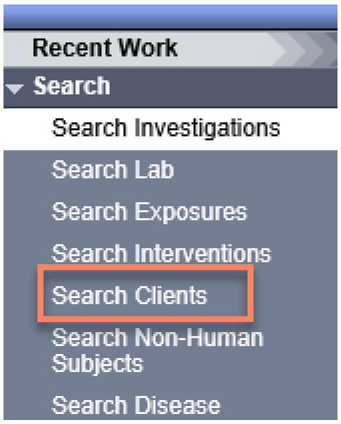
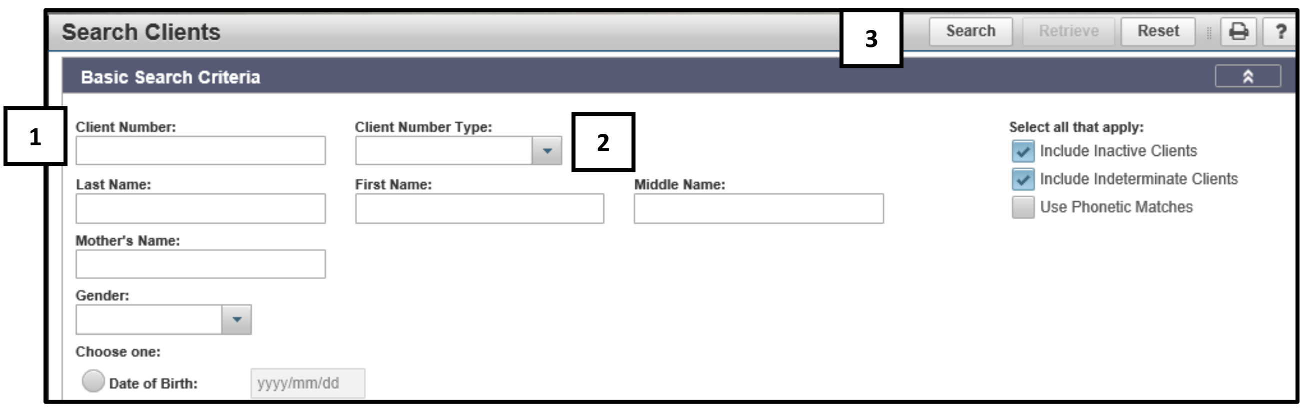
Hepatitis C Case Management

Search for a Client

Search for a client



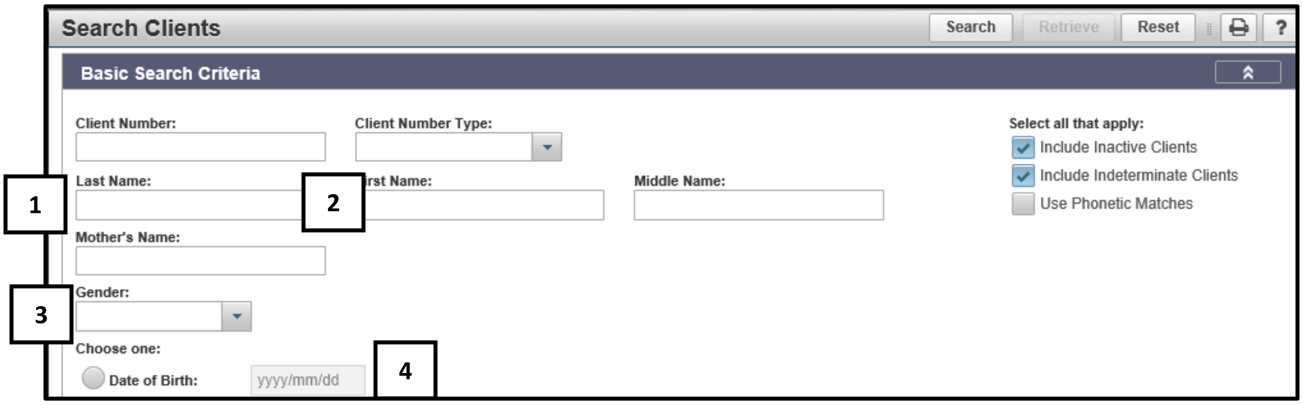
From the left-hand navigation bar, click on **Search Clients**



Health Card Number is the preferred search for a client

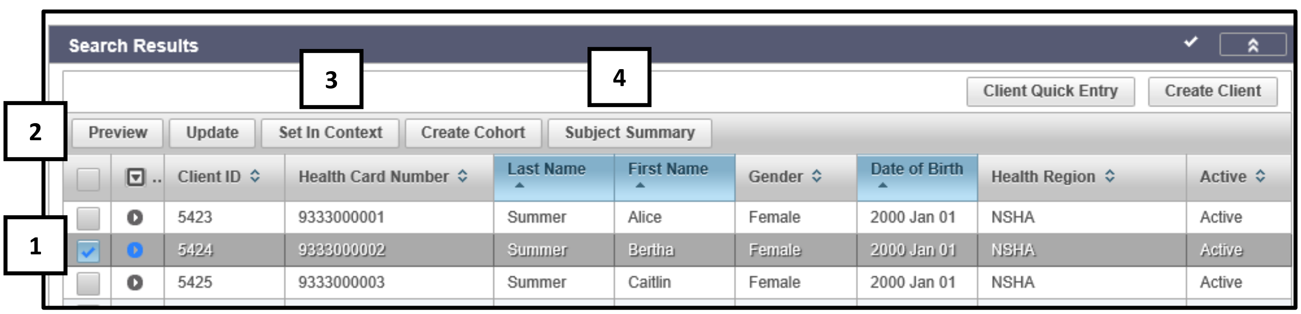
1. **Client Number** - Enter the client's Health Card Number. You need to enter all 10 digits
2. **Client Number Type** - Select **Health Card Number** from the drop down list
3. Click on the **Search** button

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



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

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



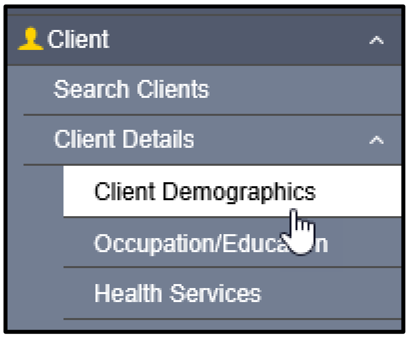
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

If no search results are returned:

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

Update Client Telephone Number, Create a Temporary Address, Ethnicity Information

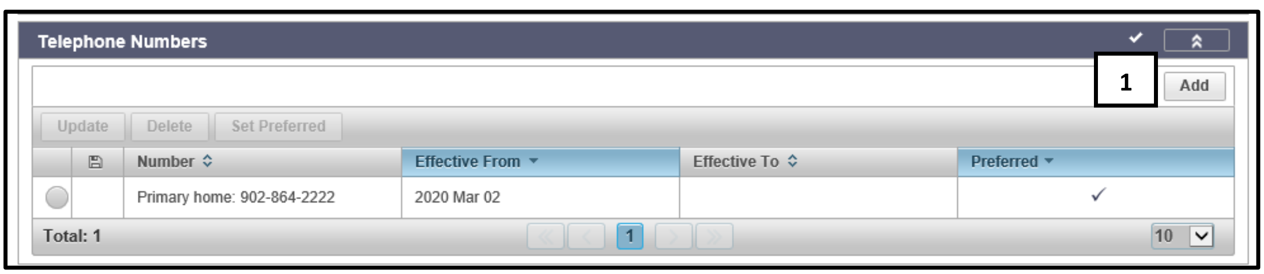
Note: The nightly Provincial Client Registry load updates the **Primary Home** and **Workplace** telephone numbers & the **Postal Address** and **Primary Home** addresses in Panorama.



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

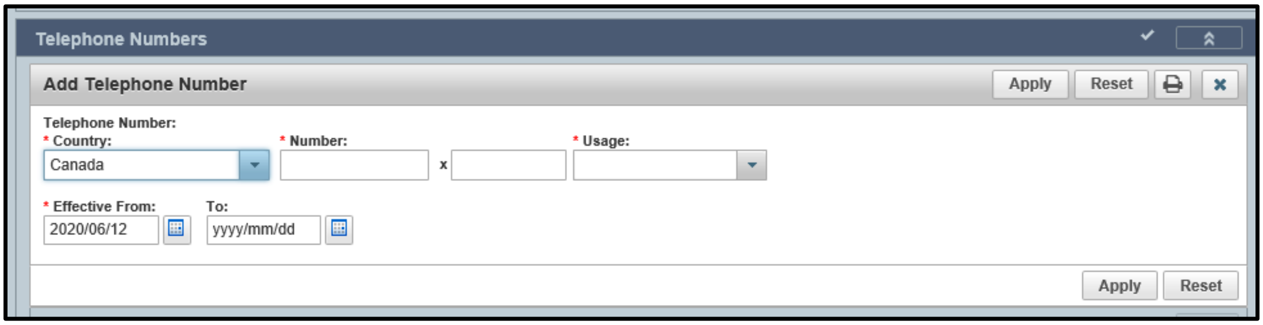
Telephone Number

View the client's telephone numbers.



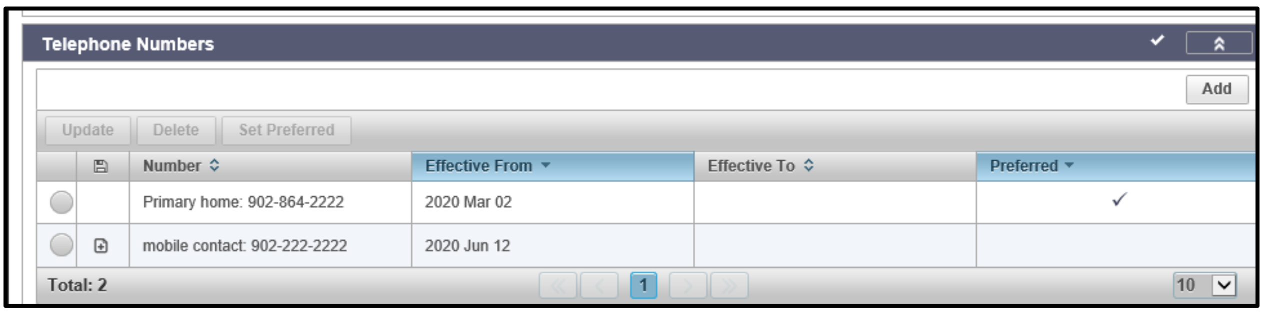
If the telephone number the client provided is different than what is in Panorama, you will need to add the telephone number.

1. Click on the **Add** button



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

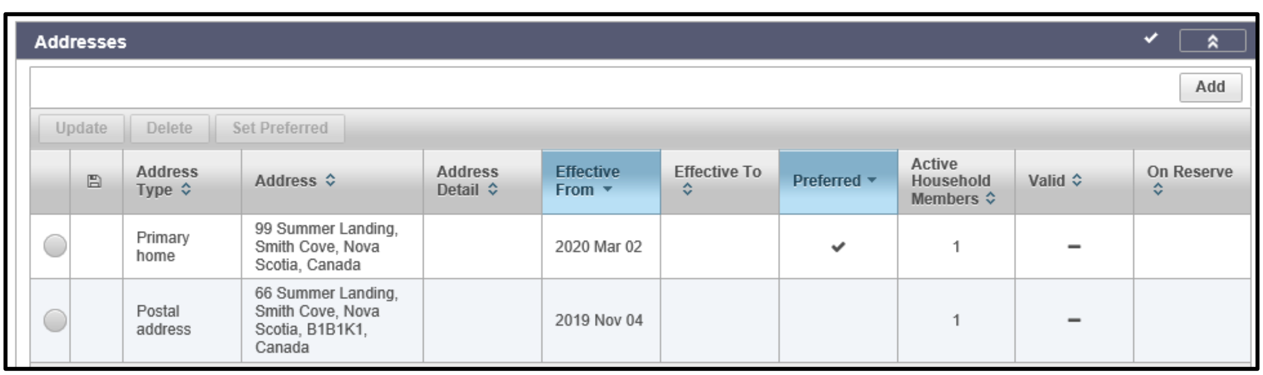
You need to set the mobile contact to preferred.



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

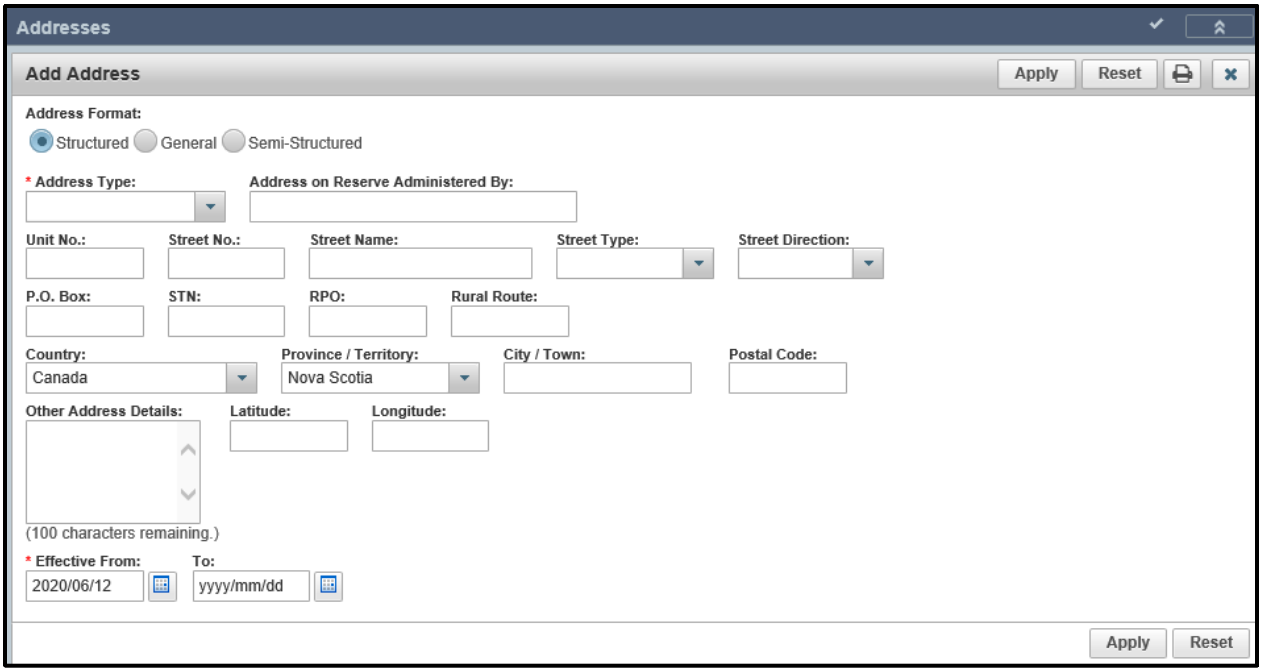
Address

View the client's address(es)



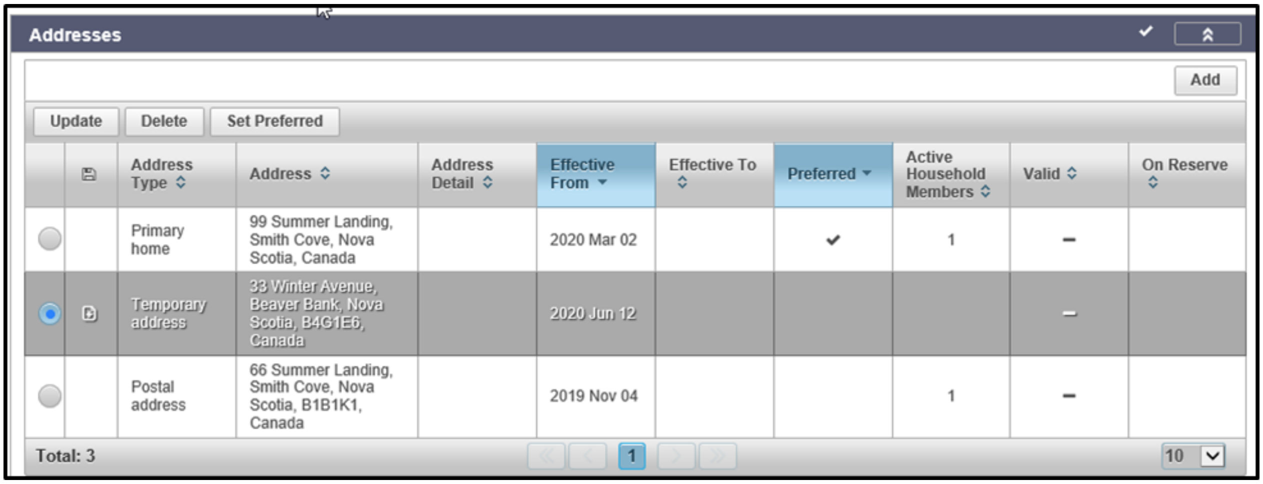
If the client's address in Panorama does not contain a postal code or the address is different than the address the client provided, you will need to add the address.

