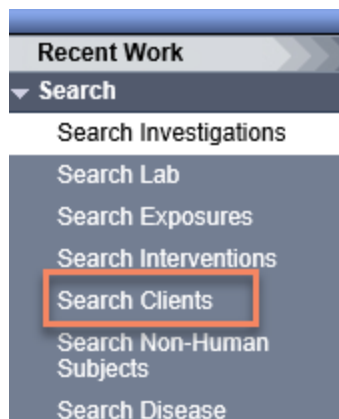


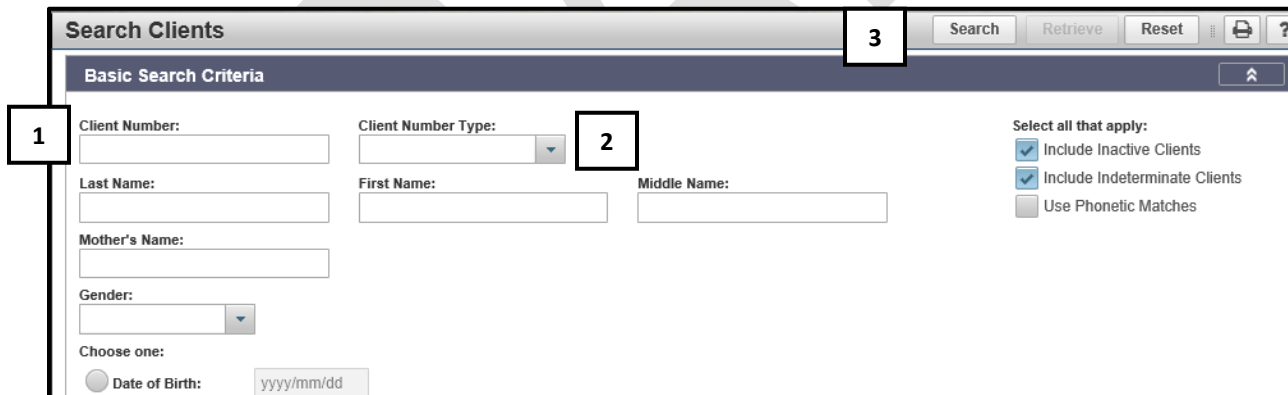
1. Search for Client
2. Update Client Phone Number and Address- Create Temporary Address
3. Create Chlamydia Investigation
4. Making a Lab Pertinent to an Investigation
5. Completing Investigation Information
6. Disease Event History- Including Site and Staging
7. Signs and Symptoms
8. Documenting Risk 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

## 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

Search Clients

5

Search

Retrieve

Reset

Print

Help

Basic Search Criteria

1

Client Number:

Client Number Type:

2

Last Name:

First Name:

Middle Name:

Mother's Name:

Gender:

3

Choose one:

4

Date of Birth:

yyyy/mm/dd

Select all that apply:

☒ Include Inactive Clients

☒ Include Indeterminate Clients

☐ Use Phonetic Matches

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

2

1

3

4

Search Results

Client Quick Entry

Create Client

Preview

Update

Set In Context

Create Cohort

Subject Summary

<input type="checkbox"/>	<input checked="" type="checkbox"/> ..	Client ID ▾	Health Card Number ▾	Last Name ▲	First Name ▲	Gender ▾	Date of Birth ▲	Health Region ▾	Active ▾
<input type="checkbox"/>	<input type="radio"/>	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	5424	9333000002	Summer	Bertha	Female	2000 Jan 01	NSHA	Active
<input type="checkbox"/>	<input type="radio"/>	5425	9333000003	Summer	Caitlin	Female	2000 Jan 01	NSHA	Active

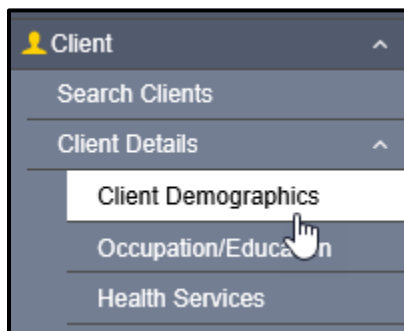
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

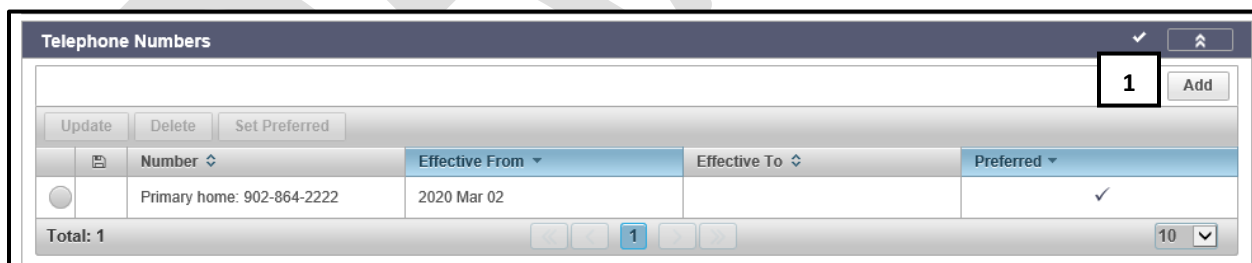
Note: The nightly Provincial Client Registry load updates the **Primary Home** and **Workplace** telephone numbers & the **Postal Address** and **Primary Home** addresses in Panorama.



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

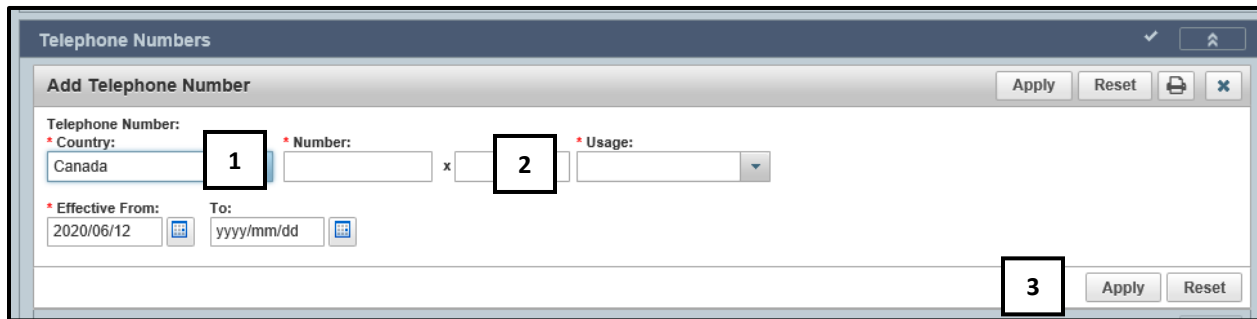
### Telephone Number

View the client's telephone numbers.



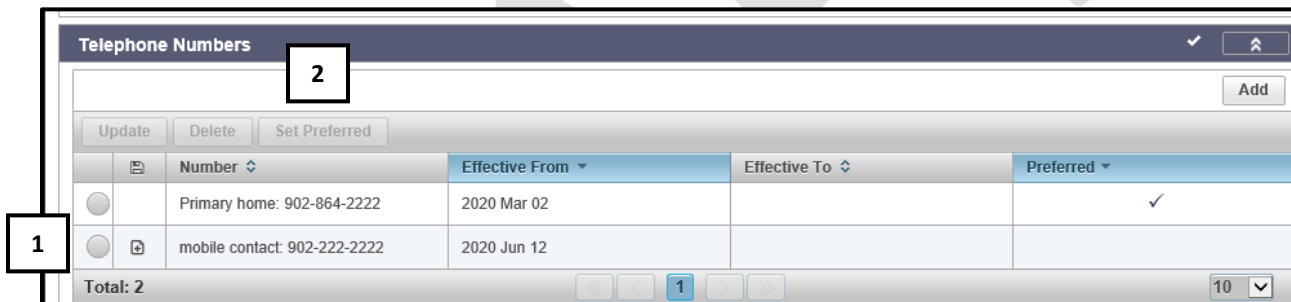
If the telephone number the client provided is different than what is in Panorama, you will need to add the telephone number.

