

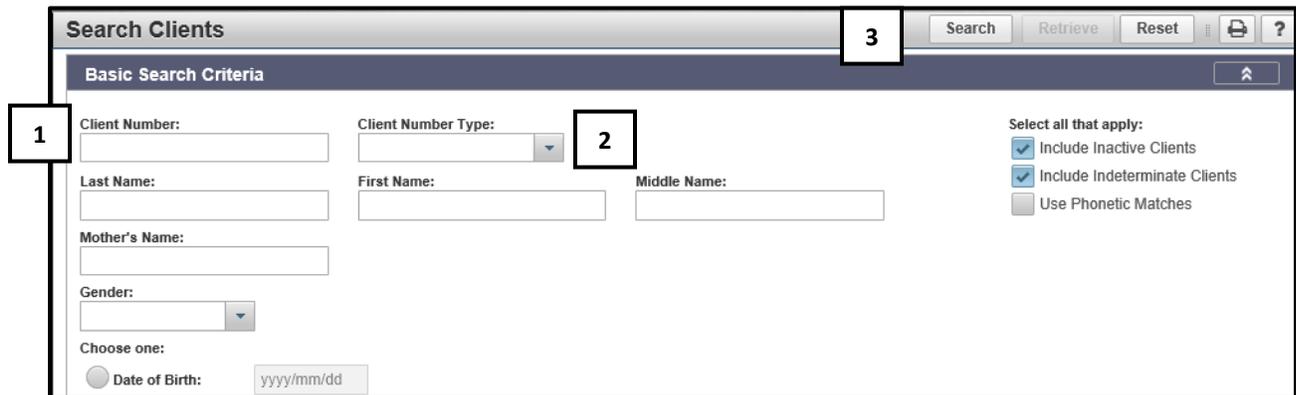
1. [Search for a Client](#)
2. [Update Client Telephone Number, Create Temporary Address, Ethnicity Information](#)
3. [Create Hepatitis C Investigation](#)
4. [Make a Lab Pertinent to an Investigation](#)
5. [Completing the Investigation Information](#)
6. [Changing Investigation Classification](#)
7. [Signs and Symptoms](#)
8. [Documenting Risk Factors](#)
9. [Entering Public Health Interventions](#)
10. [Adding an Outcome](#)
11. [Uploading a Document to an Investigation](#)
12. [Adding a Clinical Note to an Investigation](#)
13. [Update the Investigation Disposition and Close the Investigation](#)
14. [Adding a Secondary Investigator](#)
15. [Appendix A: Documenting Previously Diagnosed Cases](#)

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
Search Retrieve Reset

Basic Search Criteria

Client Number: Client Number Type:

Last Name: First Name: Middle Name:

Mother's Name:

Gender:

Choose one:

Date of Birth:

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

Search Results
Client Quick Entry Create Client

Preview Update Set In Context Create Cohort Subject Summary

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

Client Quick Entry Create Client

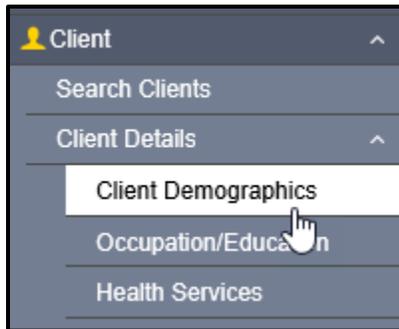
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

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

Telephone Numbers
✓ ↑

Add Telephone Number
Apply Reset

Telephone Number:

* **Country:** Canada * **Number:** x * **Usage:**

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

Apply Reset

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.

Telephone Numbers
✓ ↑

Add

Update
Delete
Set Preferred

	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home: 902-864-2222	2020 Mar 02		✓
<input type="radio"/>	mobile contact: 902-222-2222	2020 Jun 12		