1. Click on the **Add** button



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

You need to set the temporary address to preferred.



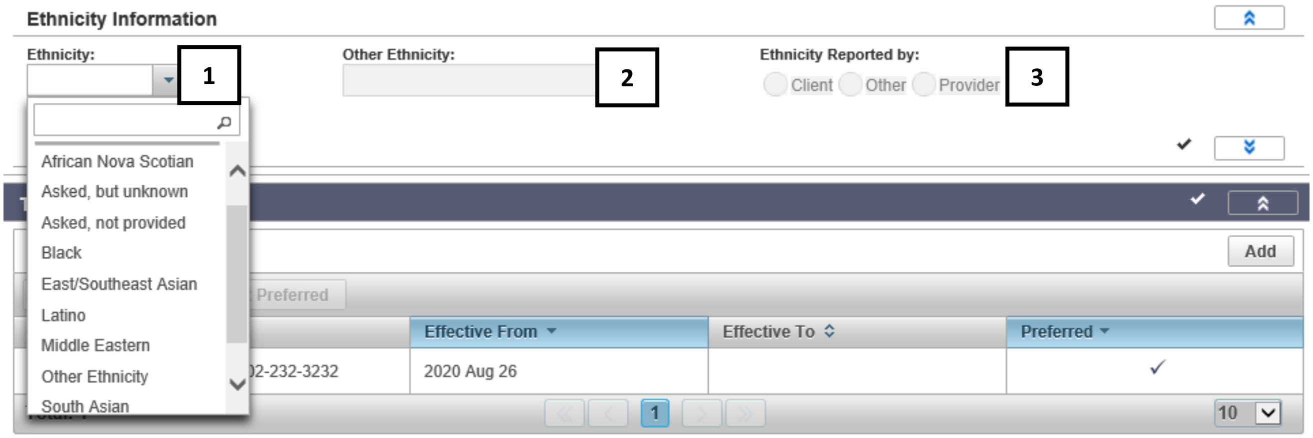
1. Click on the radio button for temporary address
2. Click on the **Set Preferred** button
3. Click on the **Save** button (top right-hand area of the screen)

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:

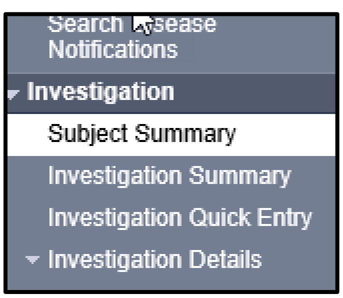
1. Expand open the Ethnicity Information tab by clicking on the down arrow.



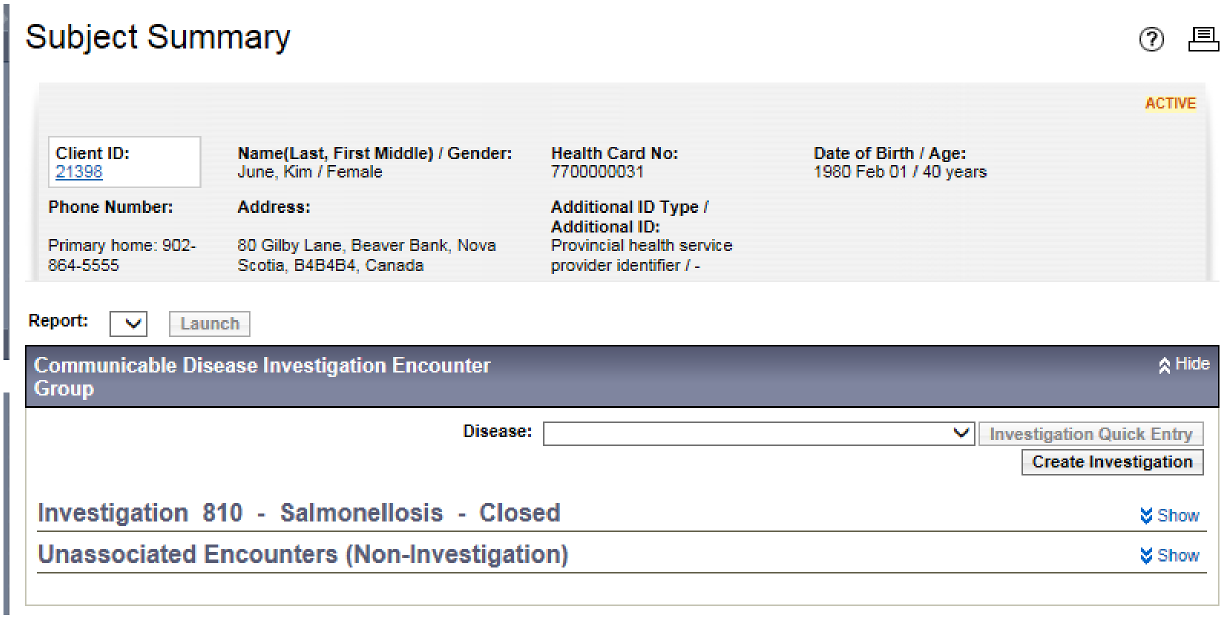
1. Select the Ethnicity value from the drop-down list. If the client identifies with an Ethnicity that is not in the list, choose "Other Ethnicity" and go to step 2.
2. If "Other Ethnicity" is chosen in step 1, type in the Ethnicity the client identifies with.
3. Select who provided the Ethnicity information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

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

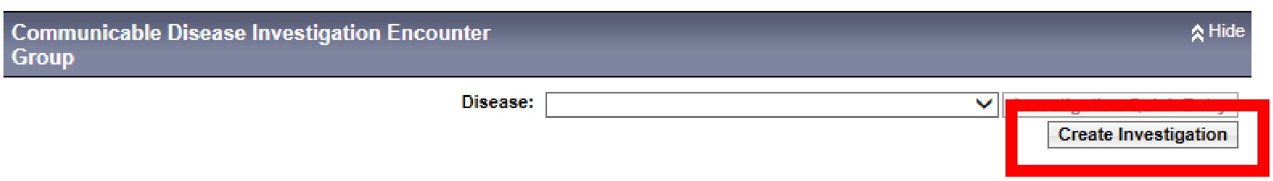
Create a Hepatitis C Investigation



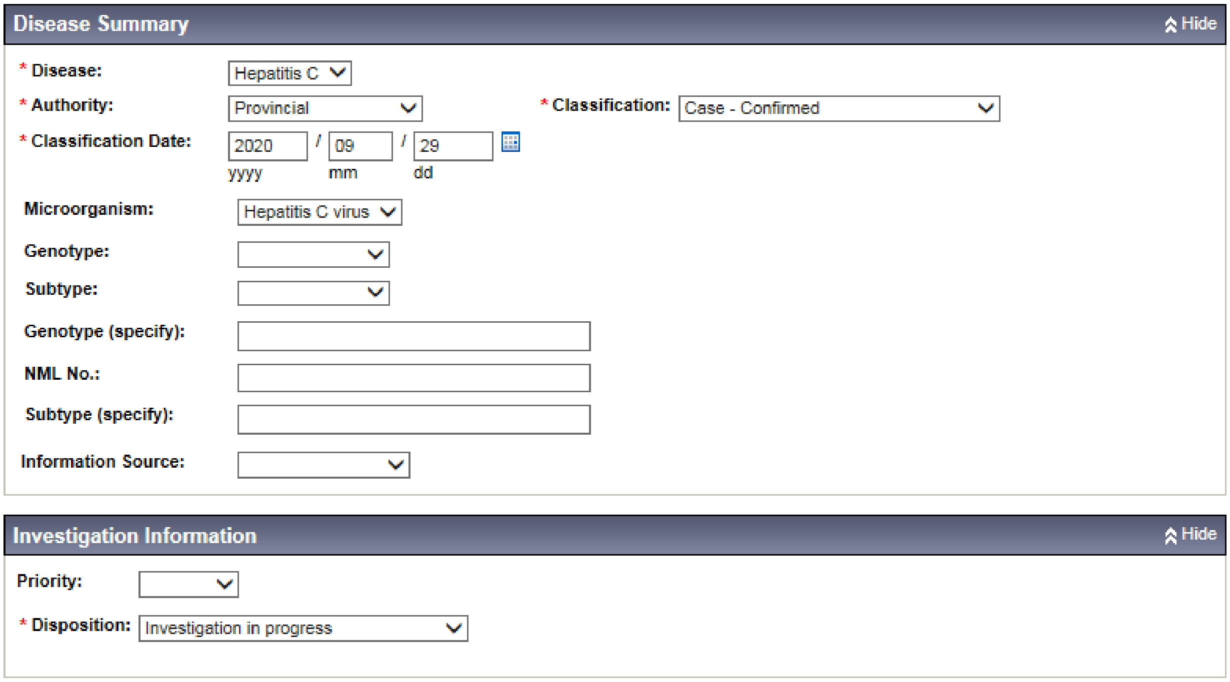
From the left-hand navigation, click on **Subject Summary**



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



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



Disease Summary Hide

* Disease: Hepatitis C

* Authority: Provincial

* Classification: Case - Confirmed

* Classification Date: 2020 / 09 / 29 (yyyy mm dd)

Microorganism: Hepatitis C virus

Genotype:

Subtype:

Genotype (specify):

NML No.:

Subtype (specify):

Information Source:

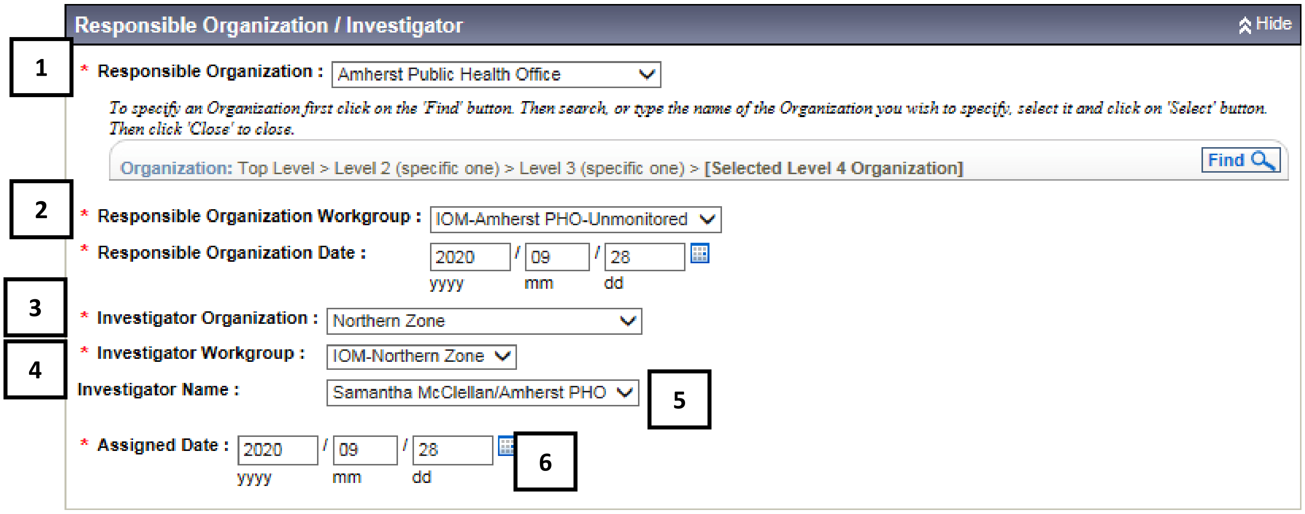
Investigation Information Hide

Priority:

* Disposition: Investigation in progress

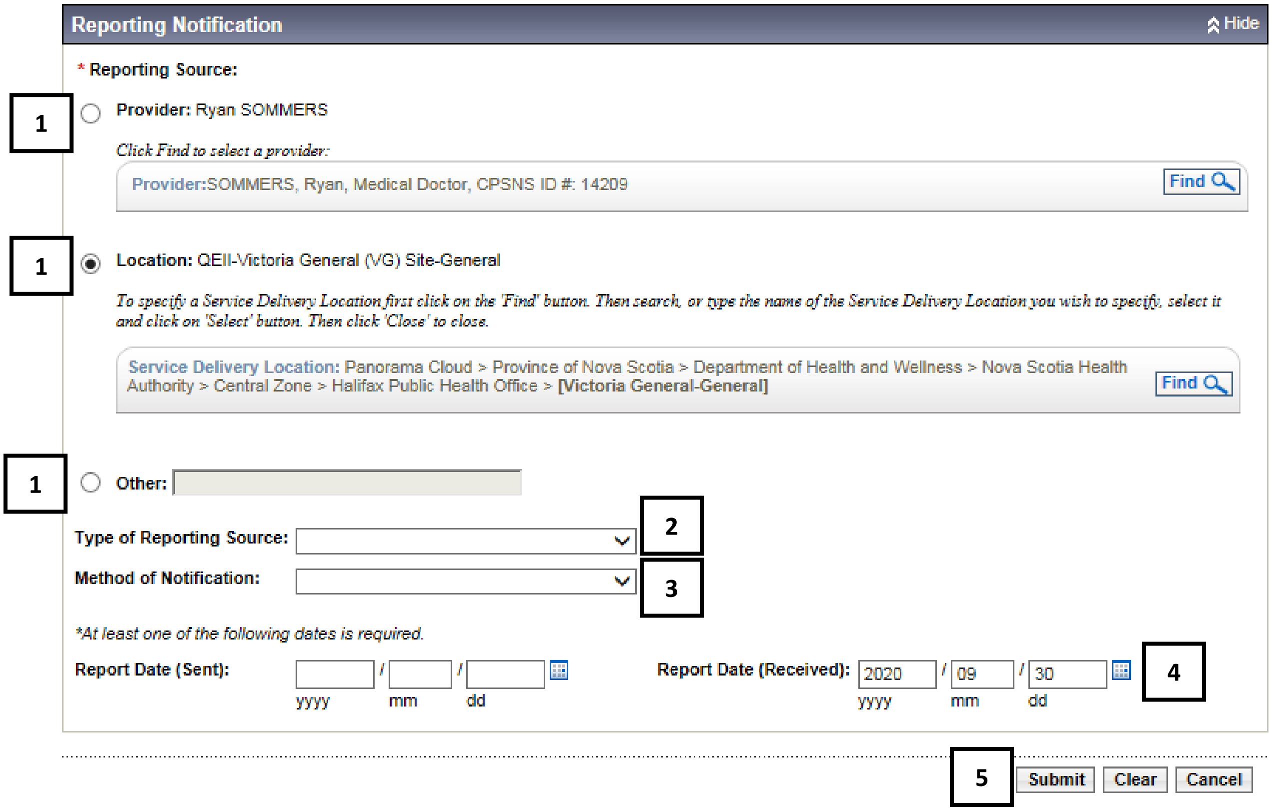
Enter the following information:

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



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)



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**

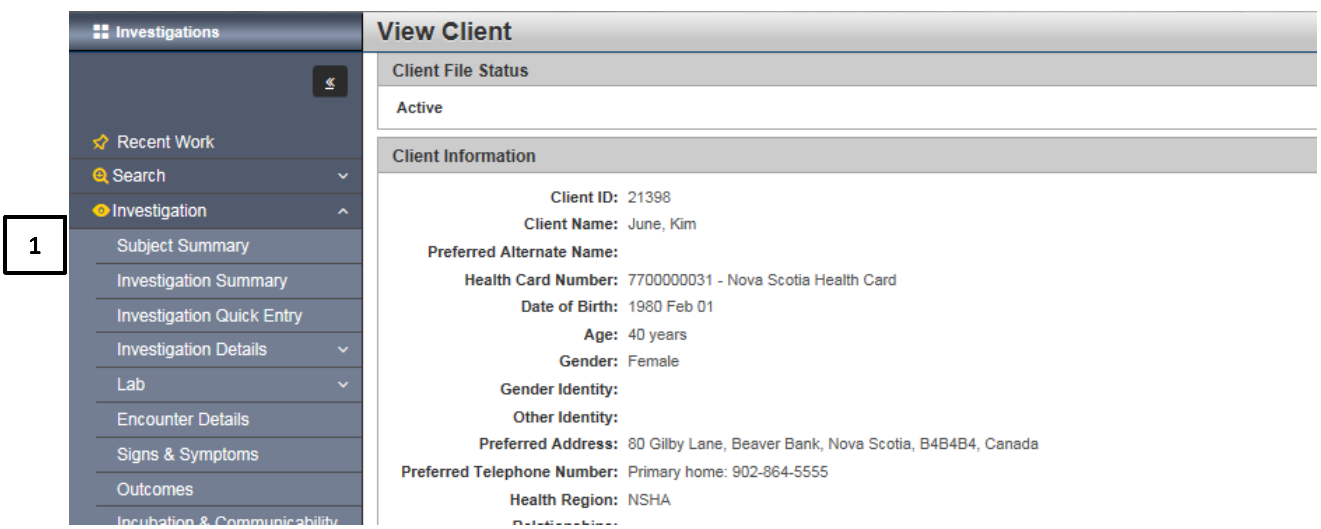
After creating an investigation, you are taken to the **investigation Summary** screen

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.

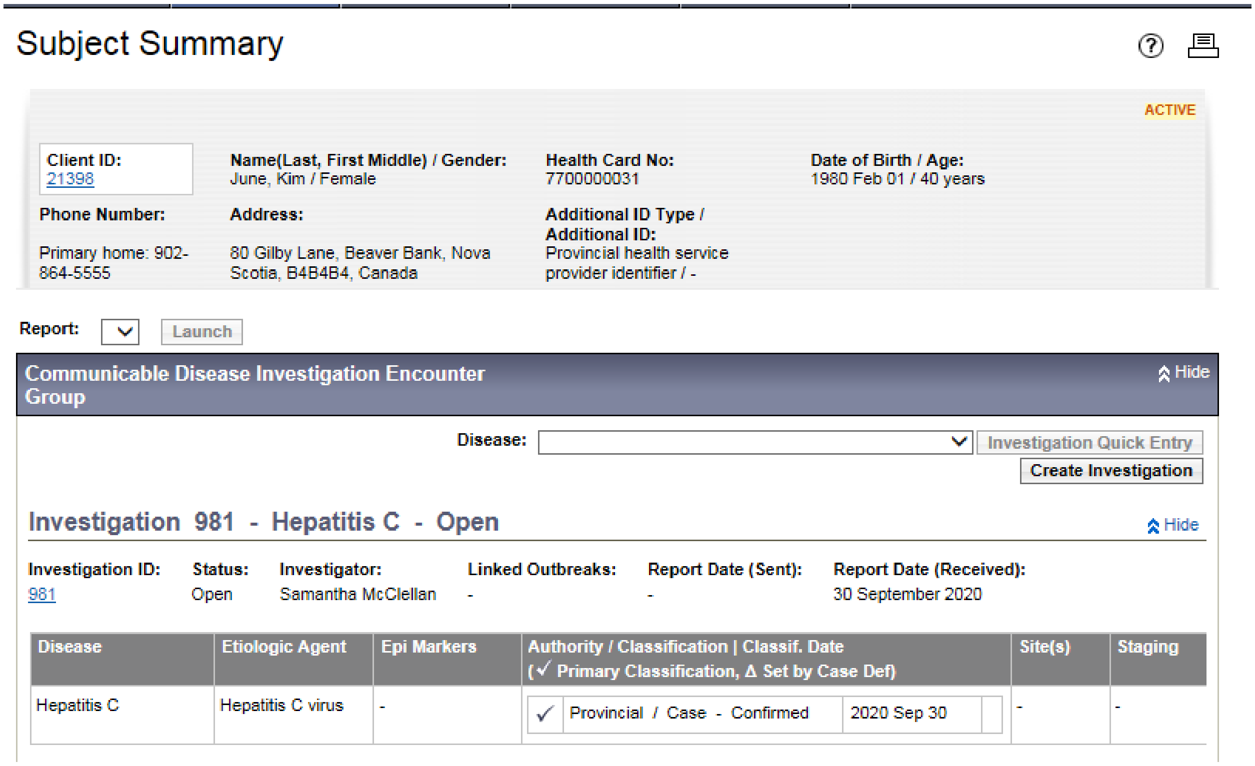
To find this lab, ensure the investigation is not in context. To put the client **only i**n context:

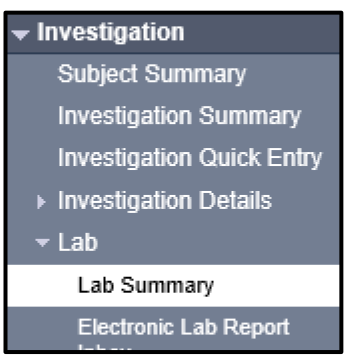
1. Go to Recent Work
2. Click on the client (not the investigation) hyperlink.



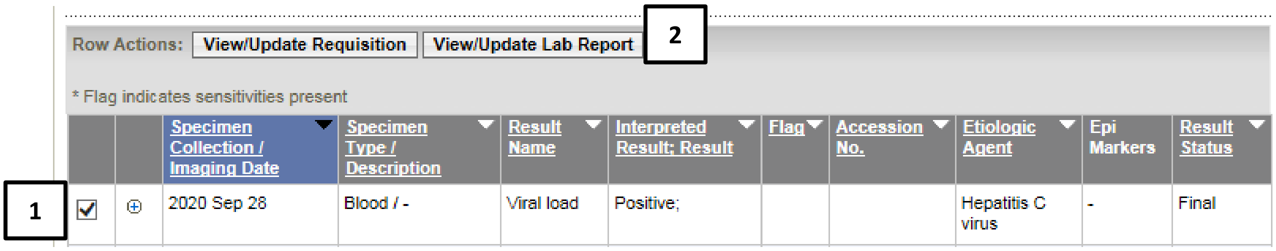
1. Click on the Subject Summary tab in the Left Hand Nav.

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



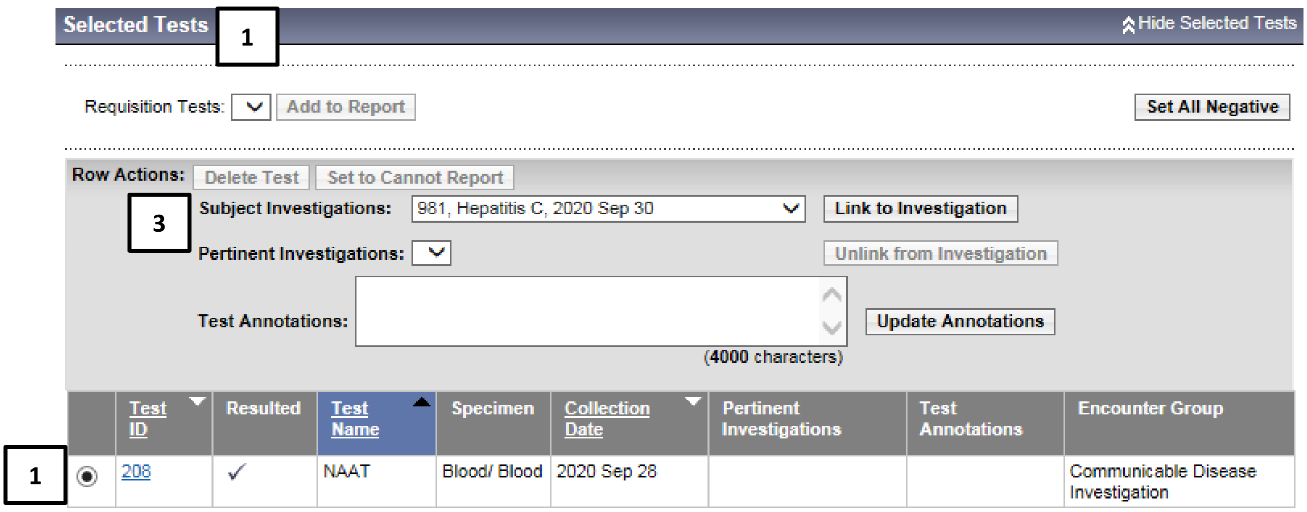


From the left-hand navigation, click on **Lab Summary**



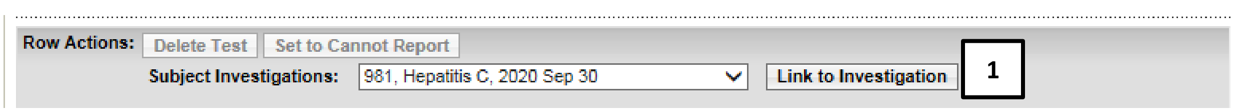
On the Lab Summary screen, scroll down to the summary table

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

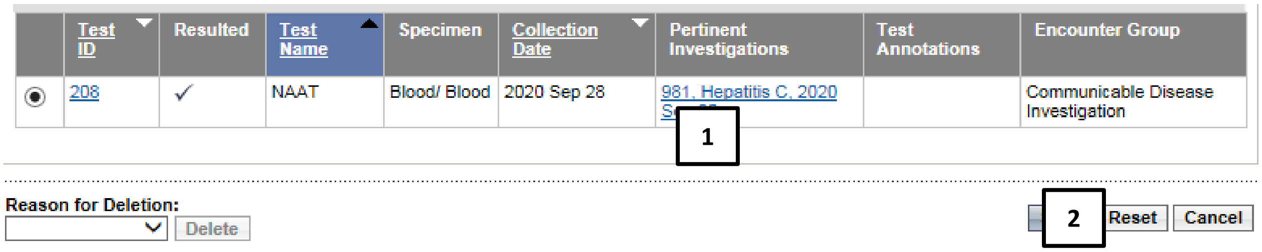


On the Human Lab Report Screen

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



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

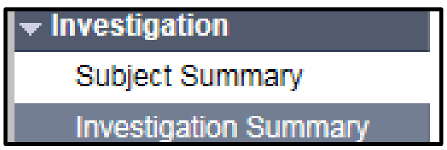


1. The lab is now pertinent to the investigation
2. Click the **Save** button

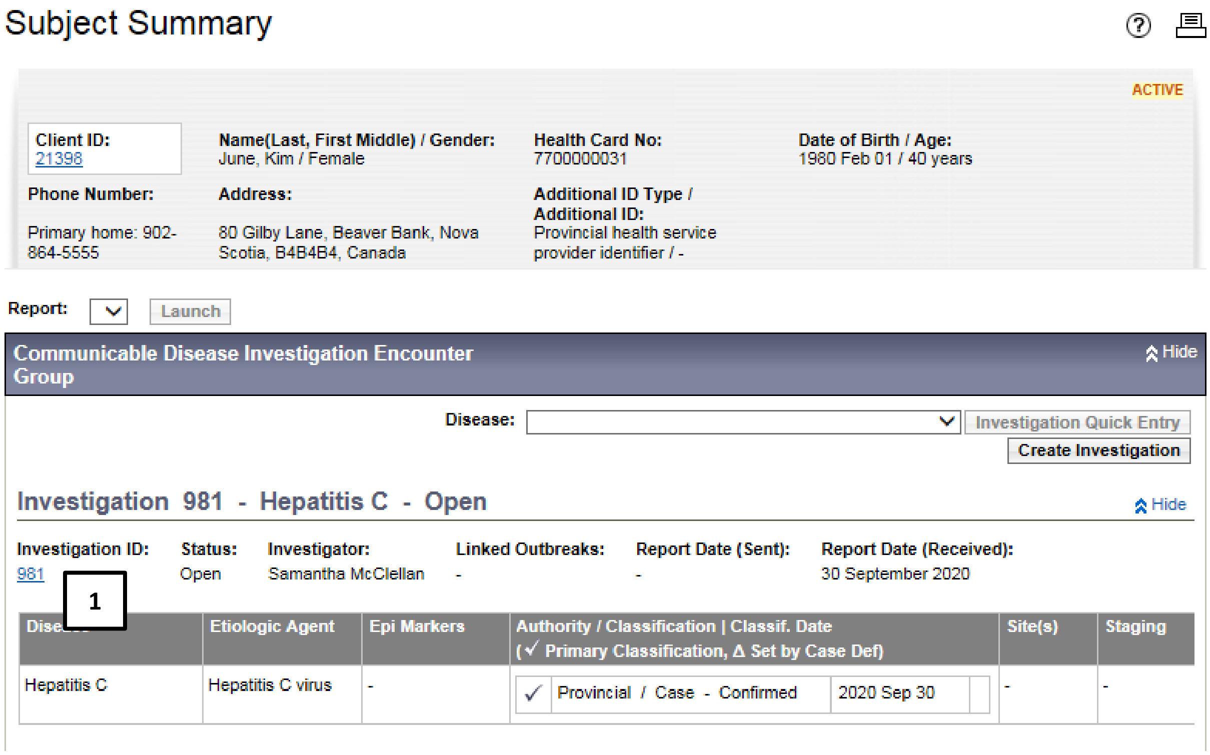
Note:

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

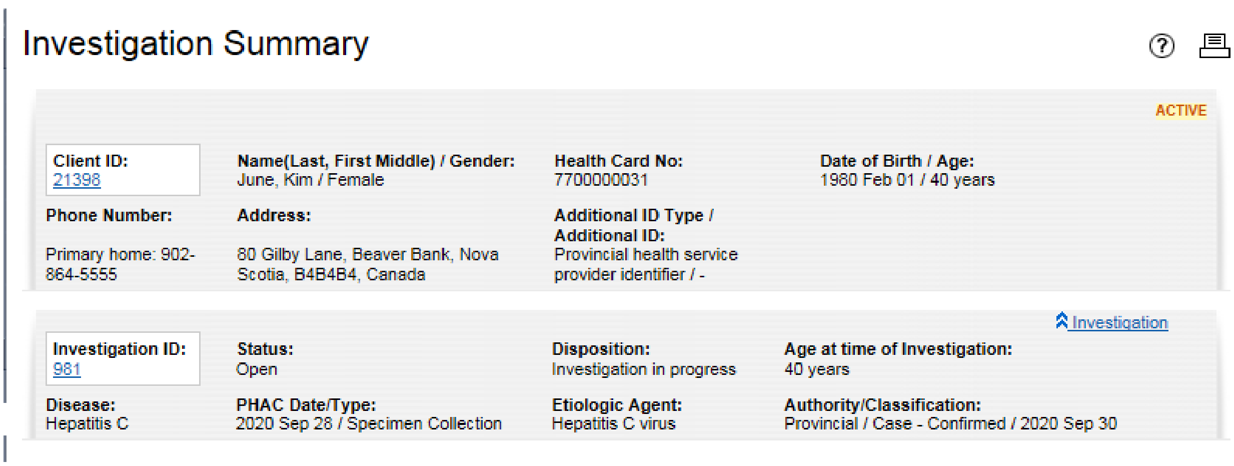
To put the investigation into context:



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

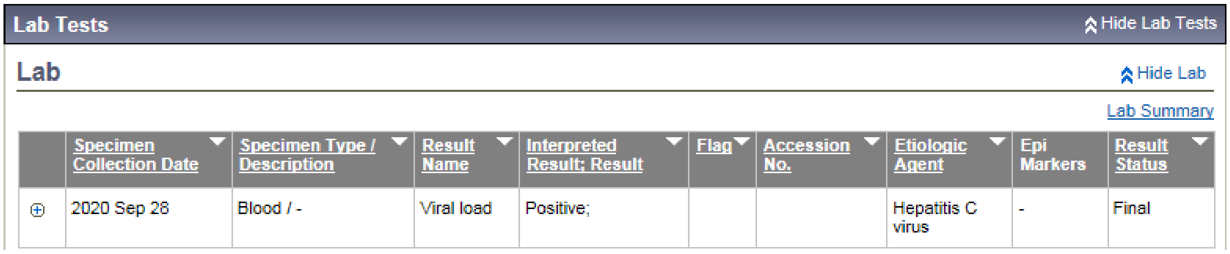


1. Click the Hyperlink associated to the current investigation



Note: The Investigation is now back in Context:

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

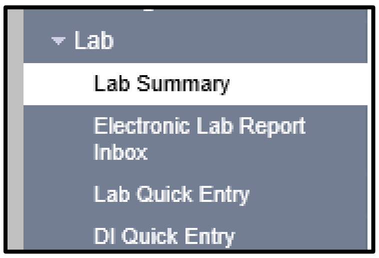

Lab Tests — Hide Lab Tests

Lab — Hide Lab

Lab Summary

	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

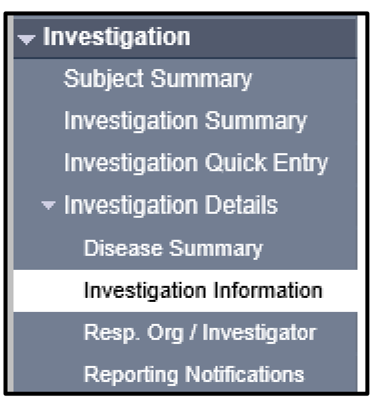
Labs can also be viewed from the **Lab Summary** screen



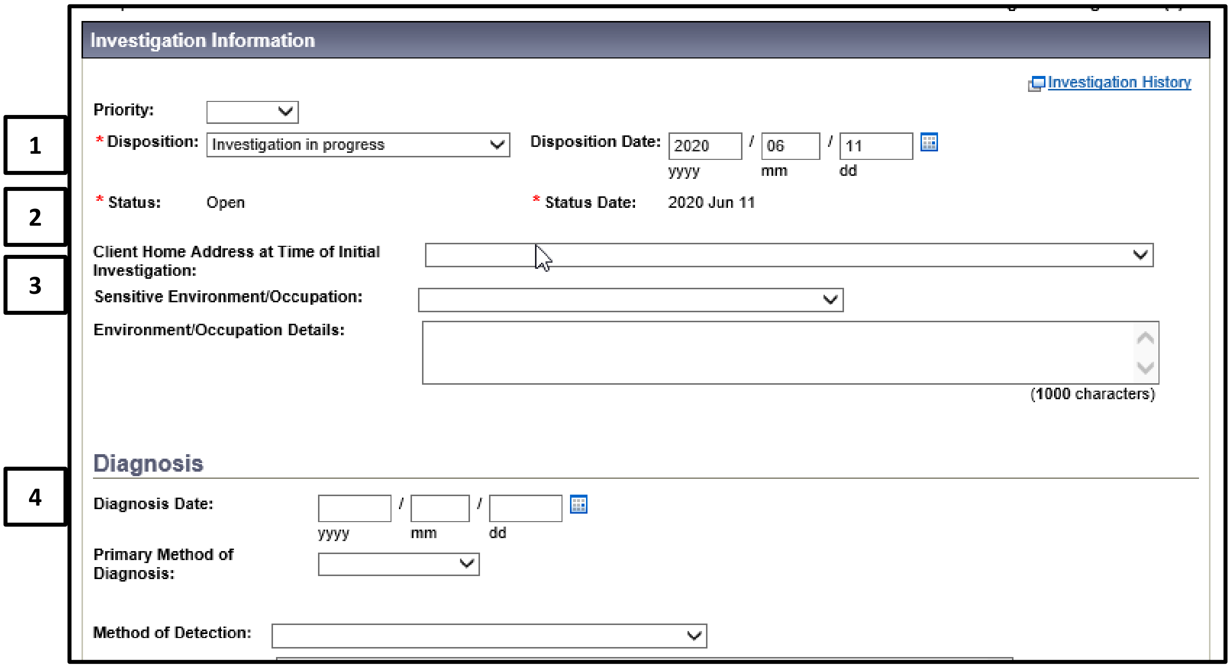
From the left-hand navigation, click on **Lab Summary**

Completing Investigation Information

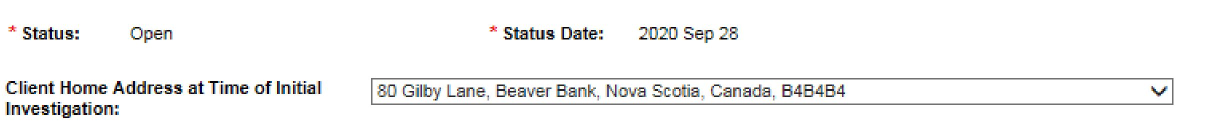
Additional information needs to be entered into Panorama once the investigation has been created and client interviewed.



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



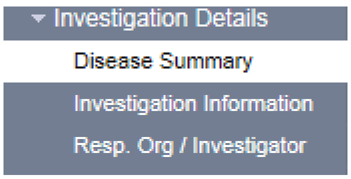
1. **Disposition and Disposition Date** – are auto-populated when the investigation was created and can be changed as needed
2. **Status and Status Date** – are auto-populated when the investigation was created
3. **Client Home Address at Time of Initial Investigation** – select the client's address 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.



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.

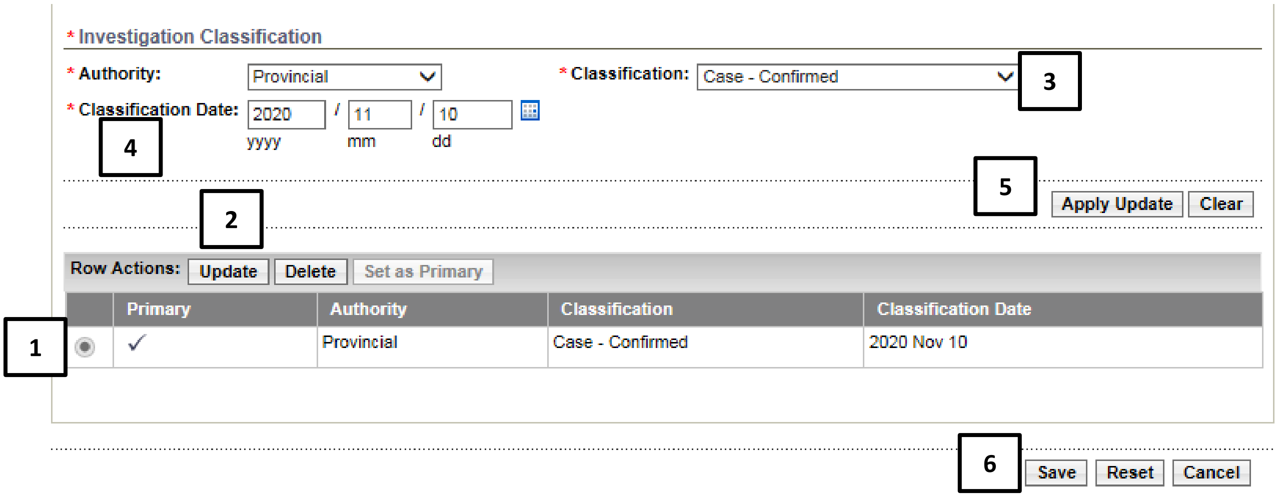
Changing Investigation Classification

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.



Select update:

Scroll down page:

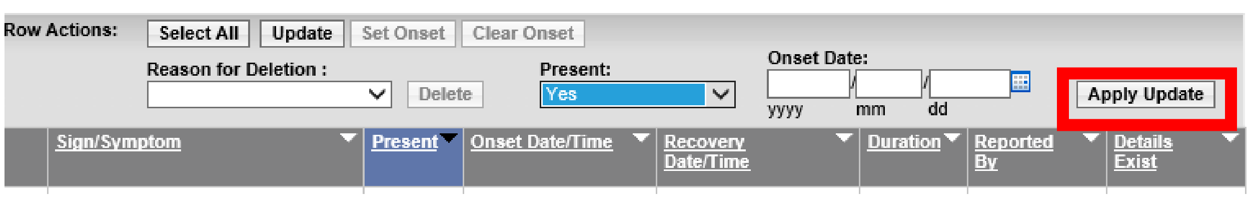


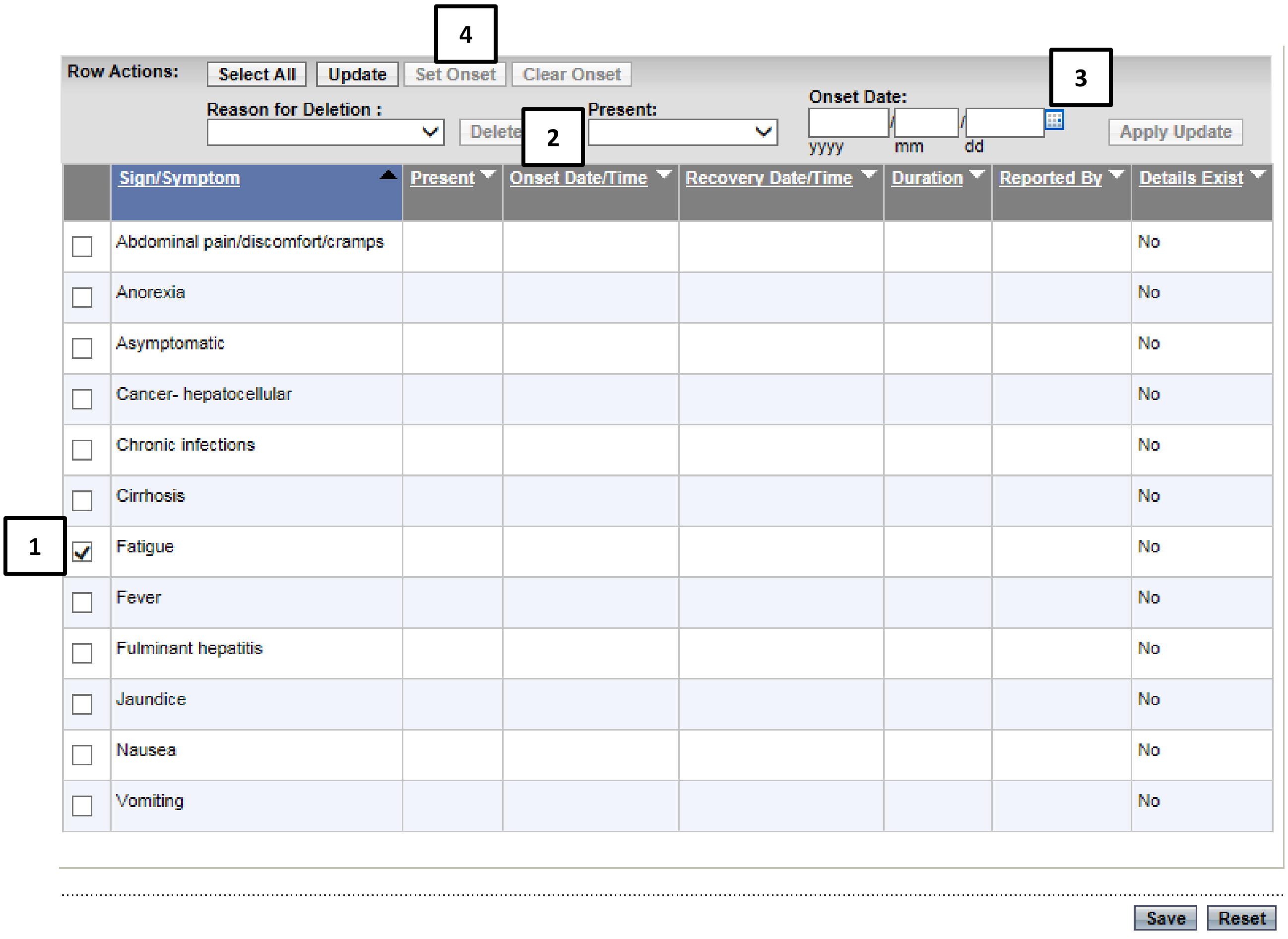
1. Select radio button
2. Select update
3. Update Classification to **Case- Previously Diagnosed**
4. Change the Classification date to the date it was updated
5. Apply update
6. Save

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)





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**- **<u>Do Not Select for Hepatitis C Investigations</u>**

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: Select All Update Set Onset Clear Onset

Reason for Deletion : Delete

Present:

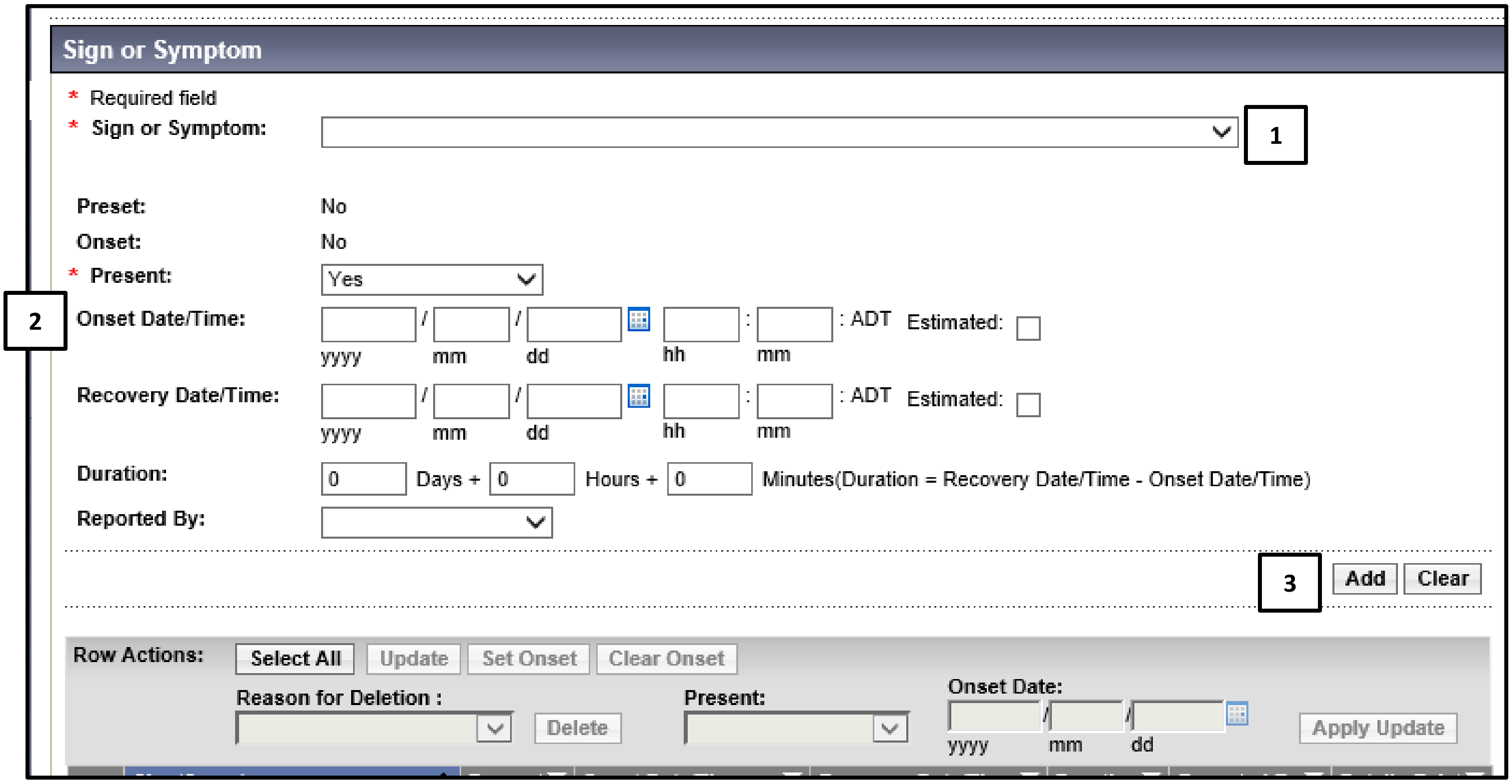
Onset Date: yyyy / mm / dd

Apply Update

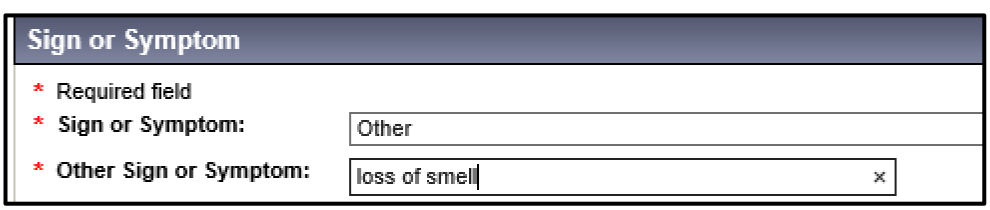
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Abdominal pain/discomfort/cramps						No
☐	Anorexia						No
☐	Asymptomatic						No
☐	Cancer- hepatocellular						No
☐	Chronic infections						No
☐	Cirrhosis						No
☐	Fatigue	Yes	2020 Sep 1 00:00 ADT				No
☐	Fever						No
☐	Fulminant hepatitis						No
☐	Jaundice						No
☐	Nausea						No
☐	Vomiting						No

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

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



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



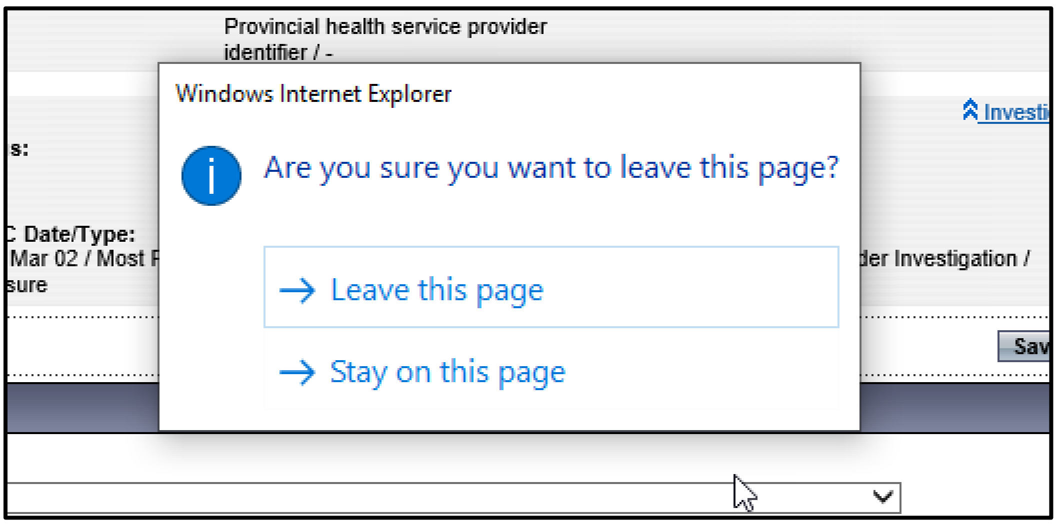
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button

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

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

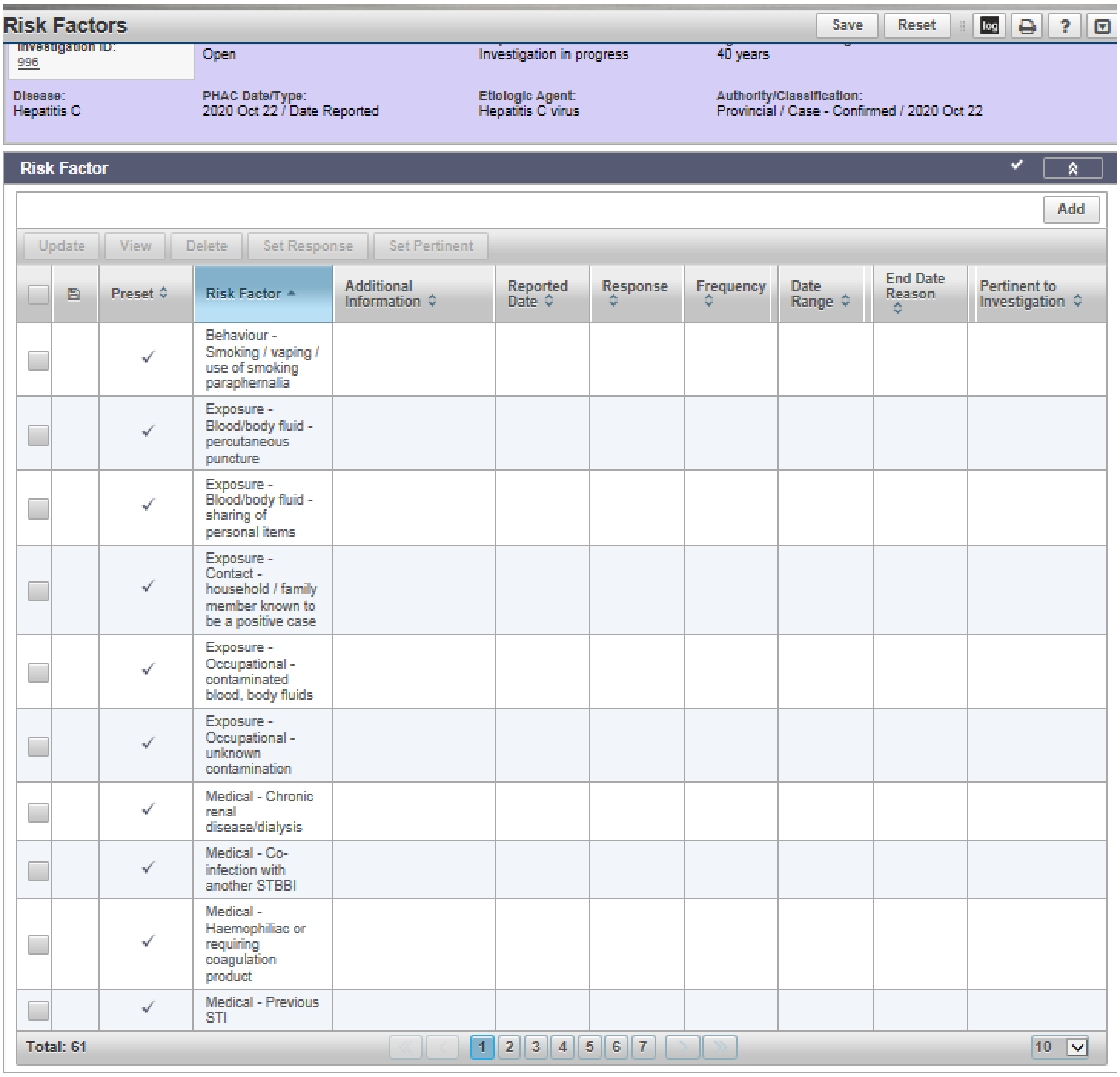
Click the **Save** button (Top or Bottom right-hand area of screen)

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

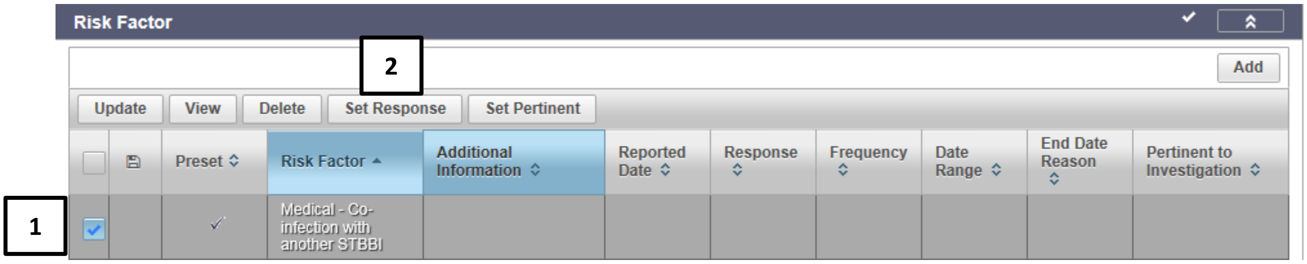
From the left-hand navigation, click on **Risk Factors**

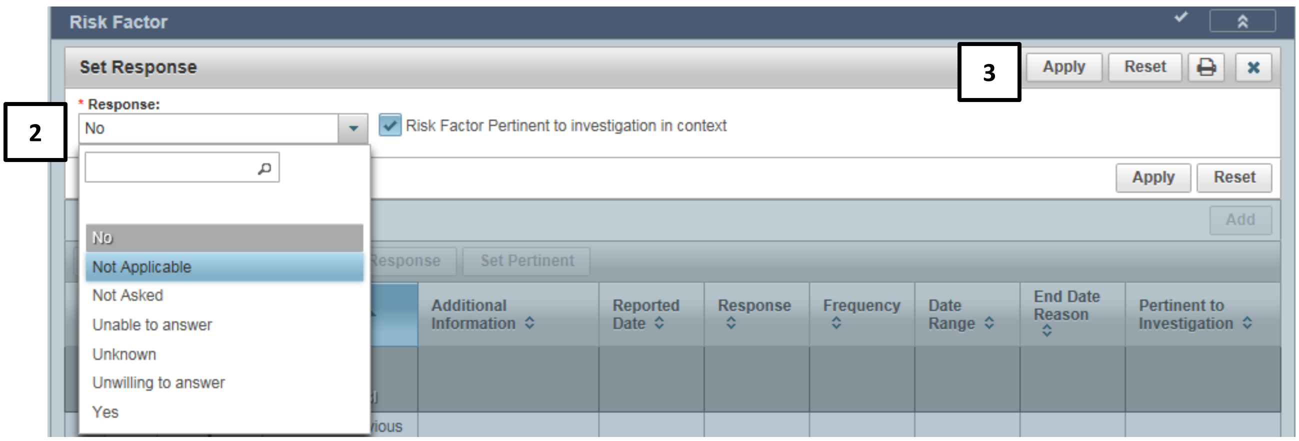


1. The risk factor table is populated with all presets defined for Hepatitis C. Ensure all preset risk factors are showing by clicking the **Drop-down** in the right- hand corner and changing from 10 to “all”:

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:

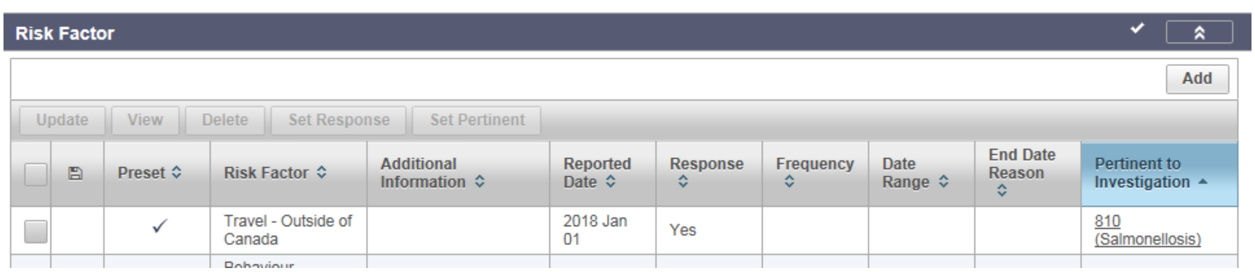




1. Select check box beside risk factors that are present (you may multi-select).
2. Click **Set Response** and select **Yes**
3. Click **Apply**

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.

