

## Panorama Tips & Tricks #24

### Adding Known Contacts to an Investigation

**Before** adding a known contact to a case investigation **always**:

1. Complete a client search for the known contact(s)
2. Review each contact's subject summary screen to determine if an existing, current investigation of the same disease exists.

#### Scenario #1

If the contact **DOES NOT** have a current investigation of the same disease:

1. Create the transmission event, save and add the contact using the Known Contact Search section.
2. Complete Search by Client



Known Contact Search Hide Known Contact Search

Cohort Result Set: -

Client: -

Non-Human Subject: -

Investigation: -

3. After selecting/returning the client, click Add button - this will take the user to the Create Investigation screen. Create the investigation for the contact, submit (twice) and save the transmission event.

An acquisition event is created for the contact. Repeat these steps for all known contacts.

#### Scenario #2

If the contact **HAS** a current investigation of the same disease:

1. Note the investigation ID of the contact's investigation.
2. Create the transmission event, save and add the contact's investigation using the Known Contact Search section.
3. Complete Search by Investigation.

## Panorama Tips & Tricks #24

### Adding Known Contacts to an Investigation

Known Contact Search
Hide Known Contact Search

Cohort Result Set: -

Client: -

Non-Human Subject: -

**Investigation:** -

4. Click Search button.

The system displays the Search Investigations – Basic screen.

5. Enter Investigation ID and click Search button.

6. Select Investigation from Investigation search results, click Select and Return button.

Investigation Search Results
New Search

1 results found. Inactive investigation(s) are not shown Click Investigation ID to view Investigation Summary.

Row Actions:

Investigation ID	Last Name, First Name	Date of Birth	Disease / Disease Event ID / Primary Authority / Classification	Reporting Date Received
<input checked="" type="checkbox"/> <a href="#">541</a>	Apple, candy	1900 Jan 1	Measles 550 / National / Case - Person Under Investigation	2018 Nov 2

Total: 1 Jump to page:

The Investigation ID is returned to the Known Contact Search.

7. Click Add button.

An acquisition event is created for the contact's current investigation.

8. Save the transmission event.

Known Contact Search
Hide Known Contact Search

Cohort Result Set: -

Client: -

Non-Human Subject: -

**Investigation:** -

Acquisition Events
Hide Acquisition Events

Row Actions:

Acquisition Event ID	Investigation ID	Subject Name	Acquisition Start	Acquisition End	Classification	Disposition	Invalid
<input type="radio"/> 187	<a href="#">541</a>	Apple, candy	2018 Nov 25	-	Measles   Case - Person Under Investigation	Investigation in progress	-
<input type="radio"/> 186	<a href="#">202</a>	Measles, Disease	2018 Nov 25	-	Measles   Case - Confirmed	Investigation in progress	-