Total: 2
1
10

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
✓ ↑

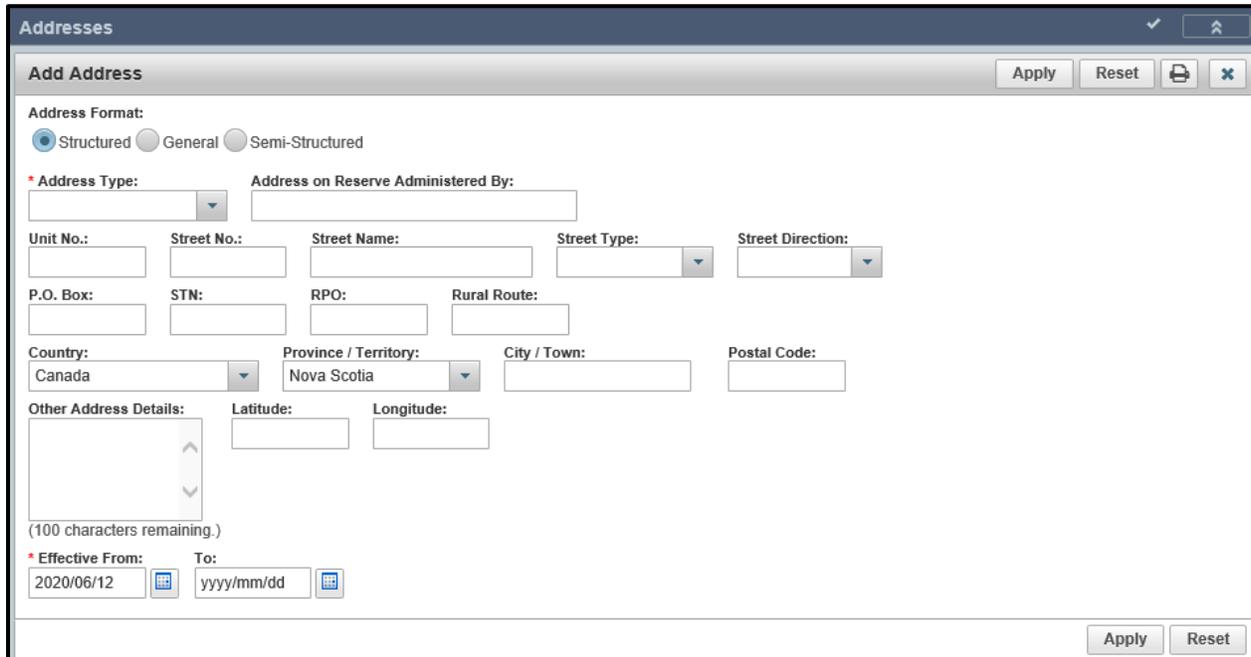
Add

Update
Delete
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 type="radio"/>	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



The screenshot shows a web form titled "Add Address" within a window labeled "Addresses". The form has several sections:

- Address Format:** Three radio buttons for "Structured" (selected), "General", and "Semi-Structured".
- * Address Type:** A dropdown menu.
- Address on Reserve Administered By:** A text input field.
- Unit No.:** A text input field.
- Street No.:** A text input field.
- Street Name:** A text input field.
- Street Type:** A dropdown menu.
- Street Direction:** A dropdown menu.
- P.O. Box:** A text input field.
- STN:** A text input field.
- RPO:** A text input field.
- Rural Route:** A text input field.
- Country:** A dropdown menu with "Canada" selected.
- Province / Territory:** A dropdown menu with "Nova Scotia" selected.
- City / Town:** A text input field.
- Postal Code:** A text input field.
- Other Address Details:** A large text area with a vertical scrollbar.
- Latitude:** A text input field.
- Longitude:** A text input field.
- (100 characters remaining.)** A note below the text area.
- * Effective From:** A date picker showing "2020/06/12".
- To:** A date picker showing "yyyy/mm/dd".

Buttons for "Apply" and "Reset" are located at the top right and bottom right of the form.

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										
Add										
Update Delete 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"/>	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 1 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)

Ethnicity Information

Note: If the client does not provide an answer to the question related to their ethnicity, this still needs to be documented in Panorama.

This section is directly above the Telephone information:

Ethnicity Information	1	▼
Birth Information	✓	▼

1. Expand open the Ethnicity Information tab by clicking on the down arrow.

Ethnicity Information ↑

Ethnicity: 1 Other Ethnicity: 2

Ethnicity Reported by: 3 Client Other Provider

African Nova Scotian
 Asked, but unknown
 Asked, not provided
 Black
 East/Southeast Asian
 Latino
 Middle Eastern
 Other Ethnicity
 South Asian

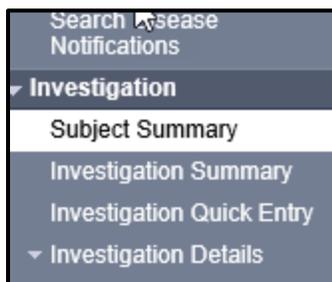
Effective From	Effective To	Preferred
2020 Aug 26		<input checked="" type="checkbox"/>

10 ↓

1. Select the Ethnicity value from the drop-down list. If the client identifies with an Ethnicity that is not in the list, choose “Other Ethnicity” and go to step 2.
2. If “Other Ethnicity” is chosen in step 1, type in the Ethnicity the client identifies with.
3. Select who provided the Ethnicity information to you (click one).

Click **Save** at the top of the page.

Create a Hepatitis C Investigation



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

Subject Summary



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 / -	

Report:

Communicable Disease Investigation Encounter Group ↑ Hide

Disease:

Investigation 810 - Salmonellosis - Closed ↓ Show

Unassociated Encounters (Non-Investigation) ↓ Show

Confirm a Hepatitis C investigation does not already exist. **If one does confirm this is a new infection (see Hepatitis C SOP)**

Communicable Disease Investigation Encounter Group ↑ Hide

Disease:

Click **Create Investigation** under Communicable Disease Investigation Encounter Group.