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)

Addresses














1

Add

Update

Delete

Set Preferred

		Address Type 	Address 	Address Detail 	Effective From 	Effective To 	Preferred 	Active Household Members 	Valid 	On Reserve 
		Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02			1	—	
		Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04			1	—	

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

**Addresses**

**Add Address** Apply Reset Print Close

**Address Format:**  
☒ Structured ☐ General ☐ Semi-Structured

**1** \* **Address Type:** ▼ **Address on Reserve Administered By:**

**2** **Unit No.:**  **Street No.:**  **Street Name:**  **Street Type:** ▼ **Street Direction:** ▼

**P.O. Box:**  **STN:**  **RPO:**  **Rural Route:**

**Country:** Canada ▼ **Province / Territory:** Nova Scotia ▼ **City / Town:**  **Postal Code:**

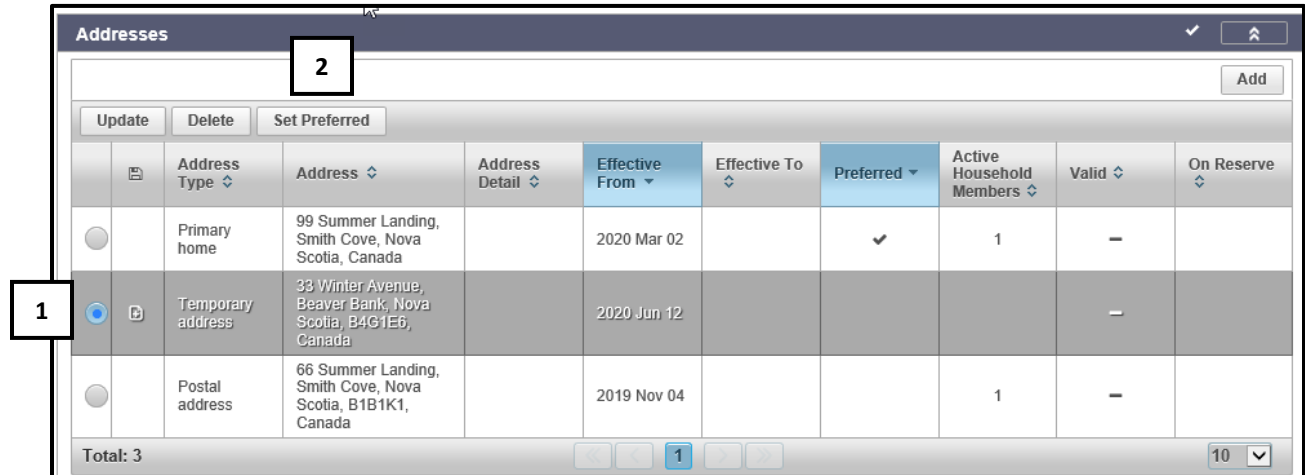
**Other Address Details:**  
  
 (100 characters remaining.)

\* **Effective From:** 2020/06/12 📅 **To:** yyyy/mm/dd 📅

**3** Apply Reset

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.



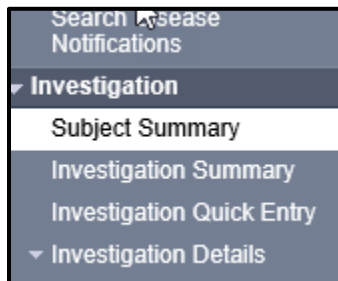
Addresses										
<input type="button" value="Add"/>										
<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Set Preferred"/>										
		Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid	On Reserve
<input type="radio"/>		Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02		✓	1	—	
<input checked="" type="radio"/>	<input type="button" value="D"/>	Temporary address	33 Winter Avenue, Beaver Bank, Nova Scotia, B4G1E6, Canada		2020 Jun 12				—	
<input type="radio"/>		Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04			1	—	

Total: 3

10

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)

## Create a Chlamydia Investigation



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

### Subject Summary

?
🖨

ACTIVE

<b>Client ID:</b> <a href="#">21398</a>	<b>Name(Last, First Middle) / Gender:</b> June, Kim / Female	<b>Health Card No:</b> 7700000031	<b>Date of Birth / Age:</b> 1980 Feb 01 / 40 years
<b>Phone Number:</b> Primary home: 902-864-5555	<b>Address:</b> 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	<b>Additional ID Type / Additional ID:</b> Provincial health service provider identifier / -	

**Report:** ▼ Launch

### Sexually Transmitted Infections Investigation Encounter Group

⬆ Hide

**Disease:** ▼
Investigation Quick Entry
Create Investigation

### Unassociated Encounters (Non-Investigation)

⬆ Hide

0 encounter(s) total Click Encounter Date for encounter details.

**Move Selected Encounter(s) To:**  
Unassociated Non-Episode Encounters ▼ Move

**Non-Episode Encounters**
Create Encounter
Hide

Encounter Date	Encounter Type	Encounter Reasons	Organization	Location
----------------	----------------	-------------------	--------------	----------

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.



Sexually Transmitted Infections Investigation  
Encounter Group
Hide

Disease:

Investigation Quick Entry  
Create Investigation

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

Disease Summary
Hide

\* Disease: 1 Chlamydia  
\* Authority: 2 National  
\* Classification: Case - Confirmed 3  
\* Classification Date: 2020 / 09 / 28 4  
Microorganism: Chlamydia trachomatis 5  
Serotype:   
Information Source:

Investigation Information
Hide

Priority:   
\* Disposition: Investigation in progress 6

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

Responsible Organization / Investigator Hide

\* Responsible Organization :

Amherst Public Health Office

1

To specify an Organization, first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

Find

\* Responsible Organization Workgroup :

IOM-Amherst PHO-Unmonitored

2

\* Responsible Organization Date :

2020 / 09 / 28

yyyy mm dd

3

\* Investigator Organization :

Northern Zone

4

\* Investigator Workgroup :

IOM-Northern Zone

5

Investigator Name :

Samantha McClellan/Amherst PHO

6

\* Assigned Date :

2020 / 09 / 28

yyyy mm dd

7

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

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

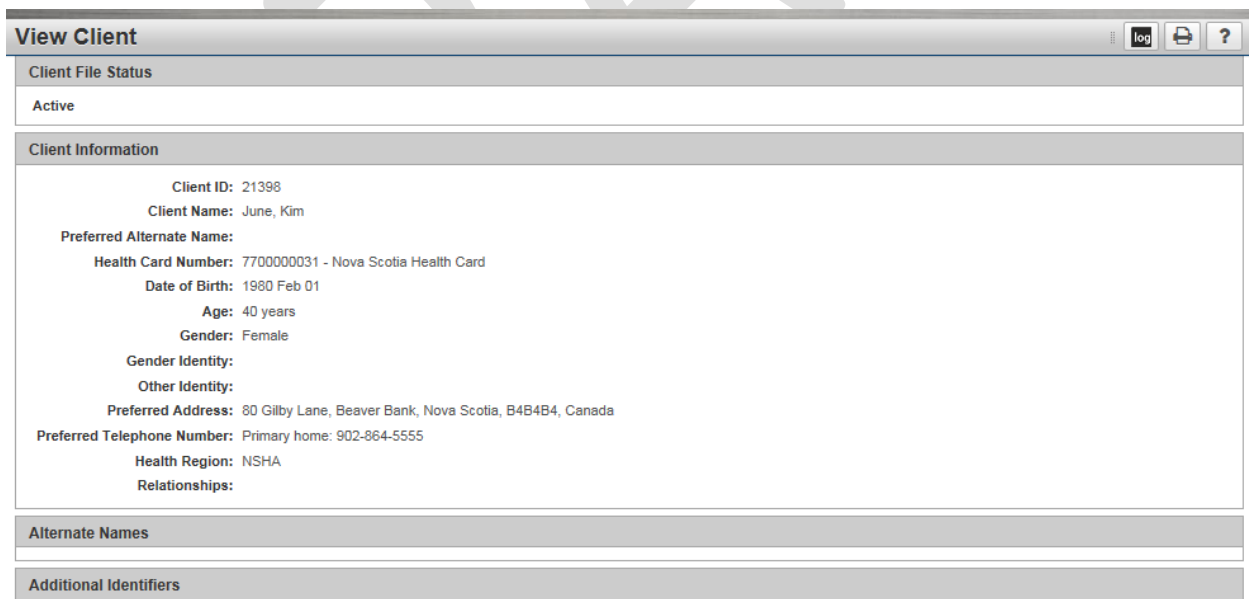
When a lab has been processed from the Electronic Lab Report Inbox, it sits at the **Subject Summary** level until it is attached to an Investigation by an Investigator.

