



- 1. Search for Client
- 2. Update Client Phone Number and Address- Create Temporary Address
- 3. Create Lyme Investigation
- 4. Making a Lab Pertinent to an Investigation
- 5. Completing Investigation Information
- 6. Signs and Symptoms
 - Adding an Additional Sign and Symptom
- 7. Risk factors
 - Adding an Additional Risk Factor
- 8. Adding an Outcome
- 9. Recording a Medication Other Than a TB or HIV Drug- Other Meds
- 10. Indicate Course Complete- Other Meds
- 11. Uploading a Document to an Investigation
- 12. Adding a Clinical Note to an Investigation
- 13. Update the Investigation Disposition and Close Investigation
- 14. Change Disease Classification
- 15. Adding a Secondary Investigator





Search for a Client

Search for a client

F	Recent Work
- 5	Search
	Search Investigations
	Search Lab
	Search Exposures
	Search Interventions
	Search Clients
	Search Non-Human Subjects
	Search Disease

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

Search Cl	ents				3	Search Retrieve Reset II 🖨 ?
Basic Sea	ch Criteria					
1	:	Client Number Type:	- 2			Select all that apply:
Last Name:		First Name:		Middle Name:		Include Indeterminate Clients Use Phonetic Matches
Mother's Nam						
Gender:	•					
Choose one:						
Date of B	rth: yyyy/mm/d	d				

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 # 🔒 ?		
	Basic Search Criteria		*		
	Client Number: Client Number Type:		Select all that apply:		
1	Last Name: Middle Name:		Use Phonetic Matches		
	Mother's Name:				
3	Gender:				
	Choose one: Date of Birth: yyyy/mm/dd 4				

- 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

	s	Searc	h Res	ults				_				< <
				3				4			Client Quick Entry Cr	eate Client
2		Pre	view	Update	5	Set In Context Create Co	hort Subjec	t Summary				
			₪	Client ID	\$	Health Card Number ≎	Last Name	First Name	Gender ≎	Date of Birth	Health Region 💲	Active \$
			0	5423		9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
1		•	D	5424		9333000002	Summer	Bertha	Female	2000 Jan 01	NSHA	Active
			0	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.

Telephone	Telephone Numbers								
Update	Update Delete Set Preferred								
8	Number 🗘	Effective From 💌	Effective To 🗘	Preferred *					
	Primary home: 902-864-2222	2020 Mar 02		``	/				
Total: 1					10				

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		✓ <u>×</u>
Add Telephone Number	Apply	Reset 🖨 🗙
Telephone Number: * Usage: * Country: * Usage: Canada 1		
Effective From: To: 2020/06/12 yyyy/mm/dd		
	3	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			× 👔		
		2			Add		
	Update Delete Set Preferred						
	8	Number \$	Effective From 🔻	Effective To 🗘	Preferred 🔻		
		Primary home: 902-864-2222	2020 Mar 02		\checkmark		
1	•	mobile contact: 902-222-2222	2020 Jun 12				
	Total: 2				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)

Addresse	5							_	✓ ×
Update	Update Delete Set Preferred								
8	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

ſ	Addresses				✓ 👔
	Add Address				Apply Reset 🖨 🗙
	Address Format:	mi-Structured			
1	* Address Type: Ac	ldress on Reserve Administered By:	:		
2	Unit No.: Street No.:	Street Name:	Street Type:	Street Direction:	
	P.O. Box: STN:	RPO: Rural Ro	ute:		
	Country:	Province / Territory: C	ity / Town:	Postal Code:	
	Canada 👻	Nova Scotia 👻			
	Other Address Details: Latitut	de: Longitude:			
	* Effective From: To: 2020/06/12 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

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You need to set the temporary address to preferred.