Disease Summary
⤴ Hide

* **Disease:**

* **Authority:** * **Classification:**

* **Classification Date:** / /
yyyy mm dd

Microorganism:

Genotype:

Subtype:

Genotype (specify):

NML No.:

Subtype (specify):

Information Source:

Investigation Information
⤴ Hide

Priority:

* **Disposition:**

Enter the following information:

1. **Disease**- select Hepatitis C from drop-down list
2. **Authority**- select **Provincial** from drop-down list (NOTE: all NS Hepatitis C investigations are of Provincial Authority)
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 Hepatitis C virus from drop-down list
6. **Disposition**- select Investigation in progress from drop-down list

Responsible Organization / Investigator
↑ Hide

1

* **Responsible Organization :**

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

2

* **Responsible Organization Workgroup :**

* **Responsible Organization Date :** / /

yyyy mm dd

3

* **Investigator Organization :**

4

* **Investigator Workgroup :**

Investigator Name :

* **Assigned Date :** / /

yyyy mm dd

5

6

Enter the following information:

1. **Responsible Organization-** find and select **your Public Health Office** (if not auto populated)
2. **Responsible Organization Workgroup-** select **IOM-Your Area PHO-Unmonitored** from drop-down list
3. **Investigator Organization-** find and select **Your Zone**
4. **Investigator Workgroup-** **IOM Your Zone**
5. **Select investigator name**
6. Assign date auto populates (can be changed as needed)

Reporting Notification
⬆ Hide

*** Reporting Source:**

1 **Provider:** Ryan SOMMERS
Click Find to select a provider:

Provider:SOMMERS, Ryan, Medical Doctor, CPSNS ID #: 14209
Find

1 **Location:** QEII-Victoria General (VG) Site-General
To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Victoria General-General]
Find

1 **Other:**

Type of Reporting Source: **2**

Method of Notification: **3**

*At least one of the following dates is required.

Report Date (Sent): / /
yyyy mm dd

Report Date (Received): / / **4**
yyyy mm dd

5
Submit
Clear
Cancel

Enter the following information:

1. **Reporting Source**- will depend on how you were notified of the case. Click the radio button on 1 of the three options:
 - 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 Lab from the drop-down list
3. **Method of Notification**- Select Lab 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 **investigation 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:



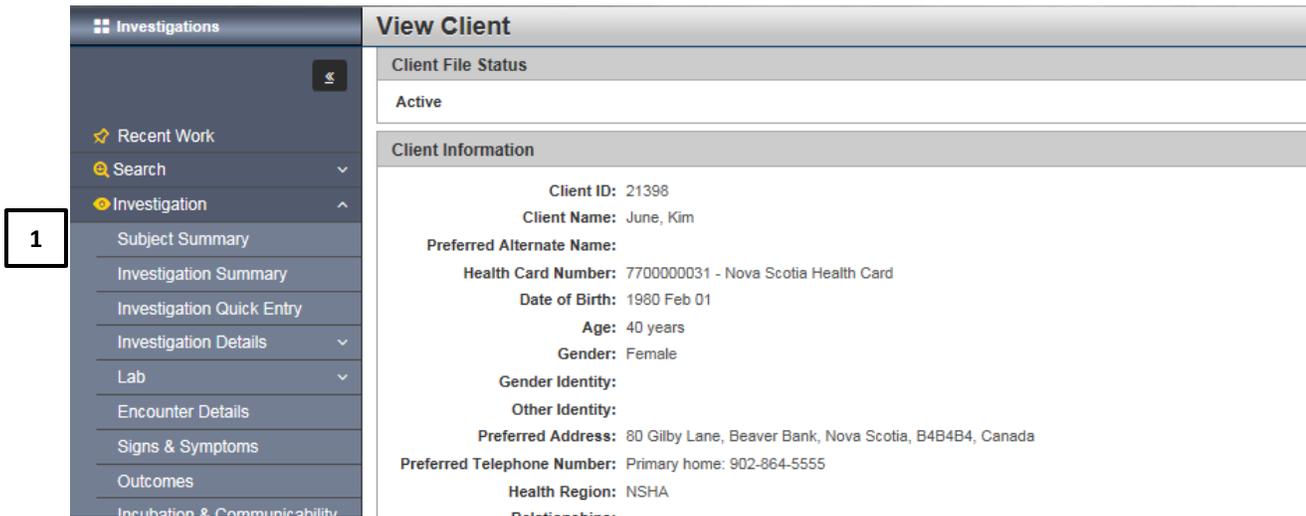
1. **Recent Work**

- Search
- Search Investigations
- Search Lab

Recent Work:

- Client: [June, Kim \(Client ID: 21398\)](#) - Investigation: [Hepatitis C](#)

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



Investigations

- Recent Work
- Search
- Investigation
- Subject Summary
- Investigation Summary
- Investigation Quick Entry
- Investigation Details
- Lab
- Encounter Details
- Signs & Symptoms
- Outcomes
- Incubation & Communicability

View Client

Client File Status

Active

Client Information

Client ID: 21398

Client Name: June, Kim

Preferred Alternate Name:

Health Card Number: 7700000031 - Nova Scotia Health Card

Date of Birth: 1980 Feb 01

Age: 40 years

Gender: Female

Gender Identity:

Other Identity:

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

Preferred Telephone Number: Primary home: 902-864-5555

Health Region: NSHA

1. Click on the Subject Summary tab in the Left Hand Nav.

This will bring you to the **Subject Summary Screen** with only the Client Details in the Client context header.