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



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

This will bring you to the View Client page.



The screenshot shows the 'View Client' page. At the top, there is a header bar with the title 'View Client' and icons for 'log', 'print', and 'help'. Below the header, there are three main sections: 'Client File Status', 'Client Information', and 'Alternate Names'. The 'Client File Status' section shows 'Active'. The 'Client Information' section contains the following details: Client ID: 21398, Client Name: June, Kim, Preferred Alternate Name: (blank), Health Card Number: 7700000031 - Nova Scotia Health Card, Date of Birth: 1980 Feb 01, Age: 40 years, Gender: Female, Gender Identity: (blank), Other Identity: (blank), Preferred Address: 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada, Preferred Telephone Number: Primary home: 902-864-5555, Health Region: NSHA, and Relationships: (blank). The 'Alternate Names' section is empty. The 'Additional Identifiers' section is also empty.



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.

Row Actions: [Delete Test](#) [Set to Cannot Report](#)

Subject Investigations:  [Link to Investigation](#) **1**

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.

Row Actions: [Delete Test](#) [Set to Cannot Report](#)

Subject Investigations:  [Link to Investigation](#)

Pertinent Investigations:  [Unlink from Investigation](#)

Test Annotations:  [Update Annotations](#)  
(4000 characters)

	Test ID	Resulted	Test Name	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group
<input checked="" type="radio"/>	<a href="#">207</a>	✓	NAAT	Swab/ Cervical	2020 Sep 25	<a href="#">976, Chlamydia, 2020 Sep 28</a> <b>1</b>		Sexually Transmitted Infections Investigation

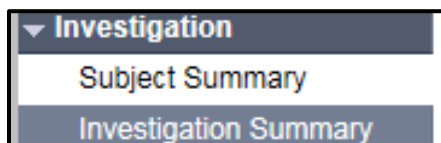
Reason for Deletion:  [Delete](#) **2** [Save](#) [Reset](#) [Cancel](#)

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**.

## Subject Summary



**ACTIVE**

<b>Client ID:</b> <a href="#">21398</a>	<b>Name (Last, First Middle) / Gender:</b> June, Kim / Female	<b>Health Card No:</b> 7700000031	<b>Date of Birth / Age:</b> 1980 Feb 01 / 40 years
<b>Phone Number:</b> Primary home: 902-864-5555	<b>Address:</b> 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	<b>Additional ID Type / Additional ID:</b> Provincial health service provider identifier / -	

**Sexually Transmitted Infections Investigation Encounter Group** ⬆ Hide

**Disease:** ▼

[Investigation Quick Entry](#)  
[Create Investigation](#)

**Investigation 976 - Chlamydia - Open** ⬆ Hide

<b>Investigation ID:</b> <a href="#">976</a>	<b>Status:</b> Open	<b>Investigator:</b> Samantha McClellan	<b>Linked Outbreaks:</b> -	<b>Report Date (Sent):</b> -	<b>Report Date (Received):</b> 28 September 2020
---	------------------------	--	-------------------------------	---------------------------------	---

Disease	Etiologic Agent	Epi Markers	Authority / Classification   Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Chlamydia	Chlamydia trachomatis	-	✓ National / Case - Confirmed 2020 Sep 28	-	-

1

1. Click the Hyperlink associated to the current investigation

## Investigation Summary



ACTIVE

<b>Client ID:</b> <a href="#">21398</a>	<b>Name(Last, First Middle) / Gender:</b> June, Kim / Female	<b>Health Card No:</b> 7700000031	<b>Date of Birth / Age:</b> 1980 Feb 01 / 40 years
<b>Phone Number:</b> Primary home: 902-864-5555	<b>Address:</b> 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	<b>Additional ID Type / Additional ID:</b> Provincial health service provider identifier / -	

<b>Investigation ID:</b> <a href="#">976</a>	<b>Status:</b> Open	<b>Disposition:</b> Investigation in progress	<b>Age at time of Investigation:</b> 40 years
<b>Disease:</b> Chlamydia	<b>PHAC Date/Type:</b> 2020 Sep 25 / Specimen Collection	<b>Etiologic Agent:</b> Chlamydia trachomatis	<b>Authority/Classification:</b> National / Case - Confirmed / 2020 Sep 28

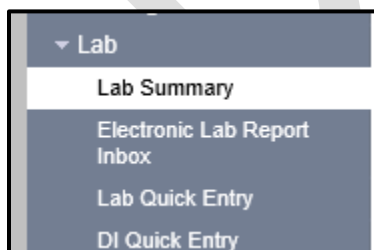
[Investigation](#)

**Note:** The Investigation is now back in Context

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

Lab Tests									
									<a href="#">Hide Lab Tests</a>
Lab									
									<a href="#">Hide Lab</a>
									<a href="#">Lab Summary</a>
	Specimen Collection Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status
⊕	2020 Sep 25	Swab / -	Presence or identity	Positive;			Chlamydia trachomatis	-	Final

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

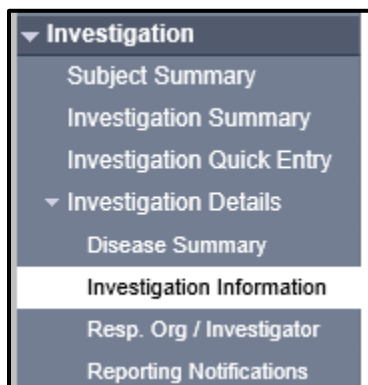


From the left-hand navigation, click on **Lab Summary**



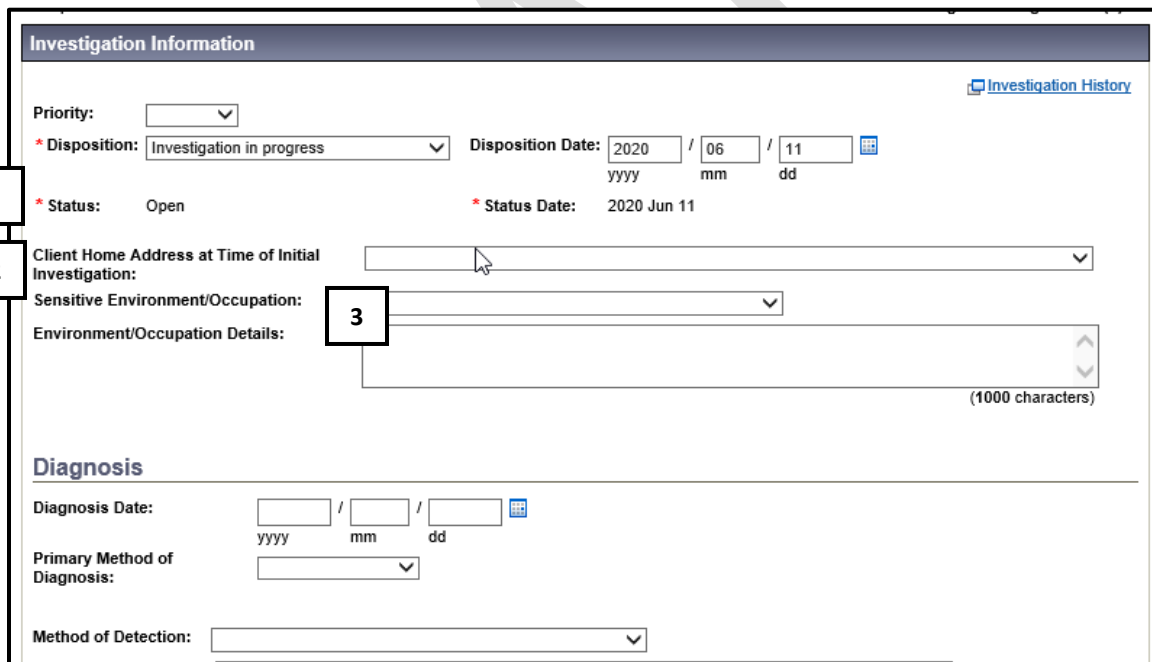
## Completing Investigation Information

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




- Investigation
  - Subject Summary
  - Investigation Summary
  - Investigation Quick Entry
  - Investigation Details
    - Disease Summary
    - Investigation Information**
    - Resp. Org / Investigator
    - Reporting Notifications

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



**Investigation Information**

Priority:

\* Disposition:  Disposition Date:  /  /  

yyyymmdd

\* Status: Open \* Status Date: 2020 Jun 11


Client Home Address at Time of Initial Investigation:

Sensitive Environment/Occupation:

Environment/Occupation Details:

(1000 characters)

**Diagnosis**

Diagnosis Date:  /  /  

yyyy mm dd

Primary Method of Diagnosis:

Method of Detection:

- Disposition and Disposition Date** – are auto-populated when the investigation was created And can be changed as needed
- Status and Status Date** – are auto-populated when the investigation was created
- 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.