Add	Iresses	;								✓ 👔
										Add
U	pdate	Delete	Set Preferred							
	8	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	-	
•	Đ	Temporary address	33 Winter Avenue, Beaver Bank, Nova Scotia, B4G1E6, Canada		2020 Jun 12				_	
		Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04			1	-	
Tot	al: 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)





Create a Lyme Investigation

Search Resease	۵			
Notifications				
Investigation				
Subject Summa	ary			
Investigation Second	ummary			
Investigation Q	uick Entry			
- Investigation D	etails			
From the left-ha	and navigation, click on S	ubject Summary		
I				
Subject Sum	nmary			? 🗏
				ACTIVE
				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:	Address:	Additional ID Type /		
Primary home: 902-	80 Gilby Lane, Beaver Bank, Nova	Additional ID: Provincial health service		
864-5555	Scotia, B4B4B4, Canada	provider identifier / -		
Report: V Lau	inch			
Communicable Dis Group	ease Investigation Encounter			A Hide
	Disease	•		stigation Quick Entry
	Distase			Create Investigation
In the second se				
investigation 8	11 - Salmonellosis - Clos	sea		Show

1 encounter(s) total Move Selected Encounter(s) To: Unassociated Non-Episode Encounters ✓ Move

Unassociated Encounters (Non-Investigation)

Confirm an open Lyme Investigation does not already exist under the Communicable Disease Investigation Encounter group. If a closed investigation does exist please determine if it's a new infection before opening a new case.

🗙 Hide

Click Encounter Date for encounter details.





Communicable Disease Investigation Encounter Group		Alide 🖈
Disease:	✓	Create Investigation

Click Create Investigation under Communicable Disease Investigation Encounter Group.

Disease Summ <mark>ary</mark>		☆ Hide
*Disease: 1	Lyme disease 🗸	
* Authority: 2	National Case - Confirmed 3	
* Classification D	2020 / 11 / 16 4	
Microorganism:	Borrelia burgdorferi V 5	
Genospecies (specify):		
NML No.:		
Information Source:	✓	
Investigation Informa	tion	☆ Hide
Priority:	✓	
* Disposition: Investigat	ion in progress	

Enter the following information:

- 1. **Disease** select Lyme 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, Not a case) from drop-down list

If you have determined the case does not meet case definition you will need to initially enter case as a <u>Case PUI</u> in order to be able to enter some of the investigation details, you can revert back to <u>Case- not a case</u> before you close

If the case does meet Probable case definition but blood work is pending then enter as <u>Case- Probable</u> and change to <u>Case- confirmed</u> once confirmatory bloodwork is received. If bloodwork is negative then case will stay as case probable as per NS case definition Case classification will need to be updated as classification of case

changes

- 4. Classification Date- will auto populate to current date, please back date if needed
- 5. Microorganism- select Borrelia burgdorferi from drop-down list
- 6. Disposition- select Investigation in progress from drop-down list





Responsible Organization / Investigator	e
* Responsible Organization : Amherst Public Health Office 1	
Then click 'Close' to close.	
Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]	
* Responsible Organization Workgroup : IOM-Amherst PHO-Unmonitored V 2	-
* Responsible Organization Date : 2020 / 09 / 28	
yyyy mm dd	
* Investigator Organization : Northern Zone V 4	
* Investigator Workgro 5 OM-Northern Zone 🗸	
nvestigator Name : Samantha McClellan/Amherst PHO 🗸 6	
* Assigned Date : 2020 / 09 / 28 7 yyyy mm dd 7	

Enter the following information:

- 1. Responsible Organization- find and select your Public Health Office
- 2. **Responsible Organization Workgroup-** select IOM- **Area where you work**-Unmonitored from drop-down list
- 3. **Responsible Organization date-** auto populates to current date and can be changed as needed
- 4. Investigator Organization- find and select the 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





	Rep	oorting Notification		X Hide
	* Re	eporting Source:		
1	۲	Provider: Ryan SOMM	ERS	
-		Click Find to select a pro	ider:	
		Provider:SOMMERS	, Ryan, Medical Doctor, CPSNS ID #: 14209	Find Q
		Please select among the	2 available search methods; Search or Type.	Close X
		Type Search		
			Start typing the last name of the Provider. Matches will begin to appear below. Select the match with the beyboard or moure	
		Name of Provider:	SOMMERS, Ryan, Medical Doctor,	Show Info
				Select
1	0	Location: Amherst Put To specify a Service Deliv and click on 'Select' butto Service Delivery Loc Authority > Northern 2	lic Health Office ery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you a. Then click 'Close' to close. ation: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scot one > Amherst Public Health Office > [Amherst PHO]	wish to specify, select it ia Health
1	0	Other:	2	
	Туре	e of Reporting Source:	Lab	
	Meth	hod of Notification:	Lab Y 3	
	*At k	east one of the following	dates is required.	
	Rep	ort Date (Sent):	Image: Markov methods Image: Markov methods	4
			5 Sub	mit Clear Cancel