Subject Summary



ACTIVE

Client ID: 21398	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 / -	

Report:

Communicable Disease Investigation Encounter Group ↑ Hide

Disease:

Investigation 981 - Hepatitis C - Open ↑ Hide

Investigation ID: 981	Status: Open	Investigator: Samantha McClellan	Linked Outbreaks: -	Report Date (Sent): -	Report Date (Received): 30 September 2020
---	------------------------	--	-------------------------------	---------------------------------	---

Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Hepatitis C	Hepatitis C virus	-	✓ Provincial / Case - Confirmed 2020 Sep 30	-	-

- ▼ Investigation
 - Subject Summary
 - Investigation Summary
 - Investigation Quick Entry
 - ▶ Investigation Details
 - ▼ Lab
 - Lab Summary
 - Electronic Lab Report

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

Row Actions: View/Update Requisition View/Update Lab Report 2										
* Flag indicates sensitivities present										
		Specimen Collection / Imaging Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2020 Sep 28	Blood / -	Viral load	Positive;		Hepatitis C virus	-	Final

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

Selected Tests 1
Hide Selected Tests

Requisition Tests: ▼ [Add to Report](#) Set All Negative

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

3 Subject Investigations: 981, Hepatitis C, 2020 Sep 30 ▼ [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
1	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	NAAT	Blood/ Blood	2020 Sep 28			Communicable Disease Investigation

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 be activated and the drop down field will contain investigations that you can select.

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

Subject Investigations: 981, Hepatitis C, 2020 Sep 30 ▼ [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.

	Test ID	Resulted	Test Name	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group
<input checked="" type="radio"/>	208	✓	NAAT	Blood/ Blood	2020 Sep 28	981, Hepatitis C, 2020 S		Communicable Disease Investigation

1

Reason for Deletion:

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

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 / -	

Report:

Communicable Disease Investigation Encounter Group ↑ Hide

Disease:

Investigation 981 - Hepatitis C - Open ↑ Hide

Investigation ID: 981	Status: Open	Investigator: Samantha McClellan	Linked Outbreaks: -	Report Date (Sent): -	Report Date (Received): 30 September 2020
---	------------------------	--	-------------------------------	---------------------------------	---

Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Hepatitis C	Hepatitis C virus	-	✓ Provincial / Case - Confirmed 2020 Sep 30	-	-

1. Click the Hyperlink associated to the current investigation

Investigation Summary



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 / -	

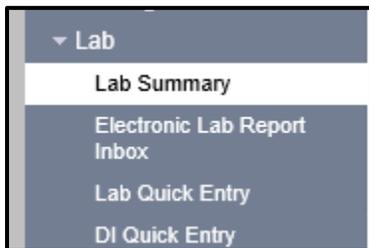
Investigation ID: 981	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 40 years	Investigation
Disease: Hepatitis C	PHAC Date/Type: 2020 Sep 28 / Specimen Collection	Etiologic Agent: Hepatitis C virus	Authority/Classification: Provincial / Case - Confirmed / 2020 Sep 30	

Note: The Investigation is now back in Context:

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

Lab Tests									
Lab									
Specimen Collection Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status	
2020 Sep 28	Blood / -	Viral load	Positive;			Hepatitis C virus	-	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.



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

Investigation Information

[Investigation History](#)

Priority:

*** Disposition:**

Disposition Date: / /

yyyy mm dd

*** Status:**

*** 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:

- 1
- 2
- 3
- 4

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. See reference material on [Updating Client Address](#) and return to this screen to select from the drop down.

*** Status:**

*** Status Date:** 2020 Sep 28

Client Home Address at Time of Initial Investigation:

4. **Diagnosis-** This area is filled out when the diagnosis date is earlier than the lab date, it then will change the PHAC date to reflect the true diagnosis date. Fill in the appropriate info and click save.
NOTE: Do not use Primary method of Diagnosis and Method of Detection.

Changing Investigation Classification

If during the investigation you discover case has been previously diagnosed and you need to change the classification to previously diagnosed click on Disease Summary in Left-Hand Navigation.

- ▼ Investigation Details
 - Disease Summary
 - Investigation Information
 - Resp. Org / Investigator

Select update:

Disease Event 993 - Hepatitis C [↑ Hide](#)

PHAC Date / Date Type: **2020 Nov 10 / 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
Hepatitis C	Hepatitis C virus	-		<input checked="" type="checkbox"/> Provincial / Case - Confirmed 2020 Nov 10	-	-

Update Delete

Scroll down page:

*** Investigation Classification**

* Authority: Provincial * Classification: Case - Confirmed 3

* Classification Date: 2020 / 11 / 10 4
yyyy mm dd

5

Row Actions:

	Primary	Authority	Classification	Classification Date
1	<input checked="" type="radio"/>	Provincial	Case - Confirmed	2020 Nov 10

6

1. Select radio button
2. Select update
3. Update Classification to **Case- Previously Diagnosed**
4. Change the Classification date to the date it was updated
5. Apply update
6. Save

Signs and Symptoms

Select Signs and Symptoms from the Left-Hand Navigation

Add Signs and Symptoms from the information reported by the client or as reported by primary care provider (repeat for all reported Signs & Symptoms)

Row Actions:

Reason for Deletion : Present: Yes Onset Date: / /
yyyy mm dd

Apply Update

Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
	Present					

4

3

Row Actions: Select All Update Set Onset Clear Onset

Reason for Deletion: ▼ Delete Present: ▼ Apply Update

Onset Date: yyyy / mm / dd

	Sign/Symptom ▲	Present ▼	Onset Date/Time ▼	Recovery Date/Time ▼	Duration ▼	Reported By ▼	Details Exist ▼
<input type="checkbox"/>	Abdominal pain/discomfort/cramps						No
<input type="checkbox"/>	Anorexia						No
<input type="checkbox"/>	Asymptomatic						No
<input type="checkbox"/>	Cancer- hepatocellular						No
<input type="checkbox"/>	Chronic infections						No
<input type="checkbox"/>	Cirrhosis						No
<input checked="" type="checkbox"/>	Fatigue						No
<input type="checkbox"/>	Fever						No
<input type="checkbox"/>	Fulminant hepatitis						No
<input type="checkbox"/>	Jaundice						No
<input type="checkbox"/>	Nausea						No
<input type="checkbox"/>	Vomiting						No

Save Reset

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
4. **Set Onset- Do Not Select for Hepatitis C Investigations**

Repeat steps #1 and #2 for S&S not present, Select No and **Apply Update**.

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

NOTE: All pre-set S&S require a response. If unknown (was unable to find answer) or not asked, please select those options as opposed to a NO response.

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 :		Present:		Onset Date:			
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="button" value="Delete"/>		<input type="button" value="Apply Update"/>		yyyy	mm	dd	
<input type="checkbox"/>	Sign/Symptom ▲	Present ▼	Onset Date/Time ▼	Recovery Date/Time ▼	Duration ▼	Reported By ▼	Details Exist ▼
<input type="checkbox"/>	Abdominal pain/discomfort/cramps						No
<input type="checkbox"/>	Anorexia						No
<input type="checkbox"/>	Asymptomatic						No
<input type="checkbox"/>	Cancer- hepatocellular						No
<input type="checkbox"/>	Chronic infections						No
<input type="checkbox"/>	Cirrhosis						No
<input type="checkbox"/>	Fatigue	Yes	2020 Sep 1 00:00 ADT				No
<input type="checkbox"/>	Fever						No
<input type="checkbox"/>	Fulminant hepatitis						No
<input type="checkbox"/>	Jaundice						No
<input type="checkbox"/>	Nausea						No
<input type="checkbox"/>	Vomiting						No

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: 1

Preset: No

Onset: No

* Present:

2 **Onset Date/Time:** / / : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

3

Row Actions:

Reason for Deletion:

Present:

Onset Date: / /

yyyy mm dd

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 Sign or Symptom:

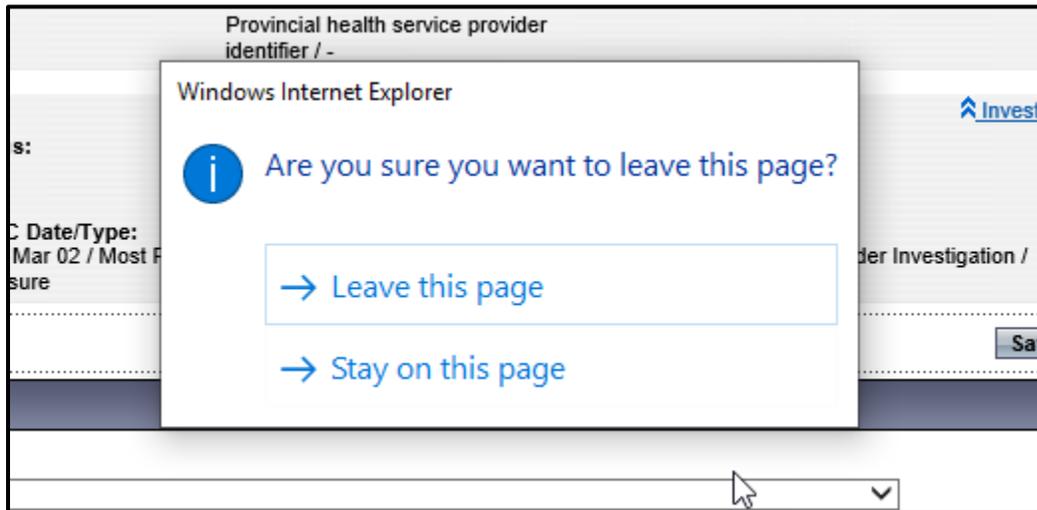
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button

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

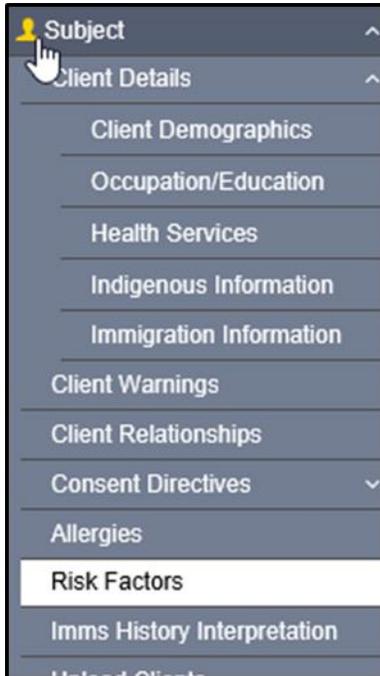
Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				No
----------------------	-----	-----------------------	--	--	--	--------------------