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

\* Status: Open      \* Status Date: 2020 Sep 28

Client Home Address at Time of Initial Investigation:

## Disease Event History- Including Site and Staging

**Recent Work**

- Search
  - Search Investigations
  - Search Lab
  - Search Exposures
  - Search Interventions
  - Search Clients
  - Search Non-Human Subjects
  - Search Disease Notifications
- Investigation
  - Subject Summary
  - Investigation Summary
  - Investigation Quick Entry
  - Investigation Details
    - Disease Summary**
    - Investigation Information
    - Resp. Org / Investigator
    - Reporting Notifications
    - External Sources
    - Links & Attachments
    - Close Investigation
    - Lab
      - Encounter Details
      - Signs & Symptoms
      - Outcomes
      - Incubation & Communicability

### Disease Summary

ACTIVE

Client ID: <a href="#">21398</a>	Name (Last, First Middle) / Gender: June, Kim / Female	Health Card No: 7700000031	Date of Birth / Age: 1980 Feb 01 / 40 years
Phone Number: Primary home: 902-864-5555	Address: 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation ID: <a href="#">976</a>	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 40 years
Disease: Chlamydia	PHAC Date/Type: 2020 Sep 28 / Date Reported	Etiologic Agent: Chlamydia trachomatis	Authority/Classification: National / Case - Confirmed / 2020 Sep 28

Merged Investigation No(s):

#### Disease Summary

Add New Disease

#### Disease Event 976 - Chlamydia

Hide

PHAC Date / Date Type: 2020 Sep 28 / Date Reported      Disease Origin: Living on Reserve Most of the Time:

Disease	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification   Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Chlamydia	Chlamydia trachomatis	-		✓ National / Case - Confirmed      2020 Sep 28	-	-

Update      Delete

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

## Disease Event Details



<b>ACTIVE</b>			
<b>Client ID:</b> 21398	<b>Name(Last, First Middle) / Gender:</b> June, Kim / Female	<b>Health Card No:</b> 7700000031	<b>Date of Birth / Age:</b> 1980 Feb 01 / 40 years
<b>Phone Number:</b> Primary home: 902-864-5555	<b>Address:</b> 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	<b>Additional ID Type / Additional ID:</b> Provincial health service provider identifier / -	

<b>Investigation ID:</b> 976	<b>Status:</b> Open	<b>Disposition:</b> Investigation in progress	<b>Age at time of Investigation:</b> 40 years
<b>Disease:</b> Chlamydia	<b>PHAC Date/Type:</b> 2020 Sep 28 / Date Reported	<b>Etiologic Agent:</b> Chlamydia trachomatis	<b>Authority/Classification:</b> National / Case - Confirmed / 2020 Sep 28

3 Save Reset Cancel

### Disease Event Details

**PHAC Date / Date Type:** 2020 Sep 28 / Date Reported

**Disease Origin:**

**Living on Reserve Most of the Time:**  (during initial investigation)

### Disease Event History

**\* Disease:** Chlamydia

**Microorganism:** Chlamydia trachomatis

**Serotype:**

**Information Source:**

**Site(s):** Hold Ctrl and then click to select multiple items.

**1 Available Sites:**

- Eye
- Genital
- Nasopharynx
- Other

**Selected Sites(s):**

Add >

< Remove

**Staging:**  **2**

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

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)



1

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

Row Actions:

Reason for Deletion :  
Present: 
Onset Date:

	Sign/Symptom ▲	Present ▼	Onset Date/Time ▼	Recovery Date/Time ▼	Duration ▼	Reported By ▼	Details Exist ▼
<input type="checkbox"/>	Abdominal pain/discomfort/cramps	No					<a href="#">No</a>
<input type="checkbox"/>	Abnormal vaginal bleeding (females)	No					<a href="#">No</a>
<input type="checkbox"/>	Asymptomatic	No					<a href="#">No</a>
<input type="checkbox"/>	Cervicitis	No					<a href="#">No</a>
<input type="checkbox"/>	Chronic pelvic pain (females)	No					<a href="#">No</a>
<input type="checkbox"/>	Conjunctivitis	No					<a href="#">No</a>
<input type="checkbox"/>	Dyspareunia (females)	No					<a href="#">No</a>
<input type="checkbox"/>	Dysuria	Yes	2020 Oct 1 00:00 ADT				<a href="#">No</a>
<input type="checkbox"/>	Ectopic pregnancy (females)	No					<a href="#">No</a>
<input type="checkbox"/>	Epididymis pain (males)	No					<a href="#">No</a>
<input type="checkbox"/>	Epididymo-orchitis (males)	No					<a href="#">No</a>
<input type="checkbox"/>	Infertility (females)	No					<a href="#">No</a>
<input type="checkbox"/>	Pelvic inflammatory disease (females)	No					<a href="#">No</a>
<input type="checkbox"/>	Pharyngitis	No					<a href="#">No</a>

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

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

Sign or Symptom										
* Required field										
* Sign or Symptom:	<input type="text"/>								<b>1</b>	
Preset:	No									
Onset:	No									
* Present:	<input type="text" value="Yes"/>									
Onset Date/Time:	<b>2</b>	<input type="text" value=""/> yyyy	/	<input type="text" value=""/> mm	/	<input type="text" value=""/> dd	<input type="button" value="Calendar"/>	: <input type="text" value=""/> hh	: <input type="text" value=""/> mm	ADT Estimated: <input type="checkbox"/>
Recovery Date/Time:		<input type="text" value=""/> yyyy	/	<input type="text" value=""/> mm	/	<input type="text" value=""/> dd	<input type="button" value="Calendar"/>	: <input type="text" value=""/> hh	: <input type="text" value=""/> mm	ADT Estimated: <input type="checkbox"/>
Duration:	<input type="text" value="0"/>	Days +	<input type="text" value="0"/>	Hours +	<input type="text" value="0"/>	Minutes	(Duration = Recovery Date/Time - Onset Date/Time)			
Reported By:	<input type="text"/>									
									<b>3</b>	
									<input type="button" value="Add"/> <input type="button" value="Clear"/>	
Row Actions:										
<input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>										
Reason for Deletion :										
<input type="text" value=""/> <input type="button" value="Delete"/>										
Present:										
<input type="text" value=""/> <input type="button" value="Calendar"/>										
Onset Date:										
<input type="text" value=""/> yyyy <input type="text" value=""/> mm <input type="text" value=""/> dd <input type="button" value="Calendar"/>										
<input type="button" value="Apply Update"/>										

**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)

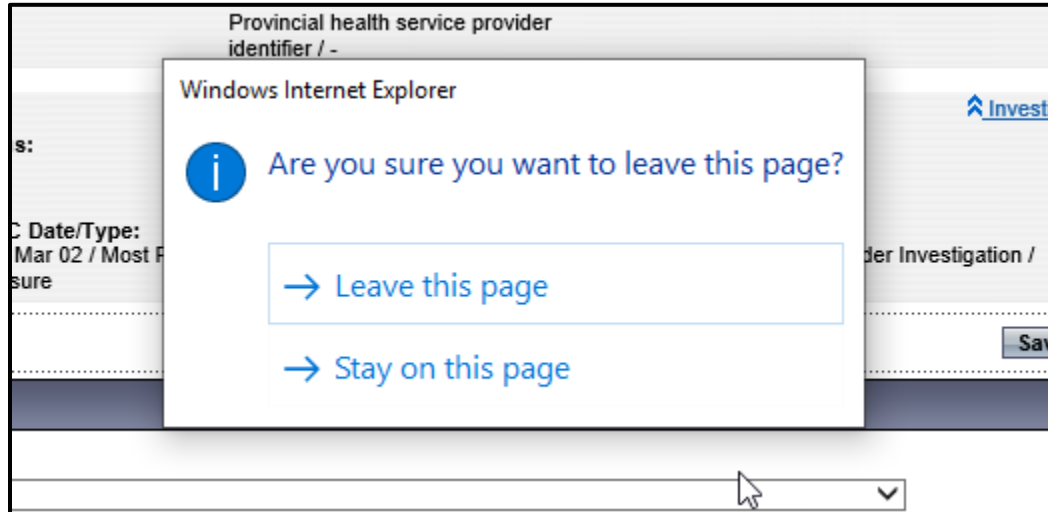
Sign or Symptom	
* Required field	
* Sign or Symptom:	Other
* Other Sign or Symptom:	loss of smell <span>✕</span>

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)

Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				<a href="#">No</a>
----------------------	-----	-----------------------	--	--	--	--------------------

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.