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	Recent Work	Pecent Work:
	Search	Recent WOIK.
	Search Investigations	1. Client: June. Loretta (Client ID: 21399 2
	Search Lab	- Investigation: Lyme disease

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

This will bring you to the View Client page.

View Client	
Client File Status	
Active	
Client Information	
Client ID:	21399
Client Name:	June, Loretta
Preferred Alternate Name:	
Health Card Number:	7700000032 - 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
Relationships:	
Alternate Names	

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From the left-hand navigation, click on Lab Summary

·	→ Inv	vesti	gation								
	5	Subje	ect Summary								
	l	nves	tigation Summar	у							
	l	nves	tigation Quick Er	ntry							
) ⊧ li	nves	tigation Details								
		.ab									
		Lab	Summary								
		Elec	ctronic Lab Report								
	Row .	Actio	ns: View/Update Re	quisition View/U	pdate Lab Repo	ort 2					
	Tiag		Specimen Collection / Imaging Date	Specimen Type / Description	<u>Result</u> Name	Interpreted Result; Result	<u>Flag</u> ▼	Accession ▼ No.	Etiologic Agent	Epi Markers	Result Status
1		Ð	2020 Nov 13	Blood / -	Antibody IgG/IgM	Positive;			Borrelia burgdorferi	-	Final
		Ð	2020 Nov 12	Blood / -	Immunoblot - IgG	Negative;			-		Final
		Ð	2020 Nov 12	Blood / -	Immunoblot - IgM	Positive;			Borrelia burgdorferi	-	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. You will be taken to the Human Lab Report Screen





l	Selec	cted Tes	sts 1							★ Hide Selected Tests
	Red	quisition T	fests: 🗸 Ad	d to Report						Set All Negative
	Row	Actions:	Delete Test Subject Inves Pertinent Inve Test Annotati	Set to Cannot tigations: 979 estigations: V	Report), Lyme diseas	e, 2020 Nov 16	× (4	Link to Investigati	on igation pdate Annotations	
		Test ID	Resulted	<u>Test</u> <u>Name</u>	Specimen	Collection Date		Pertinent Investigations	Test Annotations	Encounter Group
2	۲	207	\checkmark	Immunoassay	Blood/ Blood	2020 Nov 13				Communicable Disease Investigation
	Reaso	n for Del	etion:							Save Reset Cancel

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 Car	not Report		
	Subject Investigations: 979, Lyme disease, 2020 Nov 16 ✓ Link to Investigation 1 1. From the drop-down list, click on the investigation that you want to make the			
	1. From the drop-or lab pertinent to a	lown list, click on the investig and click the " Link to Invest	ation that you want igation" button.	to make the





Row Actions:	Delete Test	Set to Cannot	Report				
	Subject Inves	tigations:			 Link to Invest 	igation	
	Pertinent Inve	estigations:			V Unlink from Ir	vestigation	
	Test Annotati	ons:			(4000 characters)	Update Annotations]
Test ID	Resulted	Test Name	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group
<u> <u> 207</u> </u>	\checkmark	Immunoassay	Blood/ Blood	2020 Nov 13	979, Lyme diseas 2020 Nov 16	<u>se.</u> 1	Communicable Disease Investigation
	Delete						
	1. The	lab is now	pertiner	it to the ir	vestigation		
	Subject Investigations: Pertinent Investigations: Test Annotations: (4000 characters) Test Annotations Test Communicable Dise Investigation To Delete 1 The lab is now pertinent to the investigation 1. The lab is now pertinent to the investigation 2. Click the Save button 3.						
	3.						
X A duplicate	Report exists. P	lease check the '	Override Duplic	ation' checkbox	to bypass duplicate va	lidation.	
							Override Duplication
Reason for De	letion:		Lab Rep	oorts for Requi	sition:		Save Reset Cancel

Because there are three lab reports pertaining to Lyme you will receive above red message:

- 1. Check the **Override Duplicate** box
- 2. Click Save

Follow the above steps for all 3 labs.





