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## Non-Human Source Information

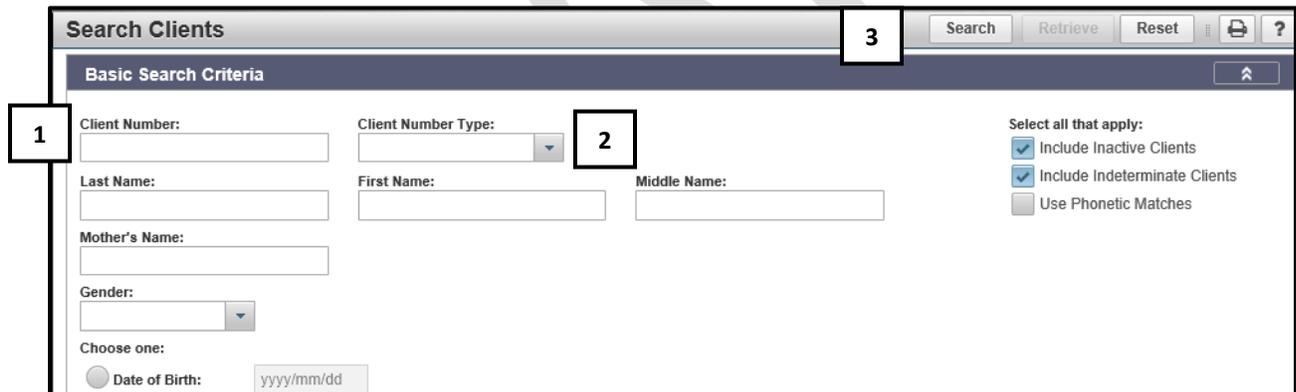
1. [Adding a Non- Human Source to an Acquisition Event](#)
2. [Public Health Interventions for Non-Human Source](#)
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## Search for a Client

Search for a client



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



**Search Clients** [3] Search Retrieve Reset [Print] [Help]

**Basic Search Criteria** [Up Arrow]

1 Client Number: [Text Field] Client Number Type: [Dropdown] 2

Last Name: [Text Field] First Name: [Text Field] Middle Name: [Text Field]

Mother's Name: [Text Field]

Gender: [Dropdown]

Choose one:

Date of Birth: [Text Field: yyyy/mm/dd]

Select all that apply:

- Include Inactive Clients
- Include Indeterminate Clients
- Use Phonetic Matches

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:

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**
3
4
Client Quick Entry   Create Client

	Preview	Update	Set In Context	Create Cohort	Subject Summary								
2	<input type="checkbox"/>	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active				
1	<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				

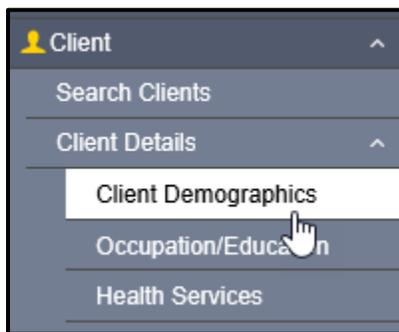
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

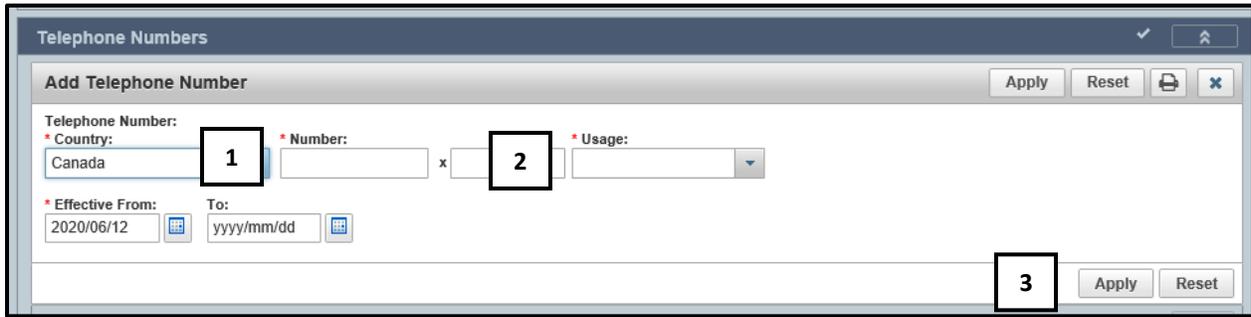
### Telephone Number

View the client's telephone numbers.



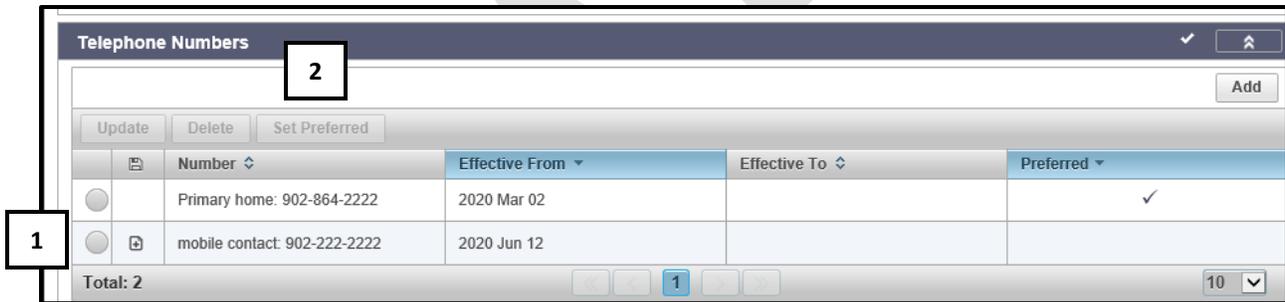
If the telephone number the client provided is different than what is in Panorama, you will need to add the telephone number.

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.



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

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										
	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		<input checked="" type="checkbox"/>	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

Add

**Add Address** Apply Reset

Address Format:  
 Structured  General  Semi-Structured

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

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

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

Country:  Province / Territory:  City / Town:  Postal Code:

Other Address Details:  Latitude:  Longitude:

(100 characters remaining.)

\* Effective From:  To:

3 Apply Reset

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

You need to set the temporary address to preferred.

Addresses										
2										
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  2 Ethnicity Reported by: 3