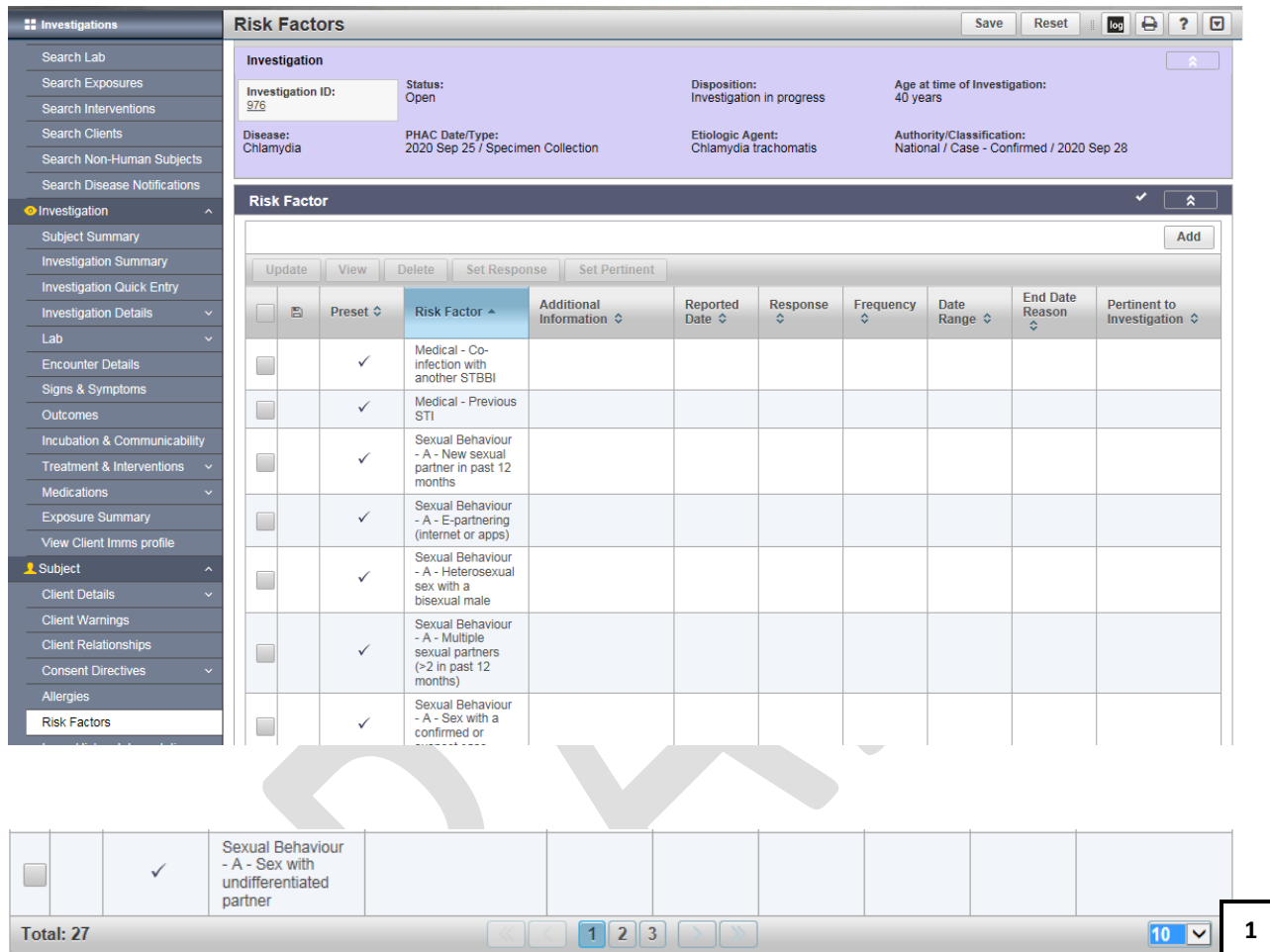


## Documenting Risk Factors





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



**Investigation**

Investigation ID: 976 Status: Open Disposition: Investigation in progress Age at time of Investigation: 40 years

Disease: Chlamydia PHAC Date/Type: 2020 Sep 25 / Specimen Collection Etiologic Agent: Chlamydia trachomatis Authority/Classification: National / Case - Confirmed / 2020 Sep 28

**Risk Factor**

Update	View	Delete	Set Response	Set Pertinent									
					Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Medical - Co-infection with another STBBI							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Medical - Previous STI							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Sexual Behaviour - A - New sexual partner in past 12 months							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Sexual Behaviour - A - E-partnering (internet or apps)							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Sexual Behaviour - A - Heterosexual sex with a bisexual male							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Sexual Behaviour - A - Multiple sexual partners (>2 in past 12 months)							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Sexual Behaviour - A - Sex with a confirmed or							

Total: 27

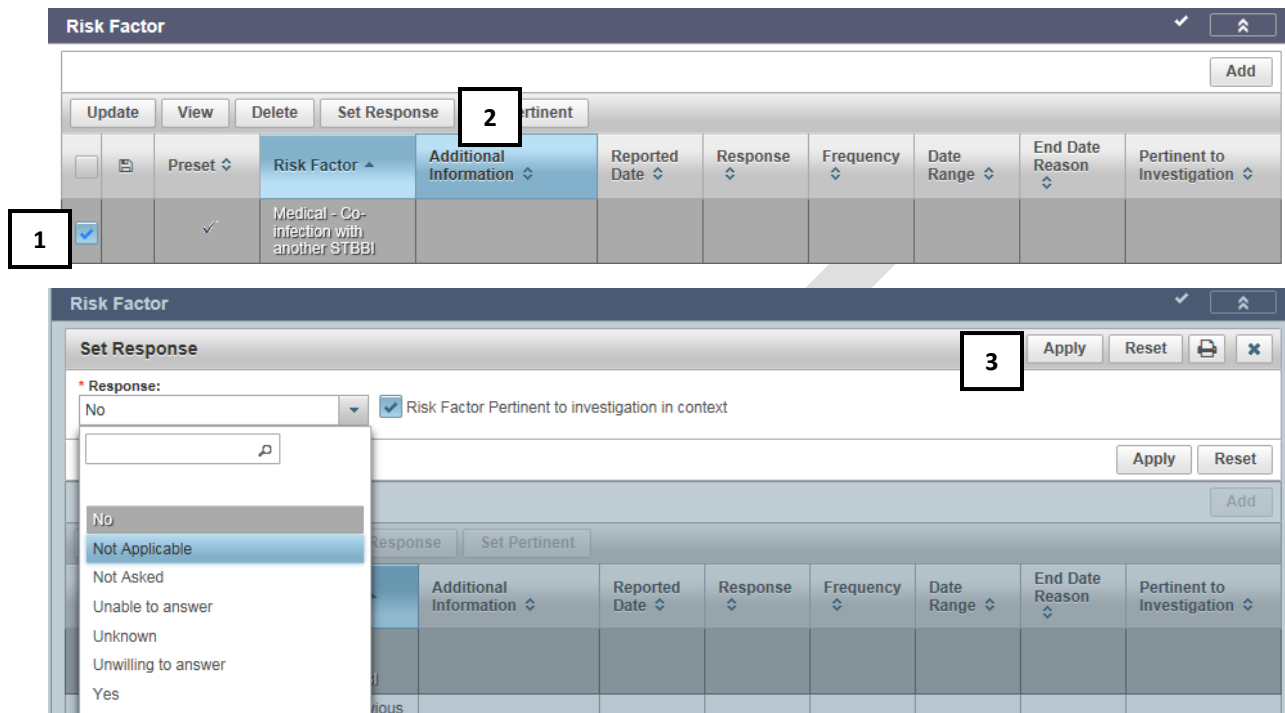
10

1

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:



The screenshot shows the 'Risk Factor' management interface. It includes a table of risk factors and a 'Set Response' modal window.

