that was required
2. **Outcome Date** - Enter the outcome date.
3. Click the **Add Outcome** button to add the outcome to the outcome table



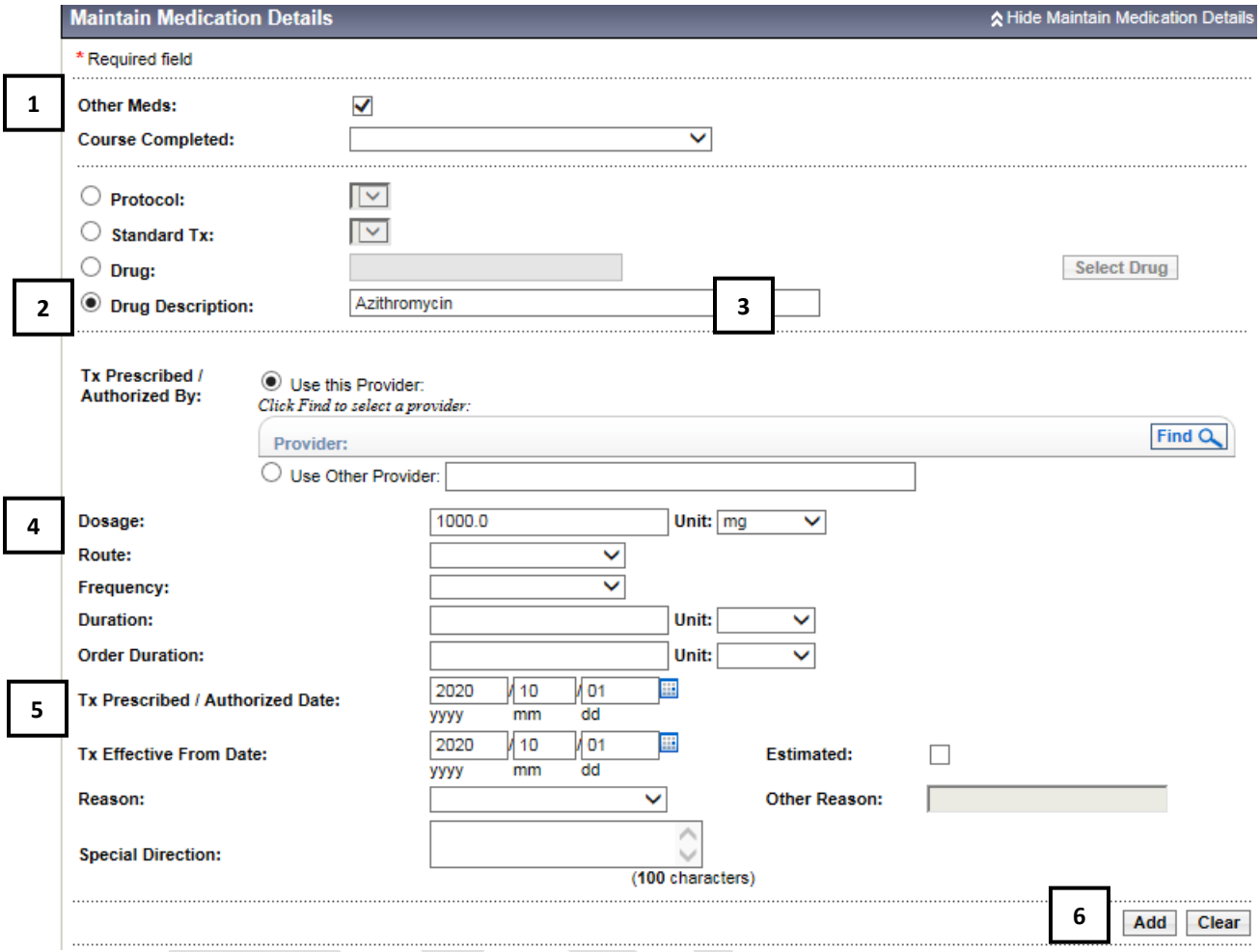
1. Click the **Save** button

Recording a Medication Other Than a TB or HIV Drug- Other Meds



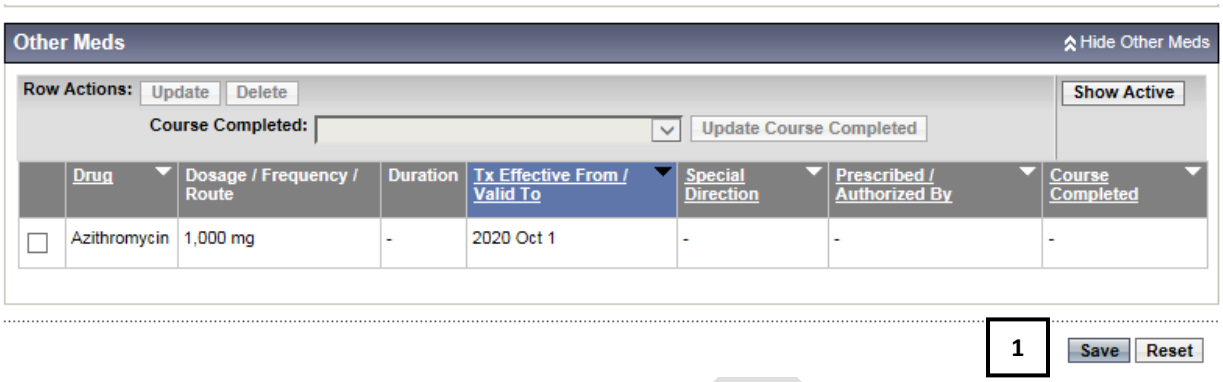
Scroll to the Medication section in the Left-Hand Navigation and click **Medication Summary**. Scroll to the **Maintain Medications Details** section.

DRAFT



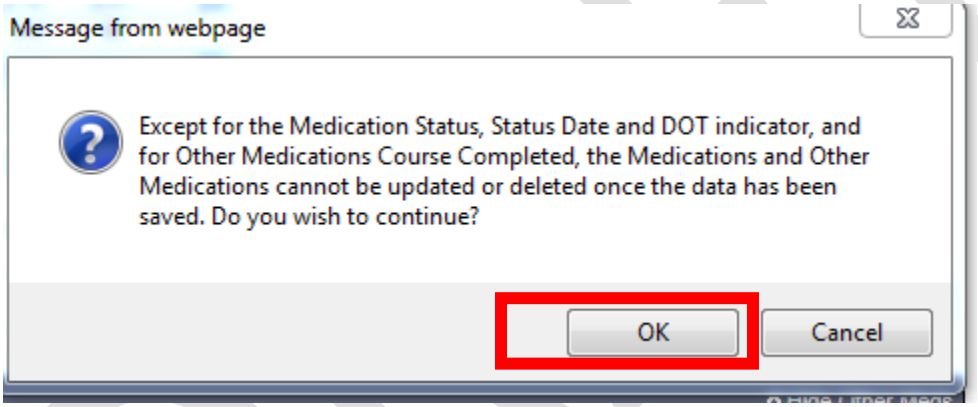
1. Click **Other Meds** check box
2. Click **Drug Description** radial button