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**

Risk Factors
Save Reset log ? [icon]

Investigation ID: Open Investigation in progress 40 years
 Disease: Hepatitis C PHAC Date/Type: 2020 Oct 22 / Date Reported Etiologic Agent: Hepatitis C virus Authority/Classification: Provincial / Case - Confirmed / 2020 Oct 22

Risk Factor
✓ [up arrow]

<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	✓	Behaviour - Smoking / vaping / use of smoking paraphernalia							
<input type="checkbox"/>	✓	Exposure - Blood/body fluid - percutaneous puncture							
<input type="checkbox"/>	✓	Exposure - Blood/body fluid - sharing of personal items							
<input type="checkbox"/>	✓	Exposure - Contact - household / family member known to be a positive case							
<input type="checkbox"/>	✓	Exposure - Occupational - contaminated blood, body fluids							
<input type="checkbox"/>	✓	Exposure - Occupational - unknown contamination							
<input type="checkbox"/>	✓	Medical - Chronic renal disease/dialysis							
<input type="checkbox"/>	✓	Medical - Co-infection with another STBI							
<input type="checkbox"/>	✓	Medical - Haemophilic or requiring coagulation product							
<input type="checkbox"/>	✓	Medical - Previous STI							

Total: 61

1. The risk factor table is populated with all presets defined for Hepatitis C. 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 a table with the following columns: Preset, Risk Factor, Additional Information, Reported Date, Response, Frequency, Date Range, End Date Reason, and Pertinent to Investigation. A checkmark is visible in the 'Preset' column for the first row, which contains the text 'Medical - Co-infection with another STBBI'. The 'Set Response' button above the table is highlighted with a box containing the number '2'.

The screenshot shows the 'Set Response' dialog box. The 'Response' dropdown menu is open, showing options: No, Not Applicable, Not Asked, Unable to answer, Unknown, Unwilling to answer, and Yes. The 'Yes' option is selected. A box with the number '2' is around the dropdown, and a box with the number '3' is around the 'Apply' button. The checkbox 'Risk Factor Pertinent to investigation in context' is checked.

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 and select **No** or any of the other responses provided as appropriate.

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

The screenshot shows a table with the following columns: Preset, Risk Factor, Additional Information, Reported Date, Response, Frequency, Date Range, End Date Reason, and Pertinent to Investigation. The first row has a checkmark in the 'Preset' column, 'Travel - Outside of Canada' in the 'Risk Factor' column, '2018 Jan 01' in the 'Reported Date' column, and 'Yes' in the 'Response' column. The 'Pertinent to Investigation' column for this row is expanded to show '810 (Salmonellosis)'.

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 Hepatitis C investigation.

1. Click the **Add** button

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

The screenshot shows the 'Add Risk Factor' form. It includes fields for Category, Risk Factor, Response, Frequency, Reported By, Effective From, Effective To, End Date Reason, and Reported Date. There is also a checkbox for 'Risk Factor Pertinent to investigation in context'. At the bottom, there are 'Apply' and 'Reset' buttons, and an 'Add' button. Below the form is a table with columns for Update, View, Delete, Set Response, Set Pertinent, and various data fields.

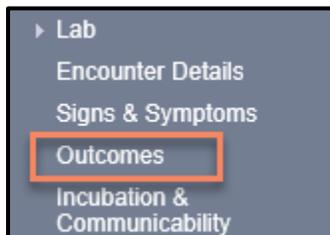
1. **Category** – select the category of the risk factor from the drop-down list.
2. **Risk Factor** – select the risk factor from the drop-down list
3. **Response** – select the response form the drop-down list
4. Click the **Apply** button

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Outside of Canada	2018 Jan 01	Yes				810 (Salmonellosis)
<input type="checkbox"/>	<input type="checkbox"/>	Travel - Outside of Canada	2020 Oct 22	Yes				996 (Hepatitis C)

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"/>		✓	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)
<input type="checkbox"/>			Travel - Outside of Canada		2020 Oct 22	Yes				996 (Hepatitis C)
<input type="checkbox"/>		✓	Behaviour - Smoking / vaping / use of smoking paraphernalia		2020 Oct 22	Yes				996 (Hepatitis C)
<input type="checkbox"/>		✓	Exposure - Blood/body fluid - percutaneous puncture		2020 Oct 22	Yes				996 (Hepatitis C)

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**

Outcome History

1

* Outcome:

Other Outcome:

Outcome Date: / /

yyyy mm dd

2

3

Row Actions: Reason for Deletion:

Outcome	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)

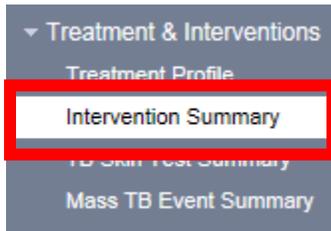
Date	Comments	Recorded By

1

1. Click the **Save** button

Entering Public Health Interventions

From the left-hand navigation, click on **Treatment and Interventions** and then **Intervention Summary**:



The Intervention Summary screen will display, in the grouped intervention box select the Bloodborne Pathogen from the drop down menu in the Intervention Group drop down:

Intervention Summary ? 🖨️

Notes 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: mobile contact: 902-307-1234	Address: 128 Main Shore Road, Yarmouth, Nova Scotia, B5A4T4, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

[Investigation](#)

Investigation ID: 1038	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 40 years
Disease: Hepatitis C	PHAC Date/Type: 2020 Oct 29 / Date Reported	Etiologic Agent: Hepatitis C virus	Authority/Classification: Provincial / Case - Confirmed / 2020 Oct 29

Preset Interventions ⬆ Hide Preset Interventions

Row Actions:

Type	SubType	Added

Grouped Interventions ⬆ Hide Grouped Interventions

Intervention Group: Bloodborne Pathogens ▼

The **Grouped Interventions** for Hepatitis C (Bloodborne Pathogen) will appear.