**Step 1:** Selecting a risk factor. In the table, the first row 'Medical - Co-infection with another STBBI' has its checkbox selected (indicated by a blue box with '1').

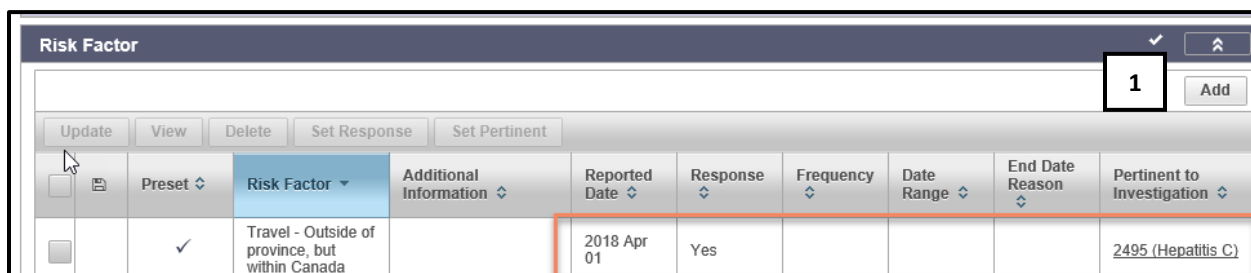
**Step 2:** Clicking 'Set Response'. The 'Set Response' modal is open, showing a dropdown menu for 'Response' with 'Not Applicable' selected (indicated by a blue box with '2').

**Step 3:** Clicking 'Apply'. The 'Apply' button in the 'Set Response' modal is highlighted (indicated by a blue box with '3').

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

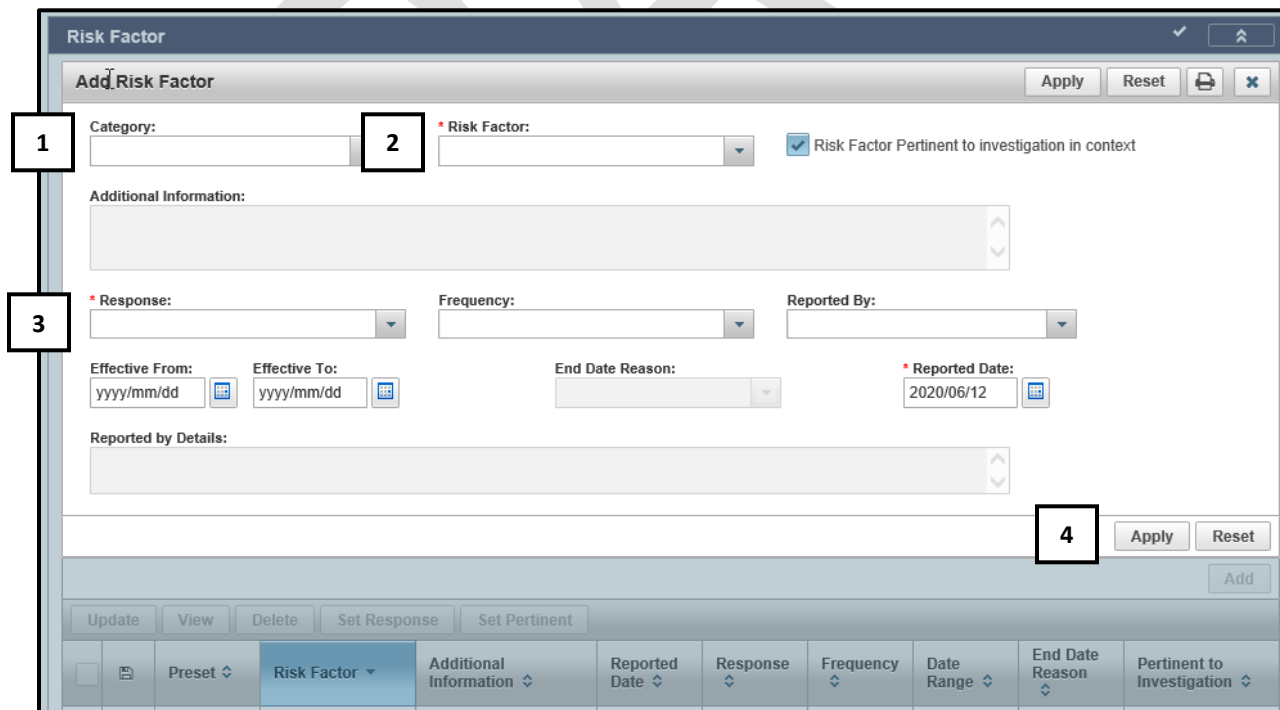
For a preset risk factors that contains a response Pertinent to another Investigation or to add a risk factor that is not a preset:



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 from the drop-down list
4. Click the **Apply** button

<input type="checkbox"/>			Travel - Outside of Canada		2020 Sep 28	Yes				<a href="#">976 (Chlamydia)</a>
<input type="checkbox"/>		✓	Travel - Outside of Canada		2018 Jan 01	Yes				<a href="#">810 (Salmonellosis)</a>

## Risk Factors

2

Save

Reset

log

print

?

list

Active

Client ID:  
21398



Name (Last, First Middle) / Gender:  
June, Kim / Female

Health Card No:  
770000031

Date of Birth / Age:  
1980 Feb 01 / 40 years

Phone Number:  
Primary home:  
902-864-5555

Address:  
80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada

Additional ID Type / Additional ID:  
Provincial health service provider identifier / -

### Investigation

Investigation ID:  
[976](#)

Status:  
Open

Disposition:  
Investigation in progress

Age at time of Investigation:  
40 years

Disease:  
Chlamydia

PHAC Date/Type:  
2020 Sep 25 / Specimen Collection

Etiologic Agent:  
Chlamydia trachomatis

Authority/Classification:  
National / Case - Confirmed / 2020 Sep 28

### Risk Factor

Add

Update

View

Delete

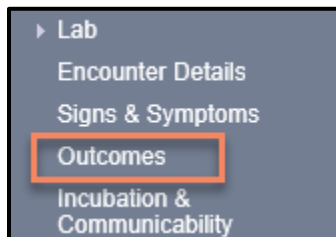
Set Response

Set Pertinent

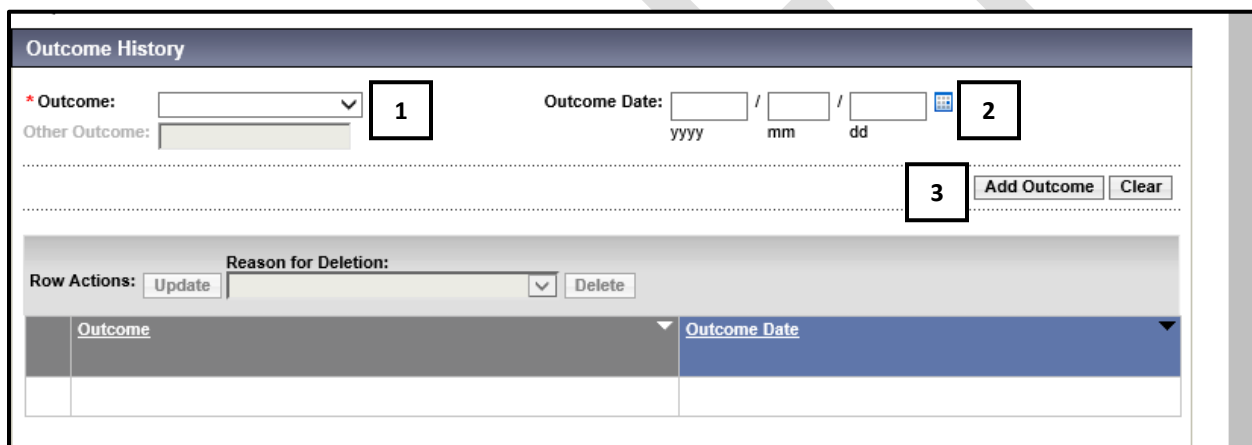
<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Medical - Co-infection with another STBBI		2020 Sep 28	No				<a href="#">976 (Chlamydia)</a>
<input type="checkbox"/>		✓	Medical - Previous STI		2020 Sep 28	No				<a href="#">976 (Chlamydia)</a>
			Sexual Behaviour							

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**



The screenshot shows the 'Outcome History' form. It includes a dropdown for '\* Outcome:' (callout 1), an 'Outcome Date' field with year, month, and day inputs (callout 2), and an 'Add Outcome' button (callout 3). Below the form is a table with columns 'Outcome' and 'Outcome Date'.