3. Enter name of prescribed drug in the **Drug Description** text box
4. Enter **Dosage** and select **Unit** (enter other info if available)
5. Enter **Tx prescribed** date
6. Click **Add**

The **Medications Summary** screen is displayed. The medications entered have been added to the **Other Meds** tablelocated near the bottom of the screen.



Important: Confirm all information is correct. Once the record is saved, only **Course Completed** information can be updated. The medication cannot be deleted.

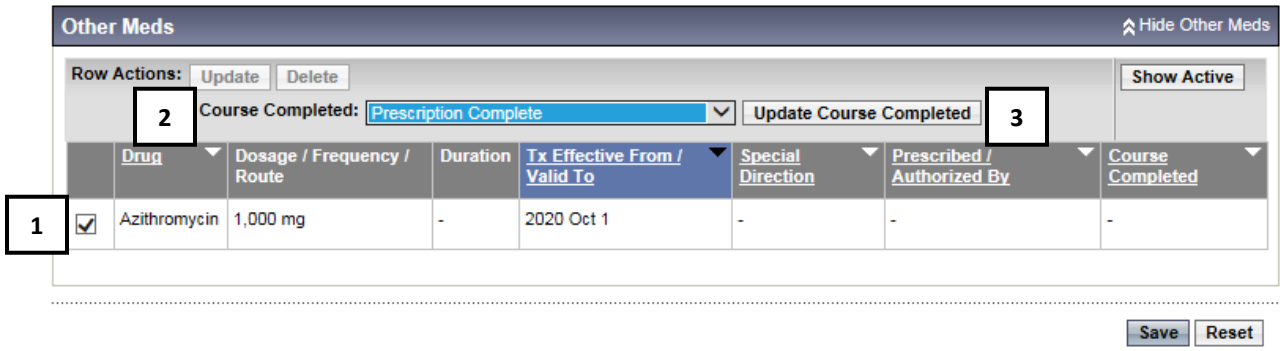
1. If record is correct, click **Save**



The system prompts the user to confirm, click OK to continue.