Client 
  Other 
  Provider

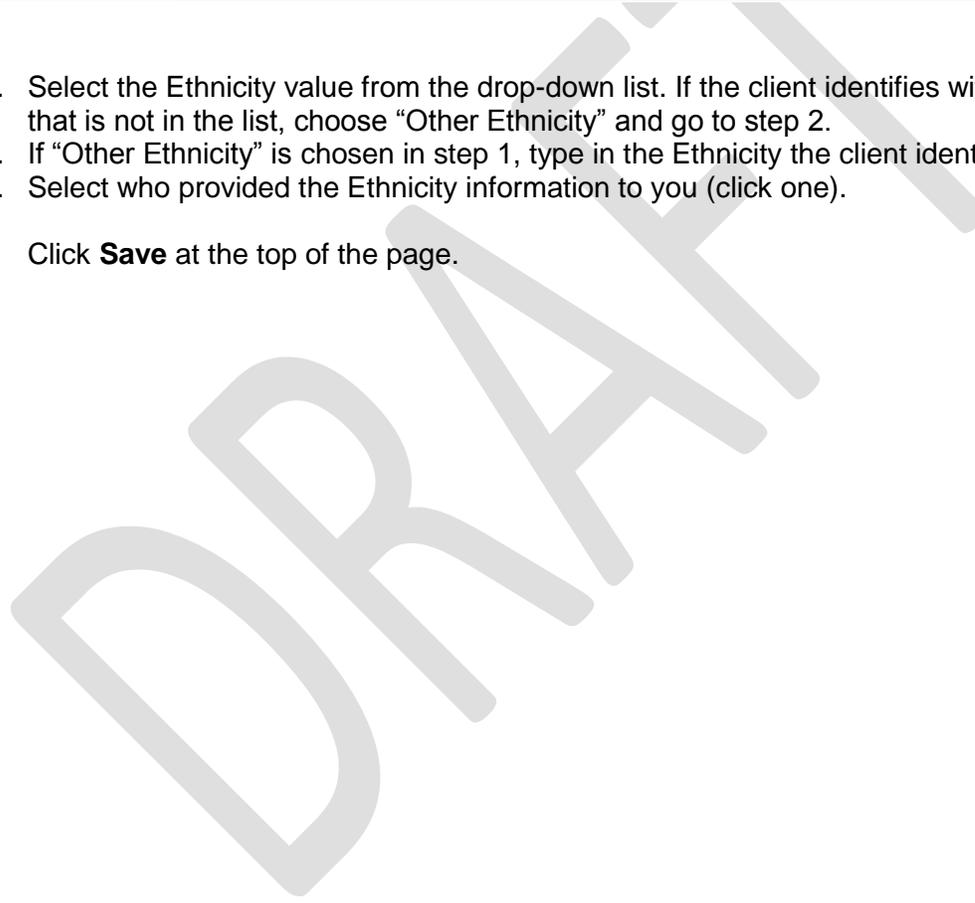
↓

Effective From	Effective To	Preferred
02-232-3232	2020 Aug 26	✓

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 Rabies Investigation

- Search Disease Notifications
- ▼ Investigation
  - Subject Summary
  - Investigation Summary
  - Investigation Quick Entry
  - ▼ Investigation Details

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

### Subject Summary ? 📄

ACTIVE

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

Report: ▼ Launch

---

**Communicable Disease Investigation Encounter Group** ⬆ Hide

Disease: ▼ Investigation Quick Entry

Create Investigation

**Investigation 811 - Salmonellosis - Closed** ⬇ Show

---

**Unassociated Encounters (Non-Investigation)** ⬆ Hide

---

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

**Move Selected Encounter(s) To:**

Unassociated Non-Episode Encounters ▼ Move

**Confirm an open Rabies Investigation does not already exist under the Communicable Disease Investigation Encounter group. If a closed investigation does exist please consult with a CDC nurse to determine if it's a new investigation.**

Communicable Disease Investigation Encounter Group
↑ Hide

Disease:

▼

Investigation Quick Entry  
Create Investigation

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

Disease Summary
↑ Hide

**\* Disease:** Rabies ▼

**\* Authority:** National ▼      **\* Classification:** Case - Person Under Investigation ▼

**\* Classification Date:** 2021 / 01 / 04 yyyy mm dd

**Microorganism:** Rabies virus ▼

**Referral Lab No.:**

**Information Source:** ▼

Investigation Information
↑ Hide

**Priority:** ▼

**\* Disposition:** Investigation in progress ▼

Enter the following information:

1. **Disease**- select **Rabies** from drop-down list
2. **Authority**- select National from drop-down list
3. **Classification** - **select the classification which fits current case definition (Case-Person Under Investigation will need to be selected in order to document information against the client's investigation, you will reclassify to Case- Not a case once the investigation is completed.) from drop-down list**
4. **Classification Date**- will auto populate to current date, please back date if needed
5. **Microorganism**- select **Rabies Virus** from drop-down list
6. **Disposition**- select Investigation in progress from drop-down list

Responsible Organization / Investigator
↑ Hide

\* **Responsible Organization :** Amherst Public Health Office 1

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

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

\* **Responsible Organization Workgroup :** IOM-Amherst PHO-Unmonitored 2

\* **Responsible Organization Date :** 2020 / 09 / 28 3  
yyyy mm dd

\* **Investigator Organization :** Northern Zone 4

\* **Investigator Workgroup :** IOM-Northern Zone 5

**Investigator Name :** Samantha McClellan/Amherst PHO 6

\* **Assigned Date :** 2020 / 09 / 28 7  
yyyy mm dd

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

Reporting Notification
↑ Hide

**\* Reporting Source:**

**1**  **Provider: Ryan SOMMERS**

*Click Find to select a provider:*

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

Please select among the 2 available search methods; Search or Type. Close

**Type** **Search**

---

*Start typing the last name of the Provider. Matches will begin to appear below. Select the match with the keyboard or mouse.*

Name of Provider:  Show Info

**1**  **Location: Amherst Public Health Office**

*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

**1**  **Other:**

Type of Reporting Source:  **2**

Method of Notification:  **3**

*\*At least one of the following dates is required.*

Report Date (Sent):  /  /

Report Date (Received):  /  /   **4**

**5**

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

An Investigation banner now is displayed at the top the screen, which displays the system-generated **Investigation ID, Status, Disposition, Disease, PHAC Date, and Authority/Classification**. This context header for the investigation will be displayed on all investigation screens to indicate what investigation you are working with.

DRAFT

## Updating Immigration Information

- Subject
- Client Details
  - Client Demographics
  - Occupation/Education
  - Health Services
  - Indigenous Information
  - Immigration Information
  - Client Warnings

From the left-hand navigation, click on Immigration Information

**Immigration Information** 3 Save Reset log ?

Client ID: 5423    Name(Last, First Middle) / Gender: Summer, Alice / Female    Health Card No: 9333000001    Date of Birth / Age: 2000 Jan 01 / 20 years

Phone Number: -    Address:    Additional ID Type / Additional ID: Provincial health service provider identifier / -

---

**Immigration Information**

1 **Citizen:**  Yes  No    **Date Citizenship Received:** yyyy/mm/dd

**Immigration File No:**     **Date Immigration Form Received:** yyyy/mm/dd

**Arrival Date:** yyyy/mm/dd    **Arrival Year:**

**Immigration Status at Time of Arrival:**

2 **Country Emigrated From:**     **Country Last Resided:**

**Country Born in:**     **Province Born in:**

**Mother's Birth Country:**     **Father's Birth Country:**

1. **Citizen** – click on the appropriate radio button: Yes or No
2. **Country Emigrated From** - if citizen is no, select the country the client emigrated from in the drop-down list.
3. Click the **Save** button

## Adding Indigenous Status

**Note:** If the client does not identify as Indigenous or if they refused to answer the question, Indigenous Information still needs to be documented in Panorama.

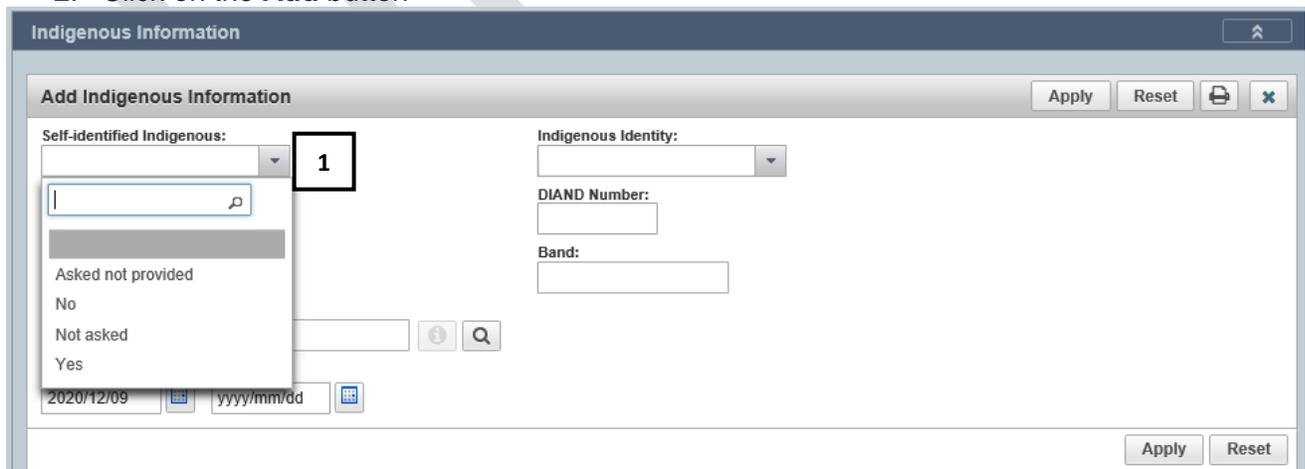


From the left-hand navigation, click on **Indigenous Information**.