Row Action	Add Intervention		
		SubType	Added
<input type="radio"/>	Communication	Communication to general public (specify...	-
<input type="radio"/>	Communication	Letter (specify)	-
<input type="radio"/>	Communication	Other communication (specify)	-
<input type="radio"/>	Communication	Public health advisory	-
<input type="radio"/>	Communication	Public health alert	-
<input type="radio"/>	Communication	Public health order	-
<input type="radio"/>	Contact tracing	Contact tracing	-
<input type="radio"/>	Education/counselling	Education/counselling	-
<input type="radio"/>	Environmental Health	Inspection - personal service facility	-
<input type="radio"/>	Environmental Health	Inspection - work	-
<input type="radio"/>	Notification for action	Other (specify)	-
<input type="radio"/>	Notification for action	Canadian Blood Services	-
<input type="radio"/>	Notification for action	Dept. of Environment	-
<input type="radio"/>	Notification for action	Provincial Multi-Organ Transplant Progra...	-
<input type="radio"/>	Notification for action	Regional Tissue Bank	-
<input type="radio"/>	Notification for action	Dept. of Health and Wellness	-
<input type="radio"/>	Prophylaxis	Chemoprophylaxis	-
<input type="radio"/>	Prophylaxis	Immunoprophylaxis	-
<input checked="" type="radio"/>	Referral	Other (specify)	-
<input type="radio"/>	Referral	Primary care provider	-

1

1. Select the appropriate intervention
2. Click **Add Intervention** from Row Action button

Intervention Details
Hide Intervention Details

** Required field*

Encounter Group: Communicable Disease Investigation

** Intervention Type:* 1 Referral ** Intervention Sub Type:* Other (specify) 2

Intervention Disposition: Completed 3

** Outcome:* Do Not Use 4

** Start Date:* 5 2020 / 10 / 29 *End Date:* 5 2020 / 10 / 29

Next Follow Up Date: / /

Workgroup Organization *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: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Northern Zone > [Amherst Public Health Office] Find

Workgroup: User:

6 ** Organization:* *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: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Northern Zone > [Amherst Public Health Office] Find

7 ** Location:* *To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.*

Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Northern Zone > Amherst Public Health Office > [Amherst PHO] Find

Primary Provider:

Use this Provider: *Click Find to select a provider:*

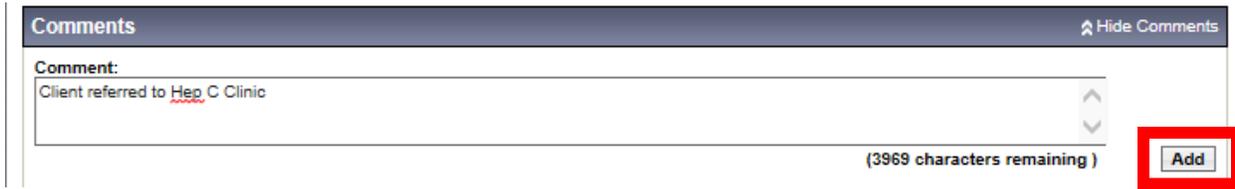
Provider: Find

Use Other Provider:

Fill your mandatory fields:

1. Intervention Type
2. Intervention Sub Type
3. Disposition- **Completed**
4. Outcome- **Do Not Use**
5. Start date and End Date- **will auto-populate**
6. Organization- **will auto-populate**
7. Location- **will auto-populate**

Enter comment in comment field and click **Add**



Comment will appear in the comment box:

Date	Comments	Recorded By
2020 Oct 29	Client referred to Hep C Clinic	McClellan, Samantha

Click **Save** and follow above instructions for each intervention.

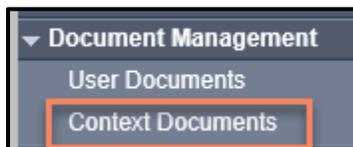
Ensure you take the intervention out of context



- Click the **Cancel** button towards the top of the screen

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

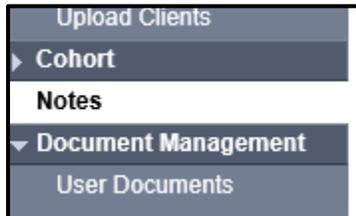
1. Browse for file- locate document and select it
2. Click the **Upload File** button. You will see that the file is uploaded
3. **Document Title** – enter the document title
4. **Description** – enter the document description
5. Click the **Submit** button

Document List Hide Document List							
Row Actions: <input type="button" value="Delete"/>				<input type="button" value="Add New"/>			
	Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status
<input type="checkbox"/>	Physician Report Form- XXXXX	78.66	PDF	McClellan, Samantha	2020 Sep 28		active