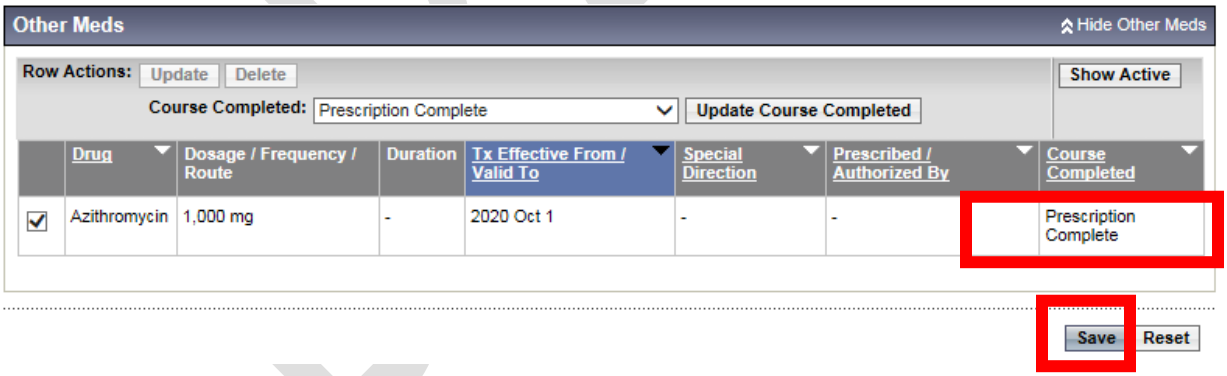
Indicate Course Completed- Other Meds

Once the record has been saved, only the **Course Completed** information can be updated in **Other Meds- only if you have this information**

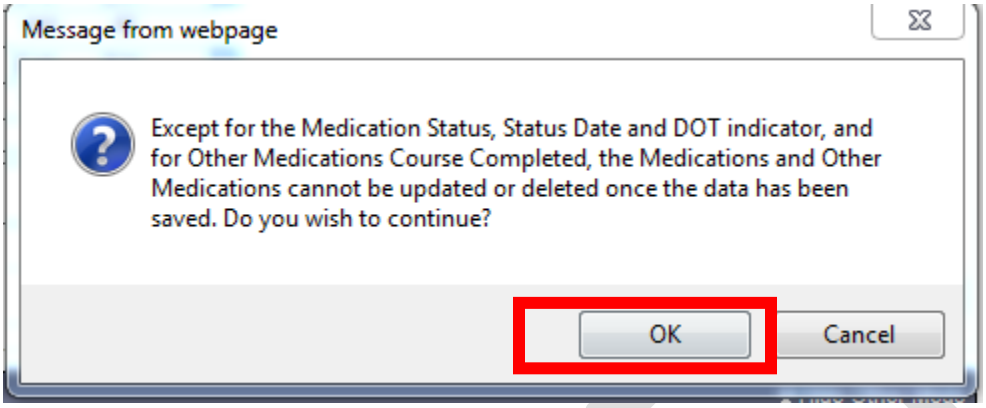


1. Click radial button next to the drug to be updated
2. Select reason from **Course Completed**
3. Click **Update Course Completed** button

The system adds the reason selected to the **Course Completed** column in the **Other Meds** table.

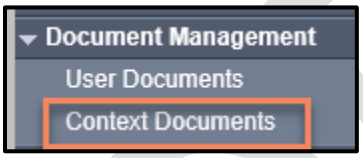


Click the **Save** button and the system prompts the user to confirm, select ok.