If the client does not have Indigenous Information in Panorama, you will need to add it.



2. Click on the **Add** button



1. Select the Self-identified Indigenous value from the drop-down list. If this response is **NO**, go to step 3.

The screenshot shows the 'Indigenous Information' form. The 'Indigenous Identity' dropdown menu is open, displaying a list of options: 'Asked, but unknown', 'Asked, not provided', 'First Nations', 'First Nations and Inuit', 'First Nations and Metis', 'First Nations, Inuit and Metis', and 'Inuit'. A box labeled '2' highlights the dropdown menu.

2. If the client self-identified as Indigenous, select the Indigenous Identity from the drop-down list.

The screenshot shows the 'Indigenous Information' form. The 'Lives outside a First Nations Community' dropdown menu is open, displaying a list of options: 'Asked, but unknown', 'Asked, not provided', 'Asked, replied no', 'Lives outside a First Nations Community', 'Lives within a First Nations Community', 'Non-status Indian', 'Not Asked', and 'Status Indian'. A box labeled '3' highlights the dropdown menu. The 'Apply' button is highlighted with a box labeled '4'. The 'Save' button is highlighted with a box labeled '5'.

3. Select the First Nations Status (if applicable) from the drop-down list.  
**If the client has answered “No” to Self-identified Indigenous but lives in a First Nations Community, you would identify here. If client says “No” to living in First Nations Community, proceed to step 4**

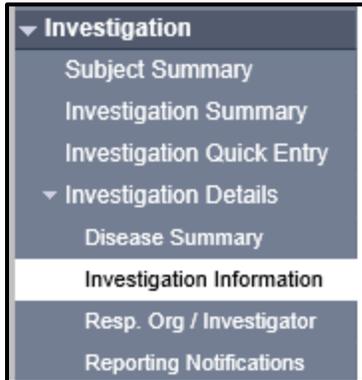
You do not need to enter information in the other fields

4. Click the **Apply** Button
5. Click the **Save** Button

DRAFT

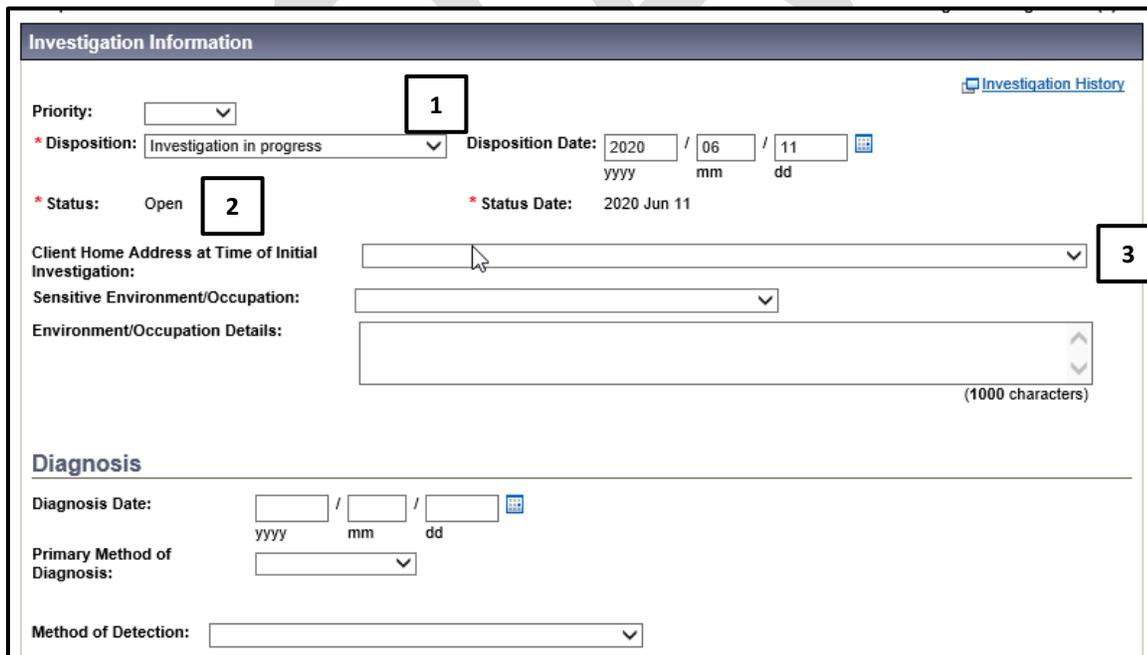
## Completing Investigation Information

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** [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:

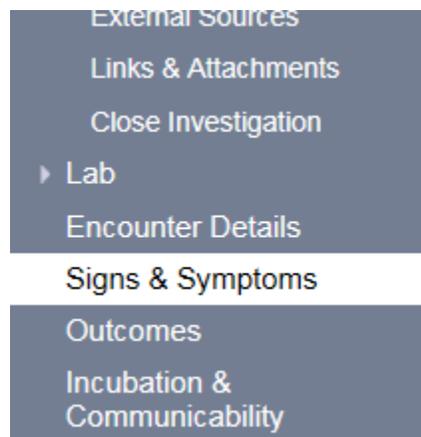
1. **Disposition and Disposition Date** – are auto-populated when the investigation was created And can be changed as needed
2. **Status and Status Date** – are auto-populated when the investigation was created
3. **Client Home Address at Time of Initial Investigation** – select the client’s address 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 page 3 for Updating Client Address and return to this screen to select from the drop down.

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## Signs and Symptoms

---

Select Signs and Symptoms from the Left-Hand Navigation



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

Row Actions:     3

Reason for Deletion :   2 Present: No  4

Onset Date:  /  /

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Asymptomatic						No
<input type="checkbox"/>	Coma						No
<input type="checkbox"/>	Delirium						No
<input type="checkbox"/>	Dysphagia						No
<span style="border: 1px solid black; padding: 2px;">1</span> <input checked="" type="checkbox"/>	Fever						No
<input type="checkbox"/>	Headache						No
<input type="checkbox"/>	Hydrophobia						No
<input type="checkbox"/>	Malaise						No
<input type="checkbox"/>	Paralysis						No
<input type="checkbox"/>	Pruritus						No
<input type="checkbox"/>	Seizures						No
<input type="checkbox"/>	Sense of apprehension						No
<input type="checkbox"/>	Sensory changes						No

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

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

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

Row Actions:

Reason for Deletion :  Present:  Onset Date:

<input type="checkbox"/>	Sign/Symptom ▲	Present ▼	Onset Date/Time ▼	Recovery Date/Time ▼	Duration ▼	Reported By ▼	Details Exist ▼
<input type="checkbox"/>	Asymptomatic	No					<a href="#">No</a>
<input type="checkbox"/>	Coma	No					<a href="#">No</a>
<input type="checkbox"/>	Delirium	No					<a href="#">No</a>
<input type="checkbox"/>	Dysphagia	No					<a href="#">No</a>
<input type="checkbox"/>	Fever	No					<a href="#">No</a>
<input type="checkbox"/>	Headache	No					<a href="#">No</a>
<input type="checkbox"/>	Hydrophobia	No					<a href="#">No</a>
<input type="checkbox"/>	Malaise	No					<a href="#">No</a>
<input type="checkbox"/>	Paralysis	No					<a href="#">No</a>
<input type="checkbox"/>	Pruritus	No					<a href="#">No</a>
<input type="checkbox"/>	Seizures	No					<a href="#">No</a>
<input type="checkbox"/>	Sense of apprehension	No					<a href="#">No</a>
<input type="checkbox"/>	Sensory changes	No					<a href="#">No</a>

## Adding an Additional Sign and Symptom

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:

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:

---

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:

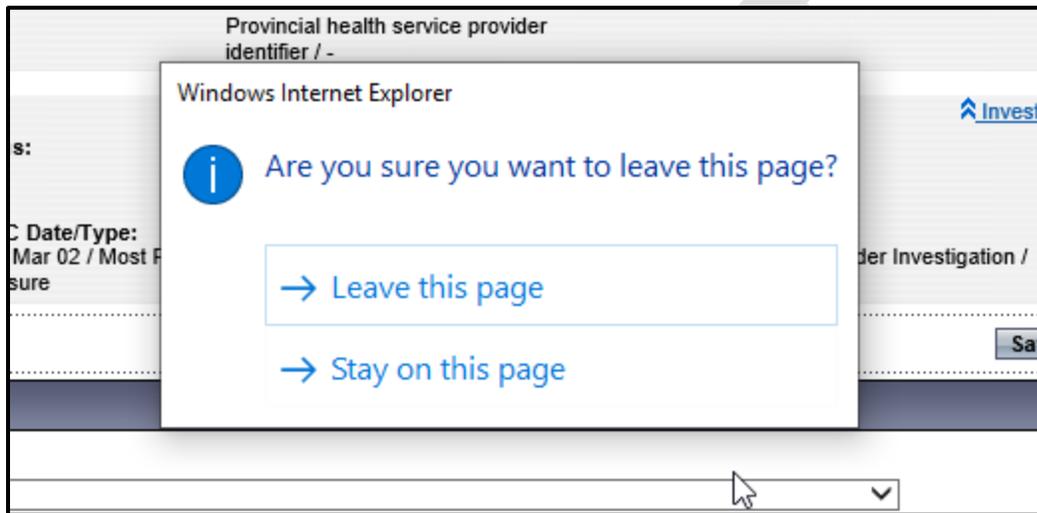
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button

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

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

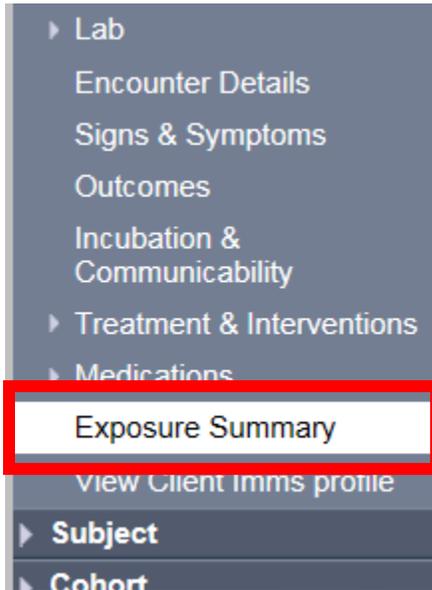
Click the **Save** button (Top or Bottom right-hand area of screen)

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



## Creating an Acquisition Event

Click on Exposure Summary in the left hand Nav



1. Click **Create Acquisition Event**

The Acquisition Event page will load. Fill in the details according to the following steps.

Acquisition Event
Hide Acquisition Event

Acquisition Event ID: -      Transaction Event ID: -

\* Exposure Name:  1

Invalid:  2 Invalid Reason:

Acquirer Role:

Exposed:  3

Responsible Organizational Unit:  4

To specify an Organization, 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

---

\* Required field (for Add/Update only)

\* Potential Mode of Acquisition: 5

Nature of Exposure: 6

All natures of transmission

Direct contact

Enteric

Respiratory route/droplet

STBBI

Through the provision of health care

Vectorborne and other zoonoses

Vertical transmission

Selected: 7

Add Clear

1. For the **EXPOSURE NAME** -Use **Animal/Environment**
2. Acquirer Role—**Leave blank** or pick from drop down “**DO NOT USE**”
3. Exposed –**DO NOT USE**
4. Responsible Organization Unit - **DO NOT USE**
5. Potential Mode of Acquisition- Vectorborne or other zoonosis
6. Nature of Exposure- select appropriate response
7. Click **Add**
  - a. Information will then be added to table below fields

Row Actions: <span style="border: 1px solid #ccc; padding: 2px;">Delete</span> <span style="border: 1px solid #ccc; padding: 2px;">Update</span>	Potential Mode of Acquisition	Nature of Exposure
<input type="radio"/>	Vectorborne and other zoonoses	Domestic animal exposure

Continue filling out each section as you scroll down the AE page.

1
Source Show Source

2
Acquisition Event Investigator Information Show Acquisition Event Investigator Information

1. **Source** – To be completed once the AE details have been entered and **SAVED**
2. **Acquisition Event Investigator Information** – **DO NOT USE**

## Acquisition Event Date/Time

Acquisition Event Date/Time <span style="float: right;">Hide Acquisition Event Date/Time</span>				
Disease	Source Earliest Possible Communicability From	Source Earliest Probable Communicability From	Source Latest Probable Communicability To	Source Latest Possible Communicability To
<i>Acquisition start/end denote the first and last possible times acquisition could have occurred.</i>				
* Acquisition Start:	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="checkbox"/> Estimated	1
Acquisition End:	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> : <input type="text"/>	<input type="checkbox"/> Estimated	2
Exposure Duration:	--			

1. **Acquisition Start**-date is mandatory a field. Add the date and (if known) time the AE started. If start time is an estimate please check that box.
2. **Acquisition End** -Add the date and (if known) time the AE event ended. If end time is an estimate please check that box.

## Exposure location

Exposure Location <span style="float: right;">Hide Exposure Location</span>					
Exposure Location Name:	<input type="text"/>				
Exposure Setting Type:	<input type="text"/>				
Exposure Setting:	<input type="text"/>				
Country:	Canada				
Address:	<input type="text"/>				
	Unit No.	Street No.	Street Name	Street Type	Street Direction
	<input type="text"/>				
	P.O. Box	STN	RPO	Rural Route	
Province/Territory:	<input type="text"/>				
Postal Code:	<input type="text"/>				
<b>Geo-coding Information</b>					
Geo-code Status:					
Latitude:	<input type="text"/>	Longitude:	<input type="text"/>		

