



Client 1 - New Confirmed Case

- 1. Search for a client
- 2. Verify Client's telephone number and address create temporary address-add email address
- 3. Entering Ethnic Information
- 4. Create Investigation
- 5. Attach Lab to the Investigation
- 6. Immigration Information
- 7. Indigenous Information
- 8. Investigation Information
- 9. <u>Signs & Symptoms investigation does not have any Signs & Symptoms, client is reporting Signs & Symptom</u>
- 10. Assessing Symptom Onset
- 11. Isolation intervention
- 12. Risk Factors
- 13. Outcome
- 14. Exposure Summary (Upcoming training)
- 15. Upload PHAC form SBAR communications and Recovery Letter
- 16. Nursing Notes Note
- 17. COVID Alert App

Client 2 - Contact Case now Confirmed Case

- 1. Search for a client
- 2. <u>Telephone number, address and email address</u>
- 3. Entering Ethnic Information
- 4. Update Disease Classification
- 5. Attach Lab to the investigation
- 6. Immigration Information
- 7. Indigenous Information
- 8. Investigation Information
- 9. Signs & Symptoms Investigation has Signs & Symptoms, client is reporting Signs & Symptoms.
- 10. Assess Symptom Onset
- 11. Update Isolation intervention
- 12. Risk Factors
- 13. <u>Outcome</u>
- 14. Exposure Summary (Upcoming training)
- 15. Uploading PHAC form and SBAR communications
- 16. Update Nursing Notes
- 17. COVID Alert App
- 18. Adding a Secondary Investigator

Contact Low Risk because of COVID 19 Immunization Status.

- 1. Search for Client
- 2. Open Immunization Records and review
- 3. Return to Investigation and create/update National Contact Investigation
- 4. Add a nursing Note





Intermittent Monitoring

1. Client 3 - Contact Case - Intermittent Monitoring June 7th

- 1. <u>Search for Investigation</u>
- 2. Create Isolation Intervention
- 3. Update Signs and Symptoms
- 4. Update Nursing notes

2. <u>Client 1 - Case – Intermittent Monitoring June 10</u>

- 1. Update Signs and Symptoms
- 2. Update Nursing notes

3. Client 2 - Case- Intermittent Monitoring June 10

- 1. Update Signs and Symptoms
- 2. Update Nursing notes

4. <u>Client 3 – Contact Case – Intermittent Monitoring – June 12</u>

- 1. Update Signs and Symptoms
- 2. Update Nursing notes

5. <u>Client 3 – Contact Case – Intermittent Monitoring – June 21</u>

- 1. Update Signs and Symptoms
- 2. <u>Close contact case</u>
- 3. Update Nursing notes

6. <u>Client 1 – Case – Intermittent Monitoring – June 13</u>

- 1. Update Signs and Symptoms
- 2. <u>Close Case</u>
- 3. Update Nursing notes





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 Clients	3 Search Retrieve Reset # 🖨 ?
	Basic Search Criteria	^
1	Client Number: Client Number Type:	Select all that apply:
	Last Name: First Name: Middle Na Mother's Name: Gender:	ne: Use Phonetic Matches
	Choose one: Date of Birth: yyyy/mm/dd	

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: Middle Name:		Use Phonetic Matches								
	Mother's Name:										
3	Gender:										
	Choose one: Date of Birth: yyyy/mm/dd										
	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

		Searc	h Res	ults							< <
	Ļſ	3								Client Quick Entry Cr	eate Client
2		Pre	view	Update	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 \$
	Ч		0	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
1		-	0	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, Create a Temporary Address & Email 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.

Те	lephone	Numbers				~	\$			
						1	Add			
	Update	Delete Set Preferred								
	8	Number 🗘	Effective From 💌	Effective To 🗘	Preferred *					
		Primary home: 902-864-2222	2020 Mar 02			\checkmark				
Т	Total: 1									

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

1. Click on the Add button

Telephone Numbers	✓ 👔				
Add Telephone Number	Apply	Reset	•	×	
Telephone Number: • Number: • Usage: Canada 1 • Z • Effective From: To: 2020/06/12 yyyy/mm/dd	3	Apply	Res	set	

- 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)

Add	resses	;							_	✓ (▲)
									Add	
		Delete	et Preterred							
	B	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





	Addresses	× 🖹
	Add Address	Apply Reset 🖨 🗙
	Address Format:	
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:	
	Canada 🔹 Nova Scotia 💌	
	Other Address Details: (100 characters remaining.)	
	2020/06/12	
		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.

Add	resse	S	2							× ×
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	-	
۲	Ð	Temporary address	33 Winter Avenue, Beaver Bank, Nova Scotia, B4G1E6, Canada		2020 Jun 12				_	
0		Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04			1	-	
Tota	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)





*

Entering Email Address

Email Address

1. Expand the email tab by clicking on the down arrows

Email Addresses

2. If the email address the client provided is different than the one on file or if there is currently no email address on file for the client. Click the add button.

Email Addresses	^
To create a new record click Add.	Add

3. Email type : select personal or work. Email: Add the email address provided by the client. Click apply.

	3	^
Personal	Apply	leset 🔒 🗙
Worк Т	* Email: email@domain.com 2	
		Apply Reset

Email Addresses						
U	pdate	Delete Clear Preferred Set Preferred				
	B	Email Type 🔺	Email 🗘	Preferred *		
	Ð	Personal	spain123@outlook.com			
Tot	al: 1			10 💌		

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





Entering 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.



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

Ethnicity Information	1	*
Birth Information	✓ [*

1. Expand the Ethnicity Information tab by clicking on the down arrows.

_	Ethnicity Information							
	Ethnicity:		Other Eth	nicity: 2	Ethnicity Reported by: Client Other Provider	3		
	African Nova Scotian	~					~	8
ĥ	Asked, but unknown						~	
a	Asked, not provided							
	Black							Add
1	East/Southeast Asian		Preferred					
	Latino							
	Middle Eastern			Effective From *	Effective To 🗢	Preferred *		
	Other Ethnicity	~)2-232-3232	2020 Aug 26			\checkmark	
1	South Asian	-		K I D				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 Covid-19 Investigation

Search Losease Notifications					
Investigation					
Subject Summary					
Investigation Summary					
Investigation Quick Entry					
 Investigation Details 					

From the left-hand navigation, click on Subject Summary

Disease Surveillance and Manage	ement								
	WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	INVENTORY				
Recent Work	Cubicat C								
	Subject St	ummary						0	
Search Investigations									
Search Lab								ACTIVE	ē .
Search Exposures	Client ID:	Name(Last, First Mi	ddle) / Gender:	Health Card No:	Date	of Birth / Age:			
Search Interventions	<u>5521</u>	Stone, Rolling / Male		2222333444	1990) Jun 02 / 30 years			
Search Clients	Phone	Address:		Additional ID Type /					
Search Non-Human Subjects	-	97 Willow Street, Am B4H3W6, Canada	herst, Nova Scotia,	Provincial health servi provider identifier / -	ce				
Search Disease Notifications	Report:	Launch							
- Investigation									
Subject Summary	Communicable	Disease Investiga	tion Encounter					A His	de
Investigation Summary	Charle								_
Investigation Quick Entry			Disea	se:		~	Investigation Qui	ck Entry	_
 Investigation Details 							Create Inves	stigation	-
→ Lab	Unassociate	d Encounters	Non-Investiga	ation)				🗙 Hide	le
Encounter Details									_
Signs & Symptoms	0 encounter(s) tota	1				Click Encoun	ter Date for encoun	ter detail	ls.
Outcomes	Move Selected En	counter(s) To:	Maya						
Incubation &	Unassociated Nor	I-Episode Encounters	Wove						_
	Non-Episode End	counters					Create Encounte	r Hid	le
Heatment & Interventions									
Medications	Encounter Da	te Encounter Ty	pe Encounter	Reasons	Organization		Location		
Exposure Summary									

Confirm that there is not another COVID-19 investigation.

Communicable Disease Investigation Encounter Group	☆ Hide
Disease:	Investigation Quick Entry Create Investigation

Click Create Investigation under Communicable Disease Encounter group





Disease Summary	☆ Hide
* Disease: 1 Unusual/Emerging Disease V	
* Authority: 2 National V * Classification: Case - Confirmed V 3	
* Classification Date: 2020 / 06 / 02 🔛 4	
Microorganism: COVID-19 V 5	
Information Source:	
Investigation Information Priority: * Disposition: Investigation in progress 6	☆ Hide

Enter the following information:

- 1. Disease- select Unusual/Emerging 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) from drop-down list
- 4. Classification Date- will auto populate to current date
- 5. Microorganism- select COVID-19 from drop-down list
- 6. Disposition- select Investigation in progress from drop-down list

* Responsible Organization : Halifax Public Health Office					
To specify an Organization first click on the 'Find' button. Then search, or typ Then click 'Close' to close.					
Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]					
* Responsible Organization Workgroup : IOM-Halifax-Unmonitored V					
* Responsible Organization Date : 2020 / 07 / 08					
yyyy mm dd					
* Investigator Organization: Central Zone 3					
* Investigator Workgroup : COVID-19 Unmonitored V 4					
Investigator Name :					
* Assigned Date : 2020 / 07 / 08					

All COVID-19 investigations will be setup with Halifax PHO as the responsible organization and Central Zone as the Investigator Organization.

Enter the following information:

- 1. Responsible Organization- find and select Halifax Public Health Office
- 2. Responsible Organization Workgroup- select IOM-Halifax PHO-Unmonitored from drop-down list
- 3. Investigator Organization- find and select Central Zone
- 4. Investigator Workgroup- select COVID-19 Unmonitored
- 5. Investigator name- YOUR name- or person doing investigation





	Reporting Notification	☆ Hide
	* Reporting Source:	
	O Provider:	
	Click Find to select a provider:	_
	Provider:	4
1	Location: QEII-Victoria General (VG) Site-General	
	To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select and click on 'Select' button. Then click 'Close' to close.	it
	Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Victoria General-General]	2
	Other:	
2	Type of Reporting Source: Lab	
3	Method of Notification:	
	*At least one of the following dates is required.	
	Report Date (Sent): / / / Report Date (Received): 2020 / 06 / 02 4 yyyy mm dd yyyy mm dd yyyy dd 4	
	5	
	Submit Clear Ca	ncel

Enter the following information:

1. **Reporting Source-** click **Location** radio button and search using the **Find** button for "Victoria General-General", highlighted and click **Select**

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 Delive Authority > We	ery Location: Panorama Cloud > Provestern Zone > Yarmouth Public Health	ovince of Nova Scotia > Department of Health and Wellness > Nova Scotia Health n Office > [Yarmouth PHO]	Find Q			
Туре	Search	Ci	ose 🔀			
Start typing the name of the Service Delivery Location. Matches will begin to appear below. Select the match with the keyboard or nouse.						
SDL Name:	Select the match with the keyboard or n	mouse.	5			
SDL Name:	Select the match with the keyboard or n victoria gen × Victoria General-Dialysis, Halifax, Nova Scotia	mouse.	•			
SDL Name:	Select the match with the keyboard or n victoria gen × Victoria General-Dialysis, Halifax, Nova Scotia Victoria General-General, Halifax, Nova Scotia	* Show Info	•			
SDL Name:	Select the match with the keyboard or n victoria gen × Victoria General-Dialysis, Halifax, Nova Scotia Victoria General-General, Halifax, Nova Scotia Victoria General-ICU, Halifax, Nova Scotia	mouse. Show Info Select	2			
SDL Name:	Select the match with the keyboard or n victoria gen × Victoria General-Dialysis, Halifax, Nova Scotia Victoria General-General, Halifax, Nova Scotia Victoria General-ICU, Halifax, Nova Scotia Victoria General-Infectious Diseases, Halifax, Nova Scotia	mouse. Show Info Select	2			

- 2. **Type of Reporting Source** select Lab from the drop-down list
- 3. Method of Notification- Select Lab from the drop-down list
- 4. **Report Date (Received)** auto populates to current date. Change the date to the received date if applicable.
- 5. Click Submit

After creating an investigation, you are taken to the **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.





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	Recent Work:		
	Search Investigations	1 Client: Bunny Mister (Client ID: 5014)		
	Search Lab	- Investigation: Unusual/Emerging Disease		

- 1. Go to Recent Work
- 2. Click on the client (not the investigation) hyperlink.
- 3. This takes you to the view client page.

Investigations	View Client	
	Client File Status	
	Active	
🖈 Recent Work	Olivert Information	
🔍 Search 🗸 🗸	Client Information	
Investigation ^	Client ID:	21398
Subject Summary	Client Name:	June, Kim
	Preferred Alternate Name:	7700000004 Maria Castle Usalla Cast
Investigation Summary	Health Card Number:	1/0000031 - Nova Scotia Health Card
Investigation Quick Entry		40 years
Investigation Details ~	Gender:	Female
Lab 🗸	Gender Identity:	
Encounter Details	Other Identity:	
Signs & Symptoms	Preferred Address:	80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada
	Preferred Telephone Number:	Primary home: 902-864-5555
Outcomes	Health Region:	NSHA
Incubation & Communicability	D-1-4	
	•	
 Investigation 		
Subject Summary		
Investigation Summary		
Investigation Quick Entry		
Investigation Details		
▼ Lab		
Lab Summary		
Electronic Lab Report		
le herr	1	

From the left-hand navigation, click on Lab Summary





	Row Actions: View/Update Requisition View/Update Lab Report 2 * Flag indicates sensitivities present 2										
			Specimen Collection / Imaging Date	Specimen Type / Description	Result Name	Interpreted Result; Result	<u>Flag</u> ▼	Accession No.	Etiologic Agent	Epi Markers	Result Status
1		Ð	2020 Mar 25	Swab / -	Presence or identity	Positive;		020-079- 00246	COVID-19	-	Final
	Total: 1 Image: 1 Jump to page: 2										

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

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

Selected Te	sts 1						☆ Hide Selected Tests	
Requisition	Tests: 🗸 Ad	d to Report					Set All Negative	
Row Actions	Row Actions: Delete Test Set to Cannot Report 3 Subject Investigations: ✓							
	Pertinent Inve	estigations:	~		Unlink fro	m Investigation		
	Test Annotati	ions:			Update	Annotations		
		_		(4000 c	haracters)			
Test ID	Resulted	<u>Test</u> <u>Name</u>	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group	
<u>645</u>	~	NAAT	Swab/ Nasopharyngeal swab	2020 Mar 25			Communicable Disease Investigation	

On the Human Lab Report Screen

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

Bow Actions:		1	
Row Actions.	Delete Test Set to Ca	nnot Report	
	Subject Investigations:	2044, Unusual/Emerging Disease, 2020 Mar 25 🗸	Link to Investigation





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

		Test ID	Resulted	<u>Test</u> <u>Name</u>	Specimen	Collection Date		Pertinent Investigations	Test Annotations	Encounter Group
	۲	<u>645</u>	~	NAAT	Swab/ Nasopharyngeal swab	2020 Mar:	1	2044, Unusual/Emerging Disease, 2020 Mar 25		Communicable Disease Investigation
[Reaso	n for Deletio	Delete						2 5	ave Reset Cancel

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

Note:

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

To put the investigation into context:

- Investigation
Subject Summary
Investigation Summary

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





Ş	Subject Sum	mary					? 🗏
							ACTIVE
	Client ID: 5014	Name(Last, First Mid Bunny, Mister / Male	Idle) / Gender:	Health Card No: 0123987654	Date of Birth / Age: 1975 Nov 30 / 44 years		
	Phone Number:	Address:		Additional ID Type /			
	Primary home: 902- 749-6635	187 Rabbit Hole Lane Scotia, B0W3M0, Car	, Tusket, Nova nada	Provincial health service provider identifier / -			
F	Report: 🗸 Laur	nch					
	Communicable Dise Group	ease Investigation E	Encounter	_			☆ Hide
			Disease:		✓ In	vestigation (Quick Entry
					,	Create In	vestigation
	Investigation 2	044 - Unusual/	Emerging Di	sease - Open			A Hide
Ц	Investigation ID: St	atus: Investigator:	Linked Ou	tbreaks: Report Date (Sent):	Report Date (Received)):	
	<u>2044</u> Op	ben Krissy Rose-M	uise -	-	25 March 2020		
Π	Disease	Etiologic Agent E	pi Markers / (Authority / Classification Class ✔ Primary Classification, Δ Set	if. Date by Case Def)	Site(s)	Staging
	Unusual/Emerging Disease	COVID-19 -		✓ National / Case - Confirme	d 2020 Jun 2	-	-