Completing Investigation Information

Additional information needs to be entered into Panorama once the investigation has been created and Physician Report Form has been returned.

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: I * Disposition: Investigation in progress Investigation in progress Disposition Date: 2 * Status Date:	[그] Investigation History
Client Home Address at Time of Initial Investigation:	~ 3
Sensitive Environment/Occupation:	
Environment/Occupation Details:	(1000 characters)
Diagnosis	
Diagnosis Date: / / / IIIIII	
Primary Method of Diagnosis:	
Method of Detection:	

- 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
- 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.

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Signs and Symptoms

Note:

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

No – the question was asked, and the individual's response was no.

Not applicable – only use in situations where the risk factor is not applicable to the client. For example – pregnancy risk factor for a male.

Not asked – there is clear indication from a health care provider that they did not ask the specific question, or the interviewer did not ask because of time or the question is awkward/uncomfortable.

Unable to answer – the question was asked, and the individual was unable to answer due to being incapable of understanding the question or communicating an answer.

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

Unwilling to answer – the question was asked, and the individual indicated that they were unwilling to answer the question.

Yes – the question was asked, and the individual's response was yes.

Select Signs and Symptoms from the Left-Hand Navigation

External Sources

Links & Attachments

Close Investigation

▶ Lab

Encounter Details

Signs & Symptoms

Outcomes

Incubation & Communicability





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

ROW	Actions:	Reason for Deletion :	Set Ons	et C	Prese	nt:	3	Onset Da	te:	/		
	01			elete				уууу	mm	dd	App	ly Update
	<u>Sign/Sym</u>	ptom			Present *	<u>Onset</u> Date/Time		<u>Recovery</u> Date/Time		Duration *	Reported • By	Details Exist
✓	A - Erythen <5cm) diag	ma migrans - multiple (lesio gnosed by health care provi	ns may be ider	9								No
	A - Erythen health care	ma migrans - single >=5cm e provider	diagnose	d by								No
	Arthritis											No
	Asymptom	atic										No
	AV heart b	llock										No
	Encephalo	omyelitis										No
	Encephalo	pathy										No
	Influenza-li	ike illness										No
	Lymphocyt	tic meningitis										No
	Myocarditis	S										No
	Neuropathy	У										No
	Other skin	rashes										No
	Recurrent,	brief joint swelling										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

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)

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Row	Actions: Select All Update Set Onset	Clear Onset					
	Reason for Deletion :	Pres	ent:	Onset Date:	/	Appl	v Lindate
				yyyy mm	dd		Jopane
	<u>Sign/Symptom</u>	Present T	Onset Date/Time	Recovery Date/Time	<u>Duration</u>	Reported T	Details Exist
	A - Erythema migrans - multiple (lesions may be <5cm) diagnosed by health care provider	Yes	2020 Nov 3 00:00 AST				<u>No</u>
	A - Erythema migrans - single >=5cm diagnosed by health care provider	No					<u>No</u>
	Arthritis	No					No
	Asymptomatic	No					<u>No</u>
	AV heart block	No					<u>No</u>
	Encephalomyelitis	No					<u>No</u>
	Encephalopathy	No					<u>No</u>
	Influenza-like illness	Yes	2020 Nov 3 00:00 AST				<u>No</u>
	Lymphocytic meningitis	No					<u>No</u>
	Myocarditis	No					<u>No</u>
	Neuropathy	No					<u>No</u>
	Other skin rashes	No					<u>No</u>
	Recurrent, brief joint swelling	No					<u>No</u>

Save Reset





Adding an Additional Sign and Symptom

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

Row Actions: Selec	t All Update Set Onset Clear Onset
Reported By:	
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Recovery Date/Time:	yyyy mm dd hh mm
Onset Date/Time: 2	yyyy mm dd hh mm
* Present:	Yes 🗸
Onset:	No
* Sign or Symptom: Preset:	√1
Required field	

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 ×

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

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

Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				<u>No</u>		
Olighthe Cover hutten (Ten or Dettern right hand even of general)								

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 " \rightarrow Stay on this page" and click the Save button.