## 1. EXPOSURE LOCATION NAME –Enter location name-

- For locations within Nova Scotia, e.g. Banks, Grocery stores, Pharmacies, Restaurants, Schools, Events, etc.
  - Include the name of the location, and city/town if known
  - Examples:
    - Sobeys - North Sydney; Shopper's Drug Mart – Fall River; Wake at Atlantic Funeral Home – Dartmouth; McDonalds – Truro; Horton High School – Wolfville
- If travel-related (outside NS or Canada), enter the province/state names or [Country Code\(s\)](#) where the case spent significant time; if multiple countries/provinces/states were visited as part of the travel separate by semicolons
  - Examples
    - Alberta; Florida; BC; NY; (can be initials or spelled out)
    - MEX; DOM; CRI
    - If travel involved a cruise, bus tour, vehicle, etc., add 'Cruise ship', 'Bus', etc. to the location
  - Examples
    - Cruise Ship – MEX; DOM; BHS; CRI; Royale Caribbean
    - Bus – Victoria, BC to Toronto, ON; Greyhound
    - For flight-related exposures, ensure the airline, flight number, and seat are included for each flight
    - e.g. Flight - MEX to Halifax - Air Canada 625, Seat 16C

## 2. EXPOSURE SETTING TYPE

- Choose from the 12 dropdown categories.
- DO NOT USE "Multiple". Each exposure setting required its own AE
- If "Other" is chosen for any category, please ensure the Exposure Location Name and Exposure Address are complete

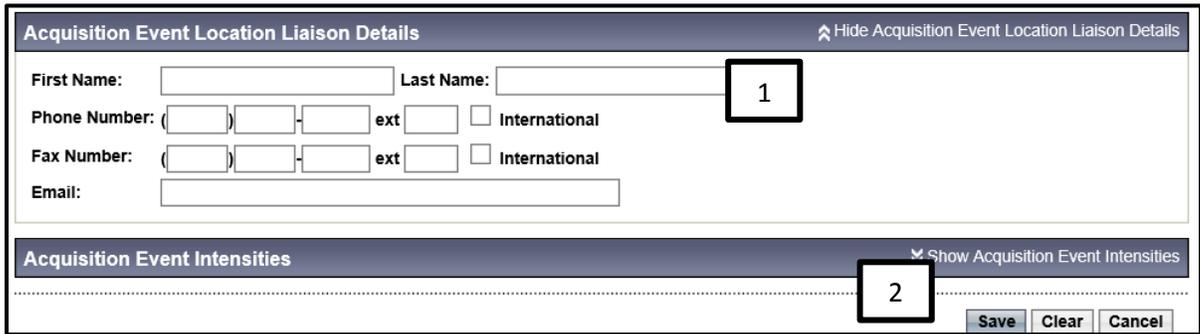
## 3. EXPOSURE SETTING – When you choose setting type a drop down will populate

- Choose from the dropdown sub-categories
- If "Other" is chosen for any category, please ensure the Exposure Location Name and Exposure Address are complete

## 4. ADDRESS

- Provide an address whenever possible to differentiate locations; particularly important for common locations like Banks, Grocery stores, Pharmacies, etc.
- Note: Select City before entering the postal code.

## Acquisition Event Location Liaison Details- optional



If a person is identified to be a point of contact at a location:

1. Record their name and contact information ie. animal owner
2. **Click SAVE** to lock in all the information previously added to the AE
  - a. Your Acquisition Event details have now been saved, AE created and you will now be able to add a Source to an Acquisition event.
3. The following message will be displayed at the top of the page

Acquisition event successfully saved.

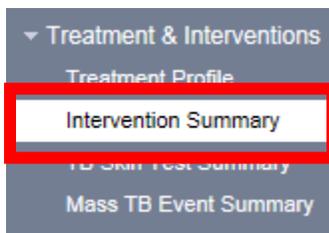
---

## Entering Public Health Interventions for Client

---

**Note- all interventions against Non-Human Subjects must be charted against that investigation and all interventions against the Client must be charted against their investigation. Please be sure to have correct investigation in context when documenting.**

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



The Intervention Summary screen will display



1. Click on the **Create Intervention** button

**Intervention Details** Hide Intervention Details

\* Required field

**Encounter Group:** Communicable Disease Investigation

\* **Intervention Type:** 1 Prophylaxis       \* **Intervention Sub Type:** 2 Immunoprophylaxis

**Intervention Disposition:** 3 Completed

\* **Outcome:** 4 Do Not Use

\* **Start Date:** 5 2021 / 01 / 05       **End Date:** 5  /  /

**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:

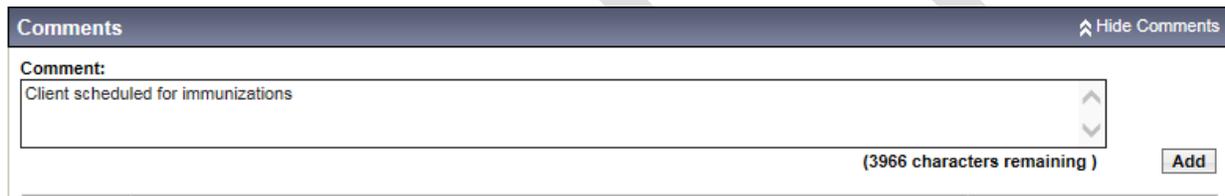
**Provider:**  Find 🔍

Use Other Provider:

Fill your mandatory fields:

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

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



The screenshot shows a 'Comments' section with a text input field containing 'Client scheduled for immunizations'. Below the field, it indicates '(3966 characters remaining)'. An 'Add' button is located to the right of the field. A 'Hide Comments' link is visible in the top right corner of the section.

Comment will appear in the comment box:

Date	Comments	Recorded By
2021 Jan 5	Client scheduled for immunizations	McClellan, Samantha

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

**Ensure you take the intervention out of context**



The screenshot shows three buttons: 'Save', 'Clear', and 'Cancel'. The 'Cancel' button is highlighted with a red rectangular border.

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

## Documenting Risk Factors

**Note- Risk Factors are documented against the Client be sure to have correct Investigation in context.**



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

A screenshot of the 'Risk Factor' table interface. The table has columns for Preset, Risk Factor, Additional Information, Reported Date, Response, Frequency, Date Range, End Date Reason, and Pertinent to Investigation. There are four rows of data, with the third row containing a date and a response.

<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Exposure - Animal - contact with pets, farm, petting zoo, or wildlife							
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Travel - Inside province							
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Travel - Outside of province, but within Canada							

Total: 4

1. The risk factor table is populated with all presets defined for Rabies. 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**  **2** [Set Response]

	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Exposure - Animal - contact with pets, farm, petting zoo, or wildlife							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Inside province							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Outside of province, but within Canada							

Total: 4 [1] 10

**3** [Apply]

\* Response: Yes  Risk Factor Pertinent to investigation in context

	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Inside province							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Outside of Canada		2018 Jan 01	Yes				810 (Salmonellosis)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Travel - Outside of province, but within Canada							

Total: 4 [1] 10

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:**

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 Lyme investigation.

Risk Factor										
Add										
Update View Delete Set Response Set Pertinent										
<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Travel - Outside of province, but within Canada		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.