1. Click the Hyperlink associated to the current investigation

Note: The Investigation is now back in Context:

Recent Work Search	Investigation	Summary			?≞
Search Investigations					
Search Lab					ACTIVE
Search Exposures	Client ID:	Name(Last, First Middle) / Gender:	Health Card No:	Date of Birth / Age:	
Search Interventions	<u>5014</u>	Bunny, Mister / Male	0123987654	1975 Nov 30 / 44 years	
Search Clients	Phone Number:	Address:	Additional ID Type /		
Search Non-Human Subjects	Primary home: 902- 749-6635	187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada	Additional ID: Provincial health service provider identifier / -		
Search Disease Notifications					▲Investigation
- Investigation	Investigation ID:	Status:	Disposition:	Age at time of Investigation	1:
Subject Summary	2044	Open	progress	44 years	
Investigation Summary	Disease:	PHAC Date/Type:	Etiologic Agent:	Authority/Classification:	0000
Investigation Quick Entry	Unusual/Emerging Dise	Collection	COVID-19	02	2020 Jun
Investigation Details					
- Lab	Investigation Details	s		✓ Contains Data 🛛 🛠	Hide Investigation Details
Lab Summary					
Electronic Lab Report	Investigation Details				Create Encounter





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

Lab Tests Alide Lab Tests									
Lal	Lab Alide Lab								
									Lab Summary
	Specimen Collection Date	Specimen Type / <u>Description</u>	Result Name	Interpreted Result; Result	Flag▼	Accession <u>No.</u>	Etiologic Agent	Epi Markers	Result Status
Ð	2020 Jun 1	Swab / -	Presence or identity	Positive;		jas-123654	COVID-19	-	Final

Labs can also be viewed from the Lab Summary screen



From the left-hand navigation, click on Lab Summary

Updating Immigration Information



From the left-hand navigation, click on Immigration Information





	Immigration Informatio	3	Save Reset	log 🔒 ? 🖸			
	Client ID: 5423 Phone Number: - Name(Last, First Middle) Summer, Alice / Female Address: -		e) / Gender: le	Health Card No: 9333000001 Additional ID Type / Additional ID: Provincial health service provider ic	lentifier /	Date of Bir 2000 Jan (Active th / Age: 01 / 20 years
	Immigration Information						^
1	Citizen:		Date Citizenship Rece yyyy/mm/dd	ived:			
	Immigration File No:		Date Immigration For yyyy/mm/dd	n Received:			
	Arrival Date: yyyy/mm/dd		Arrival Year:				
	Immigration Status at Time of Arriv	val:					
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
Indigenous Information		\$
To create a new record click Add.	1	Add

2. Click on the Add button

Indigenous Information	^
Add Indigenous Information	Apply Reset 🖨 🗙
Self-identified Indigenous:	
	Apply Reset

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

Indigenous Information		^
Add Indigenous Information		Apply Reset 🖨 🗙
Self-identified Indigenous:	Indigenous Identity:	
First Nations Status:		
Indigenous Organization:	Asked, but unknown Asked, not provided	
e.g. Organization Display Name	First Nations First Nations and Inuit	
2020/12/09 🔛 yyyy/mm/dd 🔛	First Nations and Metus First Nations, Inuit and Metus	Apply Reset
To create a new record click Add.	Inuit	Add

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





Indigenous Information			Save Res	set 🛛 🖞 🛛 🖓	₽? 🖸
Primary home: 99 Happy Stree 902-232-3232	t, Hubbards, Nova Scotia, Canada	Provincial health service provider ide	5		
Indigenous Information					^
Add Indigenous Information			Арр	ly Reset	₽×
Self-identified Indigenous: Yes First Nations Status: Lives outside a First Natio 3 Asked, but unknown	Indigenous Identity: First Nations DIAND Number: Band: C	v			
Asked, not provided Asked, replied no Lives outside a First Nations Community Lives within a First Nations Community Non-status Indian Not Asked Status Indian				4 Appl	y Reset

 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, select Lives Outside a First Nations Community.

You do not need to enter information in the other fields

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

Completing Investigation Information

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







From the left-hand	navigation.	click on	Investigation	Information
	i navigation,		moongation	mornation

	Investigation Information	
	Priority:	Pinvestigation History
1	* Disposition: Investigation in progress V Disposition Date: 2020 / 06 / 11	
2	* Status: Open * Status Date: 2020 Jun 11	
	Client Home Address at Time of Initial Investigation: Sensitive Environment/Occupation: Environment/Occupation Details: 5	✓ 3 (1000 characters)
	Diagnosis Diagnosis Date: / <	
6	Method of Detection:	

- 1. Disposition and Disposition Date are auto-populated when the investigation was created
- 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 Updating Client Address.

* Status:	Open	66 Summer Landing, Smith Cove, Nova Scotia, Canada, B1B1K1 99 Summer Landing, Smith Cove, Nova Scotia, Canada,	
Client Home A Investigation:	ddress at Time of Initial	33 Winter Avenue, Beaver Bank, Nova Scotia, Canada, B4G1E6	

 Sensitive Environment/Occupation – choose the most appropriate option that matches the response on the PHAC form from the drop-down list. There will be investigations that do not have sensitive environment/occupation. Example – retired individuals

Choosing the appropriate option





monty:	V	
Disposition:	Investigation in progres	s V Disposition Date: 2021 / 01 / 05
		yyyy mm dd
* Status:	Open	* Status Date: 2021 Jan 5
Client Home A	ddress at Time of Initia	44-12 Main Street, Halifax, Nova Scotia, Canada, B2G2K9
Sensitive Envir	ironment/Occupation:	
		Communal setting - Work/volunteer
Diagnosis	3	Correctional facility - Reside Correctional facility - Work/volunteer Federal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction
Diagnosis Diagnosis Date	5 10:	Correctional facility - Reside Correctional facility - Work/volunteer Federal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction Local First Responders - Police/firefighter/EMS-paramedic Long-term care facility - Resident Long-term care facility - Work/volunteer Office usofer
Diagnosis Diagnosis Date Primary Metho Diagnosis:	s te: od of	Correctional facility - Reside Correctional facility - Work/volunteer Federal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction Local First Responders - Police/firefighter/EMS-paramedic Long-term care facility - Resident Long-term care facility - Work/volunteer Office worker Other (specify) Residential care facility - Resident Residential care facility - Work/volunteer Residential care facility - Work/volunteer Residential care facility - Work/volunteer
Diagnosis Date Diagnosis Date Primary Metho Diagnosis: Method of Dete	s te: pd of tection:	Correctional facility - Reside Correctional facility - Work/volunteer Federal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction Local First Responders - Polic effireflighter/EMS-paramedic Long-term care facility - Resident Long-term care facility - Work/volunteer Office worker Office worker Office worker Office facility - Resident Residential care facility - Resident Residential care facility - Work/volunteer Restaurant/Bar worker Retail worker - Stores/shops/markets Potetoreal worker - Oil sartis/more/other

- Animal handler or setting: use if client is a veterinary/animal worker/animal farmer
- School Child Care attend: use if client attends any school or daycare
- School Child Care Work/Volunteer: use if client works or volunteers in any school or daycare.
- Health care facility- Work/Volunteer: use if client is a health care worker or volunteer that is in direct contact with patients
- Long-term care facility- Work/volunteer: use if client is a health care worker or volunteer that is in direct contact with patients
- Residential Care Facility-Work/Volunteer: use if client is a RCF staff or volunteer in direct contact with residents.
- Other (Specify)- Lab worker handling biological specimens, Farm workers (grain or vegetable farms) and Other groups that interact with volunteer or high risk populations (i.e. Shelter worker). If the client works in more than one sensitive environment/occupation, you will need to use Other
- Environment/Occupation Details if you selected Other (Specify) for Sensitive Environment/Occupation, enter the details in this field. You can also add other details including the name of the employment location. Example for LTCF worker details could include works at ABC LTCF or for a farmer details: works at Scotchcrest Farms.





Note: For a CoVid-19 Investigation, we DO NOT fill out the <u>Diagnosis Date</u> and <u>Primary Method of</u> <u>Diagnosis.</u>

- Method of Detection <u>Upcoming configuration updates PENDING. Leave Blank for Now</u> Once configuration updates are complete, the dropdown list will include the reason for CoVid-19 testing (contact, symptoms or travel). This section is in development and when available, training updates will be provided.
- 7. Click the Save button (top or bottom right side of the screen)

Signs and Symptoms - Investigation has no recorded Signs and Symptoms

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

Row	Row Actions: Select All Update Set Onset Clear Onset								
	Reason for Deletion :	▼ Dele	Present: Yes	V Onset D	ate: // mm dd		pply Update		
	Sign/Symptom	<u>Present</u> ▼	Onset Date/Time 🔻	Recovery Date/Time	Duration	Reported By 🔻	Details Exist 🔻		
	Abdominal pain/discomfort/cramps						No		
	Arthralgia						No		
	Asymptomatic						No		
	Chest pain						No		
	Chills						No		
	Confusion						No		
~	Cough						No		
	Diarrhea						No		
	Dyspnea						No		
	Fever						No		
>	Headache						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
- 3. Onset Date Enter the date the client reported the S&S
- 4. Click Apply Update button
- 5. The S&S will now be updated in the table (see below)

Cough	Yes	2020 Jun 15 00:00 ADT		No
Diarrhea				No
Dyspnea				No
Fever	Yes	2020 Jun 15 00:00 ADT		No
Headache	Yes	2020 Jun 15 00:00 ADT		No

Client reports a symptom that is not in the displayed list of Signs and Symptoms:

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

Sign or Symptom	
* Required field* Sign or Symptom:	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	/ / : : ADT Estimated:
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	
	Add Clear
Row Actions: Select	All Update Set Onset Clear Onset
Reason	for Deletion : Present: Onset Date: V Delete V Margin 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

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
- 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>
--	--	--	-----------

U

When client indicates there is no Fever:

Fever 🔓			No

Row Actions:	Select Al Update	Set Onset Clear Onse	t			
	Reason for Deletion :	✓ Delete No	esent:	Onset Date:	_/	Apply Update

- 1. Click on the checkbox beside Fever
- 2. Select "No" from **Present dropdown**
- 3. Click Apply Update button
- 4. The <u>Fever</u> S&S will be updated (see below)

Add the temperature observation

Fever	No			No	1	

1. Click on the <u>No</u> hyperlink





Observations Details * Acquired field Sign or Symptom: Fever		
* Observation Date:	2020 / 06 / 17 III 2020 / 06 / 06 / 06 / 06 / 06 / 06 / 06	
Observation:		
Observation Value:		
* Observed By:		
	Add Clea	ar

- 1. Observation Date Enter date of the observation
- 2. **Observation field** Enter word Temperature If the client is unable to provide temperature, add Unable to provide temperature, denies feeling feverish or chills.
- 3. **Observation Value** Enter temperature value.
- 4. Unit Enter Celsius
- 5. **Observed by** select from the drop-down list
- 6. Click the Add Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u>	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

When the client indicates there is a fever:

Fever	Yes	2020 Jun 15 00:00 ADT		<u>No</u>	1

1. Click on the No hyperlink





Observations Details * Aequired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 🔛 1
Observation:	2
Observation Value: 3	
* Observed By:	
	5
	Add Clear

- 1. **Observation Date** Enter date of the observation
- Observation field Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature. I.E.. Unable to provide temperature. Experiencing chills, warmth, and flushed cheeks.
- 3. Observation Value Enter temperature value.
- 4. Unit Enter Celsius
- 5. Observed by select from the drop-down list
- 6. Click the Add Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u> 🔻	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

• 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.

,	Pro	ovincial health service provider ntifier / -	_
	Window	vs Internet Explorer	▲Investi
s:	1	Are you sure you want to leave this page?	
C Date/Type: Mar 02 / Most F			der Investigation /
sure		ightarrow Leave this page	in investigation?
		ightarrow Stay on this page	Sav
		N	





Assessing Symptom Onset

If the onset of a symptom is the earliest detection of COVID-19, then the symptom needs to be flagged as the onset symptom. In the example below – cough is the symptom that was the earliest detection of the disease (before or on the same day as the specimen collection). Choose one of the earliest symptoms and set onset.

Row	Actions:	Select All Update	2 Set Onse	clear Onset	0	- Data:		
		Reason for Deletion :	✓ D	elete Present:	yyyy	mm dd		oply Update
	<u>Sign/Sym</u>	ptom 🔺	<u>Present</u> ▼	Onset Date/Time	Recovery Date/Time	Duration 🔻	Reported By	<u>Details</u> <u>Exist</u>
	Abdominal pain/discor	mfort/cramps						No
	Arthralgia							No
	Asymptom	atic	Yes	2020 Jun 1 00:00 ADT	2020 Jun 7 00:00 ADT	6d 0h 0 m		<u>No</u>
	Chest pain							No
	Chills							No
	Confusion							No
✓	Cough		Yes	2020 Jun 7 00:00 ADT				No

- 1. Click on the **checkbox** by the onset sign/symptom
- 2. Click on the **Onset** button
- 3. The sign/symptom is now updated as the onset sign/symptom (see below). Note: this will update the PHAC date in investigation banner.

Cough (Onset)	Yes	2020 Jun 7 00:00 ADT	
---------------	-----	-------------------------	--





Adding an Isolation Intervention



From the left-hand navigation, click on Intervention Summary.