	Pro	ovincial health service provider ntifier / -						
_	Windows Internet Explorer							
s:	1	Are you sure you want to leave this page?						
C Date/Type: Mar 02 / Most F sure		→ Leave this page	der Investigation /					
		-y Leave this page	Sau					
		ightarrow Stay on this page	Jav					
		N						
		4	~					





Documenting Risk Factors

Subject	^
Client Details	^
Client Demographics	
Occupation/Education	
Health Services	
Indigenous Information	
Immigration Information	
Client Warnings	
Client Relationships	
Consent Directives	~
Allergies	
Risk Factors	
Imms History Interpretation	

From the left-hand navigation, click on Risk Factors





Risk	Risk Factor											
										Add		
Up	Update View Delete Set Response Set Pertinent											
	B	Preset \$	Risk Factor 🔺	Additional Information \$	Reported Date ≎	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$		
		~	Behaviour - Lack of personal protective measures									
		\checkmark	Lyme - Definite tick bite									
		\checkmark	Lyme - History of residence in, or visit to a higher risk area in province									
		\checkmark	Lyme - History of residence in, or visit to a lower risk area in province									
		~	Lyme - History of residence in, or visit to a moderate risk area in province									
		~	Lyme - Possible tick bite									
		~	Medical - Received a donation of blood, blood products									
		~	Medical - Received donation of cells / tissues / organs / semen									
		~	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)		
		\checkmark	Travel - Outside of province, but within Canada							Г		
Tota	al: 10									10 🗸		

1. The risk factor table is populated with all presets defined for Lyme. 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:

Risk Facto	or								 * *
Update	View	Delete Set Respo	nse Set Pertinent	2					Add
	Preset \$	Risk Factor 🔺	Additional Information ≎	Reported Date \$	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
~	~	Behaviour - Lack of personal protective measures							
		Luma Dofinita							

						3		
Set Response							Apply	Reset 🖨 🗙
* Response: No	▼	isk Factor Pertinent to inv	estigation in con	ntext				
							[Apply Reset
No Not Applicable	Respoi	nse Set Pertinent						
Not Asked Unable to answer		Additional Information \$	Reported Date \$	Response ≎	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation ≎
Unknown Unwilling to answer								
Yes	/ious							

- 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





Documenting an Additional Risk Factor

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

<u>Do not update</u> a preset Risk Factor that <u>contains a response Pertinent to another Investigation</u>. You will need to add the Risk Factor for the Lyme investigation.

Risk Factor											*
Update View Delete Set Response Set Pertinent											1
	8	Preset \$	Risk Factor 🔻	Additional Information \$	F	Reported Date ≎	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
		~	Travel - Outside of province, but within Canada		2	2018 Apr 01	Yes				2495 (Hepatitis C)

1. Click the **Add** button

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

Risk Factor		 * *
Add Risk Factor	Apply	eset 🕒
Category: 2 * Risk Factor:	ation in context	
Additional Information:		
* Response: Frequency: Reported By:	-	
Effective From: Effective To: End Date Reason: * Reported Date: 2020/06/12		
Reported by Details:		
	4	Apply Res
		Ad
Update View Delete Set Response Set Pertinent		
Preset ≎ Risk Factor → Additional Reported Response Frequency Date Range ≎	End Date Reason	Pertinent to

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- 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, a duplicate risk factor pertinent to the Lyme Investigation will appear