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 Rabies Investigation will appear

<input type="checkbox"/>			Travel - Outside of Canada		2021 Jan 04	Yes						977 (Rabies)
<input type="checkbox"/>		✓	Travel - Outside of Canada		2018 Jan 01	Yes						810 (Salmonellosis)

**Risk Factors**

2

Save Reset log Print ? Close

Active

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

**Investigation**

<b>Investigation ID:</b> <u>977</u>	<b>Status:</b> Open	<b>Disposition:</b> Investigation in progress	<b>Age at time of Investigation:</b> 40 years
<b>Disease:</b> Rabies	<b>PHAC Date/Type:</b> 2021 Jan 04 / Date Reported	<b>Etiologic Agent:</b> Rabies virus	<b>Authority/Classification:</b> National / Case - Person Under Investigation / 2021 Jan 04

**Risk Factor**
✓
↑

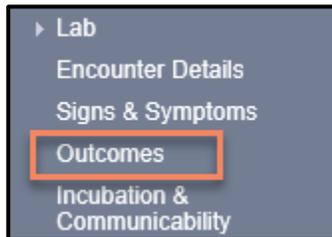
Add

<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Exposure - Animal - contact with pets, farm, petting zoo, or wildlife		2021 Jan 04	Yes				<u>977 (Rabies)</u>
<input type="checkbox"/>		✓	Travel - Inside province		2021 Jan 04	No				<u>977 (Rabies)</u>
<input type="checkbox"/>			Travel - Outside of Canada		2021 Jan 04	Yes				<u>977 (Rabies)</u>
<input type="checkbox"/>		✓	Travel - Outside of Canada		2018 Jan 01	Yes				<u>810 (Salmonellosis)</u>
<input type="checkbox"/>		✓	Travel - Outside of province, but within Canada		2021 Jan 04	No				<u>977 (Rabies)</u>

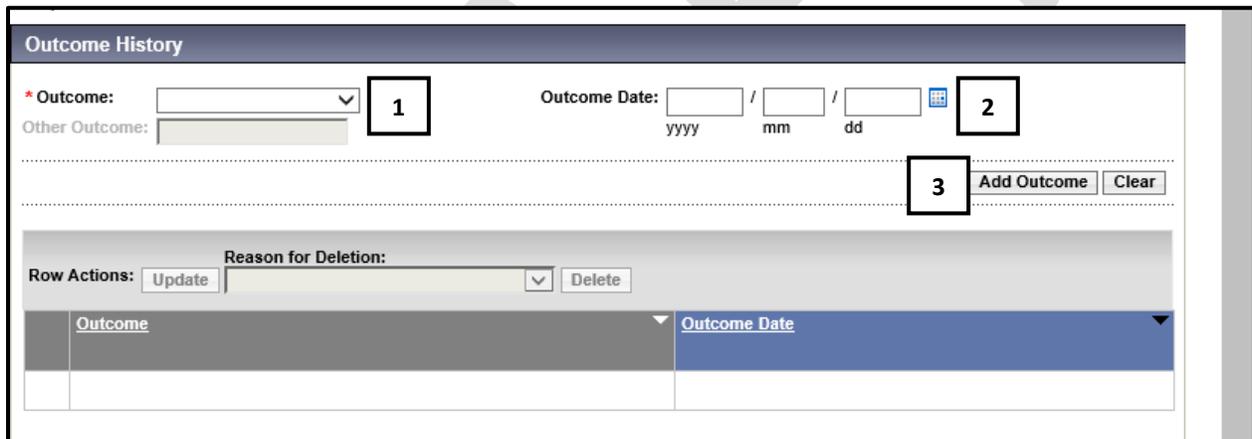
1. Ensure **ALL risk factors** have a response and
2. Click the **Save** button when done adding any additional risk factors.

## Adding an Outcome

**Note- Outcome must be added to both Non-Human Subject and Client Investigation**



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



The screenshot shows the 'Outcome History' form. At the top, there is a section for adding a new outcome. It includes a dropdown menu for '\* Outcome:' (callout 1), an 'Outcome Date:' field with separate boxes for year (yyyy), month (mm), and day (dd) (callout 2), and a date picker icon. Below these fields are 'Other Outcome:' and 'Add Outcome' (callout 3) and 'Clear' buttons. A table below shows existing outcomes with columns for 'Outcome' and 'Outcome Date'. The table has 'Update' and 'Delete' buttons for each row, and a 'Reason for Deletion' dropdown.

**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
------	----------	-------------

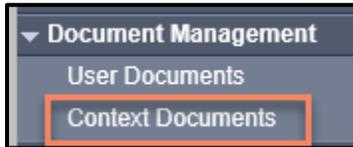
1

1. Click the **Save** button

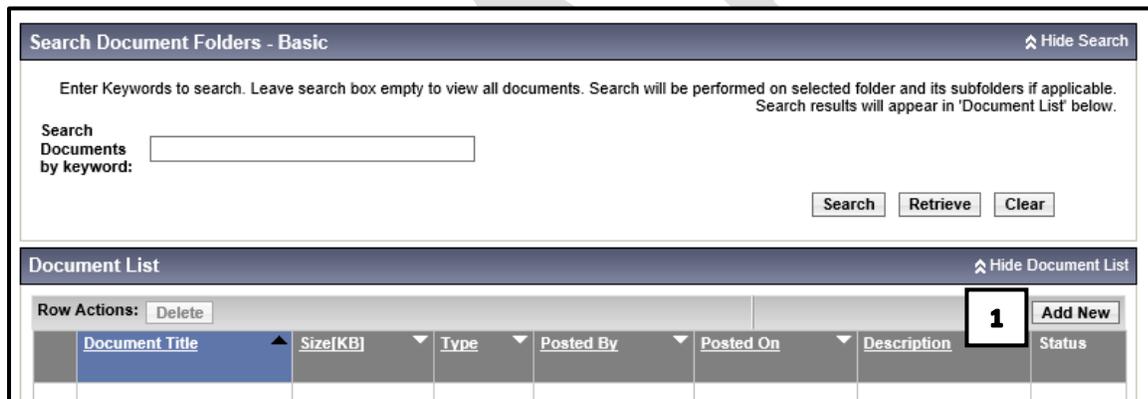
DRAFT

## Uploading a Document to an Investigation

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



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



1. Click the **Add New** button

### Document Management

**Add New Document**

\* File name:

File uploaded: 2

Selected Document:

\* Document Title:  3

\* Effective Date:  /  /    
yyyy mm dd

Expiration Date:  /  /    
yyyy mm dd

Status: \*

Enter Keyword:    Selected Keywords:

Use CTRL key for multiple selections.

Description:

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

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 <span style="float: right;">Hide Document List</span>							
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"/>	<a href="#">Physician Report Form- XXXXX</a>	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



<b>ACTIVE</b>			
<b>Client ID:</b> <a href="#">21398</a>	<b>Name (Last, First Middle) / Gender:</b> June, Kim / Female	<b>Health Card No:</b> 7700000031	<b>Date of Birth / Age:</b> 1980 Feb 01 / 40 years
<b>Phone Number:</b> Primary home: 902-864-5555	<b>Address:</b> 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada	<b>Additional ID Type / Additional ID:</b> Provincial health service provider identifier / -	
			<a href="#">Investigation</a>
<b>Investigation ID:</b> <a href="#">976</a>	<b>Status:</b> Open	<b>Disposition:</b> Investigation in progress	<b>Age at time of Investigation:</b> 40 years
<b>Disease:</b> Chlamydia	<b>PHAC Date/Type:</b> 2020 Sep 25 / Specimen Collection	<b>Etiologic Agent:</b> Chlamydia trachomatis	<b>Authority/Classification:</b> National / Case - Confirmed / 2020 Sep 28
<b>Notes</b> <span style="float: right;">^ Hide Notes</span>			
<b>Display Notes For:</b> Client: June, Kim		<b>Include Related Entities:</b> <input checked="" type="checkbox"/>	

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

Display Notes For:  Include Related Entities:

Subject Line:  Status:

Workgroup for Author:  Workgroup for Transcriber:

Author:  Transcriber:

Note Type:

Note Date: From:  /  /  To:  /  /

0 results found. To view a Note below, click on its Note Date.