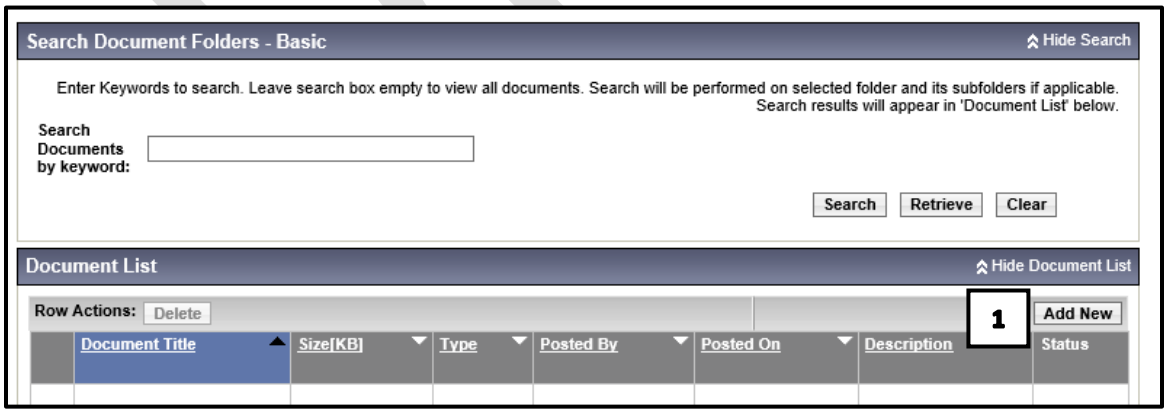


Uploading a Document to an Investigation

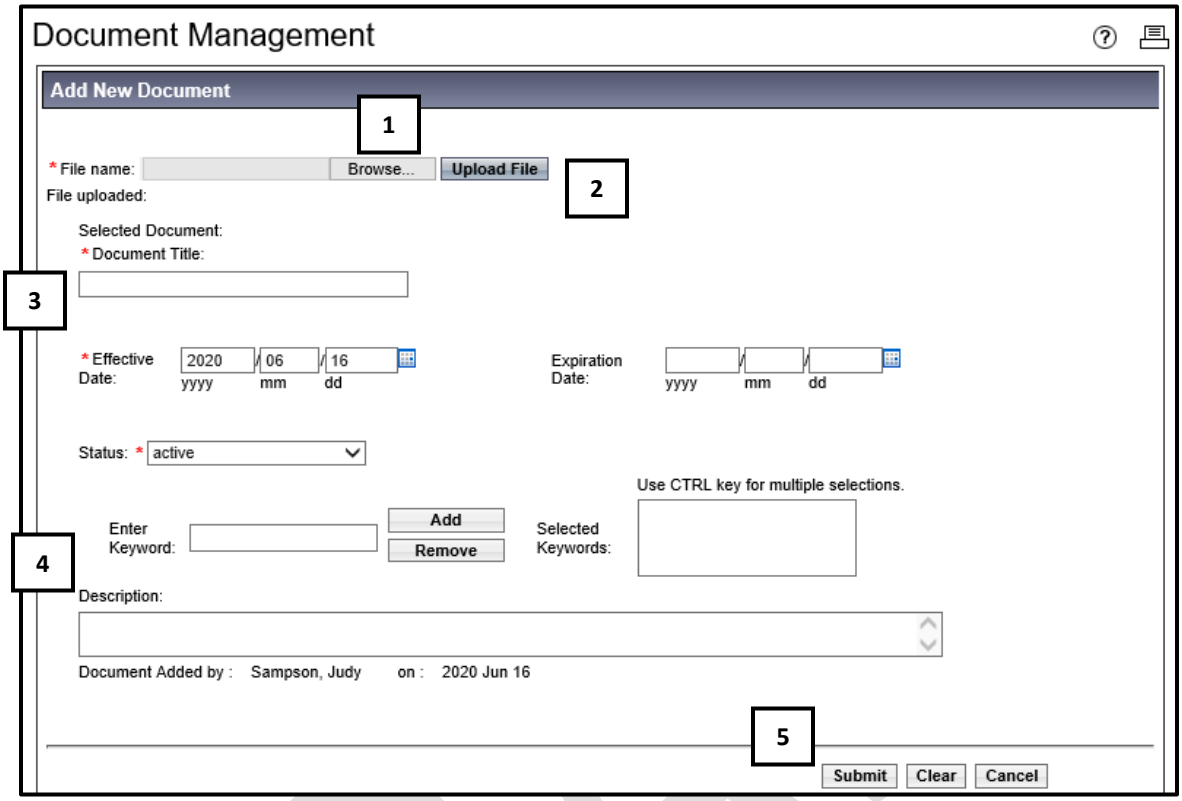
Note: Before you upload a document, ensure that an Encounter is not in the context banner. To take the encounter out of context, go to recent work and click on the investigation.



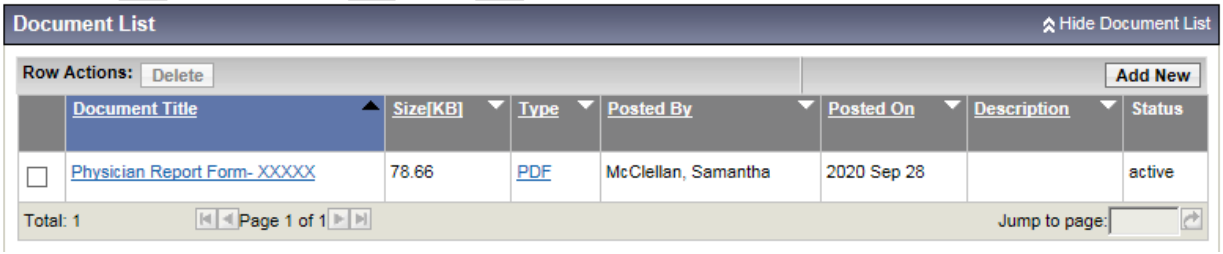
From the left-hand navigation, click on **Context Documents. Do not use User Documents.**