•		Travel - Outside of Canada		2021 Jan 04	Yes				976 (Lyme disease)	
	\checkmark	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)	
Risk Factors	_						2 Save	Reset		
Client ID: 1398	1 .	Name(Last, First Middle June, Kim / Female	e) / Gender:		Health Ca 77000000	Act alth Card No: Date of Birth / Age: 00000031 1980 Feb 01 / 40 yea				
Phone Number: Address: Address: Additional ID Primary home: 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada Provincial he						I ID Type / Addit I health service	tional ID: provider identifi	er / -		
Investigation									^	
Investigation ID: 976		Status: Open	Disposition: Age at tim Investigation in progress 40 years			ne of Investigation:				
Disease: Lyme disease		PHAC Date/Type: 2021 Jan 04 / Date R	eported	Etiologic Agent: Borrelia burgdorf	eri	Authority National	//Classification: / Case - Confirm	ned / 2021 Jar	n 04	
Risk Factor									✓ (×)	
									Add	
Update Vi	iew C	Delete Set Respor	se Set Pertinent							
📄 🖺 Pre	eset ≎	Risk Factor 🔺	Additional Information \$	Reported Date \$	Response ≎	Frequency ≎	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$	
	\checkmark	Behaviour - Lack of personal protective measures		2021 Jan 04	No				<u>976 (Lyme</u> disease)	
	\checkmark	Lyme - Definite tick bite		2021 Jan 04	No				976 (Lyme disease)	

- 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:	1 Outcome Date:	yyyy mm] / 🎫 dd	2
			3	Add Outcome Clear
Reason for Deletion:	✓ Delete			
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	•
0	Alive-Not Hospitalized	2020 Sep 28	
		·	
:omn	nents		
		~	
		\sim	
		(4000 characters)	Add
Date	Comments	R	ecorded By
			1 Save Reset

1. Click the **Save** button

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



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





	Maintain Medicatio	n Details				☆ Hide	Maintain Medication Details
	* Required field						
1	Other Meds: Course Completed:			~			
2	 Protocol: Standard Tx: Drug: Drug Description: 	: Azithror	nycin	3			Select Drug
	Tx Prescribed / Authorized By:	 Use this Provide Click Find to select a p Provider: Use Other Provi 	r: novider: der:]	Find Q
4	Dosage:		1000.0	Unit: mg	~		
	Route:		~	·]			
	Frequency:		`	<u></u>			
	Duration:				~		
5	Order Duration: Tx Prescribed / Autho	orized Date:	2020 10 01 yyyy mm dd	Unit:	~		
	Tx Effective From Dat	te:	2020 / 10 / 01 yyyy mm dd		Estimated:		
	Reason:			\checkmark	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** tablelocated near the bottom of the screen.





Othe	r Meds									A Hide Other Meds
Row	Actions:	Up	date Delete							Show Active
		Co	urse Completed:			~	Update Course	Completed		
	<u>Drug</u>		Dosage / Frequency / Route	Duration	<u>Tx Effective From /</u> <u>Valid To</u>	•	Special Direction	Prescribed / Authorized By		Course Completed
	Azithrom	ycin	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**

essage fr	rom webp	age							8
?	Except for for Othe Medicati saved. D	or the Med r Medicati ons canno o you wisł	lication St ions Cours ot be upda h to contin	atus, Statu se Comple ated or del nue?	is Date ted, th eted o	and DOT Medicat nce the da	indica tions a ata has	tor, and nd Other been	
				Г		ОК		Cancel	

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- you would only do this section if you know the medication has been completed**

	Othe	r Meds						A Hide Other Meds
	Row	Actions: Up	date Delete urse Completed: Prescrip	otion Compl	ete 🔽	Update Course	Completed 3	Show Active
		Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	Course Completed
1	✓	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.

W Actions	Upd	ate Delete						Show Active
	Cou	rse Completed: Prescrip	otion Compl	lete	~	Update Course	Completed	
Drug		Dosage / Frequency / Route	Duration	<u>Tx Effective From /</u> <u>Valid To</u>	•	Special Direction	<u>Prescribed /</u> Authorized By	<u>Course</u> Completed
Azithror	nycin	1,000 mg	-	2020 Oct 1	-	-	-	Prescription Complete





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.