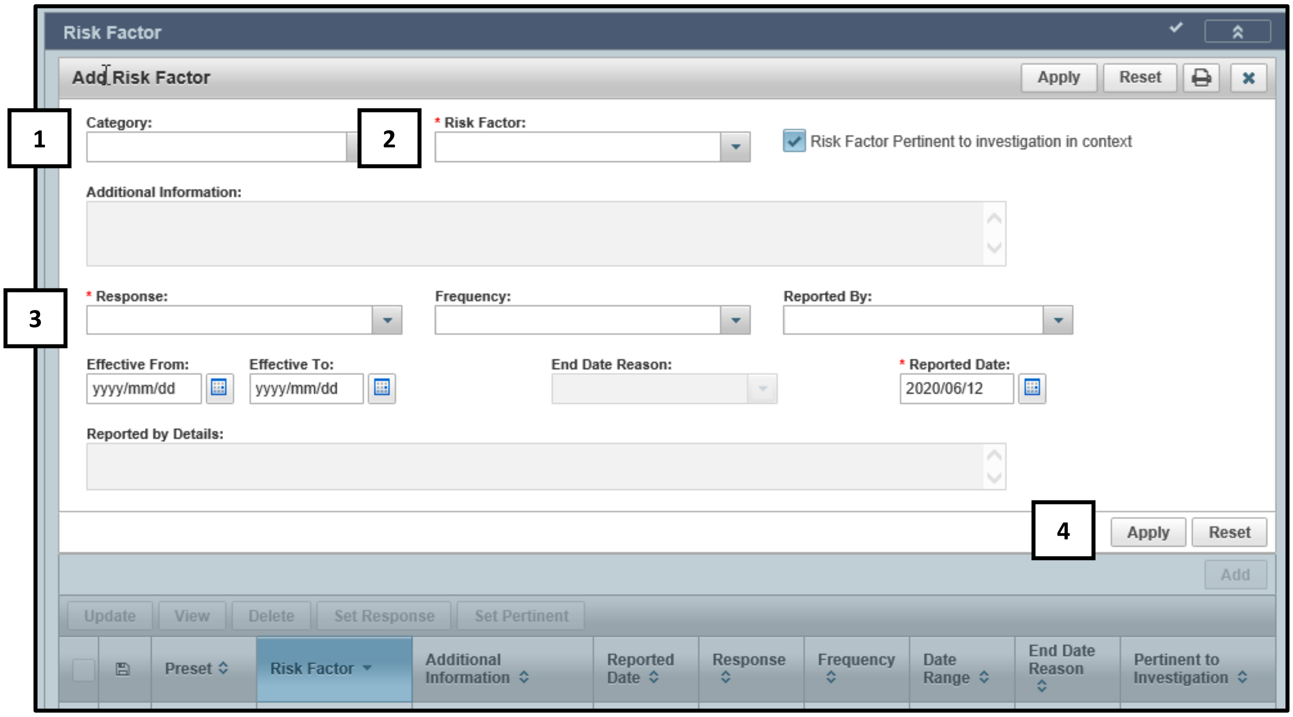
For a preset risk factors that contains a response Pertinent to another Investigation or to add a risk factor that is not a preset:



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.

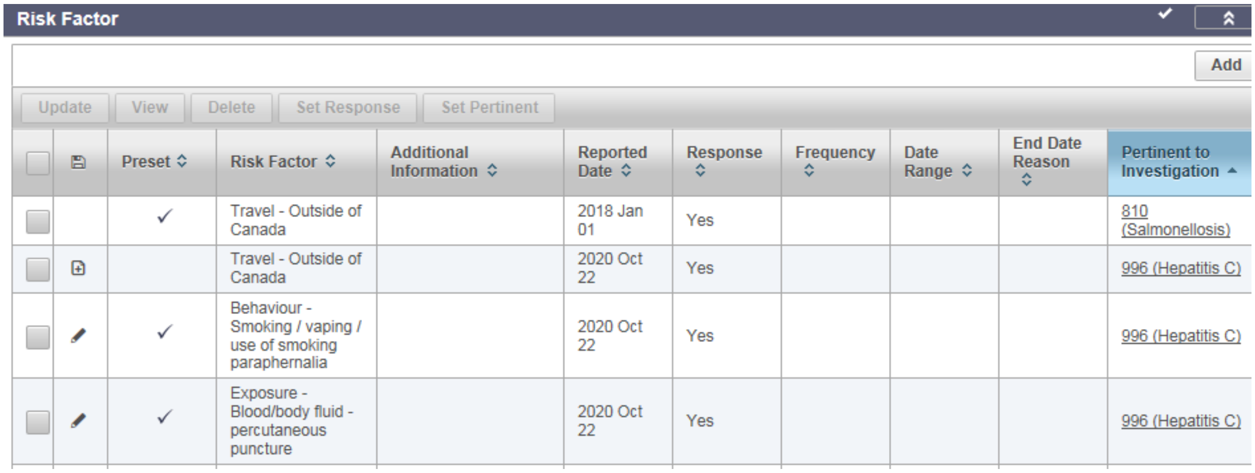
1. Click the **Add** button

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



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

		✓	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)
			Travel - Outside of Canada		2020 Oct 22	Yes				996 (Hepatitis C)



Risk Factor

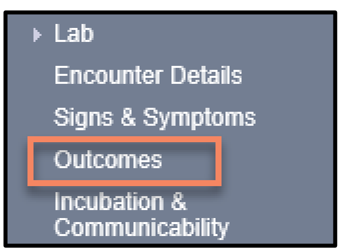
Add

Update | View | Delete | Set Response | Set Pertinent

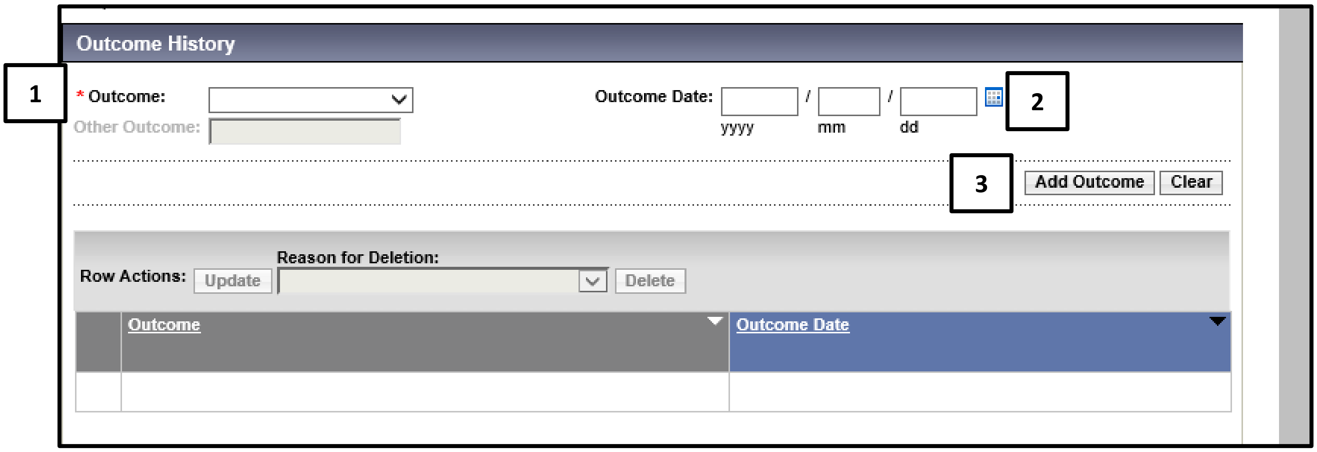
		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
		✓	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)
			Travel - Outside of Canada		2020 Oct 22	Yes				996 (Hepatitis C)
		✓	Behaviour - Smoking / vaping / use of smoking paraphernalia		2020 Oct 22	Yes				996 (Hepatitis C)
		✓	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

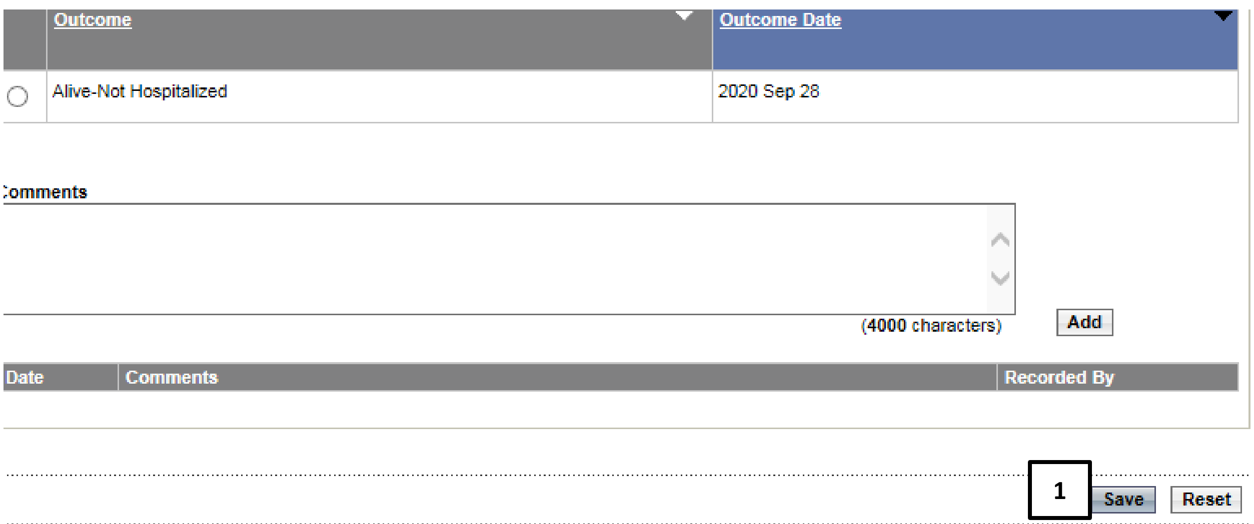


From the left-hand navigation bar, click on **Outcome**



Note: there can be multiple outcomes from throughout the investigation

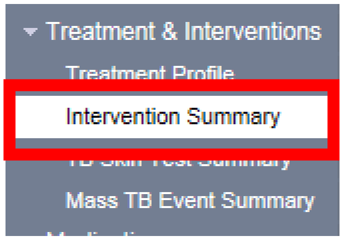
1. **Outcome** - Select the outcome from the drop-down list, select the highest level of care that was required
2. **Outcome Date** - Enter the outcome date.
3. Click the **Add Outcome** button to add the outcome to the outcome table



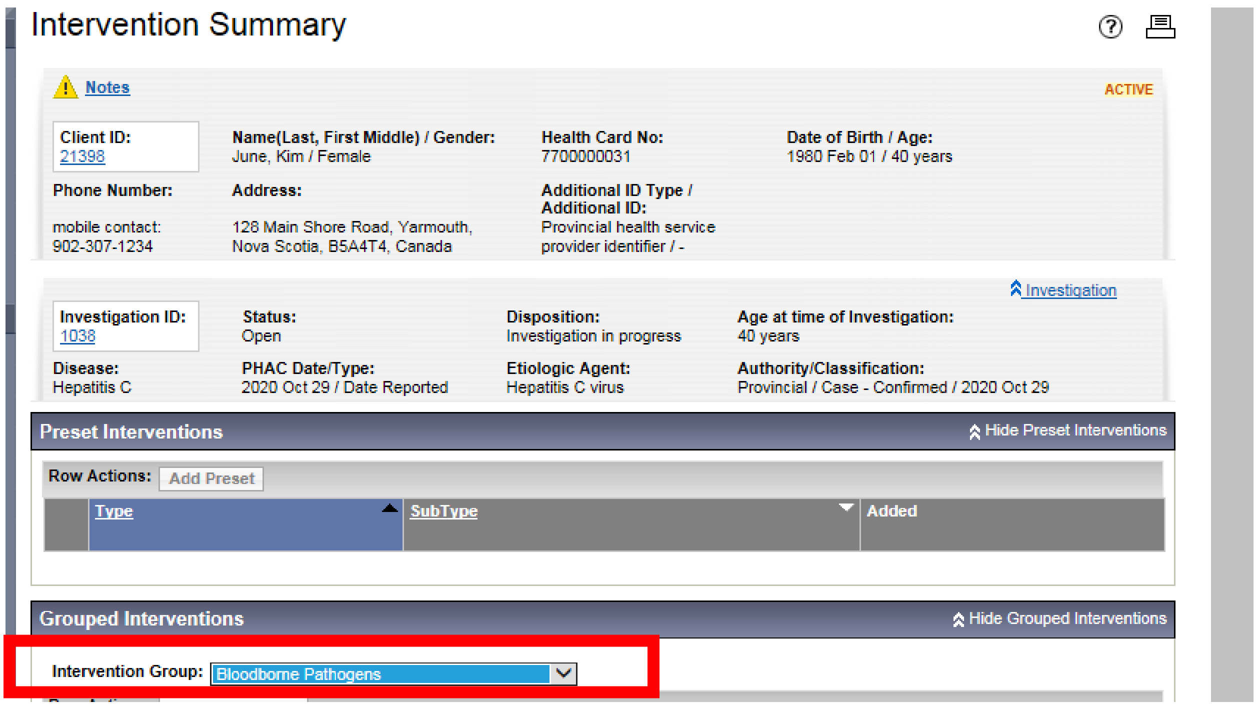
1. Click the **Save** button

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:

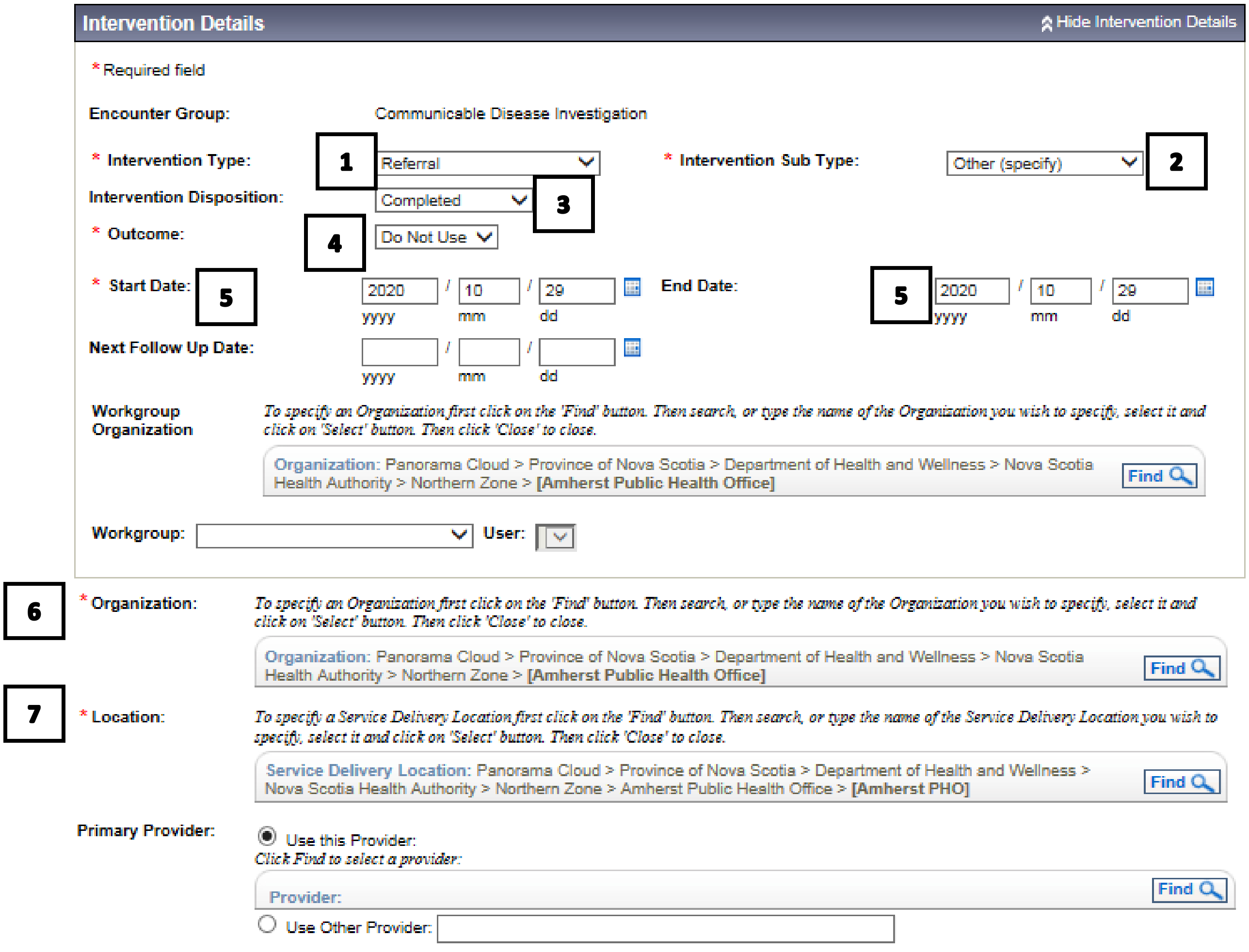


The **Grouped Interventions** for Hepatitis C (Bloodborne Pathogen) will appear.