Interventions			☆ Hide Interventions
Row Actions: Add Follow Up	Start Data	ind Data 🔍 Bravi	Create Intervention

1. Click on the Create Intervention button

Intervention Details		★ Hide Intervention Details
* Required field		
Encounter Group:	Communicable Disease Investigation	
1 Intervention Type:	* Intervention Sub Type:]
Intervention Disposition:	2	
3 Outcome:		
* Start Date: 4	2020 / 06 / 16 III End Date: 5	/ / III

- 1. Intervention Type Select Isolation from the drop-down list
- 2. Intervention Disposition Select In Progress from the drop-down list
- 3. Outcome Select DO NOT USE from the drop-down list
- 4. Start Date Enter the Isolation Start Date
- 5. **End Date** Enter the Isolation End Date for contacts. Isolation End Date is determined by the Surveillance Guidelines. A case may or may not have an Isolation End 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 > Western Zone > [Yarmouth Public Health Office]	Find Q				
Workgroup:	V User: V					
Organization:	To specify an Organization first click on the Find' button. Then search, or type the name of the Organization you with to specify click on 'Select' button. Then click 'Close' to close.	select it and				
	Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > [Central Zone]	Find Q				
Location:	To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Loca specify, select it and click on 'Select' button. Then click 'Close' to close.	ition you wish i				
	Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Halifax PHO]	Find Q				

- 1. Organization Select Central Zone using the Find button
- 2. Location Select Halifax PHO using the Find button

1	Comments #	Hide C	omments
	Comment:		_
	(4000 characters remaining	2	Add

- 1. **Comment** enter the rational for how the isolation start and end dates were determined. Include the isolation end date in the comment with 2359 hours.
- 2. Click the Add button. The comment has now been added to the comment table (see below)
- 3. Click the Save button (bottom and top right of screen) to save the Intervention

Comments	Recorded By
Positive Case with symptom onset May 2, 2021. Projected isolation end date May 12, 2021 at 2359 hours if client meets recovered criteria.	Chisholm, Rachel

Ensure you take the intervention out of context



Click the Cancel button towards the top of the screen







From the left-hand navigation, click on Risk Factors

Investigations	F	Risk	Fact	ors	_						Save	Reset		? 🛡
Subject Summary	ĺ	Inves	tigatio	n										\$
Investigation Summary		Invest	tigation	ID:		Status:		Dispositio	n:	Age	at time of Inve	stigation:		
Investigation Quick Entry		<u>2460</u>				Open		investigat	ion in progress	30 y	ears			
Investigation Details 🛛 🗸		Diseas	e:			PHAC Date	/Type:	Etiologic	Agent:	Auth	ority/Classifica	ation:	. Iv 00	
Lab ~		Unusu	al/Eme	rging Disease		2020 Jun 0	27 Date Reported	COVID-1	,	Natio	onal / Case - C	ontirmed / 2020) Jun 02	
Encounter Details	li													
Signs & Symptoms		RISK	Facto	pr										
Outcomes														Add
Incubation & Communicability		U	odate	View	Delete	Set Respo	nse Set Pertinent							
Treatment & Interventions ~			_									End Date		
Medications ~			8	Preset \$	Risk F	actor 🔺	Additional Information \$	Reported Date \$	Response	Frequency \$	Date Range \$	Reason	Pertinen Investiga	t to ation 🗢
Exposure Summary					Chroni	c livor						*		
View Client Imms profile				~	diseas	e								
L Subject ^					Expos	ure -								
Client Details ~				\checkmark	with a	case								
Client Warnings					(confin probab	med, ble or								
Client Relationships					suspec	et)								
Consent Directives ~				~	Medica	al - Cancers								
Allergies				\checkmark	Medica	al - Cardiac er								
Risk Factors Imms History Interpretation				\checkmark	Medica	al - Chronic								





	~	Special Population - Pregnant or 6 weeks postpartum					
Total: 13			12			1	10 ALL

 The risk factor table is populated with all presets defined for Unusual/Emerging disease for COVID-19. 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

For preset risk factors that do not contain a response Pertinent to another Investigation:

	Risk Facto	ər		2						
			2							Add
	Update	View	Delete Set Respon	nse Set Pertinent						
	8	Preset \$	Risk Factor 🔺	Additional Information \$	Reported Date \$	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
1	>	1	Chronic liver disease							

- 1. Click on the Checkbox beside the risk factor. You can select all risks that have the same response.
- 2. Click the Set Response button

	F	Risk Factor								✓ (Â)
		Set Response						2	Apply	Reset 🖨 🗙
1		* Response: No	R	isk Factor Pertinent to inve	estigation in con	text				
		٩								Apply Reset
		No								Add
		Not Applicable	Respo							
		Not Asked Unable to answer		Additional Information \$	Reported Date ≎	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation ≎
		Unknown Unwilling to answer								
		Yes	act							

- 1. Response select the response from the drop-down list (according to the response from the client)
- 2. Click the **Apply** button





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

Risk Facto	or								
			10						Add
Update	View	Delete Set Respon	nse Set Pertinent						
	Preset 🗘	Risk Factor 🔻	Additional Information \$	Reported Date \$	Response ≎	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
	\checkmark	Travel - Outside of province, but within Canada		2018 Apr 01	Yes				<u>2495 (Hepatitis C)</u>

<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 COVID-19 investigation.

1. Click the **Add** button

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

	F	Risk Factor							~		\$
		Add Risk Factor						Apply	Reset	₽	×
		Category: 2	* Risk Factor:			Risk Factor P	ertinent to invest	igation in con	text		
		Additional Information:									
							0				
3		* Response:	Frequency:		Re	ported By:		•			
		Effective From: Effective To: yyyy/mm/dd I yyyy/mm/dd III	En	d Date Reason:	•	*	Reported Date: 2020/06/12				
		Reported by Details:					^				
							~				
								4	Apply	Re	set
										A	\dd
		Update View Delete Set Respon	nse Set Pertinent								
		Preset Risk Factor	Additional Information \$	Reported Date ≎	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertin Invest	ent to igation	\$

- 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





The added risk factor is now in the Risk Factor table.

	Preset \$	Risk Factor 🔻	Additional Information \$	Reported Date \$	Response ≎	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
6	~	Travel - Outside of province, but within Canada		2018 Apr 01	Yes				2495 (Hepatitis C)
	~	Travel - Outside of province, but within Canada		2020 Jun 12	No				2494 (Unusual/Emerging Disease)

Risk Factors					Save	Reset	
Client ID: 5521 1 Name(La Stone, R	ast, First Middle) / Gender: colling / Male		Health Ca 22223334	rd No: 144		Da 19	Active ate of Birth / Age: 190 Jun 02 / 30 years
Phone Number: Address - 97 Willow	: w Street, Amherst, Nova Scotia, B4H3W	6, Canada	Additional Provincial	I ID Type / Addit health service	ional ID: provider identifie	er / -	
Investigation							
Investigation ID: 2460	Status: Open	Disposition Investigation	n: on in progress	Age 30 y	at time of Invest ears	tigation:	
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 02 / Date Reported	Etiologic A COVID-19	gent:	Auth	ority/Classificat onal / Case - Co	tion: onfirmed / 2020	Jun 02
Risk Factor							✓ <u>×</u>
							Add
Update View Delete	Set Response Set Pertinent						
Preset \$ Risk F	actor Additional Information \$	Reported Date \$	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
Chronie disease	c liver e	2020 Jun 02	No				2460 (Unusual/Emerging 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

Other Outcome:	* Outcome:	~	2 Outcome Date:	1	/			
3 Add Outcome Clear Reason for Deletion: Row Actions: Update Outcome Outcome Date	Other Outcome:			уууу тт	dd			
Reason for Deletion: Qutcome Outcome Date						3	Add Outcome	Clear
Reason for Deletion: Qutcome Outcome Date								
Outcome Outcome Date								
	Row Actions: Upda	Reason for Deletion:	Delete					
	Row Actions: Upd:	Reason for Deletion:	Delete	Outcome Date			_	Ţ

Note: there can be multiple outcomes.

- 1. Outcome Select the outcome from the drop-down list
- 2. Outcome Date Enter the outcome date. For Intermittent monitoring entry enter the call date
- 3. Click the Add Outcome button to add the outcome to the outcome table




	<u>Outcome</u>	Outcome Date
0	Recovered	2020 Jun 11
Comm	ients	
		\sim
		(4000 characters) Add
Date	Comments	Recorded By
		4 Save Reset

4. Click the Save button

Case's must have: 1. An **initial** outcome (from our first phone call) 2. A **final** outcome (**Recovered** if they meet PH recovered criteria)

Outcomes are only changed if the status of the case's outcome changes during our investigation. For Example:

Outcome	Outcome Date
Recovered	2021 May 13
Alive-Not Hospitalized	2021 May 11
Alive-Hospitalized	2021 May 10
Alive-Hospitalized-ICU	2021 May 7
Alive-Hospitalized	2021 May 5
Alive-Not Hospitalized	2021 May 2

OR

<u>Outcome</u>	Outcome Date
Recovered	2021 May 13
Alive-Not Hospitalized	2021 May 2





Uploading a Document to an Investigation

Note: Before you upload a document, ensure that the 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.

earch Document F Enter Keywords to s	olders - B earch. Leave	asic search box e	mpty to view	all documents. Se	arch will be perform	ed on selected f	iolder and its subf	Hide Searc olders if applicable.
Search Documents						Search results	will appear in 'Do	cument List' below.
by keyword:						Sear	ch Retrieve	Clear
Pocument List								1 Add New
Document Title	^	Size[KB]	▼ <u>Түре</u>	Posted E	⊻ ▼ <u>Poste</u>	d On 🔻	Description	Status

1. Click the Add New button

Document Management	?≞
Add New Document	
* File name: 1 Browse Upload File 2 File uploaded: Selected Document: * Document Title: 3	
* Effective 2020 / 06 / 16 Expiration / / / III Date: yyyy mm dd Date: yyyy mm dd	
Status: * active V Use CTRL key for multiple selections.	
Enter Selected Keyword: Remove Keywords:	
4 Description:	
Document Added by : Sampson, Judy on : 2020 Jun 16	
5 Submit Clear Cancel	





1. Click the **Browse** button to search for the document you are uploading. The document name will appear in the file name field.



- 2. Click the Upload File button. You will see that the file is uploaded
- 3. **Document Title** enter the document title
- 4. **Description** enter the document description
- 5. Click the Submit button

Document List						☆ Hide D	ocument List
Row Actions: Delete							Add New
Document Title	Size[KB		Туре 🔻	Posted By	Posted On 🔻	Description 🔻	Status
Recovery Letter 20020416	46.46	1	PDF	Sampson, Judy	2020 Apr 24	Recovery letter	active

1. You can view the document by clicking on the hyperlinked PDF in the Type column





Adding a Clinical Note to an Investigation



From the left-hand navigation, click on Notes.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	Disease: PHAC Date/Type: Unusual/Emerging 2020 Mar 02 / Most Recent Disease Exposure		Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Clier	nt: Car, Honda	Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01
Encounter Date: 2020 Jun 19	Encounter Group / Type: Communicable Disease Investigati	on / Intervention	Â <u>Encounter</u> Encounter Activity: -
Notes			☆ Hide Notes
Display Notes Fo : End	counter: 2020 Jun 19	Include Related Entiti	es:

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

		INTEONOTION	001011110	
Recent Work	Pocont Wa	ork.		
 Search 	Necent wo	лк.		
Search Investigations	1 Client: Contac	t. Case June (Client ID	5829)	
Search Lab	- Investigation:	Unusual/Emerging D	isease	

From the left-hand navigation, click on **Recent Work** and click on the **Investigation** hyperlink.





Subject Line:						Status:				~	
Workgroup for Author:					~	Workgroup for Transcriber:					~
Author:					~	Transcriber:					~
Note Type:					~						
Note Date: I	rom:	уууу	/ 	/ dd		To:	уууу	/	/dd		
										Display	Clear

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: TNormal	Sampson, Judy Role: NS_IMMS_IOM_NURSE $\begin{array}{c ccccccccccccccccccccccccccccccccccc$
		Save as 5 Note Complete Clear Cancel

- 1. Ensure the note is being added for an investigation ID only
- 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





COVID Alert App-Documentation

When completing case follow up you must document if you provide a **O**ne-time **k**ey **c**ode (OKC) for the client to use with the COVID Alert app. This needs to be reflected in a stand-alone note within the clients file. You only need to document if you provide this code for use.

Note ID: -	Status: -
* Required Field	
Author: * Subject: * Note Date: Note Type: Common Phrases: * Note: TNNormal V	Benjamin, Kimberly Role: NS_IMMS_IOM_NURSE One-time key code (OKC) 1 2020 10 14 2 Note Time: 09 41 :ADT Investigation V Add to Note Add to Note T Add to Note
OKC provided	to client for use. 3 Save as Draft Note Complete Clear Cancel

- 1. **Subject** –One-Time key Code (OKC) this must be fully typed out and the acronym after it as this is not an approved acronym.
- 2. 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.
- 3. Note One Time Key Code provided for client use
- 4. Click the Note Complete button

1 r	1 results found.				To view a Note below, click on its Note Date. The list reflects the records you have access to.				
R	ow Actio	ns: View All Not	es in Table Update	Note View	View Note Corrections Author Note Transcribe N				ribe Note
		Move selected	d note to		\checkmark	Move Note			
	<u>Crea</u> Date	ated e/Time	Note Date/Time	Note Type	Subject Line 🔹	Author 🔻	Attached To	<u>Status</u> ▼ <u>C</u>	Corrected
C	2020 ADT) Oct 14 09:44	2020 Oct 14 09:41 ADT	Investigation	One-time key code (OKC)	Benjamin, Kimberly	<u>Inv 3663</u>	Complete	
Т	Total: 1 Jump to page.								1





Client 2 - Contact Case to Confirmed Case:

Search for a Client



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

	Search Clients		3	Search Retrieve Reset # 🖨 ?	
	Basic Search Criteria				
1	Client Number:	Client Number Type:	× 2		Select all that apply:
	Last Name: Mother's Name: Gender:				Use Phonetic Matches
	Choose one: Date of Birth: yyyy/n	nm/dd			

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: First Name: Middle Name:		Include Indeterminate Clients Use Phonetic Matches Include Indeterminate Clients Include Indeterminate Clients
	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

		Searc	h Res	3			1			Client Quick Entry Cro	A
2	Preview Update Set In Context Create Cohort S						t Summary				
			▼	Client ID 🗘	Health Card Number ≎	Last Name	First Name	Gender ≎	Date of Birth	Health Region 💲	Active \$
	4		0	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
1		-	0	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, Create a Temporary Address Add Email 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	e Numbers			_	✓ 🐊				
	Update Delete Set Preferred								
Update									
8	Number \$	Effective From 🔻	Effective To 🗘	Preferred *					
	Primary home: 902-864-2222	2020 Mar 02		~	r				
Total: 1	Total: 1								

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: * Number: * Country: 1 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			
	B	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)

Ad	ddresses											
									1	Add		
	Update Delete Set Preferred											
		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





	Addresses		*	✓ ×				
	Add Address	Apply	Reset	₽	×			
	Address Format:							
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: Canada Nova Scotia Country: Country: Other Address Details: Latitude: Longitude: (100 characters remaining.) Effective From: To: 2020/06/12 yyyy/mm/dd Image: Country:	- 3	Analy					

- 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

Add	resse	5	2							✓ Âdd
Ur	edate B	Delete S Address Type ≎	Address \$	Address Detail ≎	Effective From ▼	Effective To	Preferred 🔻	Active Household Members ≎	Valid \$	On Reserv
0		Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02		~	1	-	
۲	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	-	
Tota	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)





≷

Email Address

1. Expand the email tab by clicking on the arrows

Email Addresses

2. If the email address the client provided is different than the one on file or if there is currently no email address on file for the client. Click the add button.

1	I Addresses	^
То с	create a new record click Add.	Add

3. Email type : select personal or work. Email: Add the email address provided by the client. Click apply.

E		3	
	Personal	Ар	ıly Reset 🖨 🗙
	1	* Email: email@domain.com 2	
			Apply Reset

Email Addresses							
			Add				
Update	Delete Clear Preferred Set Preferred						
8	Email Type 🔺	Email 🗘	Preferred *				
	Personal	spain123@outlook.com					
Total: 1			10 🗸				

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





Entering 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.



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

Ethnicity Information	1	*	۶
Birth Information	*	*	\$

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

Ethnicity Information							
Ethnicity: Other Ethnicity:			anicity: 2	Ethnicity Reported by: Client Other Provider	3		
African Nova Scotian	~					*	*
Asked, but unknown						~	
Asked, not provided							
Black							Add
East/Southeast Asian		Preferred					
- Latino							
Middle Eastern			Effective From *	Effective Io 🜣	Preferred *		
Other Ethnicity	~)2-232-3232	2020 Aug 26			\checkmark	
South Asian	-						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.





Changing the Investigation Classification

When an investigation already in progress needs to be have the Classification changed based on new information, the Disease Summary needs to be updated (i.e. Case PUI to Case Confirmed or Contact PUI to Case Confirmed).