Total: 1 Page 1 of 1 Jump to page:

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

Client ID: 21398	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: 996	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 40 years
Disease: Hepatitis C	PHAC Date/Type: 2020 Oct 22 / Date Reported	Etiologic Agent: Hepatitis C virus	Authority/Classification: Provincial / Case - Confirmed / 2020 Oct 22

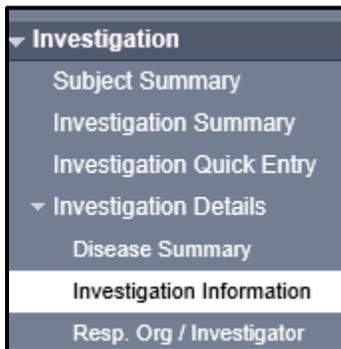
Notes Hide Notes

Display Notes For: Include Related Entities:

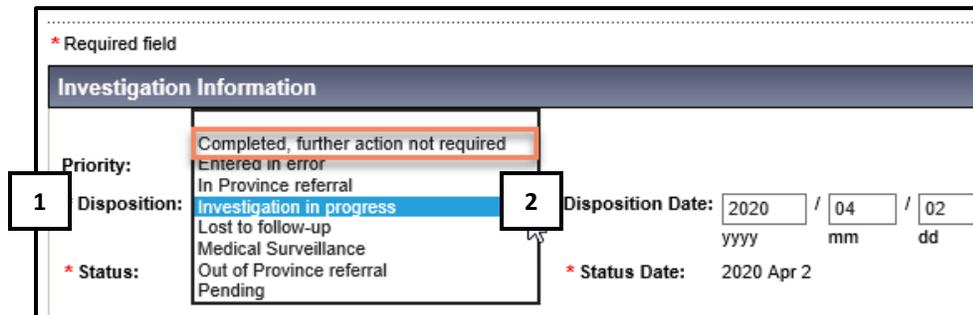
Ensure your investigation is in context. Do not add the note if only the client is in context.

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 “Completed, further action not required” 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:

- ▼ Investigation Details
 - Disease Summary
 - Investigation Information
 - Resp. Org / Investigator
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Close Investigation

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 **Assigned Time :** : : AST

yyyy mm dd hh mm

End Date : / / 6

yyyy mm dd

Add Clear

Row Actions: Update

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input type="radio"/>	Secondary	Jayne 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	Jayne 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

Appendix A: Documenting Previously Diagnosed Cases

What do we do with a new lab on a Previously Diagnosed Case already closed in Panorama (Disposition: Complete, further action no required)?

1. Determine that this lab is not a reinfection or a new case following treatment and/or had negative labs to prove recovery prior. If a new infection, complete case followed up as a new investigation.
2. Determine if this case was completed (risk factors reflecting investigation completed in past which migrated over) or lost to follow up in need of completion (see following question).
3. Enter the lab under the investigation or link the lab to the investigation
4. Document a note, as required, to identify any investigative/follow up completed to determine this lab was not a new case
5. Enter in any new information into panorama that you may have collected during your investigation
6. Check the PHAC date and make sure it does not reflect this newest lab result date
7. If PHAC date changed, go into the Investigation Information and enter in the previous Diagnosis Date



Investigation Information

[Investigation History](#)

Priority:
*** Disposition:** **Disposition Date:** / /
yyyy mm dd
*** Status:** Open *** Status Date:** 2019 Jan 8

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:

What do we do with a new lab on a Previously Diagnosed Case already closed in Panorama (Disposition: Lost to follow up)?

1. Determine if the lab is a reinfection or a new case following treatment and/or had negative labs to prove recovery prior to assigning a new confirmed case classification.
2. Once determined that it is not a new infection, classify as Case-Previously Diagnosed. **Do not** reopen the lost to follow up investigation but make sure you review that case as it can help in the current follow up.
3. Enter in lab or link the lab to the investigation
4. The PHAC date will need to reflect the date of the previous diagnosis. Go into the Investigation Information and enter in the previous Diagnosis Date from the lost to follow up case investigation.
5. Document a note, as required, to identify any investigative/follow up completed to determine this lab was not a new case. If you obtained information from the Lost to follow up investigation, document details in a note as well.
6. Enter in any new information into panorama that you collected during your investigation. This includes documenting risk factors for this current investigation despite any that were previously document on the lost to follow up case.

What do we do with a new lab on a Previously Diagnosed Case NOT in Panorama? i.e. Out of Province (OOP) Diagnosis/follow up

1. Create the shell of an investigation
2. Classify as Case: Previously Diagnosed
3. Enter in lab or link lab to the investigation
4. Document in a Note any pertinent details that were obtained during your investigation to determine this case was OOP and does not need PH follow up
5. Make sure the Diagnosis Date in Investigation Information reflects the actual diagnosis date. This is just so the diagnosis date is captured correctly. It won't be captured as a NS case because the case classification is Previously Diagnosed.
6. As this is not a new case in NS, no need to gather Signs and Symptoms or Risk Factors UNLESS it was determined that no investigation by PH was completed in the past.
7. Document Disposition, Outcomes and Close Case