Document Management

User Documents

Context Documents

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

Search Document Folder	s - Basic			A Hide Search
Enter Keywords to search.	Leave search box empty to view a	all documents. Search will be perfo	ormed on selected folder and its sub Search results will appear in 'D	ofolders if applicable. locument List' below.
Documents by keyword:				
			Search Retrieve	Clear
Document List				☆ Hide Document List
Row Actions: Delete	▲ <u>Size[KB]</u> ▼ <u>Type</u>	▼ <u>Posted By</u> ▼ <u>Po</u>	sted On Description	1 Add New Status

1. Click the Add New button





Document Management	?≞
Add New Document	
3	
* Effective 2020 / 06 / 16 Expiration / / / III Date: yyyy mm dd Date: yyyy mm dd	
Status: * active V Use CTRL key for multiple selections.	
Add Selected Keyword: Remove Keywords:	
Description:	
Document Added by : Sampson, Judy on : 2020 Jun 16	
5	
Submit Clear Cancel	

- 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

I)ocu	ment List					☆ Hide Do	cument List
	Row	Actions: Delete					4	Add New
		Document Title	Size[KB]	<u>Түре</u> 🔻	Posted By	Posted On 🔻	Description 🔻	Status
		Physician Report Form- XXXXX	78.66	PDF	McClellan, Samantha	2020 Sep 28		active
	Total:	1 • • • • • • • • • • • • • • • • • • •					Jump to page:	2

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.

Upload Clients Cohort Notes Document Mana User Documen	igement ts				
Clinical Note	S			(?)	Ē
				ACTI	VE
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:	Address:	Additional ID Type /			
Primary home: 902- 864-5555	80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	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 / 202	20 Sep 28	
Notes				☆ Hide N	otes
Display Notes For: Cl	ient: June, Kim	Include Related Enti	ities: 🗹		

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

onosuaremorging e	
Notes	★ Hide Notes
Display Notes For:	Client: smith, jody V Include Related Entities: 🗹
Subject Line:	Status:
Workgroup for Author:	Workgroup for V Transcriber:
Author:	Transcriber:
Note Type:	✓
Note Date: Fr	vom: / / / yyyy mm dd yyyy mm dd
	Display Clear
0 results found.	To view a Note below, click on its Note Date, The End effects the records you have access to.
Row Actions: View	All Notes in Table Update Note View Note Corrections 1 Author Note Transcribe Note
Move	selected note to V Move Note

Panorama- Lyme Case Management





1. Click on Author Note button

1	Note is being cr	eated for Investigation ID 2503
	Note ID: - * Required Field	Status: -
2	Author: Subject: Note Date: Note Type: Common Phrases: Note: Note:	Sampson, Judy Role: NS_IMMS_IOM_NURSE 2020 06 16 Image: Note Time: Index (31) 2020 06 16 16 16 2020 06 16 16 16 2020 06 16 16 16 2020 06 16 16 16 2020 06 16 16 16 2020 06 16 16 16 2020 06 16 16 16 2020 06 16 16 16 2020 16 16 16 16 16
		Save as 5 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.



- 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

To Close the Investigation:

1	Close Investigation Re-Open Investigation	Save Reset
	* Required field	Merged Investigation No(s):
	Investigation Information	
		Investigation History
	Priority:	
	* Disposition: Completed, further action not required V Disposition Date: 2020 / 06 / 15	

1. Click on the Close Investigation button

Panorama- L	yme Case	Management
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2	Close Investigation Reset
* Required field	Merged Investigation No(s):
Close Investigation	
1 'Closed' Status Date: 2020 / 06 / 16	
yyyy mm dd Close Investigation Policies: Update: Outcome, Classification, Disposition	

- 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.

	required	
e:	Etiologic Agent: Authority/Classif	ication:
ite	Message from webpage	× ed / 202
	You are about to set the status of the investigation to 'Closed'. Do you want to close?	e (vyes yed inv
	1 OK Cancel	
10		

1. Click the **OK** button





Changing the Investigation Classification

When an investigation already in progress or closed needs to be have the Classification changed based on new information, the Disease Summary needs to be updated (i.e. Case- Not a Case to Case- Confirmed).