From the left-hand navigation, click on Disease Summary

					Add Nev	v Disease
)isease Even	t 2612 - Unusi	ual/Emergin	ng Disea	ase		🗙 Hide
HAC Date / Date Ty 020 Jun 1 / Report F Disease	rpe: Disease Received Etiologic Agent	e Origin: Livi Epi Markers	ing on Res Lab Result	erve Most of the Time: Authority / Classification Classif. Date	Site(s)	Staging

1. Click on the Update Button





PHAC Date / Date Type:	2020 Jun 1 / 9	Specimen Collection				
isease Origin:			~			
iving on Reserve Most of Time:	the	(during initial inv	vestigation)			
isease Event History		_			_	
Disease:	Jnusual/Emerging D	isease 💙				
Microorganism:	COVID-19	~				
nformation Source:		~				
ite(s): Hold Ctrl and then cl	ick to select multiple	items.				
Available Sites				Calacted Sites(a);		
Available Sites:		1		Selected Sites(s):		13
()		E	Add >			
		E	Add >			
			Add > < Remove		 	i C
taging: 🗸			Add > < Remove		 	
itaging: V			Add > < Remove		 	
itaging: 🔽	tion		Add > < Remove			10
itaging: Investigation Classifica	tion V	* Class	Add > < Remove			
Investigation Classifica Authority:	ition	* Class	Add > < Remove		 	
Investigation Classifica Authority:	tion	* Class 12 d	Add > <remove ification:<="" td=""><td></td><td></td><td></td></remove>			
Investigation Classifica Authority:	ntion 1 06 1 - mm d	* Class 12 d	Add > < Remove		 Add Classification	Clea
Investigation Classifica Authority: Classification Date: 2020 yyyy	tion → / 06 / - mm d	* Class 12 d	Add > < Remove		 Add Classification	Clea
taging: Investigation Classifica Investigation Date: 2020 Yyyy 2 Row Actions: Update	tion	* Class 12 d	Add > < Remove		 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	
3	* Investigation Class	sification	4	Case - Suspect Contact - Not a Contact	
5	* Classification Date:	2020 / 06 / 01 yyyy mm dd		Contact - Person Under Investigation	
				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)

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

				merge	u nivesuga	uon No(s).		
Disease Summary	isease Summary							
					Add Ne	w Disease		
Disease Event	Disease Event 2612 - Unusual/Emerging Disease							
PHAC Date / Date Ty 2020 Jun ⁻¹ / Date Rep	PHAC Daite / Date Type: Disease Origin: Living on Reserve Most of the Time: 2020 Jun ⁻¹ / Date Reported							
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	COVID-19	-		✓ National / Case - Confirmed 2020 Jun 11	-	-		
Unusual/Emerging Disease	COVID-19	-		✓ National / Contact - Person Under Investigation 2020 Jun 1	-	-		





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	Recent Work:
	Search Investigations	1 Client: Bunny Mister (Client ID: 5014)
	Search Lab	- Investigation: Unusual/Emerging Disease

- 1. Go to Recent Work
- 2. Click on the client (not the investigation) hyperlink.
- 3. This takes you to the View Client page

Investigations	View Client
ĸ	Client File Status
-	Active
📌 Recent Work	Client Information
🍳 Search 🛛 🗸 🗸	
Investigation	Client ID: 21398
	Client Name: June, Kim
Subject Summary	Preferred Alternate Name:
Investigation Summary	Health Card Number: 7700000031 - Nova Scotia Health Card
Investigation Quick Entry	Date of Birth: 1980 Feb 01
Investigation Details	Age: 40 years
	Gender: Female
Lab	Gender Identity:
Encounter Details	Other Identity:
Signs & Symptoms	Preferred Address: 80 Gilby Lane, Beaver Bank, Nova Scotia, B4B4B4, Canada
0	Preferred Telephone Number: Primary home: 902-864-5555
Outcomes	Health Region: NSHA
Incubation & Communicability	Deletionetics

Investigation
 Subject Summary
 Investigation Summary
 Investigation Quick Entry
 Investigation Details
 Lab
 Lab Summary
 Electronic Lab Report





From the left-hand navigation, click on Lab Summary

	Row Actions: View/Update Requisi 2 View/Update Lab Report										
	* Flag	indica	ates sensitivities preser	nt							
			Specimen Collection / Imaging Date	Specimen Type / Description	Result Name	Interpreted Result; Result	<u>Flag</u> ▼	Accession ▼ No.	Etiologic Agent	Epi Markers	<u>Result</u> <u>Status</u>
1		Ð	2020 Mar 25	Swab / -	Presence or identity	Positive;		020-079- 00246	COVID-19	-	Final
	Total: 1 Verified Page 1 of 1 Page 2 of 1 Page 2										

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

- 3. Click the Radio button for the lab result that you want to make pertinent to the investigation
- 4. Click the View/Update Lab Report button

Selected Tests 1						
Requisition Tests: V Add to Report					Set All Negative	
Row Actions: Delete Test Set to Can 3 Subject Investigations:	not Report		✓ Link to Inv	estigation		
Pertinent Investigations:	~		Unlink from	n Investigation		
Test Annotations:			Update	Annotations		
		(4000 c	haracters)			
<u>Test</u> ▼ Resulted <u>Test</u> ID	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group	
	Swab/ Nasopharyngeal swab	2020 Mar 25			Communicable Disease Investigation	
	1					

On the Human Lab Report Screen

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





Row Actions:	Delete Test Set to Car	not Report	
	Subject Investigations:	2044, Unusual/Emerging Disease, 2020 Mar 25 🗸	Link to Investigation

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

		<u>Test</u> ▼ ID	Resulted	<u>Test</u> <u>Name</u>	Specimen	Collection Date		Pertinent Investigations	Test Annotations	Encounter Group
	۲	<u>645</u>	~	NAAT	Swab/ Nasopharyngeal swab	2020 Mar:	1	2044, Unusual/Emerging Disease, 2020 Mar 25		Communicable Disease Investigation
								·		
[Reason for Deletion: Delete 2 Save Reset Cancel									

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

Note:

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

To put the investigation into context:

- Investigation
Subject Summary
Investigation Summary

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





-						
Ş	Subject Sum	mary				? 🗏
						ACTIVE
	Client ID: 5014	Name(Last, First M Bunny, Mister / Mal	liddle) / Gender: e	Health Card No: 0123987654	Date of Birth / Age: 1975 Nov 30 / 44 years	
	Phone Number: Address: Primary home: 902- 749-6635 187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada			Additional ID Type /		
				Additional ID: Provincial health service provider identifier / -		
	Report: 🗸 Laur	ch				
	Communicable Dise Group	ease Investigation	n Encounter	_		☆ Hide
I			Disease	:	✓ Inves	tigation Quick Entry
						Create Investigation
	Investigation 2	044 - Unusua	l/Emerging D)isease - Open		☆ Hide
	Investigation ID: St	atus: Investigator	: Linked O	utbreaks: Report Date (Ser	nt): Report Date (Received):	
	<u>2044</u> Or	en Krissy Rose-	Muise -	-	25 March 2020	
	Disease	Etiologic Agent	Epi Markers	Authority / Classification Cla (\checkmark Primary Classification, \triangle	assif. Date Si Set by Case Def)	ite(s) Staging
	Unusual/Emerging Disease	COVID-19	-	Vational / Case - Confin	med 2020 Jun 2	-

2. Click the Hyperlink associated to the current investigation



Recent Work	Investigation	Summary			0 🗏
Search Investigations					
Search Lab					ACTIVE
Search Exposures	Client ID:	Name(Last. First Middle) / Gender:	Health Card No:	Date of Birth / Age:	
Search Interventions	<u>5014</u>	Bunny, Mister / Male	0123987654	1975 Nov 30 / 44 years	
Search Clients	Phone Number:	Address:	Additional ID Type /		
Search Non-Human Subjects	Primary home: 902- 749-6635	187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada	Additional ID: Provincial health service provider identifier / -		
Search Disease Notifications					▲Investigation
- Investigation	Investigation ID:	Status:	Disposition:	Age at time of Investigation	:
Subject Summary	2044	Open	progress	44 years	
Investigation Summary	Disease:	PHAC Date/Type:	Etiologic Agent:	Authority/Classification:	2020 km
Investigation Quick Entry	Unusual/Emerging Dises	Collection	COVID-19	02	2020 300
Investigation Details					
- Lab	Investigation Details			✓ Contains Data 🛛 🛠	lide Investigation Details
Lab Summary	Inconference Delaite				Questo Engenerator
Electronic Lab Report	investigation Details				Create Encounter





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

Lab Tests Alide Lab Tests										
Lab								★ Hide Lab		
Specimen V	Specimen Type /	Result Vame	Interpreted	<u>Flag</u> ▼	Accession	Etiologic	Epi Markara	Result		
 ⊕ 2020 Jun 1 	Swab / -	Presence or	Positive;		jas-123654	COVID-19	-	Final		

Labs can also be viewed from the Lab Summary screen

- Lab
Lab Summary
Electronic Lab Report Inbox
Lab Quick Entry
DI Quick Entry

From the left-hand navigation, click on Lab Summary





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 🛛 🕞 🗭 ?				
	Client ID:	Name(Last, First Middle) / Gender: Summer, Alice / Female	Health Card No: 9333000001 Additional ID Type (Additional ID:		Acti Date of Birth / Age: 2000 Jan 01 / 20 years		
	-		Provincial health service provider id	entifier /	-		
	Immigration Information				*		
1	Citizen:	Date Citizenship Receiv yyyy/mm/dd	ed:				
	Immigration File No:	Date Immigration Form yyyy/mm/dd	Received:				
	Arrival Date: yyyy/mm/dd	Arrival Year:					
	Immigration Status at Time of Arriva	d:					
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.

<mark>⊥</mark> s	ubject	^
(Client Details	^
	Client Demographics	
	Occupation/Education	
	Health Services	
	Indigenous Information	
	Immigration Information	

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
Indigenous Information	*
To create a new record click Add.	Add

1. Click on the **Add** button

Indigenous Information		\$
Add Indigenous Information	Apply Reset	₽×
Self-identified Indigenous: Indigenous Identity: DIAND Number: Band: Band: Band: Yes U2020/12/09 US yyyy/mm/dd		
	Apply	Reset

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





Indigenous Information		^
Add Indigenous Information		Apply Reset 🖨 🗙
Self-identified Indigenous:	Indigenous Identity:	
First Nations Status:	٩	
Band of Origin:	Asked, but unknown	
Indigenous Organization: e.g. Organization Display Name	Asked, not provided First Nations	
* Effective From: To: 2020/12/09 III yyyy/mm/dd III	First Nations and Inuit First Nations and Metis	
	First Nations, Inuit and Metis	Apply Reset
To create a new record click Add.		Add

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

digenous Information				Save	Reset	i log 🖨 ?
imary home: 99 Happy Street, Hu 2-232-3232	ibbards, Nova Scotia	a, Canada	Provincial health served	rice provider identifier /	-	
ndigenous Information						
Add Indigenous Information					Apply	Reset
Self-identified Indigenous:		Indigenous Identity:				
Yes		First Nations	•			
First Nations Status:		DIAND Number:				
		Band				
Asked but unknown						
Asked, not provided	L. C.					
Asked, replied no						
Lives outside a First Nations Community						
Lives within a First Nations Community					4	Apply Rese
Non-status Indian						Ad

3. Select the First Nations Status 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





Completing Investigation Information

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

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:	
1	* Disposition: Investigation in progress V Disposition Date: 2020 / 06 / 11	
2	* Status: Open * Status Date: 2020 Jun 11	
	Client Home Address at Time of Initial 3	~
	Sensitive Environment/Occupation:	
4	Environment/Occupation Details: 5	^
		\sim
		(1000 characters)
	Diagnosis	
	Diagnosis Date: / / IIII	
	Primary Method of Diagnosis:	
6	Method of Detection:	_

- 1. Disposition and Disposition Date are auto-populated when the investigation was created
- 2. Status and Status Date are auto-populated when the investigation was created
- 3. Client Home Address at Time of Initial Investigation select the client's address which includes the Postal Code from the drop-down list. If the drop-down options do not include the correct address with the postal code, you will need to update the address. See reference material on Updating Client Address.





* Status:	Open	66 Summer Landing, Smith Cove, Nova Scotia, Canada, B1B1K1 99 Summer Landing, Smith Cove, Nova Scotia, Canada
Client Home A Investigation:	ddress at Time of Initial	33 Winter Avenue, Beaver Bank, Nova Scotia, Canada, B4G1E6

 Sensitive Environment/Occupation – choose the most appropriate option that matches the response on the PHAC form from the drop-down list. There will be investigations that do no have sensitive environment/occupation. Example – retired individuals

Choosing the appropriate option – (these options are changing)

Phonty:	~	Finvestigation Histo
* Disposition:	Investigation in	progress V Disposition Date: 2021 / 01 / 05
		yyyy mm dd
* Status:	Open	* Status Date: 2021 Jan 5
Client Home Ad Investigation:	ddress at Time	of Initial 44-12 Main Street, Halifax, Nova Scotia, Canada, B2G2K9
Sensitive Envir	ronment/Occup	ation:
		Correctional facility - Work/volunteer
Diagnosis		Health care facility - Resident/patient Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction
Diagnosis Diagnosis Date	r: [Pederal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction Local First Responders - Police/firefighter/EMS-paramedic Long-term care facility - Resident Long-term care facility - Work/volunteer WW
Diagnosis Date Diagnosis Date Primary Metho Diagnosis:	r: [] d of [Pederal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction Local First Responders - Policertirefighter/EMS-paramedic Long-term care facility - Resident Long-term care facility - Work/volunteer Office worker Office worker Other (specify) Residential care facility - Resident Residential care facility - Work/volunteer Residential care facility - Work/volunteer Residential care facility - Work/volunteer Residential care facility - Work/volunteer
Diagnosis Date Diagnosis Date Primary Metho Diagnosis: Method of Dete	t: [Pederal Agencies - Canadian Armed Forces/Coast Guard/RCMP/Border Agency/Security/Intelligence Service Health care facility - Resident/patient Health care facility - Work/volunteer Industrial Worker - Factory/warehouse/construction Local First Responders - Police/firefighter/EMS-paramedic Long-term care facility - Resident Long-term care facility - Work/volunteer WYY Office worker Other (specify) Residential care facility - Resident Residential care facility - Work/volunteer Residential care facility - Work/volunteer Residential care facility - Resident Residential worker - Other (Specify) Residential care facility - Resident Residential worker - Other (Specify) Residential worker - Other (Specify)

- Animal handler or setting: use if client is a veterinary/animal worker/animal farmer
- School Child Care attend: use if client attends any school or daycare
- School Child Care Work/Volunteer: use if client works or volunteers in any school or daycare.
- Health care facility- Work/Volunteer: use if client is a health care worker or volunteer that is in direct contact with patients
- Long-term care facility- Work/volunteer: use if client is a health care worker or volunteer that is in direct contact with patients
- Residential Care Facility-Work/Volunteer: use if client is a RCF staff or volunteer in direct contact with residents.
- Other (Specify)- Lab worker handling biological specimens, Farm workers (Grain and Vegetable), and Other groups that interact with volunteer or high risk populations (i.e. Shelter worker). If the client works in more than one sensitive environment/occupation, you will need to use Other





- Environment/Occupation Details if you selected Other (Specify) for Sensitive Environment/Occupation, enter the details in this field. You can also add other details including the name of the employment location. Example for LTCF worker details could include works at ABC LTCF or for a farmer details: works at Scotchcrest Farms.
 - if you selected **Other (Specify**) for Sensitive Environment/Occupation, enter the details in this field. You can also add other details including the name of the employment location.