Row Actions:

1. Click on **Author Note** button

**1** Note is being created for Investigation ID 2503

Note ID: - Status: -

\* Required Field

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

**2** Subject:

**3** Note Date:  /  /  Note Time:  :  :  ADT

Note Type:

Common Phrases:

**4** Note:

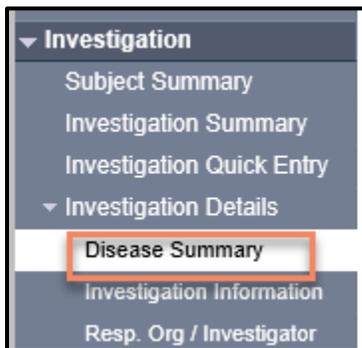
Normal Arial 7pt b i u

**5**

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

## Changing the Investigation Classification

*Note- Once the Rabies Investigation is complete i.e. Animal observation period is complete or immunization is complete, then the Investigation must be switched to case not a case.*



**Disease Summary**

[Add New Disease](#)

### Disease Event 977 - Rabies [Hide](#)

**PHAC Date / Date Type:** 2021 Jan 4 / 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
Rabies	Rabies virus	-		<input checked="" type="checkbox"/> National / Case - Person Under Investigation     2021 Jan 4	-	-

1
Update
Delete

1. Click on the Update Button

**Disease Event History**

**\* Disease:**

**Microorganism:**

**Referral Lab No.:**

**Information Source:**

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

Available Sites:

Selected Sites(s):

**Staging:**

---

**\* Investigation Classification**

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

**\* Classification Date:**  /  /

---

**Row Actions:**

	Primary	Authority	Classification	Classification Date	
<b>1</b>	<input type="radio"/>	<input checked="" type="checkbox"/>	National	Case - Person Under Investigation	2021 Jan 4

**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

**\* Investigation Classification**

3 \* Authority: National 4 \* Classification: Case - Not a Case

5 \* Classification Date: 2021 / 01 / 04  
yyyy mm dd

5

---

Row Actions:

Primary	Authority	Classification	Classification Date
<input checked="" type="checkbox"/>	National	Case - Person Under Investigation	2021 Jan 4

7

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

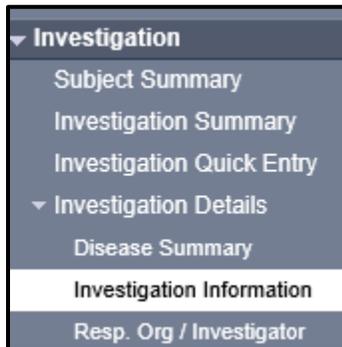
3. **Authority** – do not change
4. **Classification** - select the new Classification from the **Classification** drop-down list
5. **Classification Date** - populates with the previous classification date. Change to the actual classification date
6. Click the **Apply Update** button
7. Click the **Save**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

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

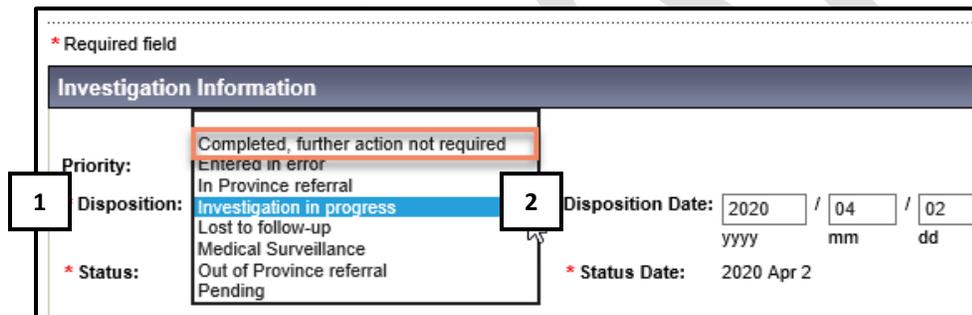
Disease Summary						
						<input type="button" value="Add New Disease"/>
<b>Disease Event 977 - Rabies</b>						<a href="#">Hide</a>
<b>PHAC Date / Date Type:</b> 2021 Jan 4 / Date Reported		<b>Disease Origin:</b> Living on Reserve		<b>Most of the Time:</b>		
Disease	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification   Classif. Date (✓ Primary Classification, Δ Set by Case Def)		Site(s)   Staging
Rabies	Rabies virus	-		✓ National / Case - Not a Case	2021 Jan 4	-   -
Rabies	Rabies virus	-		✓ National / Case - Person Under Investigation	2021 Jan 4	-   -
						<input type="button" value="Update"/> <input type="button" value="Delete"/>

## Update the Investigation Disposition and Close the Investigation

*Note- Both Non-Human Subject and Client Investigations need to be updated.*



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. 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

---

**Row Actions:**

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

Enter the following information:

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

New name will appear in the table below:

1. Click the Save Button

Row Actions: <span>Update</span>						
	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

## Non-Human Source Panorama Documentation

### Adding a Non-Human Source to a Rabies Acquisition Event

Navigate to the Exposure Summary in the Left Hand Nav:

Adherence Summary
DOT Summary
Exposure Summary
View Client Imms profile
▶ Subject
▶ Cohort
Notes

Navigate to the Acquisition Event for the exposure:

Acquisition Event Summary <span style="float: right;">⤴ Hide Acquisition Event Summary</span>										
1 Acquisition Events Found.										
Row Actions: <a href="#">Search and Link TE</a> <a href="#">Copy</a>				<a href="#">Multiple AE Entry</a>		<a href="#">Create Acquisition Event</a>				
	AE ID	TE ID	Source Name	Acquisition Start	Acquisition End	Location Name	Setting Type	Exposed	Likely Source	Invalid
1	<a href="#">503</a>	-	-	2021 Feb 1	2021 Feb 1	Clients Home	-	-	-	-

1. Click on the hyperlink

Scroll to source section and Show Source:

Source	<a href="#">Show Source</a>
--------	-----------------------------

**Source** Hide Source

\* Required for create source

\* **Source Name:**

\* **Source Category:**

\* **Source Type:**  **Source Subtype:**

**Client:** -

**Non Human Subject:** -

**Investigation** -

---

---

**Source Id:** - **Investigation Id:** -

**Source Name:** -

**Source Description:**

**Most Likely Source:**

1. **Select** source name radio button- Add source name
2. **Source category**- Organism
3. **Source type**- Select appropriate type
4. **Source subtype**- Select appropriate subtype
5. **Click** create as source button

You will then be asked to create the Investigation for the source:

Create Rabies Investigation for Source:

ACTIVE

Subject ID: <a href="#">23178</a>	Subject Name / Type: black dog / Wild animal	Liaison Name (First, Last) / Role: - / -	Subject Address / Same as Liaison: - / null
--------------------------------------	---	---	--

Additional details (e.g., disease, diagnosis, attached documents) may be entered after the investigation has been created.

\* Required field

Disease Summary
↑ Hide

Disease Event - Rabies			
Disease	Etiologic Agent	Epi Markers	Authority / Classification   Classif. Date (✓ Primary Classification)
Rabies	Rabies virus	-	<input checked="" type="checkbox"/> National Case - Person Under Investigation <input type="checkbox"/> -

Investigation Information
↑ Hide

Priority:

\* Disposition:  1

1. **Disposition**- In progress

Responsible Organization / Investigator
↑ Hide

\* Responsible Organization :  1

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

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

\* Responsible Organization Workgroup :  2

\* Responsible Organization Date :  /  /  3  
yyyy mm dd

\* Investigator Organization :  4

\* Investigator Workgroup :  5

Investigator Name :  6

\* Assigned Date :  /  /  7  
yyyy mm dd

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

DRAFT



9. **Report Date (Received)** - auto populates to current date. Change the date to the received date if applicable.
10. **Click Submit**

Review your Acquisition Event source section and take note of Investigation ID for animal.