Row A **2** Add Intervention

	Type	SubType	Added
○	Communication	Communication to general public (specify...	-
○	Communication	Letter (specify)	-
○	Communication	Other communication (specify)	-
○	Communication	Public health advisory	-
○	Communication	Public health alert	-
○	Communication	Public health order	-
○	Contact tracing	Contact tracing	-
○	Education/counselling	Education/counselling	-
○	Environmental Health	Inspection - personal service facility	-
○	Environmental Health	Inspection - work	-
○	Notification for action	Other (specify)	-
○	Notification for action	Canadian Blood Services	-
○	Notification for action	Dept. of Environment	-
○	Notification for action	Provincial Multi-Organ Transplant Progra...	-
○	Notification for action	Regional Tissue Bank	-
○	Notification for action	Dept. of Health and Wellness	-
○	Prophylaxis	Chemoprophylaxis	-
○	Prophylaxis	Immunoprophylaxis	-
1 ◉	Referral	Other (specify)	-
○	Referral	Primary care provider	-

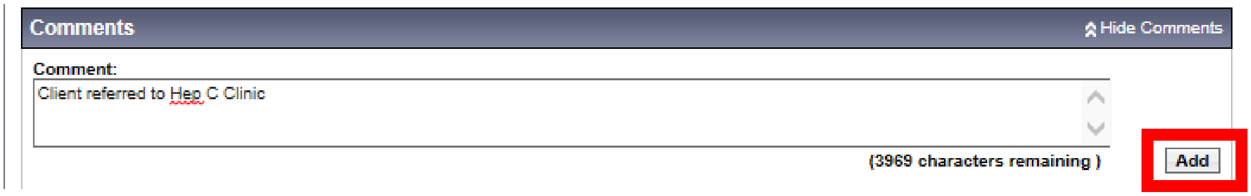
1. Select the appropriate intervention
2. Click **Add Intervention** from Row Action button



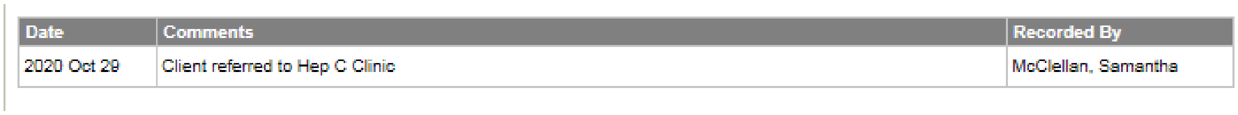
Fill your mandatory fields:

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:



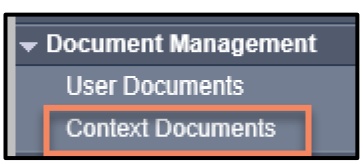
Click **Save** and follow above instructions for each intervention.

Ensure you take the intervention out of context

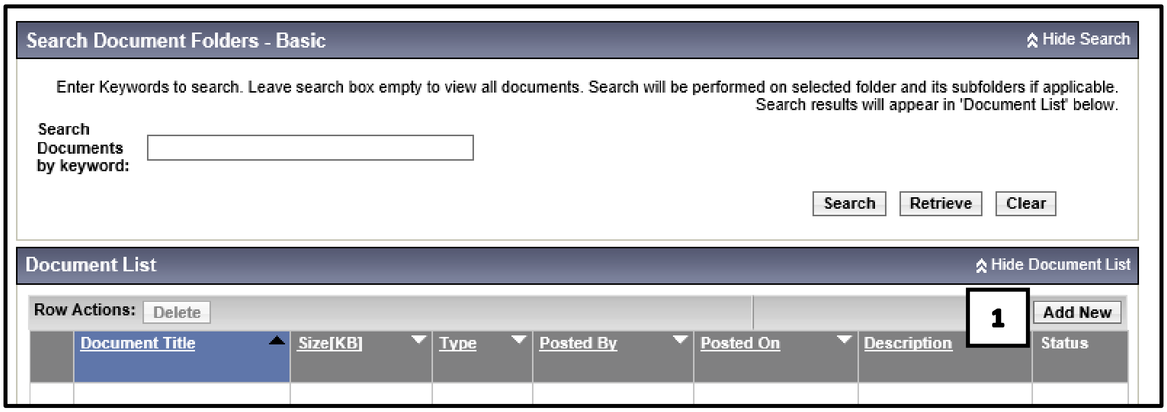
- Click the **Cancel** button towards the top of the screen

Uploading a Document to an Investigation

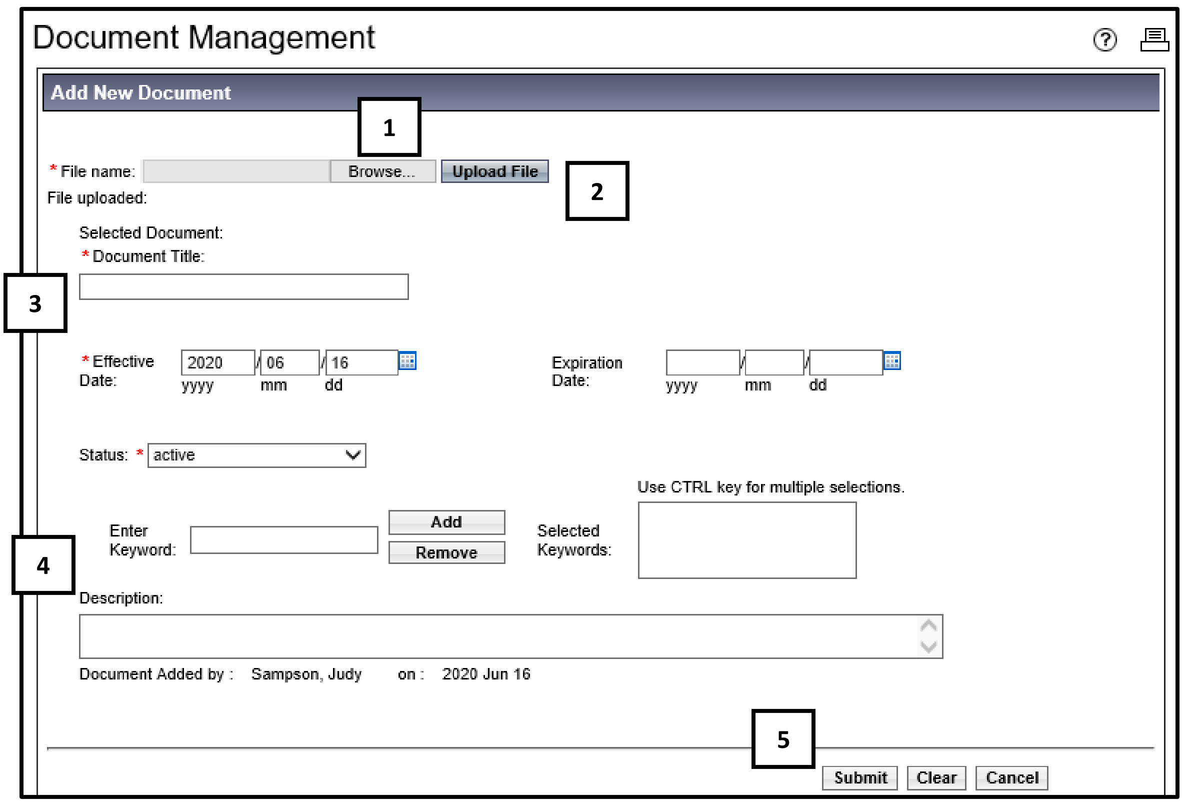
Note: Before you upload a document, ensure that an Encounter is not in the context banner. To take the encounter out of context, go to recent work and click on the investigation.



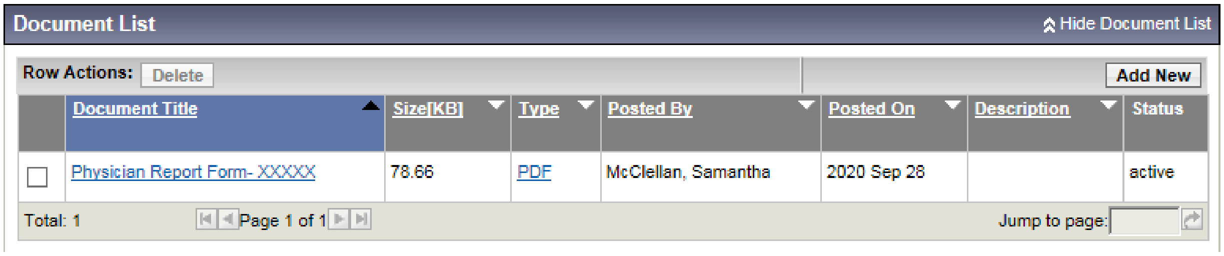
From the left-hand navigation, click on **Context Documents. Do not use User Documents.**



1. Click the **Add New** button

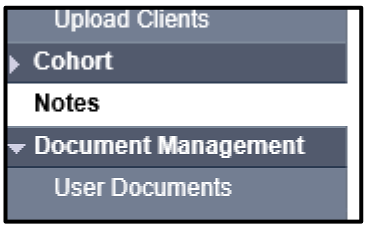


1. Browse for file- locate document and select it
2. Click the **Upload File** button. You will see that the file is uploaded
3. **Document Title** – enter the document title
4. **Description** – enter the document description
5. Click the **Submit** button

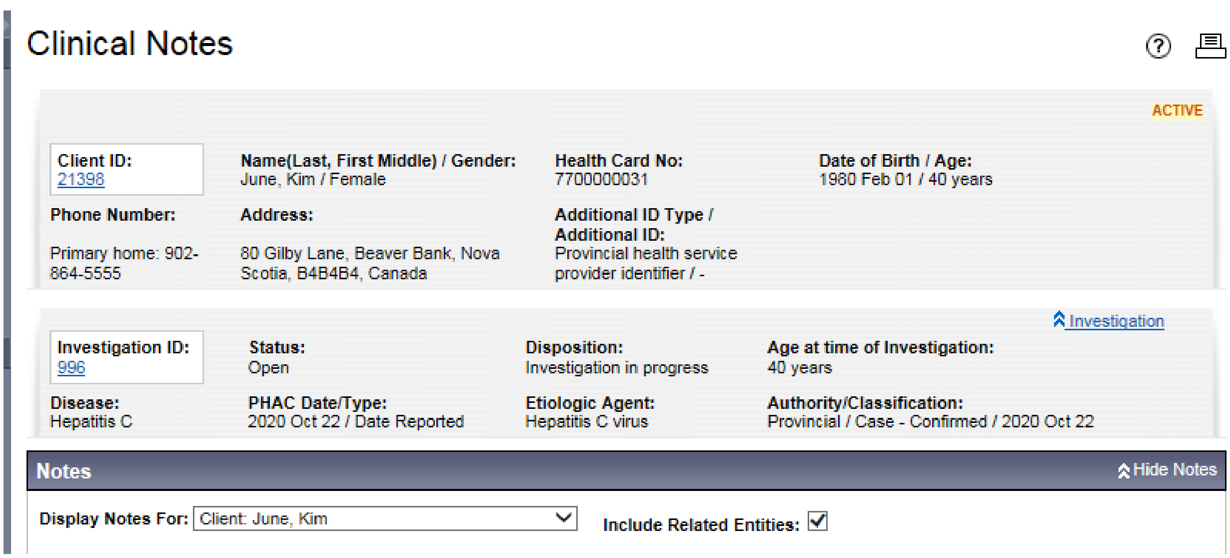


You can view the document by clicking on the hyperlinked name in the **Type** column

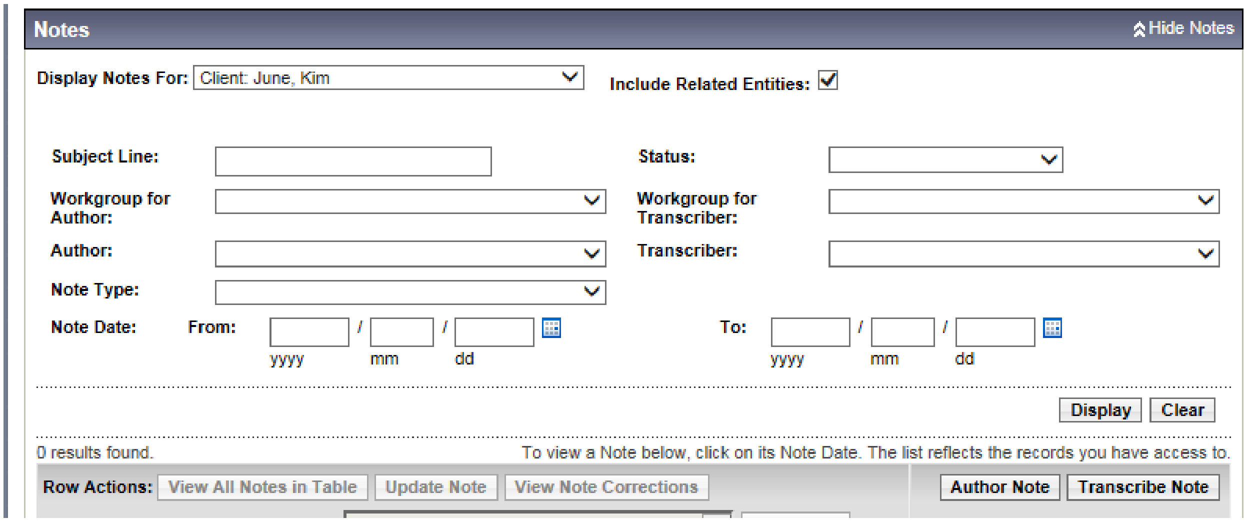
Adding a Clinical Note to an Investigation