Note: For a CoVid-19 Investigation, we DO NOT fill out the <u>Diagnosis Date</u> and <u>Primary Method of</u> <u>Diagnosis.</u>

- Method of Detection <u>Upcoming configuration updates PENDING Leave Blank for Now</u> Once configuration updates are complete, the dropdown list will include the reason for CoVid-19 testing (contact, symptoms or travel). This section is in development and when available, training updates will be provided.
- 7. Click the Save button (top or bottom right side of the screen)





Signs & Symptoms - Investigation <u>has</u> recorded Signs and Symptoms & Intermittent Monitoring Report indicates Signs and Symptoms <u>present</u>

The investigation has recorded S&S with a present of Yes (other than Asymptomatic) and does not have a Recovery Date and <u>the S&S is no longer reported by the client</u>, you need to end date the S&S by entering the Recovery Date

Sign or Symptom									
* Required field Sign or Symptom:	Rhinorrhea								
Preset:	Yes								
Onset:	No 🗟								
* Present:	Yes	\sim							
Onset Date/Time:	2020 / 06 yyyy mm	/ 03 dd		00 : 00 hh mi) : ADT	Estimated:			
Recovery Date/Time:	yyyy mm	/ dd		hh mi	: ADT	Estimated:			
Duration:	0 Days -	+ 0	Hours +	0 M	inutes(Durati	ion = Recovery	Date/Time - Onse	t Date/Time)	
Reported By:		~	_						
								Apply Up	date Clear
Row Actions: Select All Update Set Onset Clear Onset									
Reason	for Deletion :		elete	Present:	~	Onset D yyyy	ate: ///// mm dd	Apr	oly Update
Sign/Symptom		Present	Onset Dat	te/Time	Recovery	/ Date/Time	Duration	Reported By	Details Exist
Vomiting									No
Rhinorrhea	`	Yes	2020 Jun 3	3 00:00 ADT					No

- 1. Click on the **Checkbox** for the S&S
- 2. Click the **Update** button
- 3. Recovery Date enter the date the client is no longer reporting the S&S
- 4. Click the Apply Update button
- 5. The S&S is now updated in the Sign & Symptom list

Rhinorrhea Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12 d 0 h 0 m	!	No
----------------	----------------------	--------------------------	-----------------	---	----

Sign and Symptom – <u>reported by client</u> and already present - <u>Yes</u> without a recovery date.





	Cough	Yes	2020 Jun 15 00:00 ADT				<u>No</u>
--	-------	-----	--------------------------	--	--	--	-----------

Do not update

If Fever is Y on the daily monitoring report and Fever is N on the Investigation (do not change the Fever N to Y)

• At the top section of the screen, select fever from the drop down

Sign or Symptom						
 * Required field * Sign or Symptom: 	Fever				~	
Preset:	No					
Onset:	No					
* Present:	Yes 🗸					
Onset Date/Time:	yyyy mm dd	: :	: ADT Estimated:			
Recovery Date/Time:	yyyy mm dd	iii [: ADT Estimated:			
Duration:	0 Days + 0	Hours + 0 Mi	nutes(Duration = Recover	y Date/Time - Ons	et Date/Time)	
Reported By:	· · ·					
					Add Clear	
Row Actions: Select All Update Set Onset Clear Onset						
Reason	for Deletion :	Delete Present:	yyyy	mm dd	Apply Update	
<u>Sign/Symptom</u>	▲ Present ▼	Onset Date/Time	Recovery Date/Time	Duration 🔻	Reported Details By <u>Exist</u>	
Abdominal pain/discomfort/crai	Yes	2020 Apr 11 00:00 ADT	2020 Apr 12 00:00 ADT	1d 0h 0 m	No	
🖂 Arthraloia					No	

- 1. Present defaults to Yes. If you are adding a Fever No, select rom the drop-down list
- 2. Onset Date/Time Enter the date of the call with the client
- 3. Click the **Add** button

Add temperature observation

On the appropriate Fever S&S:

- if client reported fever record on active Fever Yes (no recovery date)
- if client did not report a fever or did not report a temperature record on the Fever No

Fever 🔓	No			Yes
Fever	Yes	2020 Jun 15 00:00 ADT		Yes





1. Click on the hyperlink to the right of the row.

Observations Details	
* Aequired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 III yyyy mm dd
Observation:	
Observation Value:	Unit:
* Observed By:	
	Add Clear

- 1. **Observation Date** Enter date of the observation
- 3. **Observation field** Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
- 4. Observation Value Enter temperature value.
- 5. Unit Enter Celsius
- 6. Observed by select from the drop-down list
- 7. Click the Add Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u>	Observed By 🔻
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

Client is reporting a S&S that is not updated on the Signs and Symptoms list:

Row	Ac Select All Update	Set Ons	et Clear Onset		Onset Dat	e.		
	Reason for Deletion :	~	Present: Ves	~	уууу	// mm dd		pply Update
	Sign/Symptom	<u>Present</u> ▼	Onset Date/Time 🔻	<u>Recovery</u> Date/Time	▼ <u>D</u>	uration 🔻	<u>Reported</u> <u>Ву</u>	Details Exist
	Vomiting							No
	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT					No
~	Pharyngitis							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
- 3. Onset Date Enter the date the client reported the S&S
- 4. Click **Apply Update** button





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

Pharyngitis	Yes	2020 Jun 16 00:00 ADT				No
-------------	-----	--------------------------	--	--	--	----

Client reports a symptom that <u>is not</u> in the displayed Signs and Symptoms list, you will manually add this symptom:

Signs and Symptoms can be added through the top section of the screen.

Sign or Symptom	
* Required field* Sign or Symptom:	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	yyyy mm dd hh mm
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	
	Add Clear
Row Actions: Select	All Update Set Onset Clear Onset
Reason	for Deletion : Present: Onset Date: V Delete / / V Delete / /

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

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
- 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>





• 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.

	Pro	vvincial health service provider ntifier / -	
_	Windov	vs Internet Explorer	▲Investi
s:	1	Are you sure you want to leave this page?	
C Date/Type: Mar 02 / Most F			der Investigation /
sure		ightarrow Leave this page	Joi myesagaaon,
		\rightarrow Stay on this page	Sav
			~





Assess Symptom Onset

If the onset of a symptom is the earliest detection of COVID-19, then the symptom needs to be flagged as the onset symptom. In the example below – cough is the symptom that was the earliest detection of the disease (before or on the same day as the positive lab result)

Row	Actions: Select All Upd Reason for Deletio n .	Set Onse	Clear Onset Present: elete	Onset I	Date: // mm dd		pply Update
	Sign/Symptom	<u>Present</u> ▼	Onset Date/Time 🔻	Recovery Tate/Time	Duration 🔻	Reported ▼ By	<u>Details</u> <u>Exist</u>
	Abdominal pain/discomfort/cramps						No
	Arthralgia						No
	Asymptomatic	Yes	2020 Jun 1 00:00 ADT	2020 Jun 7 00:00 ADT	6d 0h 0 m		<u>No</u>
	Chest pain						No
	Chills						No
	Confusion						No
~	Cough	Yes	2020 Jun 7 00:00 ADT				No

- 1. Click on the **checkbox** by the onset sign/symptom
- 2. Click on the **Onset** button
- 3. The sign/symptom is now updated as the onset sign/symptom (see below). Note: this will update the PHAC date in investigation banner.

Cough (Onset)	Yes	2020 Jun 7 00:00 ADT	
---------------	-----	-------------------------	--





Updating the End Date on the Isolation Intervention



From the left-hand navigation, click on Intervention Summary.

	Interventions												
Row Actions: Add Follow Up												С	reate Intervention
				Туре 🔻	<u>SubType</u>		Disposition	<u>s</u>	itart Date 🔻	En	nd Date 🔻	Provider •	Location 🔻
	С	1		<u>Isolation</u>	Isolation		In progress	2	020 Jun 19	202	20 Jun 25	-	Halifax PHO

1. Click on the **Isolation** hyperlink

		Save Reset Cancel Reason for Deletion:
Intervention Details		☆ Hide Intervention Details
* Required field		
Encounter Group:	Communicable Disease Investigation	
* Intervention Type: Intervention Disposition: * Outcome:	Isolation In progress Do Not Use	Isolation V
* Start Date:	2020 / 06 / 19 End Date: 1 yyyy mm dd	2020 / 06 / 25 🔛 yyyy mm dd

1. End Date - enter the revised end date

1	Comments #	Hide C	omments
	Comment:	2	Add

- 1. **Comment** enter the rational for updating the end date. Include the isolation end date in the comment and 2359 hours.
- 2. Click the **Add** button. The comment has now been added to the comment table





3. Click the **Save** button (bottom and top right of screen) to save the Intervention

Ensure you take the intervention out of context

Save Clear Cancel					
	0	Save	Clear	Cancel	

Click the Cancel button towards the top of the screen





Documenting Risk Factors

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

From the left-hand navigation, click on Risk Factors

Investigations	F	Risk Factors Save Reset												? 🛡
Subject Summary	Investigation													
Investigation Summary		Investigation ID:				Status:		Disposition: Investigation in progress		Age at time of Investigation: 30 years				
Investigation Quick Entry		2460			Open									
Investigation Details 🛛 🗸		Disease:				PHAC Date/Type: 2020 Jun 02 / Date Reported		Etiologic Agent: COVID-19		Authority/Classification: National / Case - Confirmed / 2020 Jun 02				
Lab ~		Unusual/Emerging Disease												
Encounter Details	l													
Signs & Symptoms		Risk Factor												
Outcomes														Add
Incubation & Communicability		Ur	odate	View	Delete	Set Respo	nse Set Pertinent							
Treatment & Interventions ~												End Date		
Medications ~			B	Preset \$	Risk Fa	ctor 🔺	Additional Information \$	Reported Date \$	Response	Frequency \$	Date Range \$	Reason	Pertiner Investig	ation ≎
Exposure Summary				Chronic		c liver						*		
View Client Imms profile				\checkmark	disease	liver								
L Subject ^					Exposur	re -								
Client Details ~				\checkmark	(confirmed, probable or									
Client Warnings														
Client Relationships					suspect))								
Consent Directives ~				~	Medical	- Cancers								
Allergies				\checkmark	Medical disorder	- Cardiac								
Risk Factors Imms History Interpretation				~	Medical renal	- Chronic								


COVID-19 Case Management



	~	Special Population - Pregnant or 6 weeks postpartum			-			
Total: 13			(12			1	10 ALL	

 The risk factor table is populated with all presets defined for Unusual/Emerging disease for COVID-19. 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

For preset risk factors that do not contain a response Pertinent to another Investigation:

	Risk Facto	or		⊳						✓ (Â)
			2							Add
	Update	View	Delete Set Respon	nse Set Pertinent						
		Preset \$	Risk Factor 🔺	Additional Information \$	Reported Date ≎	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
1	>	1	Chronic liver disease							

- 1. Click on the **Checkbox** beside the risk factor. You can select all risks that have the same response.
- 2. Click the **Set Response** button

	Risk Factor			× 👔
	Set Response		2	Apply Reset 🖨 🗙
1	* Response: No	Risk Factor Pertinent to investigation in context		
	م		•	Apply Reset
	No			Add
	Not Applicable	esponse Set Pertinent		
	Not Asked Unable to answer	Additional Reported Re Information \diamondsuit Date \diamondsuit	sponse Frequency Date Range ≎	End Date Reason
	Unknown Unwilling to answer			
	Yes	ct		

- 1. **Response** select the response from the drop-down list.
- 2. Click the **Apply** button





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 COVID-19 investigation.

Risk	Facto	ər									*	^
											1	Add
U	Update View Delete Set Response Set Pertinent											
	8	Preset \$	Risk Factor 🔻	Additional Information \$		Reported Date ≎	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertiner Investig	nt to Jation ≎
		~	Travel - Outside of province, but within Canada			2018 Apr 01	Yes				<u>2495 (H</u>	epatitis C)

1. Click the **Add** button

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

	F	Risk Factor								~	^	:
		Add Risk Factor							Apply	Reset	₽	×
		Category:	2	* Risk Factor:		*	Risk Factor Pe	ertinent to invest	igation in conte	ext		
		Additional Information:										
								0				
3		* Response:	•	Frequency:		₹.	ported By:		•			
		Effective From: Effective From: Effective From: yyyy/mm/dd III yy	ective To: yy/mm/dd	End [)ate Reason:		*	Reported Date: 2020/06/12				
		Reported by Details:						0				
									4	Apply	Rese	et
											Ad	ld
		Update View Del	lete Set Respon	se Set Pertinent								
		Preset 🗘	Risk Factor 💌	Additional Information \$	Reported Date \$	Response \$	Frequency	Date Range ≎	End Date Reason \$	Pertinen Investiga	t to ation 4	\$

- 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





The added risk factor is now in the Risk Factor table.

	Preset \$	Risk Factor 🔻	Additional Information \$	Reported Date \$	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
63	\checkmark	Travel - Outside of province, but within Canada		2018 Apr 01	Yes				2495 (Hepatitis C)
	\checkmark	Travel - Outside of province, but within Canada		2020 Jun 12	No				2494 (Unusual/Emerging Disease)

Risk Factors							1 Save	Reset	i i i i i i i i i i i i i i i i i i i
Client ID: 5521 • Phone Number:	Name(Las Stone, Ro Address:	st, First Middl olling / Male	e) / Gender:		Health Car 22223334 Additional	rd No: 44 ID Type / Addi	tional ID:	Da 19	Active ate of Birth / Age: 190 Jun 02 / 30 years
-	97 Willow	/ Street, Amh	erst, Nova Scotia, B4H3W	/6, Canada	Provincial	health service	provider identif	ier / -	
Investigation Age at time of Investigation: Investigation ID: Open Disposition: Age at time of Investigation: 2450 Open Investigation in progress 30 years							×		
Disease: Unusual/Emerging Disease		PHAC Date/ 2020 Jun 02	Type: 2 / Date Reported	Etiologic A COVID-19	gent:	Aut Nat	hority/Classifica onal / Case - C	ition: onfirmed / 2020	Jun 02
Risk Factor									 *
									Add
Update View	Delete	Set Respo	set Pertinent						
Preset 🗘	Risk Fa	ctor 🔺	Additional Information \$	Reported Date \$	Response \$	Frequency \$	Date Range ≎	End Date Reason ≎	Pertinent to Investigation \$
	Chronic disease	liver		2020 Jun 02	No				2460 (Unusual/Emerging Disease)

Ensure ALL risk factors have a response

1. Click the **Save** button when done adding any additional risk factors.





Adding an Outcome



From the left-hand navigation bar, click on Outcome

	*Outcome:	
Т	Other Outcome:	yyyy mm dd
l	J	
		3 Add Outcome Clear
I		
	Row Actions: Update Reason for Deletion:	Delete
	Outrooms	V Outcome Date

Note: there can be multiple outcomes.

- 1. Outcome Select the outcome from the drop-down list
- 2. Outcome Date Enter the outcome date. For daily monitoring entry enter the call date
- 3. Click the Add Outcome button to add the outcome to the outcome table





	<u>Outcome</u>	Outcome Date	•
0	Recovered	2020 Jun 11	
~			
Comn	nents		
		^	
		~	
		(1000 1 1 1	Add
		(4000 characters)	Add
Date	Comments	Rec	corded By
			4 Save Reset

4. Click the Save button

Case's must have: 1. An initial outcome (from our first phone call) 2. A final outcome (**Recovered** if they meet PH recovered criteria)

Outcomes are only changed if the status of the case's outcome changes during our investigation





Uploading a Document to an Investigation

Note: Before you upload a document, ensure that the 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.

Search Document Folde	ers - Basic				☆ Hide Search
Enter Keywords to search Search Documents	. Leave search box emp	oty to view all documents. Sea	rch will be performed on sel Search	lected folder and its subf results will appear in 'Do	olders if applicable. cument List' below.
by keywora:				Search Retrieve	Clear
Document List				*	Hide Document List
Row Actions: Delete	Size[KB]	Type Posted By	Posted On	▼ <u>Descri</u> 1	Add New Status

1. Click the Add New button





Document Management	? E
Add New Document	
* File name: 1 Browse Upload File File uploaded: 2 Selected Document: * Document Title: 2	
3 * Effective 2020 / 06 / 16 Expiration / / III Date: yyyy mm dd Date: yyyy mm dd	
Status: * active V Use CTRL key for multiple selections.	
Enter Add Selected Keyword: Remove Keywords:	
4 Description:	
Document Added by : Sampson, Judy on : 2020 Jun 16	
5 Submit Clea	r Cancel

1. Click the **Browse** button to search for the document you are uploading. The document name will appear in the file name field.