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

From the left-hand navigation, click on Disease Summary

					Add Nev	w Disease
)isease Event	t 2612 - Unusu	ual/Emergin	ig Disea	ase		🛠 Hide
TIAC Date / Date 19	pe. Disease	Cingini Livi	ng on rica	erve most of the fille.		
020 Jun 1 / Report F	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification Classif. Date	Site(s)	Staging

1. Click on the Update Button





HAT' Date / Date Tumer	1021020010050000				
PHAC Date / Date Type:	2020 Jun 1 /	Specimen Collection			
Disease Origin:		~			
Living on Reserve Most of t Fime:	ne	✓ (during initial investigat	ion)		
)isease Event History					
Disease:	nusual/Emerging D	isease 💙			
Microorganism:	COVID-19	~			
Information Source:		~]			
ite(s): Hold Ctrl and then cli	k to select multiple	items.			
Available Sites:			Selected Sites(s):	
		Ad	d >		
		< Rei	nove		
Staging: 🔽		< Rei	nove		
itaging: 🔽		< Rei	nove		82
itaging: 🔽	ion	< Rei	nove		
Staging:	ion 🗸	Classificatio	nove		
Staging: Investigation Classificat Authority: Classification Date: 2020	ion /	Classificatio	nove		
Investigation Classificat Investigation Date: 2020 Yyyy	ion / 06 / [mm c	Classificatio	n: V		
Staging: Investigation Classificat Authority: Classification Date: 2020 yyyy	ion / 06 / [mm c	Classificatio	nove	Add Classification	Cles
Staging: Investigation Classificat Authority: Classification Date: 2020 yyyy 2	ion / 06 / [mm c	Classificatio	n: V	Add Classification	Clea
Investigation Classificat Authority: Classification Date: 2020 yyyy Row Actions: Update [ion / 06 / [mm c	Classificatio	n: 🗸	Add Classification	Clea
Staging: Stagin	ion / 06 / [mm c	Classification	nove	Add Classification	Clea

Note:

- Do not add any information in the Disease Event Detail or the Disease Event History sections.
- Do not Add Classification in the Investigation Classification area.
- 1. Click on the **Radio** button for the current classification. This will activate the Row Action buttons.
- 2. Click on the **Update** button





	Staging: 🗸					Case - Confirmed Case - Not a Case Case - Person Under Investigation Case - Previously Diagnosed Case - Probable	n		
3	* Investigation Class	sification	~	4	* Classification	Case - Suspect Contact - Not a Contact	tion		
5	* Classification Date:	2020 / 06 yyyy mm	/ 01 dd		Classification	Comact - Person Under Investiga	uon		
							6	Apply Update	Clear

The authority and classification information will now be populated in the Investigation Classification area.

- 3. Authority do not change
- 4. Classification select the new Classification from the Classification drop-down list
- 5. **Classification Date -** populates with the previous classification date. Change to the actual classification date
- 6. Click the **Apply Update** button
- 7. Click the **Save** button (top and bottom right side of screen)

				merge	u mvesugat				
Disease Summary									
	Add Net	w Disease							
Disease Event	Disease Event 2612 - Unusual/Emerging Disease								
PHAC Date / Date Ty 2020 Jun 1 / Date Rep	pe: Disease C ported)rigin: Living	on Reser	rve Most of the Time:					
Disease	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification Classif. Date (\checkmark Primary Classification, Δ Set by Case Def)	Site(s)	Staging			
Unusual/Emerging Disease	Unusual/Emerging COVID-19 - 🗸 National / Case - Confirmed 2020 Jun 11								
Unusual/Emerging Disease	Inusual/Emerging COVID-19 - Vational / Contact - Person 2020 Jun 1 Under Investigation 2020 Jun 1								
		1							

On the Disease Summary screen, you will see the history of the Authority/Classification





Adding a Secondary Investigator

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



Close Investigation					
Scroll to bottom of p	bage:				
Investigator					🛠 Hide
 * Required only if adding or up Investigator Type : * Investigator Organization : * Investigator Workgroup : Investigator Name : * Assigned Date : 2021	dating investigator 1 Secondary ✓ Northern Zone ✓ IOM-Northern Zone ✓ Laurie Phalen/Pictou I / 02 / 02 mm dd	ation. 2 3 PHO 4 5 igned Time : hh	: AST mm	6	Add Clear
Row Actions: Update					
Investigator Type	Investigator Name Javme MacLellan	Investigator Workgroup	Investigator Organization	Assigned Date/Time 2021 Feb 2	End Date
Primary S	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

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	<u>End</u> 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	