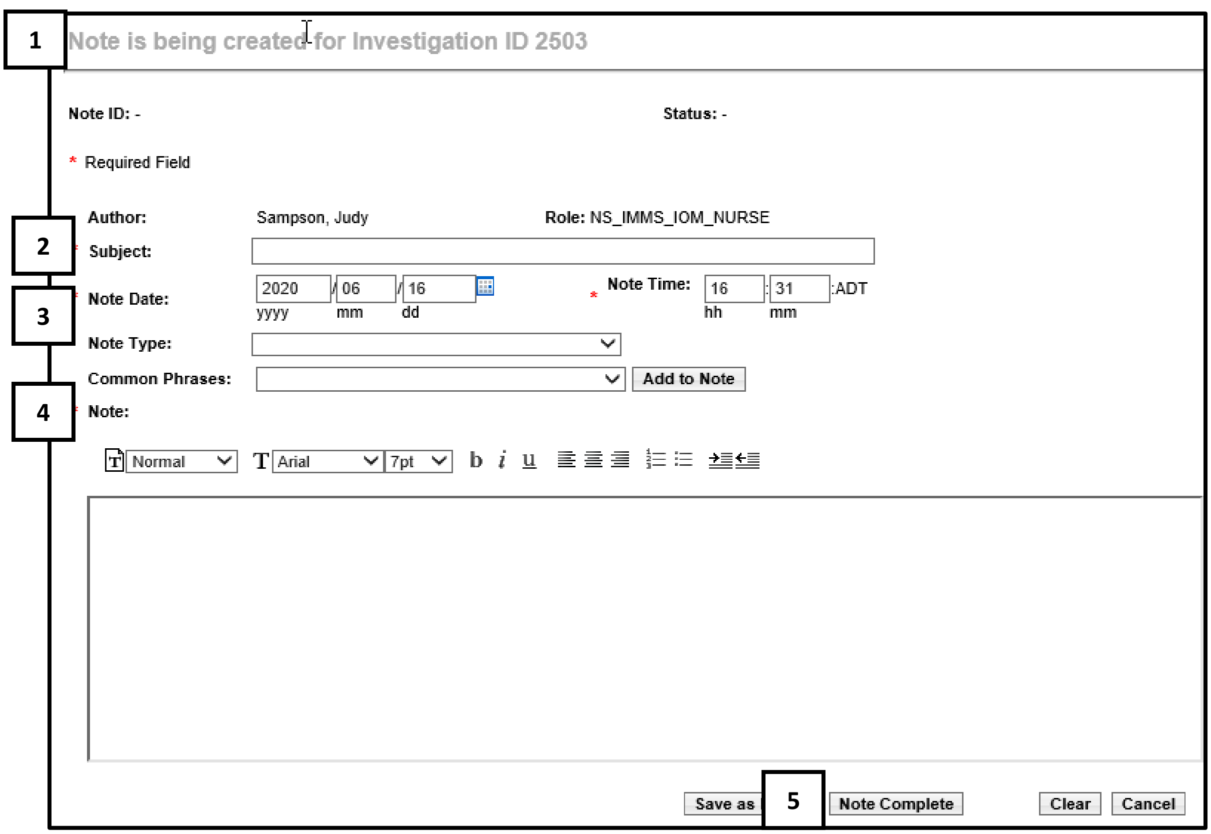
From the left-hand navigation, click on **Notes.**



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

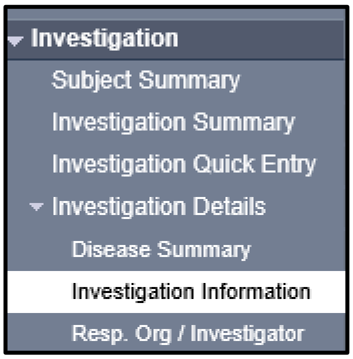


1. Click on **Author Note** button

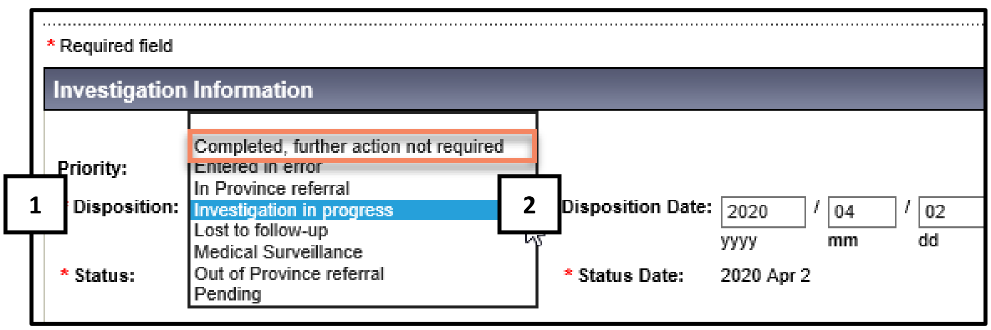


1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time –** defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note –** enter the note details
5. Click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

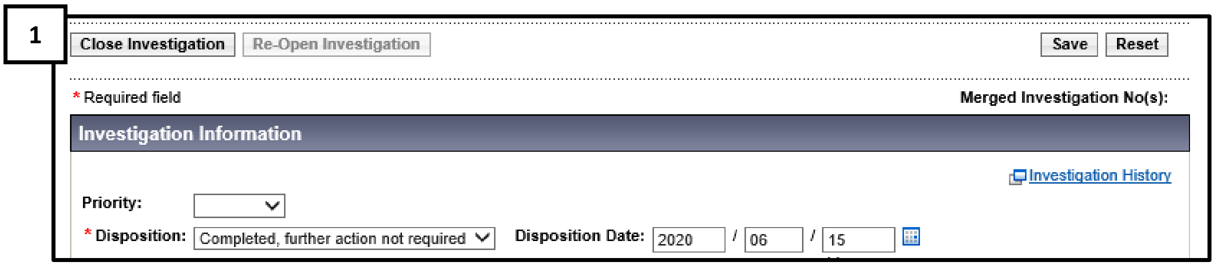
Update the Investigation Disposition and Close the Investigation



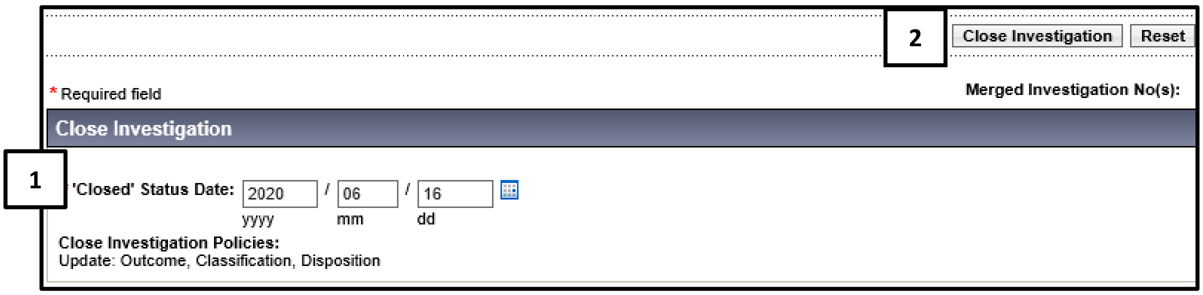
From the left-hand navigation, click on **Investigation Information.**



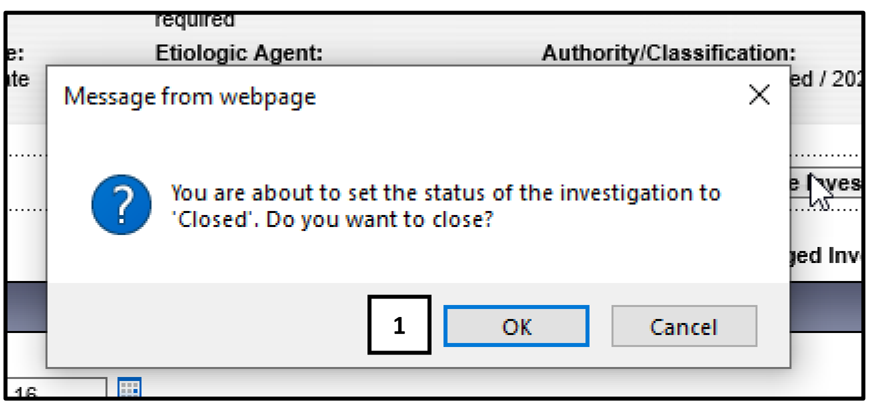
1. **Disposition** - Select "Completed, further action not required" from the drop down
2. **Disposition Date –** defaults to the date of the previous disposition. Enter the close date.
3. Click the **Save** button



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.

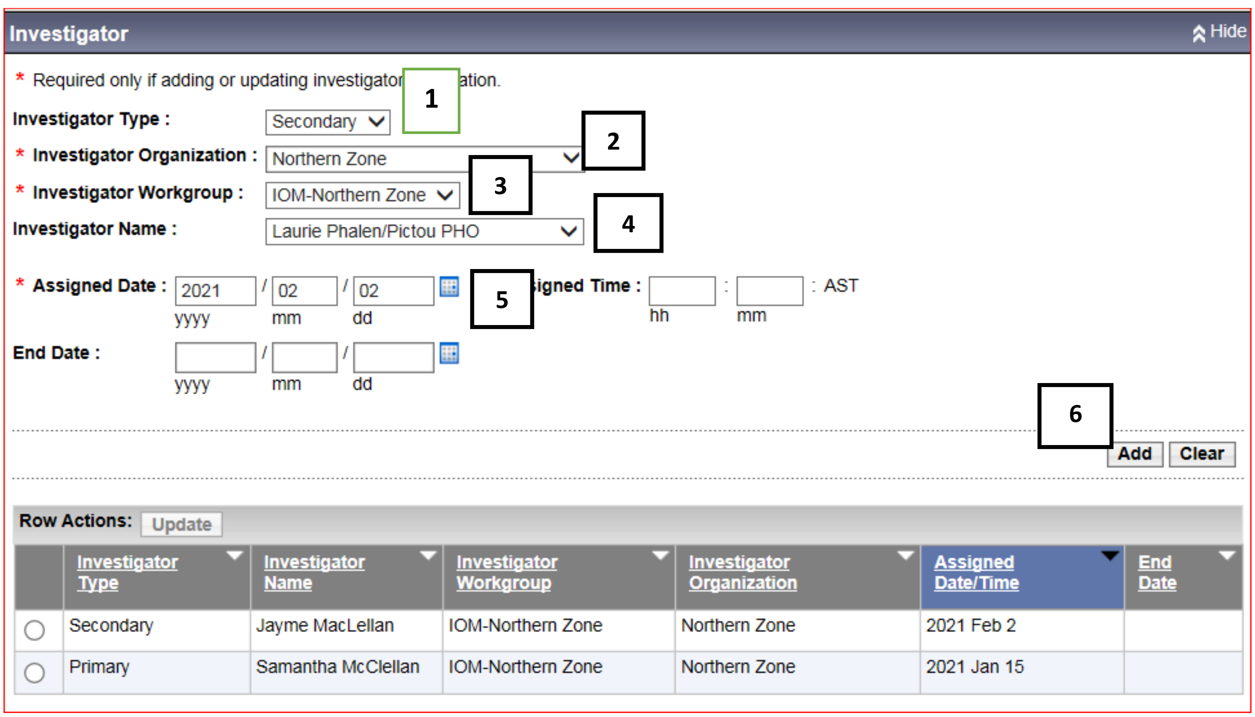


1. Click the **OK** button

Adding a Secondary Investigator

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

Scroll to bottom of page:

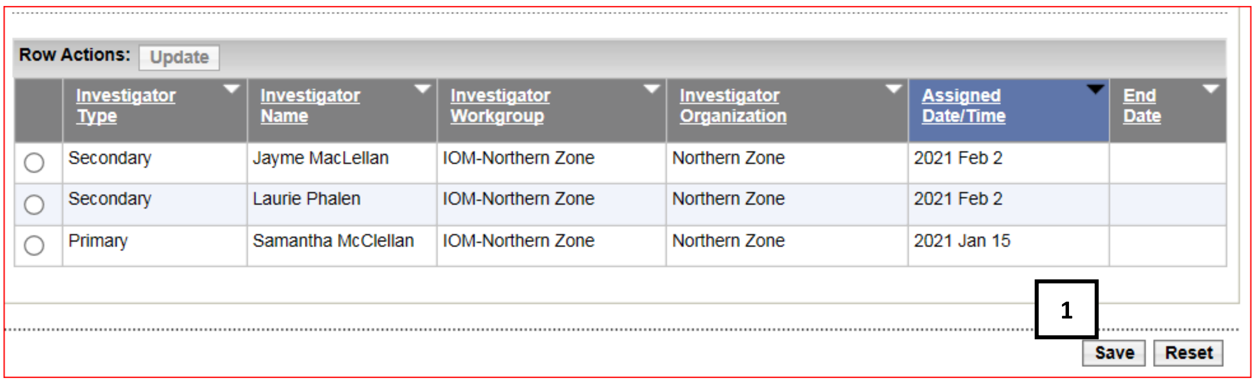


Enter the following information:

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

New name will appear in the table below:

1. Click the Save Button



	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
○	Secondary	Jayme MacLellan	IOM-Northern Zone	Northern Zone	2021 Feb 2	
○	Secondary	Laurie Phalen	IOM-Northern Zone	Northern Zone	2021 Feb 2	
○	Primary	Samantha McClellan	IOM-Northern Zone	Northern Zone	2021 Jan 15	

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).

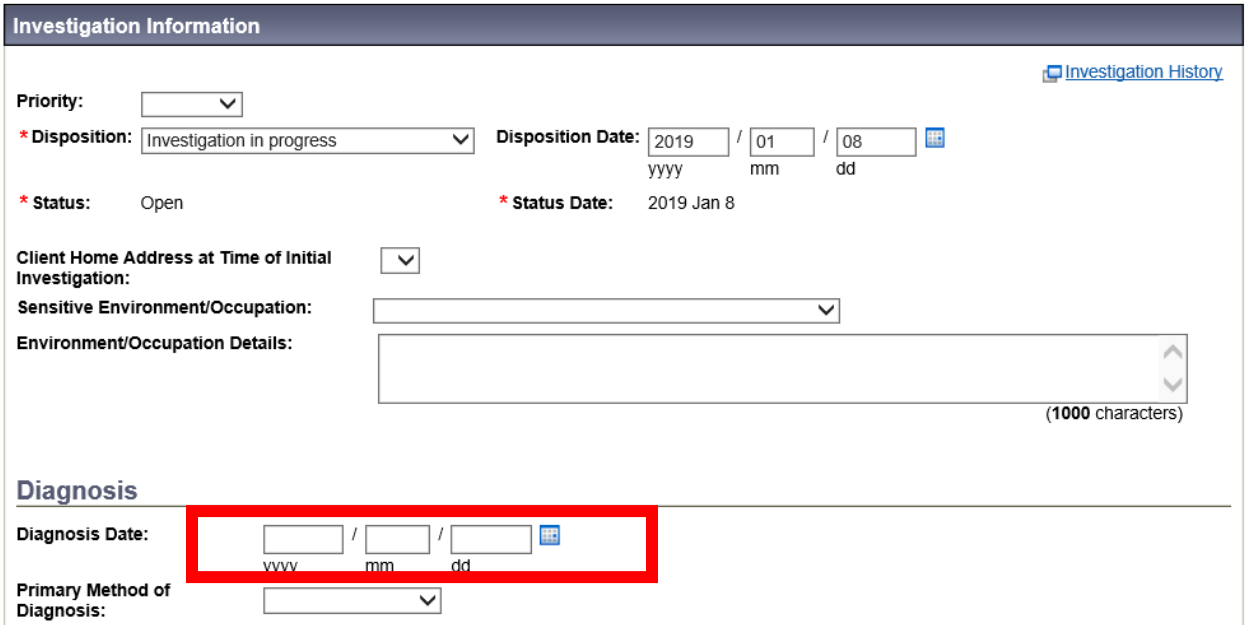
3. Enter the lab under the investigation or link the lab to the investigation

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



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 precious 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