- 2. Click the **Upload File** button. You will see that the file is uploaded
- 3. Document Title enter the document title
- 4. Description enter the document description
- 5. Click the Submit button

Document List			🛠 Hide Document List
Row Actions: Delete			Add New
Document Title	Size[KB] Type	Posted By Posted On	Description Status
Recovery Letter 20020416	46.46 1 PDF	Sampson, Judy 2020 Apr 24	Recovery letter active

1. 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.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Cl	lient: Car, Honda	V Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years					
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01					
Encounter Date: 2020 Jun 19	Encounter Group / Type: Communicable Disease Investig	gation / Intervention	<u>A Encounter</u> Encounter Activity: -					
Notes Alide Notes								
Display Notes Fo :	Encounter: 2020 Jun 19	Include Related Entit	ies:					

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

Recent Work Search	Recent Work:					
Search Investigations Search Lab	1. Client: <u>Contact</u> , Case June (Client ID: 5829) - Investigation: <u>Unusual/Emerging Disease</u>					

From the left-hand navigation, click on **Recent Work** and click on the **Investigation** hyperlink.





isplay Notes For:	Client: smith, joo	У		× 1	nclude Related Entit	ties: 🗹				
Subject Line:					Status:				~	
Workgroup for Author:				~	Workgroup for Transcriber:					~
Author:				~	Transcriber:					~
Note Type:				~						
Note Date: Fr	от: уууу	/ 	 dd		То: [у	уууу	/ mm] / dd	III	
									Display	Clear
results found.				To view a N	ote below, click on its	Note Date		eflects the rec	ords you have	access t

1. Click on **Author Note** button

1	Note is being cr	eated for Investigation ID 2503
	Note ID: - * Required Field	Status: -
	Author:	Sampson, Judy Role: NS_IMMS_IOM_NURSE
2	Subject:	
3	Note Date:	2020 / 06 / 16 . Note Time: 16 : 31 :ADT yyyy mm dd hh mm
<u> </u>	Note Type:	✓
	Common Phrases:	✓ Add to Note
	* Note:	T <mark>Arial ∨ 7pt ∨</mark> b <i>i</i> <u>u</u> ≧ ≧ ≣ ≒≣ ≠≣≰≣
4		
		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





COVID Alert App documentation

When completing case follow up you must document if you provide a **O**ne-time **k**ey **c**ode (OKC) for the client to use with the COVID Alert app. This needs to be reflected in a stand-alone note within the clients file. You only need to document if you provide this code for use.

- 1. **Subject** –One-Time key Code (OKC) this must be fully typed out and the acronym after it as this is not an approved acronym.
- 2. **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.
- 3. Note OKC provided for client use
- 4. Click the **Note Complete** button

1 results found.					ew a Note below, click or	n its Note Date. The	list reflects the re	cords you have access to.
Row Actions: View All Notes in Table Update Note					Note Corrections		Author No	ote Transcribe Note
Move selected note to					\checkmark	Move Note		
		Created Date/Time	Note Date/Time	<u>Note</u> Type	Subject Line 🔹 🔻	Author 🔻	Attached To	Status ▼ Corrected ▼
	0	2020 Oct 14 09:44 ADT	2020 Oct 14 09:41 ADT	Investigation	One-time key code (OKC)	Benjamin, Kimberly	Inv 3663	Complete
	Total: 1 Jump to page:							Jump to page:





Adding a Secondary Investigator

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



Scroll to bottom of page:

Investigator	🗙 Hide							
Required only if adding or updating investigato Investigator Type:								
* Investigator Organization : 2								
* Investigator Workgroup : 🔽 3								
Investigator Name : 4								
★ Assigned Date : 2021 / 01 / 15 ★ Assigned Time :								
End Date : / / / III / III / III	6							
	Add Clear							
Row Actions: Update								
Investigator Investigator Investigator Assigned Type Name Workgroup Investigator Date/Time	End Date							
Primary Samantha McClellan COVID-19 Unmonitored Central Zone 2020 Sep 14								
otia.ca/CaseMgmtWeb/investigation/	Save Reset							

Enter the following information:

- 1. Investigator Type- Secondary
- 2. Investigator Organization- find and select the Zone that represents where the case lives
- 3. Investigator Workgroup- IOM the Zone that represents where the case lives
- 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:



COVID-19 Case Management



KOW	Actions: Update	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
0	Secondary	Krissy Rose-Muise	COVID-19 Unmonitored	Central Zone	2021 Jan 15	
0	Primary	Samantha McClellan	COVID-19 Unmonitored	Central Zone	2020 Sep 14	

7. Click the Save Button

Contacts Considered Low Risk due to Immunization Status



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

	Search Clients		3	Search Retrieve Reset # 🔒 ?	
	Basic Search Criteria				^
1	Client Number:	Client Number Type:	- 2		Select all that apply:
	Last Name:	First Name:	Middle Name:		Include Indeterminate Clients
	Mother's Name:]		
	Gender:				
	Date of Birth:	vy/mm/dd			

Health Card Number is the preferred search for a client

- 4. Client Number Enter the client's Health Card Number. You need to enter all 10 digits
- 5. Client Number Type Select Health Card Number from the drop down list





6. 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: First Name: Middle Name:		 Include Indeterminate Clients Use Phonetic Matches
	Mother's Name:		
3	Gender:		
	Choose one: Date of Birth: yyyy/mm/dd 4		

- 6. Last Name Enter client's last name
- 7. First Name Enter client's first name
- 8. Gender Select the client's gender from the drop-down list
- 9. Date of Birth Enter client's DOB
- 10. Click on the Search button

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

Ī	Search Results										< .
	2								Client Quick Entry Cr	eate Client	
	Preview Update Set In Context Create Cohort Su			hort Subjec	t Summary						
	(▼	Client ID 💠	Health Card Number ≎	Last Name	First Name	Gender ≎	Date of Birth	Health Region 💲	Active \$
	ı		0	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
		~	O	5424	9333000002	Summer	Bertha	Female	2000 Jan 01	NSHA	Active
Т			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. 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.





3. At the top of your screen click on **Immunization**

WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	INVENTORY	_
Subject Su	ummary				

This will open the client's immunization record. Review the immunization history for the client.

Agent 🔺				Date Administered	Date Administe	ered	Date Administere	Date Administe	ered	Date Administered	Date Administered	
COVID-19 mRNA					2021 Apr 13	2021 Apr 13 2021 May 18						
Immui	mmunization History - Detailed Data Table											
Immu	Immunization History - Detailed Data Table Add Single Immunization Add One or More Immunizations											
Upd	ate (Copy/Replace	View Delete									
	8	Agent 🔺	Date Administered \$	Age at Administ	ration 🗢 St	tatus ≎	Re Do	vised se 🗘 Tra	de Name 💲	В	ody Site 🗘	Volume ≎
\bigcirc		COVID-19 mRNA	2021 Apr 13	41y	V	alid		CC Bio BT	VID-19 Pfizer- NTech mRNA M	D	eltoid: left	0.3 Dose
\bigcirc		COVID-19 mRNA	2021 May 18	41y	Vi	alid		CC Bio BT	VID-19 Pfizer- NTech mRNA M	D	eltoid: right	0.3 Dose

If your contact has two doses of a Health Canada approved Covid-19 vaccine and has been exposed to COVID-19 two weeks after their second dose, they would be treated as a **low** risk exposure. As per the NS Interim Measures document. This direction may change. Please, review the document.

You must create a Contact PUI Investigation, add a note and close the investigation status closed and disposition completed no further follow up required.

On the top left hand area of your screen click on 1. the windows icon and click 2. investigations

Imm	unization	Work Mgmnt On
1		Investigations 2
\$	Client ID: 9016	Outbreaks Midd Immunization
	Phone Number:	Inventory

Panorama will return to the investigation subject summary page.





	WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	INVENTORY		
Recent Work	0						
▼ Search	Subject Si	ummary					

If no contact investigation exists for your client click on create investigation and follow the steps outlined to create a National Contact PUI investigation. Disposition would be completed. Status of Closed.

Once you create the investigation add a Clinical Note. With the following details

Subject: Low risk contact due to receiving 2 doses COVID Vaccine

Body: this contact has received a 2 dose series of a Health Canada Approved COVID-19 vaccine and has been exposed to COVID-19, 2 weeks after their second dose. This person is a low risk contact. See Immunization record on file.

Save the note. Do not add any other information to this contact investigation Make sure the Status of the investigation is closed and the Disposition is Completed further action not required.





Intermittent Monitoring

Client 3 - First Intermittent Monitoring – Contact Case – June 7

Search for an Investigation



From the left-hand navigation, click on Search Investigations

Disease / Basic Criteria		*	Hide Disease / Basic
Search by:	Include:	• Human	O Non-Human
Investigation ID:			
Investigation Group:			
Outbreak Group:	Search Outbreak		
Disease Event ID:			
Report Date (Received) Range:	From: / / / To: / / / / / / / / / / / / / / / / / / /		
Encounter Group:	✓		
Disease:	\checkmark		
Authority:	\checkmark		
Classification:	\checkmark		
Microorganism:			
Site(s): CTRL + click to select multiples			
Staging:	\checkmark		
PHAC Notification S	tatus:	~	
Co-managed Disease			
Outstanding Recom	mendations		
Exclude Outbreak ID:	2		
	Search	Retrieve	Clear Advance
1 Investigatio	n ID optor the investigation ID		

- 1. **Investigation ID** enter the investigation ID
- 2. Click the **Search** button





Investigation Search Results								
		New Search						
1 results found.	Inactive investigation(s) are not shown	Click Investigation ID to view Investigation Summary.						
Row Actions: Select All	Deselect All Preview Update	Generate Map Update Selected						
	► Last Name, Date of Tisease / Disease	Event ID / Primary Authority / Reporting Date Received						
2 2073	1 Car, Honda 2005 Sep 1 Unusual/Emerging Person Under Invest	Disease / 2193 / National / Contact - 2020 Apr 2 stigation						

- 1. In the search results, validate your investigation matches the case or contact and the client name
- 2. Click on the hyperlink for the investigation

nvestigatio	n Summary				0 🗉
					ACTIVE
Client ID:	Name(Last, First Middle) /	Health (Card No:	Date of Birth / Age:	
5423	Summer, Alice / Female	9333000	0001	2000 Jan 01 / 20 years	
Phone	Address:	Additio	nal ID Type / Additional ID:		
-		Provinci identifier	al health service provider r / -		
			A.		▲ Investigation
Investigation ID: 2492	Status: Open		Disposition: Investigation in progress	Age at time of Investigation: 20 years	
Disease: Unusual/Emerging I	PHAC Date/Typ Disease 2020 Jun 01 / D	e: ate Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 202	20 Jun 11

The investigation is now in context.





Adding an Isolation Intervention



From the left-hand navigation, click on Intervention Summary.

	Interventions		☆ Hide Interventions
1.	Image: Type SubType	Disposition Start Date End Date	Provised
	Intervention Details *Required field		★ Hide Intervention Details
Г	Encounter Group: Intervention Type:	Communicable Disease Investigation * Intervention Sub Type:	
	Intervention Disposition: Outcome:		
	* Start Date: 4	2020 / 06 / 16 III End Date: 5	yyyy mm dd

- 1. Intervention Type Select Isolation from the drop-down list
- 2. Intervention Disposition Select In Progress from the drop-down list
- 3. Outcome Select DO NOT USE from the drop-down list
- 4. Start Date Enter the Isolation Start Date
- 5. **End Date** Enter the Isolation End Date for contacts. Isolation End Date is determined by the Surveillance Guidelines. A case may or may not have an Isolation End Date.



COVID-19 Case Management



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 > Western Zone > [Yarmouth Public Health Office]					
Workgroup:	V User:					
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 > [Central Zone]					
	To marify a Service Delman Location first elick on the Find button. They search or time the name of the Service Delman Location was with a					
Location:	specify, select it and click on 'Select' button. Then click 'Close' to close.					

- 1. Organization Select Central Zone using the Find button
- 2. Location Select Halifax PHO using the Find button

1	Comments \$	Hide Co	omments
	Comment:		
	(4000 characters remaining	2	Add

- 1. **Comment** enter the rational for how the isolation start and end dates were determined. Include the isolation end date in the comment with 2359 hours.
- 2. Click the Add button. The comment has now been added to the comment table (see below)
- 3. Click the Save button (bottom and top right of screen) to save the Intervention

Comments	Recorded By
Positive Case with symptom onset May 2, 2021. Projected isolation end date May 12, 2021 at 2359 hours if client meets recovered criteria.	Chisholm, Rachel

Ensure you take the intervention out of context



Click the Cancel button towards the top of the screen





Signs and Symptoms

Investigation has no S&S and client indicates NO S&S

Daw							
ROW	Actions: Select All Update	Set Onset	Clear Onset	Onest Dr			
	Reason for Deletion :		Present:	Unset Da			
		✓ Dele	ete		mm dd	A	pply Update
	Sign/Symptom	Present 🔻	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
3	a						
	Abdominal pain/discomfort/cramps						No
	Arthralgia						No
~	Asymptomatic						No

Client is <u>Asymptomatic (all S&S on the investigation are **blank**)</u>

- 1. Click on the checkbox beside Asymptomatic
- 2. Present Select "yes" from the drop-down list
- 3. Onset Date Enter the date of the call with the client
- 4. Click Apply Update button
- 5. The asymptomatic S&S will be updated in the S&S table (see below)

Asymptomatic	Yes	2020 Apr 13 00:00 ADT		No

Client indicates no fever:

✓	Fever 🔓			No

Row Actions:	Select II Update Set Onset Clea	r Onset		
	Reason for Deletion :	Present: No V	Onset Date: // yyyy mm dd	Apply Update

- 1. Click on the checkbox beside Fever
- 2. Select "No" from Present dropdown
- 3. No date to add as no symptom
- 4. Click Apply Update button





5. The Fever S&S will be updated (see below)

Add temperature observation:



1. Click on the <u>No</u> hyperlink

Observations Details * Acquired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 III yyyy mm dd
Observation:	
Observation Value:	Unit:
* Observed By:	
	Add Clear

- 1. **Observation Date** Enter date of the observation
- 3. **Observation field** Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
- 4. **Observation Value -** Enter temperature value.
- 5. **Unit** Enter Celsius
- 6. Observed by select from the drop-down list
- 7. Click the **Add** Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u> 🔻	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

• 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.

	Provincial health service provider identifier / -	
	Windows Internet Explorer	<u> nvesti</u>
s:	Are you sure you want to leave this page?	
C Date/Type: Mar 02 / Most F		der Investigation /
sure	ightarrow Leave this page	
	ightarrow Stay on this page	Sav
	6	>





Adding a Clinical Note



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

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months				
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02				
Notes							
Display Notes For: Client: Car, Honda							

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01
Encounter Date:	Encounter Group / Type:		<u>Â ⊏ncounter</u> Encounter Activity:
2020 Jun 19	Communicable Disease Investigat	tion / Intervention	
2020 Jun 19 Notes	Communicable Disease Investigat	tion / Intervention	- ∧ Hide Notes

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

		INTEGNISHIONO	00101121110			
Recent Work	Pocont W/	ork.				
⁷ Search	Recent WOR.					
Search Investigations	1 Client: Contac	t Case June (Client ID	5829)			
Search Lab	- Investigation:	Unusual/Emerging D	isease			

From the left-hand navigation, click on **Recent Work** and click on the **Investigation** hyperlink.