1. Click the **Add New** button

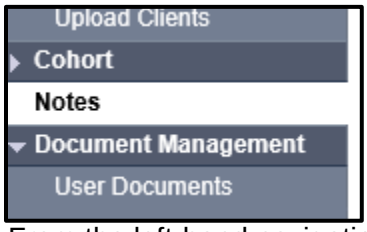


1. Browse for file- locate document and select it
2. Click the **Upload File** button. You will see that the file is uploaded
3. **Document Title** – enter the document title
4. **Description** – enter the document description
5. Click the **Submit** button

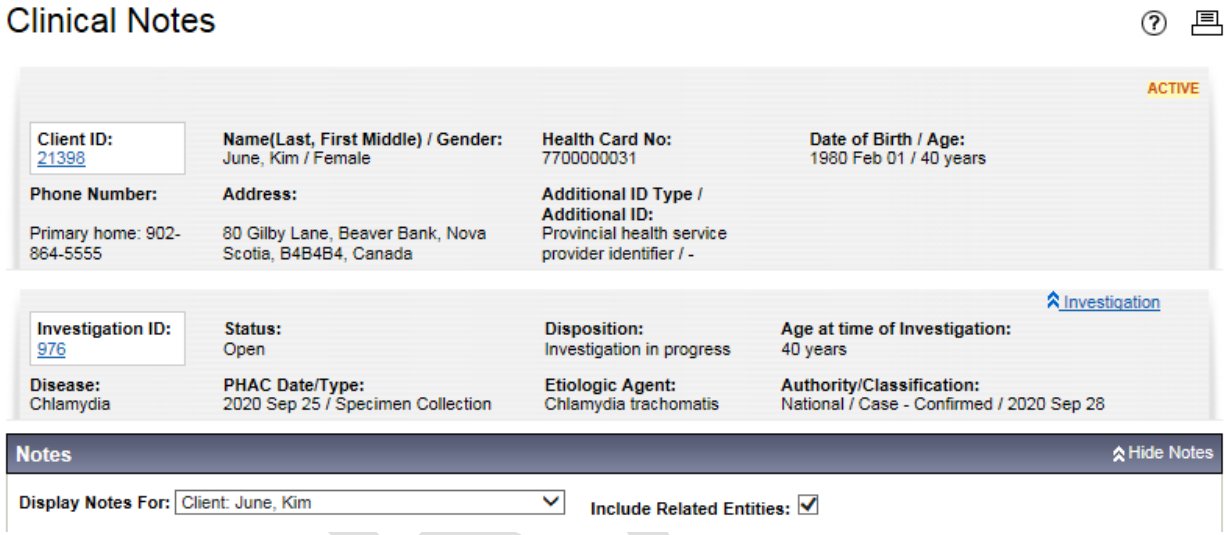


You can view the document by clicking on the hyperlinked name in the **Type** column

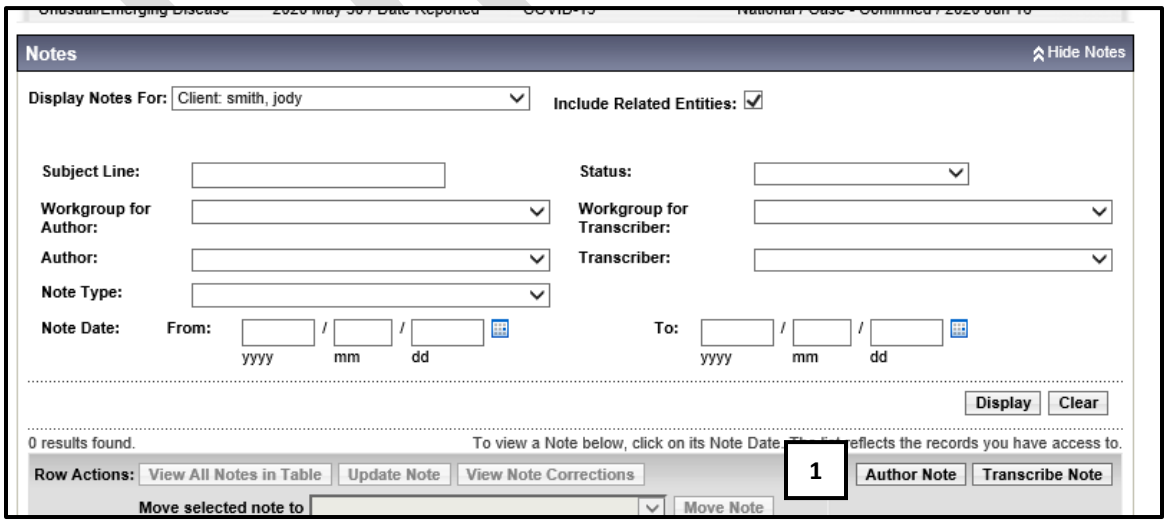
Adding a Clinical Note to an Investigation