**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

Outcome	Outcome Date
<input type="radio"/> Alive-Not Hospitalized	2020 Sep 28

Comments
 

(4000 characters)

Add

Date	Comments	Recorded By
<div> <div>Save</div> <div>Reset</div> </div>		

1. Click the **Save** button

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

Medications

Medications Summary

Medications History

Adherence Summary

DOT Summary

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

Maintain Medication Details

Hide Maintain Medication Details

\* Required field

1

Other Meds:

☒

Course Completed:

Protocol:

Standard Tx:

Drug:

2

Drug Description:

Azithromycin

3

Select Drug

Tx Prescribed / Authorized By:

Use this Provider:

Click Find to select a provider:

Provider:

Find

Use Other Provider:

4

Dosage:

1000.0

Unit: mg

Route:

Frequency:

Duration:

Unit:

Order Duration:

Unit:

5

Tx Prescribed / Authorized Date:

2020

10

01

yyyy mm dd

Tx Effective From Date:

2020

10

01

yyyy mm dd

Estimated:

☐

Reason:

Other Reason:

Special Direction:

(100 characters)

6

Add

Clear

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** table located near the bottom of the screen.

Panorama- Chlamydia Case Management

Page 31 of 40

Version 1.5 Last Updated: 2021-02-19

Other Meds

Row Actions:

Update

Delete

Course Completed:

Update Course Completed

Show Active

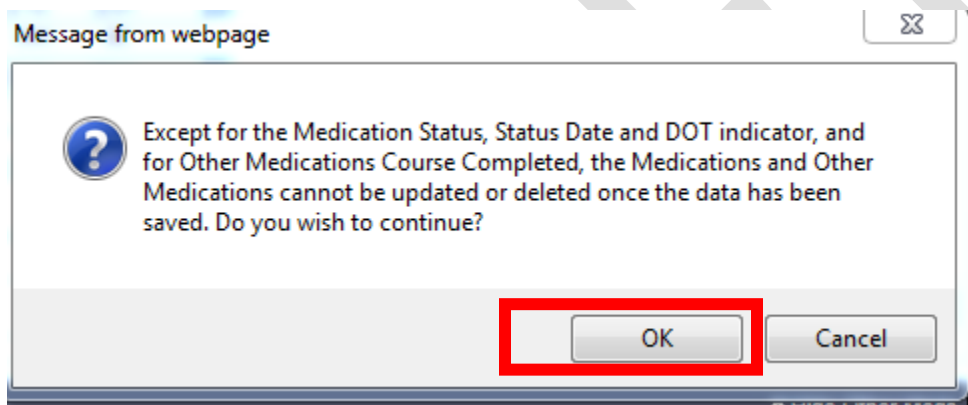
	Drug	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	Course Completed
<input type="checkbox"/>	Azithromycin	1,000 mg	-	2020 Oct 1	-	-	-

1

Save Reset

**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

Other Meds

Row Actions:

Update

Delete

Course Completed:

Prescription Complete

Update Course Completed

Show Active

	Drug	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	Course Completed
1	<input checked="" type="checkbox"/>	Azithromycin	1,000 mg	-	2020 Oct 1	-	-

Save

Reset

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.

Other Meds

Row Actions:

Update

Delete

Course Completed:

Prescription Complete

Update Course Completed

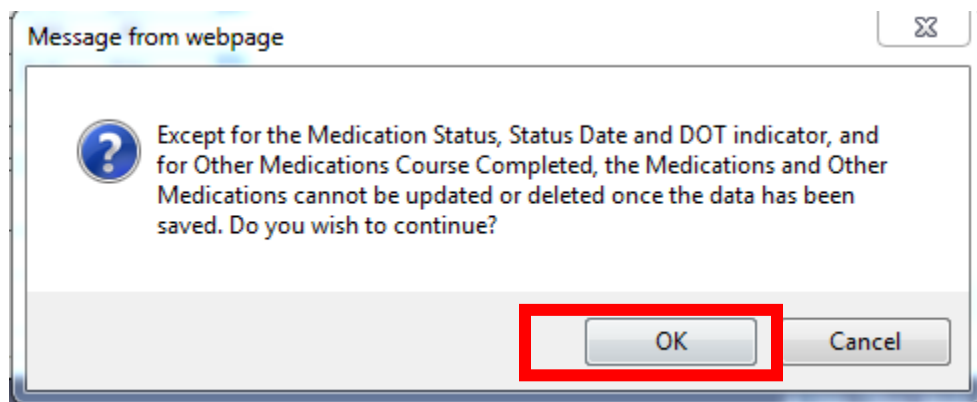
Show Active

	Drug	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	Course Completed
	<input checked="" type="checkbox"/>	Azithromycin	1,000 mg	-	2020 Oct 1	-	Prescription Complete

Save

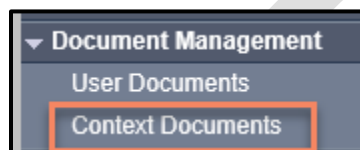
Reset

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

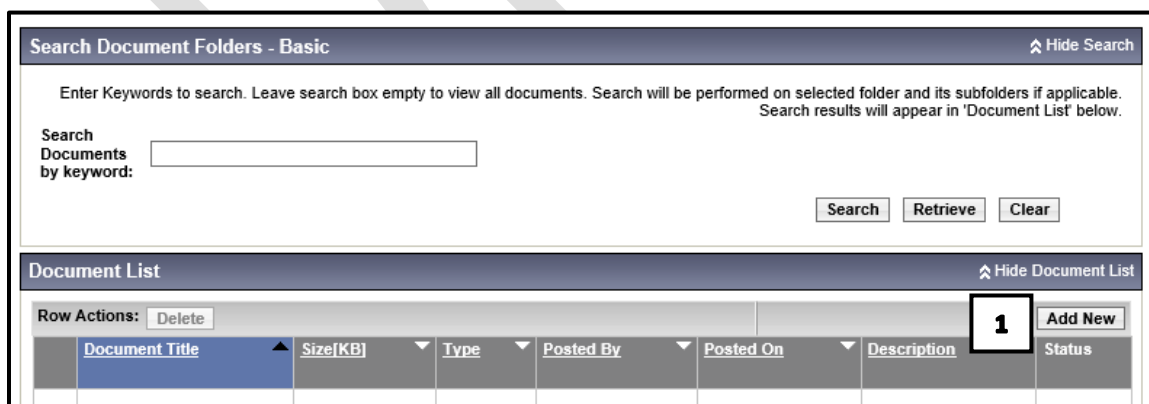


## Uploading a Document to an Investigation

**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

Document Management

Add New Document

1

\* File name:  Browse...

2

File uploaded:

Selected Document:

\* Document Title:

3

\* Effective Date: / /

Expiration Date: / /

Status: \* active

4

Enter Keyword:

Selected Keywords:

Description:

Document Added by : Sampson, Judy on : 2020 Jun 16

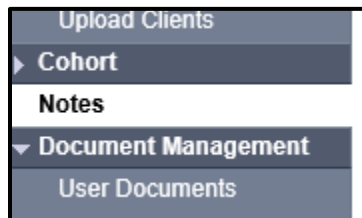
5

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

Document List							
<div> Row Actions: <input type="button" value="Delete"/> </div> <div> <input type="button" value="Add New"/> </div>							
	Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status
<input type="checkbox"/>	<a href="#">Physician Report Form- XXXXX</a>	78.66	<a href="#">PDF</a>	McClellan, Samantha	2020 Sep 28		active
<div> Total: 1 </div> <div> Page 1 of 1 </div> <div> Jump to page: </div>							

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**.