COVID-19 Case Management



otes										;	Hide Note
isplay Notes For	Client:	smith, jody			~	Include Related Er	ntities: 🔽]			
Subject Line:						Status:	[\checkmark	
Workgroup for Author:					~	Workgroup for Transcriber:	[~
Author:					~	Transcriber:	[~
Note Type:					~						
Note Date:	From:	уууу	/ 	/dd		To:	уууу	/ 	/dd		
										Display	Clear
results found.					To view a N	ote below, click on	its Note D	ate. The Fe	reflects the re	ecords you hav	e access t
low Actions:	iew All N	otes in Ta	ble Upd	ate Note	View Note O	orrections		1	Author N	ote Transci	ibe Note

1. Click on Author Note button

Note is being cr	reated for Investigation ID 2503
Note ID: -	Status: -
Author:	Sampson, Judy Role: NS_IMMS_IOM_NURSE
Note Date:	2020 06 16 Note Time: 16 :ADT yyyy mm dd hh mm
Note Type: Common Phrases: Note:	Add to Note
T Normal V	T Arial ✓ 7pt ✓ b i <u>u</u> ≧ ≦ ≣ ≒ ≒ ≠≣ €≣
	Save and 5 Note Complete
	Note is being cr Note ID: - * Required Field Author: Subject: Note Date: Note Type: Common Phrases: Note: TNormal

- 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





Client 1 - Case – Intermittent Monitoring – June 10

Investigation <u>has</u> recorded Signs and Symptoms & Daily Monitoring Report indicates Signs and Symptoms <u>present</u>

The investigation has recorded S&S with a present of Yes (other than Asymptomatic) and does not have a Recovery Date and <u>the S&S are no longer reported by the client</u>, you need to end date the S&S by entering the Recovery Date.

Sign or Symptom									
* Required field Sign or Symptom:	Rhinorrhea								
Preset:	Yes								
Onset:	No 🗟								
* Present:	Yes	~							
Onset Date/Time:	2020 / 06 yyyy mm	/ 03 dd	00 bh	: 00 mm	: ADT	Estimated:]		
Recovery Date/Time:	yyyy mm	/ dd	liii hh	: mm	: ADT	Estimated:]		
Duration:	0 Days	+ 0	Hours + 0	Min	utes(Duratio	n = Recovery	Date/Time - Onset	Date/Time)	
Reported By:		~							
								Apply Up	date Clear
Row Actions: Select	t All Update	Set Ons	et Clear Onset						
Reason	for Deletion :		elete Pres	ent:	~	Onset Da	nte: ///// mm dd	Ар	oly Update
Sign/Symptom		Present	Onset Date/Time		Recovery	Date/Time	Duration	Reported By	Details Exist
Vomiting									No
Rhinorrhea		Yes	2020 Jun 3 00:00	ADT					No

- 1. Checkbox Click on the checkbox for the S&S
- 2. Click the **Update** button
- 3. Leave the Present drop down as YES
- 4. Recovery Date enter the date the client is no longer reporting the S&S
- 5. Click the Apply Update button
- 6. The S&S is now updated in the Sign & Symptom list





Sign and Symptom – <u>reported by client</u> and already indicated as present:

Should be <u>Yes</u> without a recovery date, example client still reporting cough:

Cough	Yes	2020 Jun 15 00:00 ADT		<u>No</u>

Do not update or change this S&S

Fever on the Investigation is different than Fever the client is reporting.

Examples – Fever on Investigation <u>Yes</u> and client reporting <u>No</u> or Fever on Investigation is <u>No</u> and client reporting <u>Yes</u>

The other fever needs to be added. At the top section of the screen, select fever from the drop down

Sign or Symptom								
 * Required field * Sign or Symptom: 	Fever						~	
Preset:	No							
Onset:	No							
* Present:	Yes	\sim						
Onset Date/Time:	yyyy mm	/ dd	: hh	. ADT	Estimated:]		
Recovery Date/Time:	yyyy mm	/dd	: hh	. ADT	Estimated:]		
Duration:	0 Days	+ 0 H	ours + 0	Minutes(Duratio	n = Recovery I	Date/Time - On	iset Date/Time)	
Reported By:		\checkmark						
								Add Clear
Row Actions: Selec	t All Update	Set Onset	Clear Onset					
Reaso	n for Deletion :	Delete	Presen	t:	Onset Da	te: ////// mm dd		pply Update
Sign/Symptom	Ē	Present▼ On	set Date/Time	Recovery Date/Time	• •	Duration 🔻	Reported By	Details Exist
Abdominal pain/discomfort/cra	amps Y	/es 202 AD	0 Apr 11 00:00 T	2020 Apr 12 ADT	2 00:00 1 n	d Oh O n		No
- Arthraloia								No

- 1. Present defaults to Yes. If you are adding a Fever No, select "NO" from the drop-down list
- 2. Onset Date/Time if a yes. Date/Time will be grade out if "No" as not a symptom
- 3. Click the Add button



COVID-19 Case Management



Add temperature observation:

On the appropriate Fever S&S:

- if client reported fever record on active Fever Yes (if more than one add to the one with no recovery date)
- if client did not report a fever or did not report a temperature record on the Fever No

Fever	\searrow	No			Yes	-
Fever		Yes	2020 Jun 15 00:00 ADT		<u>Yes</u>	

1. Click on the <u>Yes</u> hyperlink

Observations Details * Required field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 III
Observation:	
Observation Value:	Unit:
* Observed By:	
	Add Clear

- 1. Observation Date Enter date of the observation
- 2. **Observation field** Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature. Denies feeling feverish or chills.
- 3. Observation Value Enter temperature value.
- 4. Unit Enter Celsius
- 5. Observed by select from the drop-down list
- 6. Click the Add Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u> 🔻	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda





Sign and Symptom – client is reporting and Yes and the S&S has already been reported and has a Recovery Date

Example:

Cough	Yes	2020 Jun 1 00:00 ADT	2020 Jun 10 00:00 ADT	9d 0h	0 m		No
-------	-----	----------------------	--------------------------	-------	-----	--	----

The Sign or Symptom needs to be re-added (do not change a sign or symptom that has a recovered date)

Signs and Symptoms can be added through the top section of the screen.

Sign or Symptom	
 * Required field * Sign or Symptom: 	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	yyyy mm dd hh mm
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	\checkmark
	Add Clear
Row Actions: Select	t All Update Set Onset Clear Onset
Reason	n for Deletion :

- 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
- 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 added in the table (see below)

Cough	Yes	2020 Jun 1 00:00 ADT	2020 Jun 10 00:00 ADT	9d 0h 0m	No
Cough	Yes	2020 Jun 17 00:00 ADT			No





Client is reporting a S&S that has not been previously reported on the Signs and Symptoms list:

Row	Ac Sns: Select All Update	Set Ons	et Clear Onset						
	Reason for Deletion :	v	Present: Ves	~	Onset E yyyy	Date: // mm	dd		Apply Update
	Sign/Symptom	<u>Present</u> ▼	Onset Date/Time 🔻	<u>Recovery</u> <u>Date/Time</u>	•	<u>Duration</u>		Reported By	▼ <u>Details</u> ▼ Exist
	Vomiting								No
	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT						<u>No</u>
>	Pharyngitis								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
- 3. Onset Date Enter the date the client reported the S&S
- 4. Click Apply Update button
- 5. The S&S will now be updated in the table (see below)

Pharyngitis Yes 2020 Jun 16 00:00 ADT No	Pharyngitis
---	-------------





Client reports a symptom that is <u>not</u> in the displayed Signs and Symptoms list, you need to document:

Signs and Symptoms can be added through the top section of the screen.

Sign or Symptom	
 * Required field * Sign or Symptom: 	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	yyyy mm dd hh mm
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	\checkmark
	Add Clear
Row Actions: Select	All Update Set Onset Clear Onset
Reason	for Deletion : Present: Onset Date: V Delete V Mmm 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

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
- 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>
--	----------------------	-----	-----------------------	--	--	--	-----------

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



COVID-19 Case Management



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.

	Provincial health service provider identifier / -						
_	Windows Internet Explorer						
s:	Are you sure you want to leave this page?						
C Date/Type: Mar 02 / Most F sure	\rightarrow Leave this page	der Investigation /					
	ightarrow Stay on this page	Sav					
		~					





Adding a Clinical Note



From the left-hand navigation, click on Notes.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent:	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Clie	nt: Car, Honda	Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status:	Disposition: Investigation in progre	Age at time of Investigation: ess 20 years	
Disease: Unusual/Emerging Dis	PHAC Date/Type: 2020 Jun 01 / Date	Etiologic Agent: Reported COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01	
Encounter Date: 2020 Jun 19	Encounter Group / Communicable Disea	Гуре: ise investigation / Intervention	<u>Â Encounter</u> Encounter Activity: -	
Notes			☆ Hide Note	ies
Display Notes Fo	Encounter: 2020 Jun 19	Include Related	Entities:	

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

Recent Work	Recent Work:
Search Investigations	4 Cliente Contact Cons lung (Client ID: 5820)
Search Lab	- Investigation: Unusual/Emerging Disease

From the left-hand navigation, click on Recent Work and click on the Investigation hyperlink.





splay Notes For	Clien	t: smith, jod	у		~	include Related E	intities: 🖌	2			
Subject Line:						Status:				~	
Vorkgroup for Author:					~	Workgroup fo Transcriber:	r				~
Author:					~	Transcriber:					~
Note Type:					~						
Note Date:	From:	уууу	/ mm	/dd		To:	уууу	/ mm	/ dd		
										Display	Clear
oculto found					To view a N	ote below, click or	its Note F	ate The Se	reflects the	records you ha	we access t

1. Click on **Author Note** button

1	Note is being cr	eated for Investigation ID 2503
	Note ID: - * Required Field	Status: -
	Author:	Sampson, Judy Role: NS_IMMS_IOM_NURSE
2	Subject:	
3	Note Date:	2020 / 06 / 16
L	Note Type:	✓
	Common Phrases:	✓ Add to Note
4	Note:	
	T Normal V	T Arial ∨ 7 pt ∨ b $i \underline{u} \equiv \equiv \equiv \ddagger \equiv \div \equiv \bigstar$
		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





Client 2 – Contact Case – Intermittent Monitoring – June 10

The investigation has recorded S&S with a present of Yes (other than Asymptomatic) and does not have a Recovery Date and <u>the S&S is no longer reported by the client</u>, you need to end date the S&S by entering the Recovery Date

Sign or Symptom						
* Required field Sign or Symptom:	Rhinorrhea					
Preset:	Yes					
Onset:	No 😼					
* Present:	Yes 🗸					
Onset Date/Time:	2020 / 06 / 03 yyyy mm dd	3 00 : 00 hh mm	: ADT Estimated:]		
Recovery Date/Time:	yyyy mm dd	iii [: ADT Estimated:]		
Duration:	0 Days + 0	Hours + 0 Mir	utes(Duration = Recovery	Date/Time - Onset	Date/Time)	
Reported By:	`]				
					Apply Upd	ate Clear
Row Actions: Select	All Update Set On	set Clear Onset				
Reason	for Deletion :	Delete Present:	V Syyyy	nte: ///// mm dd	Appl	y Update
Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
Vomiting						No
Rhinorrhea	Yes	2020 Jun 3 00:00 ADT			1	No

- 1. Checkbox Click on the for the S&S
- 2. Click the **Update** button
- 3. Recovery Date enter the date the client is no longer reporting the S&S
- 4. Click the Apply Update button
- 5. The S&S is now updated in the Sign & Symptom list

Rhinorrhea Yes	s 2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12d 0h 0 m	No
----------------	------------------------	--------------------------	---------------	----





Sign and Symptom – <u>reported by client</u> and already present - <u>Yes</u> without a recovery date:

Cough	Yes	2020 Jun 15 00:00 ADT		<u>No</u>

Do not update

Fever on the Investigation is different than Fever the client is reporting.

Examples – Fever on Investigation <u>Yes</u> and client reporting <u>No</u> or Fever on Investigation is <u>No</u> and client reporting <u>Yes</u>

• The other fever needs to be added. At the top section of the screen, select fever from the drop down

Sign or Symptom							
* Required field * Sign or Symptom:	Fever					~	
Preset:	No						
Onset:	No						
* Present:	Yes	~					
Onset Date/Time:	yyyy mm	/ dd		ADT Estir mm	mated:		
Recovery Date/Time:	yyyy mr	// n dd		ADT Estir mm	nated:		
Duration:	0 Days	+ 0	Hours + 0	Minutes(Duration = I	Recovery Date/Time	- Onset Date/Time)	
Reported By:		~					
							Add Clear
Row Actions: Selec Reason	t All Update	Set Onset	Clear Onset Present ete	t: 	Onset Date:	id A	pply Update
Sign/Symptom	^	<u>Present</u> ▼ (<u> Onset Date/Time</u>	Recovery Date/Time	Duration	▼ <u>Reported</u> ▼ <u>By</u>	Details Exist
Abdominal pain/discomfort/cra	mps	Yes 2 A	2020 Apr 11 00:00 ADT	2020 Apr 12 00: ADT	00 1d0h m	D	No
- Arthraloia							No

- 1. Present defaults to Yes. If you are adding a Fever No, select from the drop-down list
- 2. Onset Date/Time Enter the date of the call with the client
- 3. Click the **Add** button



COVID-19 Case Management



Add temperature observation:

On the appropriate Fever S&S:

- if client reported fever record on active Fever Yes (no recovery date)
- if client did not report a fever or did not report a temperature record on the Fever No

Fever	\searrow	No			Yes
Fever		Yes	2020 Jun 15 00:00 ADT		Yes

1. Click on the \underline{Yes} hyperlink

Observations Details * Acquired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 III
Observation:	
Observation Value:	Unit:
* Observed By:	
	Add Clear

- 1. **Observation Date** Enter date of the observation
- 2. **Observation field** Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
- 3. **Observation Value** Enter temperature value.
- 4. Unit Enter Celsius
- 5. Observed by select from the drop-down list
- 6. Click the Add Button. The observation will be added to the observation list (see below)

O 2020 Apr 14 Temperature 37.4	4 celsius	Car, Mazda




Sign and Symptom – client is reporting a symptom and the symptom has already been reported and recovered:

Example:

Cough	Yes	2020 Jun 1 00:00 ADT	2020 Jun 10 00:00 ADT	9d 0h	0 m		No
-------	-----	----------------------	--------------------------	-------	-----	--	----

The Sign or Symptom needs to be added (**do not change a sign or symptom that has a recovered date**)

Signs and Symptoms can be added through the top section of the screen:

Sign or Symptom	
 * Required field * Sign or Symptom: 	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	yyyy mm dd hh mm
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	\checkmark
	Add Clear
Row Actions: Select	t All Update Set Onset Clear Onset
Reason	of for Deletion : Present: Onset Date: Delete yyyy mdd

- 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
- 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 added in the table (see below)

Cough	Yes	2020 Jun 1 00:00 ADT	2020 Jun 10 00:00 ADT	9d 0h 0m	No
Cough	Yes	2020 Jun 17 00:00 ADT			No





Client is reporting a S&S that is not updated on the Signs and Symptoms list:

Row	Ac sns: Select All Update	e Set Ons	et Clear Onset	_			
	Reason for Deletion :	~	Present: Ves		yyy mm dd		pply Update
	Sign/Symptom	<u>Present</u> ▼	Onset Date/Time 🔻	Recovery Date/Time	▼ <u>Duration</u> ▼	Reported By	Details Exist
	Vomiting						No
	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
~	Pharyngitis						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
- 3. Onset Date Enter the date the client reported the S&S
- 4. Click Apply Update button
- 5. The S&S will now be updated in the table (see below)

Pharyngitis	Yes	2020 Jun 16 00:00 ADT			No
				1	1





Client reports a symptom that is <u>not</u> in the displayed Signs and Symptoms list, you need to add it

Signs and Symptoms can be added through the top section of the screen.

Sign or Symptom	
 * Required field * Sign or Symptom: 	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	yyyy mm dd hh mm
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	✓
	Add Clear
Row Actions: Select	t All Update Set Onset Clear Onset
Reason	In for Deletion : Present: Onset Date: V Delete V V V Delete V V

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

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
- 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>
--	----------------------	-----	-----------------------	--	--	--	-----------

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



COVID-19 Case Management



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.