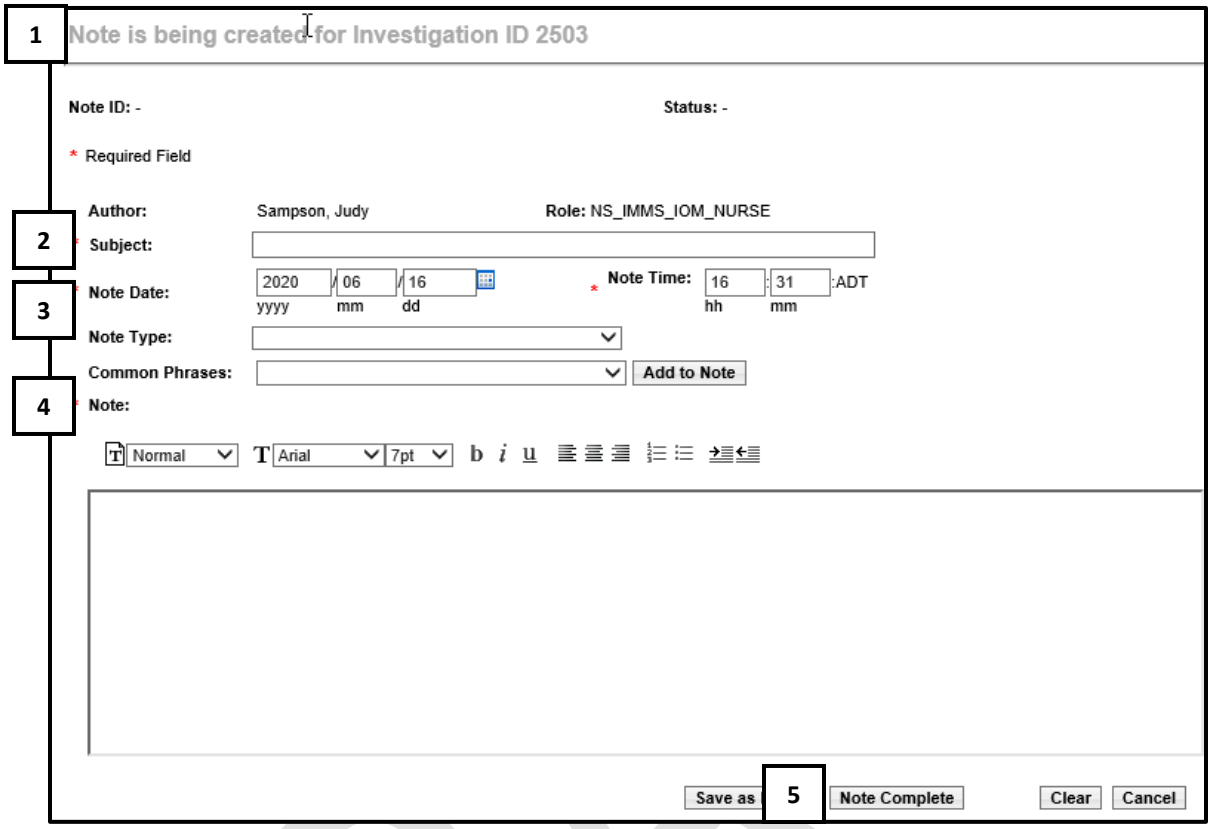
From the left-hand navigation, click on **Notes.**



Ensure your investigation is in context. Do not add the note if only the client is in context.