Source		Hide Source	
Source Id:	23178	Investigation Id:	978
Source Name:	black dog		
Source Description:	<input type="text"/>		
Most Likely Source:	<input type="checkbox"/>		

Save the Acquisition Event

## Updating the Classification for the Animal's Investigation

Search for the animal's investigation using the search investigation function, be sure to include non-human subjects:

**Search Investigations - Basic**

**Search Criteria**

Wildcard characters % (multiple letters) and \_ (singleletters) can be used when searching by First or Last Name -except when matching phonetically. Wildcard-only searches not allowed.

**Disease / Basic Criteria**

**Include:**  Human  Non-Human  Both

**Search by:**

**Investigation ID:**

Place the Animals Investigation and the Animal in context and navigate to the Disease Summary section in the Left Hand Nav:

**Recent Work**

**Search**

- Search Investigations
- Search Lab
- Search Exposures
- Search Interventions
- Search Clients
- Search Non-Human Subjects
- Search Disease Notifications

**Investigation**

- Subject Summary
- Investigation Summary
- Investigation Quick Entry
- Investigation Details
  - Disease Summary**
  - Investigation Information
  - Resp. Org / Investigator
  - Reporting Notifications
  - External Sources
  - Links & Attachments
  - Close Investigation
- Lab
  - Encounter Details
  - Signs & Symptoms
  - Outcomes
  - Incubation &

**Disease Summary**

**Subject ID:** [23178](#)    **Subject Name / Type:** black dog / Wild animal    **Liaison Name (First, Last) / Role:** - / -    **Subject Address / Same as Liaison:** - / null

**Investigation ID:** [978](#)    **Status:** Open    **Disposition:** Investigation in progress    **Age at time of Investigation:** -

**Disease:** Rabies    **PHAC Date/Type:** 2021 Jan 05 / Date Reported    **Etiologic Agent:** Rabies virus    **Authority/Classification:** National / Case - Person Under Investigation / 2021 Jan 05

Merged Investigation No(s):

**Disease Summary** Add New Disease

**Disease Event 978 - Rabies** Hide

**PHAC Date / Date Type:** 2021 Jan 5 / 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
Rabies	Rabies virus	-		✓ National / Case - Person Under Investigation    2021 Jan 5	-	-

**Update** **Delete**

1. Select update

**Disease Event History**

**\* Disease:** Rabies

**Microorganism:** Rabies virus

**Referral Lab No.:**

**Information Source:**

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

**Available Sites:**

**Selected Sites(s):**

**Staging:**

---

**\* Investigation Classification**

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

**\* Classification Date:**  /  /

---

**Row Actions:**

	Primary	Authority	Classification	Classification Date
<b>1</b>	<input checked="" type="radio"/>	National	Case - Person Under Investigation	2021 Jan 5

1. In Disease Event History Section select the radio button in front of the Classification
2. Select update

The area above will auto populate with classification information:

**\* Investigation Classification**

\* **Authority:** 1 Non-Human Subject v      \* **Classification:** 2 Case - Non-Human Subject v

\* **Classification Date:** 2021 / 01 / 05 [calendar icon]  
yyyy      mm      dd

---

3 Apply Update Clear

---

**Row Actions:** Update Delete Set as Primary

	Primary	Authority	Classification	Classification Date
<input checked="" type="radio"/>	✓	National	Case - Person Under Investigation	2021 Jan 5

---

4 Save Reset Cancel

1. **Change Authority** to Non-Human Subject
2. **Change Classification** to Case- Non-Human Subject
3. **Select Apply Update**
4. **Select save**

Note the changes to Authority and Classification in the Investigation Banner:

## Disease Event Details



ACTIVE

<b>Subject ID:</b> <a href="#">23178</a>	<b>Subject Name / Type:</b> black dog / Wild animal	<b>Liaison Name (First, Last) / Role:</b> - / -	<b>Subject Address / Same as Liaison:</b> - / null
---	--	--	---

---

<b>Investigation ID:</b> <a href="#">978</a>	<b>Status:</b> Open	<b>Disposition:</b> Investigation in progress	<b>Age at time of Investigation:</b> -
<b>Disease:</b> Rabies	<b>PHAC Date/Type:</b> 2021 Jan 05 / Date Reported	<b>Etiologic Agent:</b> Rabies virus	<b>Authority/Classification:</b> Non-Human Subject / Case - Non-Human Subject / 2021 Jan 05

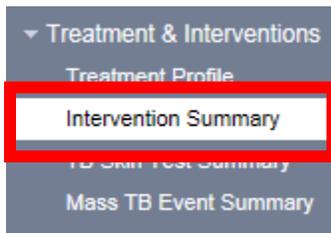
Investigation details successfully saved.

Save Reset Cancel

## Entering Public Health Interventions for Non-Human Source

**Note- all interventions against Non-Human Subjects must be charted against that investigation and all interventions against the Client must be charted against their investigation. Please be sure to have correct investigation in context when documenting.**

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



The Intervention Summary screen will display.



- Click on the **Create Intervention** button

**Intervention Details** ↑ Hide Intervention Details

*\* Required field*

**Encounter Group:** Communicable Disease Investigation

**\* Intervention Type:** 1 Quarantine  **\* Intervention Sub Type:** 2 Quarantine

**Intervention Disposition:** In progress  3

**\* Outcome:** 4 Do Not Use

**\* Start Date:** 5 2021 / 02 / 12  **End Date:** 5  /  /

**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**- could be quarantine, referral, notification for action
2. **Intervention Sub Type**- will need to be selected based on Type
3. **Disposition**- need to select the best descriptor of situation
4. **Outcome**- need to select Do Not Use
5. **Start date**- and **End Date**-
6. **Organization**- will auto-populate
7. **Location**- will auto-populate

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

**Comments** ↑ Hide Comments

**Comment:**

Client scheduled for immunizations

(3966 characters remaining )

Comment will appear in the comment box:

Date	Comments	Recorded By
2021 Jan 5	Client scheduled for immunizations	McClellan, Samantha

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

**Ensure you take the intervention out of context**



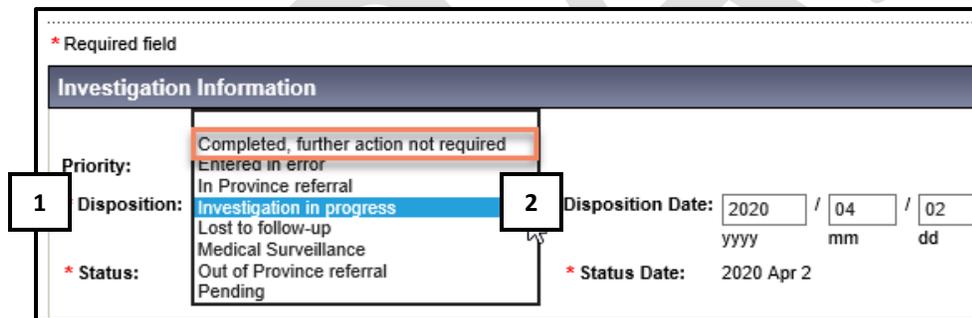
- Click the **Cancel** button towards the top of the screen

## Update the Investigation Disposition and Close the Investigation for Non-Human Source

*Note- Both Non-Human Subject and Client Investigations need to be updated.*



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



\* Required field

**Investigation Information**

Priority:

**1** Disposition: **2** Completed, further action not required  
Entered in error  
Investigation in progress  
Lost to follow-up  
Medical Surveillance  
Out of Province referral  
Pending

Disposition Date: 2020 / 04 / 02  
yyyy mm dd

\* Status: \* Status Date: 2020 Apr 2

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

## To Close the Investigation:

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

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

2. Click the **OK** button