### Clinical Notes



ACTIVE

<b>Client ID:</b> <a href="#">21398</a>	<b>Name (Last, First Middle) / Gender:</b> June, Kim / Female	<b>Health Card No:</b> 7700000031	<b>Date of Birth / Age:</b> 1980 Feb 01 / 40 years
<b>Phone Number:</b> Primary home: 902-864-5555	<b>Address:</b> 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	<b>Additional ID Type / Additional ID:</b> Provincial health service provider identifier / -	

<b>Investigation ID:</b> <a href="#">976</a>	<b>Status:</b> Open	<b>Disposition:</b> Investigation in progress	<b>Age at time of Investigation:</b> 40 years
<b>Disease:</b> Chlamydia	<b>PHAC Date/Type:</b> 2020 Sep 25 / Specimen Collection	<b>Etiologic Agent:</b> Chlamydia trachomatis	<b>Authority/Classification:</b> National / Case - Confirmed / 2020 Sep 28

**Notes** ↑ Hide Notes

**Display Notes For:** Client: June, Kim **Include Related Entities:** ☒

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

**Notes** ↑ Hide Notes

**Display Notes For:** Client: smith, jody **Include Related Entities:** ☒

<b>Subject Line:</b>	<input type="text"/>	<b>Status:</b>	<input type="text"/>
<b>Workgroup for Author:</b>	<input type="text"/>	<b>Workgroup for Transcriber:</b>	<input type="text"/>
<b>Author:</b>	<input type="text"/>	<b>Transcriber:</b>	<input type="text"/>
<b>Note Type:</b>	<input type="text"/>		

**Note Date:** From:  /  /  
To:  /  /

0 results found. To view a Note below, click on its Note Date. This reflects the records you have access to.

**Row Actions:**    1

**Move selected note to:**

1. Click on **Author Note** button

1 Note is being created for Investigation ID 2503

Note ID: -
Status: -

\* Required Field

Author: Sampson, Judy
Role: NS\_IMMS\_IOM\_NURSE

Subject:

Note Date:

Note Type:

Note Time:

Common Phrases:

Add to Note

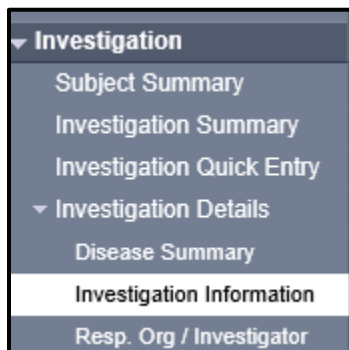
4 Note:

5

Save as
Note Complete
Clear
Cancel

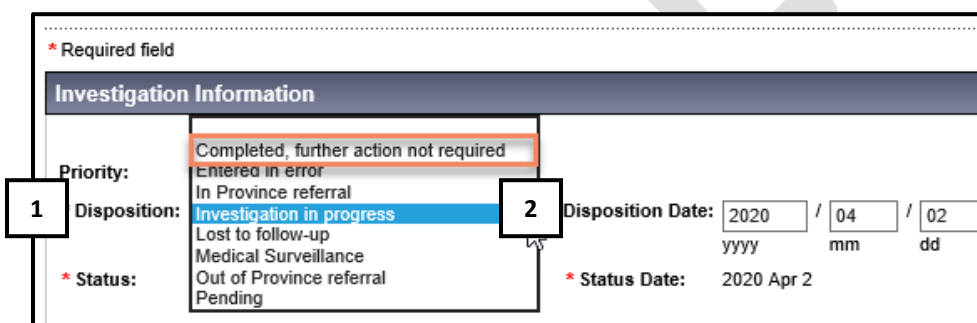
1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details
5. Click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

## Update the Investigation Disposition and Close the Investigation



- Investigation
  - Subject Summary
  - Investigation Summary
  - Investigation Quick Entry
  - Investigation Details
    - Disease Summary
    - Investigation Information
    - Resp. Org / Investigator

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



**Investigation Information**

\* Required field

Priority: Completed, further action not required

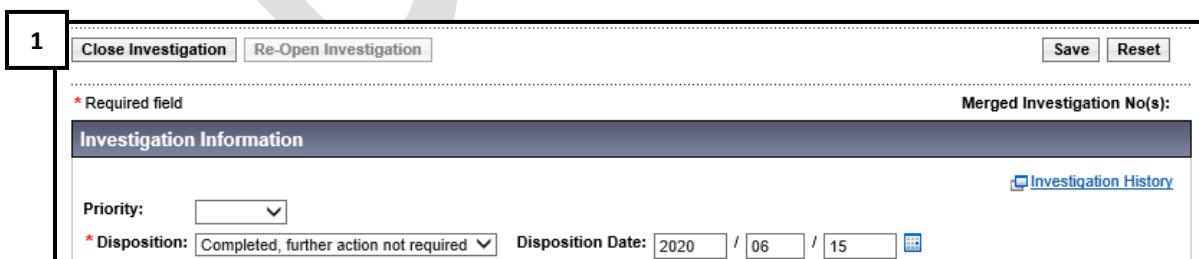
Disposition: Investigation in progress

Disposition Date: 2020 / 04 / 02  
yyyy mm dd

\* Status: Out of Province referral

\* Status Date: 2020 Apr 2

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



**Close Investigation** **Re-Open Investigation** **Save** **Reset**

\* Required field

Merged Investigation No(s):

Investigation Information

Priority: Completed, further action not required

\* Disposition: Completed, further action not required

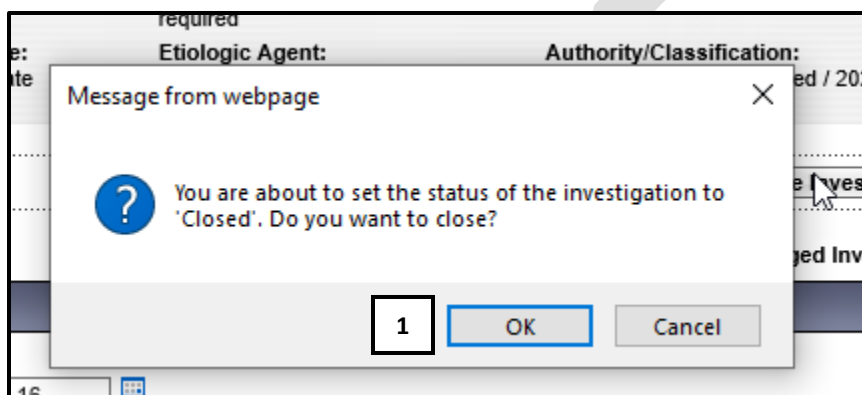
Disposition Date: 2020 / 06 / 15

[Investigation History](#)

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:

Investigator
Hide

\* Required only if adding or updating investigator information.

Investigator Type : Secondary 1

\* Investigator Organization : Northern Zone 2

\* Investigator Workgroup : IOM-Northern Zone 3

Investigator Name : Laurie Phalen/Pictou PHO 4

\* Assigned Date : 2021 / 02 / 02 5 Signed Time :  :  : AST  
yyyy mm dd hh mm

End Date :  /  /   
yyyy mm dd

6 Add Clear

---

Row Actions: Update

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input type="radio"/>	Secondary	Jayme MacLellan	IOM-Northern Zone	Northern Zone	2021 Feb 2	
<input type="radio"/>	Primary	Samantha McClellan	IOM-Northern Zone	Northern Zone	2021 Jan 15	

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

Row Actions: Update

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input type="radio"/>	Secondary	Jayme MacLellan	IOM-Northern Zone	Northern Zone	2021 Feb 2	
<input type="radio"/>	Secondary	Laurie Phalen	IOM-Northern Zone	Northern Zone	2021 Feb 2	
<input type="radio"/>	Primary	Samantha McClellan	IOM-Northern Zone	Northern Zone	2021 Jan 15	

1 Save Reset