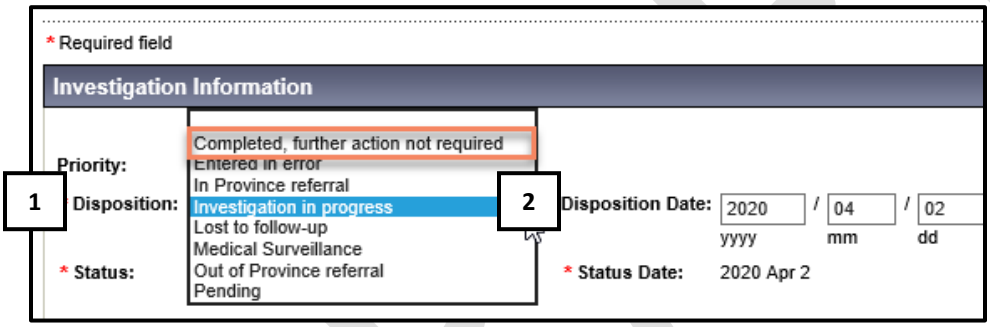
1. Click on **Author Note** button



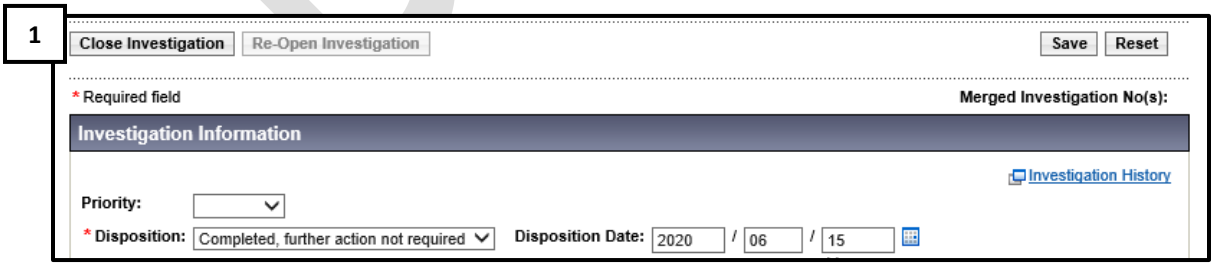
1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details
5. Click the **Note Complete** button

Update the Investigation Disposition and Close the Investigation

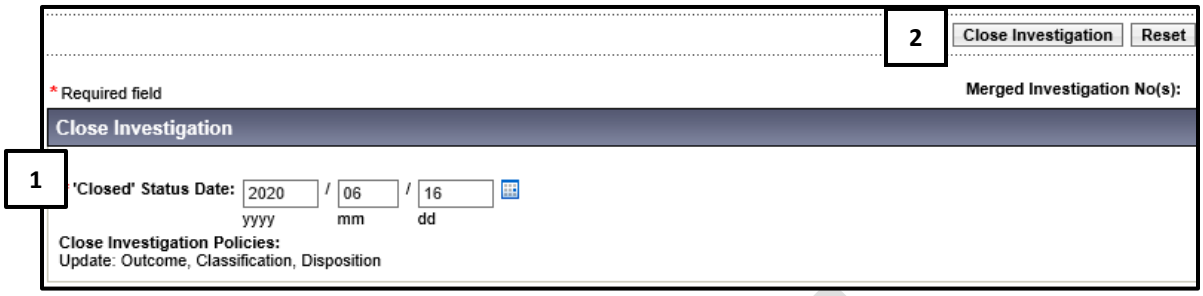
From the left-hand navigation, click on **Investigation Information.**



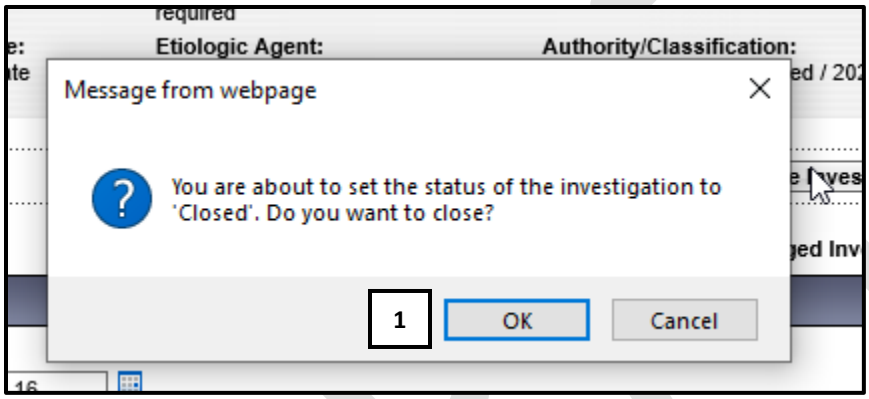
1. **Disposition** - Select appropriate response from the drop down
2. **Disposition Date** – defaults to the date of the previous disposition. Enter the close date.
3. Click the **Save** button



1. Click on the **Close Investigation** button



1. **Closed Status Date** – defaults to the current date. If the closed status date is different than the current date, enter the closed status date.
2. Click the **Close Investigation** button.

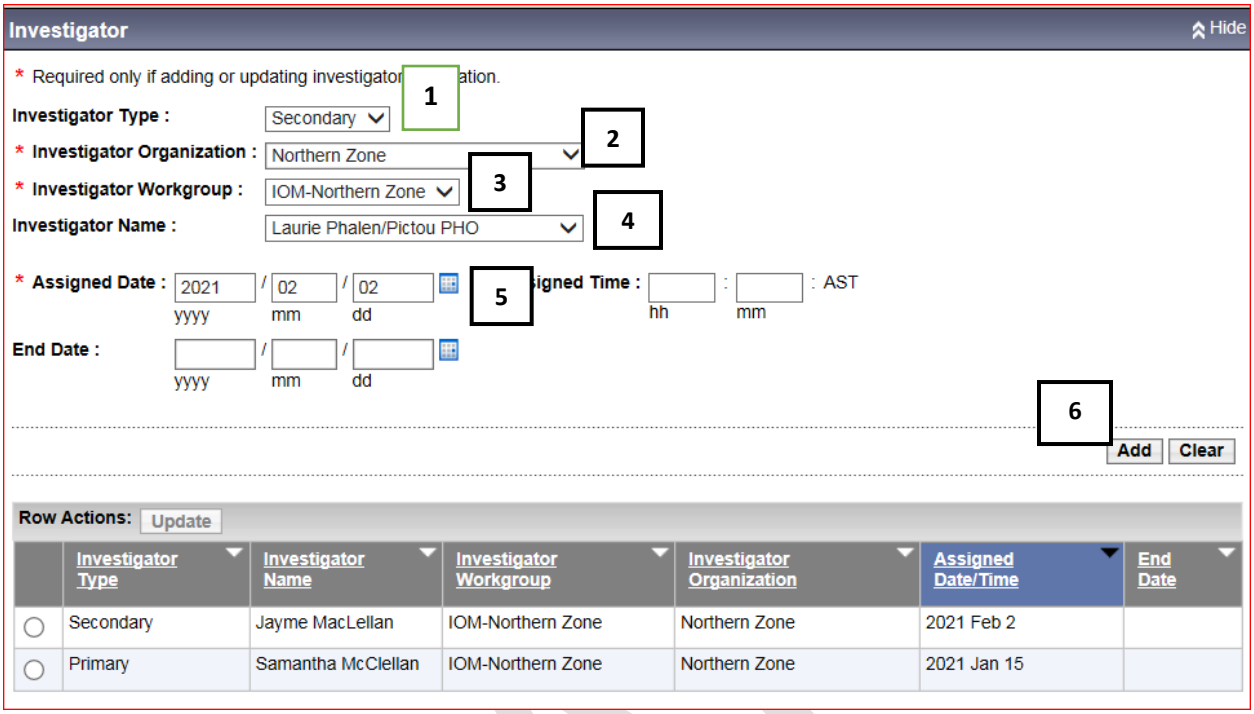


1. Click the **OK** button

Adding a Secondary Investigator

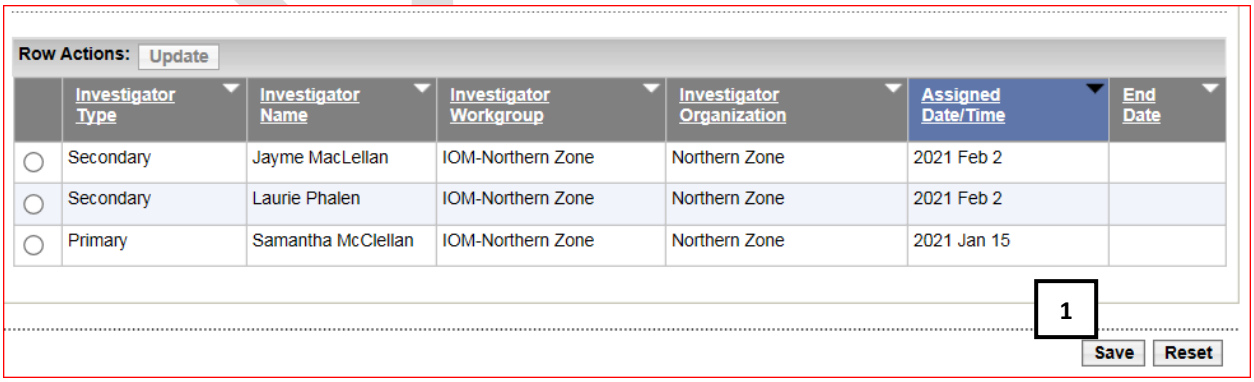
Navigate to investigation details and Resp.Org/Investigator in Left-Hand nav:

Scroll to bottom of page:



Enter the following information:

1. **Investigator Type**- Secondary
2. **Investigator Organization**- find and select the **Zone** that represents where you work.
3. **Investigator Workgroup**- IOM **the Zone** that represents where you work.
4. **Select investigator name-** your name
5. **Assigned date-** auto populates to current date and can be changed as needed
6. **Add**

New name will appear in the table below:

1. Click the Save Button