	Pro	vincial health service provider ntifier / -	
s:	Windov	vs Internet Explorer	<u> </u>
C Date/Type:		Are you sure you want to leave this page?	
Mar 02 / Most F sure		ightarrow Leave this page	der Investigation /
		\rightarrow Stay on this page	Sav
			~





Adding a Clinical Note



From the left-hand navigation, click on Notes.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent:	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Clien	nt: Car, Honda	Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years	
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01	
Encounter Date: Encounter Group / Type: Encounter Activity: 2020 Jun 19 Communicable Disease Investigation / Intervention -				
Notes			☆ Hide Notes	
Display Notes Fo :	Encounter: 2020 Jun 19	Include Related Entit	ies:	

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

Recent Work	Recent Work:
- Search	Recent WOR.
Search Investigations	1. Client: Contact. Case June (Client ID: 5829)
Search Lab	- Investigation: Unusual/Emerging Disease

From the left-hand navigation, click on Recent Work and click on the Investigation hyperlink.





isplay Notes Fo	or: Client	smith, jody	1		~	nclude Related E	ntities: 🔽]			N
Subject Line:						Status:	[~	
Workgroup for Author:					~	Workgroup for Transcriber:					~
Author:					~	Transcriber:	[~
Note Type:					~						
Note Date:	From:	уууу	/	/dd		To:	уууу	/	/dd		
										Displa	ay Clear
results found.					To view a N	ote below, click on	its Note D	ate. The F	reflects the	e records you h	ave access to

1. Click on **Author Note** button

1	Note is being cr	eated for Investigation ID 2503
	Note ID: - * Required Field	Status: -
2	Author: Subject:	Sampson, Judy Role: NS_IMMS_IOM_NURSE
3	Note Date: Note Type: Common Phrases:	yyyy mm dd hh mm
4	Note:	T Arial ∨ 7pt ∨ b i u ≧≧≣ ≟⊟ ★≣★≣
		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





Client 3 – Contact Case – Intermittent Monitoring – June 12

Investigation has a recorded Sign and Symptom of Asymptomatic – Yes and/or Fever – No Daily Monitoring Report indicates Signs and Symptoms are now present

Asymptomatic – End date (if Asymptomatic has Present of Yes)

Row Actio	ns: Select All Update	Set Onset	Clear Onset				
	Reason for Deletion :	✓ De	Present:	V Vyyy	te: // mm dd	A	pply Update
<u>Sigr</u>	/ <u>Symptom</u>	Present T	Onset Date/Time 🔻	Recovery Date/Time	Duration	Reported By 🔻	<u>Details Exist</u> ▼
Abde	ominal pain/discomfort/cramps						No
Arth	algia						No
Asyr	nptomatic	Yes	2020 Apr 9 00:00 ADT				No

- 1. Checkbox Click checkbox for Asymptomatic
- 2. Click the **Update** button
- 3. The S&S is available for editing above the S&S list

Sign or Symptom	
* Required field	
Sign or Symptom:	Asymptomatic
Preset:	Yes
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	2020 / 04 / 09 III 00 : 00 : ADT Estimated:
	yyyy mm dd hh mm
Recovery Date/Time:	/ / / III : ADT Estimated:
	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Deported By:	
Reported by:	
	Apply Update Clear

- 1. **Recover Date** Enter the date of the call (do not enter a time). Do not change the **Present** or the **Onset date** values.
- 2. Click the Apply Update button
- 3. The Asymptomatic has been updated in the table. See below





Asymptomatic	Yes	2020 Apr 9 00:00 ADT	2020 Apr 13 00:00 ADT	4d 0h 0 m	No

If Fever is Y on the daily monitoring report:

At the top section of the screen, select fever from the drop down

Sign or Symptom • Required field • Sign or Symptom: Fever • Preset: No Onset: No Onset: No Onset: No Onset Date/Time: / _ /		
 Required field Sign or Symptom: Fever Preset: No Onset: No Onset: No Onset: No Onset: Yes Onset Date/Time: Yes Yyyy mm dd hh mm Recovery Date/Time: Yyyy mm dd hh mm Recovery Date/Time: Yyyy mm dd hh mm Recovery Date/Time: Yyyy mm dd hh mm Duration: 0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time) Reported By: Add Clear Reason for Deletion : Present: Onset Date: Present: Onset Date/Time / Delete Yyyy mm dd Add Clear Reason for Deletion : Present: Onset Date/Time / Details Sign/Symptom Present Onset Date/Time / Details Sign/Symptom Yes 2020 Apr 11 00:00 ADT 11 00:00 ADT 11 00:00 Mm ADT Adveralia No No<!--</th--><th>Sign or Symptom</th><th></th>	Sign or Symptom	
Preset: No Onset: No • Present: Yes Onset Date/Time: / / / // : ADT Estimated: yyyy mm Recovery Date/Time: / / // : ADT Estimated: yyyy mm dd hh mm mm Duration: 0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time) Reported By: // Reason for Deletion : Present: Onset Date/Time Onset Date/Time Apply Update yyyy mm yyyy mm Mad Present Onset Date/Time No No	 * Required field * Sign or Symptom: 	Fever V
Onset: No Present: Yes Yes Onset Date/Time: / / / / / / / / / / / / / / / / / / /	Preset:	No
Present: Yes Yes You Show Y	Onset:	No
Onset Date/Time: / / i: : ADT Estimated: yyyy mm dd hh mm Recovery Date/Time: / / i: : ADT Estimated: yyyy mm dd hh mm Duration: 0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time) Reported By: Madd Clear Reported By: Reason for Deletion : Present Onset Date: Belete Sign/Symptom Present Onset Date/Time	* Present:	Yes 🗸
Recovery Date/Time: / / / / / / / / / / / / / / / / / / /	Onset Date/Time:	/ / I
Duration: 0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time) Reported By: Add Clear Add Clear Rew Actions: Select All Update Set Onset Clear Onset Present: Onset Date: V Delete Vyyy mm dd Sign/Symptom Present Onset Date/Time Persent Duration Reported Details Sign/Symptom Present Onset Date/Time Duration Reported Details Exist Abdominal pain/discomfort/cramps Yes 2020 Apr 11 00:00 ADT 1 d 0 h No Atthralaia No No No No No	Recovery Date/Time:	yyyy mm dd hh mm
Reported By: Image: Construction of the set on set of the set of the set on set of the set of th	Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Add Clear Row Actions: Select All Update Set Onset Clear Onset Reason for Deletion : Present: Onset Date: Apply Update V Delete V yyyy mm dd Sign/Symptom Present Onset Date/Time Duration Reported Details Abdominal pain/discomfort/cramps Yes 2020 Apr 11 00:00 ADT 1 d 0 h 0 No	Reported By:	
Row Actions: Select All Update Set Onset Clear Onset Onset Date: Reason for Deletion : Present: Onset Date: V Delete V Vyyyy mm dd Sign/Symptom Present Onset Date/Time Duration Reported Details Abdominal pain/discomfort/cramps Yes 2020 Apr 11 00:00 2020 Apr 12 00:00 1 d 0 h 0 No Arthraloia No No No No No		Add Clear
Reason for Deletion : Present: Onset Date: V Delete V Delete V Duration Reported By Details Exist Sign/Symptom Present Onset Date/Time Recovery Date/Time Duration Reported By Details Exist Abdominal pain/discomfort/cramps Yes 2020 Apr 11 00:00 ADT 2020 Apr 12 00:00 MDT 1 d 0 h 0 MDT No Arthraloia V V V V No	Row Actions: Select	t All Update Set Onset Clear Onset
Sign/Symptom Present Onset Date/Time Recovery Date/Time Duration Reported By Details Exist Abdominal pain/discomfort/cramps Yes 2020 Apr 11 00:00 ADT 2020 Apr 12 00:00 MDT 1 d 0 h 0 m No Athraloia Ves 2020 Apr 10 0:00 ADT No No No	Reason	n for Deletion : Present: Onset Date: Delete V M dd Apply Update
Abdominal pain/discomfort/cramps Yes 2020 Apr 11 00:00 ADT 2020 Apr 12 00:00 MDT 1 d 0 h 0 m No Arthraloia Arthraloia Mo Mo Mo	Sign/Symptom	Present Onset Date/Time Recovery Duration Reported Details Date/Time Date/Time Duration Reported Details
Arthraloia No	Abdominal pain/discomfort/cra	Yes 2020 Apr 11 00:00 ADT 2020 Apr 12 00:00 MDT 1 d 0 h 0 m No
	□ Arthraloia	No

- 4. Present defaults to Yes. If you are adding a Fever No, select rom the drop-down list
- 5. Onset Date/Time Enter the date of the call with the client
- 6. Click the **Add** button





Add temperature observation:

On the appropriate Fever S&S:

- if client reported fever record on active Fever Yes (no recovery date)
- if client did not report a fever or did not report a temperature record on the Fever No

Fever	\triangleright	No			Yes
Fever		Yes	2020 Jun 15 00:00 ADT		Yes

2. Click on the Yes hyperlink Note: the hyperlink will be No if this is the first temperature observation.

Observations Details * Acquired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 📖
Observation:	
Observation Value:	Unit:
* Observed By:	
	Add Clear

- 1. Observation Date Enter date of the observation
- 2. **Observation field** Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
- 3. Observation Value Enter temperature value.
- 4. Unit Enter Celsius
- 5. Observed by select from the drop-down list
- 6. Click the Add Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u>	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda





Client is reporting a S&S that is not updated on the Signs and Symptoms list:

Row	Ac Select All Update	e Set Ons	et Clear Onset	Ons	set Date:		
	Reason for Deletion :	~	Delete Yes		y mm dd		pply Update
	Sign/Symptom	<u>Present</u> ▼	Onset Date/Time 🔻	<u>Recovery</u> Date/Time	▼ <u>Duration</u> ▼	Reported By	Details Exist
	Vomiting						No
	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
~	Pharyngitis						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
- 3. Onset Date Enter the date the client reported the S&S
- 4. Click Apply Update button
- 5. The S&S will now be updated in the table (see below)

	Pharyngitis	Yes	2020 Jun 16 00:00 ADT				No
--	-------------	-----	--------------------------	--	--	--	----





Client reports a symptom that is <u>not</u> in the displayed Signs and Symptoms list, you will need to document

Signs and Symptoms can be added through the top section of the screen.

Sign or Symptom	
* Required field* Sign or Symptom:	✓
Preset:	No
Onset:	No
* Present:	Yes 🗸
Onset Date/Time:	yyyy mm dd hh mm
Recovery Date/Time:	yyyy mm dd hh mm
Duration:	0 Days + 0 Hours + 0 Minutes(Duration = Recovery Date/Time - Onset Date/Time)
Reported By:	
	Add Clear
Row Actions: Select	t All Update Set Onset Clear Onset
Reason	n for Deletion : Present: Delete Present: Present: Present: Present: Present: Present: Apply Update Apply Update

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

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
- 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>





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.







Adding a Clinical Note



From the left-hand navigation, click on Notes.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent:	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Clie	nt: Car, Honda	Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progre	Age at time of Investigation: ess 20 years	
Disease: Unusual/Emerging Dis	PHAC Date/Type: 2020 Jun 01 / Date	Etiologic Agent: Reported COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01	
Encounter Date: 2020 Jun 19	Encounter Group / Communicable Disea	Гуре: ise investigation / Intervention	<u>Â Encounter</u> Encounter Activity: -	
Notes			☆ Hide Note	ies
Display Notes Fo	Encounter: 2020 Jun 19	Include Related	Entities:	

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

Recent Work	Recent Work:
- Search	Recent WOR.
Search Investigations	1. Client: Contact. Case June (Client ID: 5829)
Search Lab	- Investigation: Unusual/Emerging Disease

From the left-hand navigation, click on Recent Work and click on the Investigation hyperlink.





splay Notes For: C	lient: smith, jod	y	~	Include Related E	intities: 🗸			
Subject Line:				Status:			~]
Workgroup for Author:			~	Workgroup fo Transcriber:	r 🗌			~
Author:			~	Transcriber:				~
Note Type:			~	·				
Note Date: Fro	т: уууу	/ 	/ 🔛	To:	уууу	/ mm	/ 🔛]
								Display Clear
			To view a	Note below click or	its Note Da	te The Fot re	flects the record	ds you have access t

2. Click on Author Note button

- Ensure the note is being added for an investigation
 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





Client 3 - Contact Case – Intermittent Monitoring – June 21

The investigation has recorded S&S with a present of Yes (other than Asymptomatic) and does not have a Recovery Date and <u>the S&S is no longer reported by the client</u>, you need to end date the S&S by entering the Recovery Date

Sign or Symptom								
* Required field								
Sign or Symptom:	Rhinorrhea							
Preset:	Yes							
Onset:	No K							
* Present:	Yes	\sim						
Onset Date/Time:	2020 / 06	/ 03 🔛	00 : 00	: ADT	Estimated:	1		
	yyyy mm	dd	hh mm			1		
Recovery Date/Time:				: ADT	Estimated:	7		
,		dd	hh mm					
Duration	,,,,,	uu						
Duration:	0 Days +	0 Hours +	0 Min	utes(Duratio	on = Recovery	Date/Time - Onset	Date/Time)	
Reported By:		\sim						
							ApplyUp	lata Clear
								Jale Clear
Row Actions: Select	All Update Se	et Onset Clear	Onset					
Reason	for Deletion :	_	Present:		Onset Da	ite:		
	~	✓ Delete		~		/j /j mm dd	App	ly Update
Sign/Symptom	Pre	esent Onset Da	te/Time	Recovery	Date/Time	Duration	Reported By	Details Exist
Vomiting							insported by	No
vomung								NU
Rhinorrhea	Yes	s 2020 Jun	3 00:00 ADT					No

- 1. Click on the **Checkbox** for the S&S
- 2. Click the **Update** button
- 3. Recovery Date enter the date the client is no longer reporting the S&S
- 4. Click the Apply Update button
- 5. The S&S is now updated in the Sign & Symptom list

Rhinorrhea Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12d 0h 0 m		No
----------------	----------------------	--------------------------	---------------	--	----

Add temperature observation

On the appropriate Fever S&S:

- if client reported fever record on active Fever Yes (no recovery date)
- if client did not report a fever or did not report a temperature record on the Fever No





Fever	ß	No			Yes
Fever		Yes	2020 Jun 15 00:00 ADT		Yes

1. Click on the \underline{Yes} hyperlink

Observations Details * Acquired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 III yyyy mm dd
Observation:	
Observation Value:	Unit:
* Observed By:	✓
	Add Clear

- 1. Observation Date Enter date of the observation
- 2. **Observation field** Enter word Temperature
- 3. **Observation Value** Enter temperature value. If the client as unable to provide temperature, add Unable to provide temperature.
- 4. Unit Enter Celsius
- 5. Observed by select from the drop-down list
- 6. Click the **Add** Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u>	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

Sign and Symptom – <u>reported by client</u> and already present - <u>Yes</u> without a recovery date:

Cough Yes	2020 Jun 15 00:00 ADT				<u>No</u>
-----------	--------------------------	--	--	--	-----------

- Do not update
- 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.

	Provincial health service provider identifier / -	
_	Windows Internet Explorer	∧ Investi
s:	Are you sure you want to leave t	his page?
C Date/Type: Mar 02 / Most F sure	ightarrow Leave this page	der Investigation /
	ightarrow Stay on this page	Sav
		~ ~

The following needs to be completed when closing a COVID-19 Contact investigation:

1. Complete the Intervention



From the left-hand navigation, click on Intervention Summary

Intervent	tions						A Hide Interventions
Row Acti	ons: Add Foll	ow Up				C	reate Intervention
	Туре 🔻	SubType 🔻	Disposition 🔹	Start Date	End Date 🔻	Provider 🔻	Location 🔹
⊂ 1	Isolation	Isolation	In progress	2020 Jun 1	2020 Jun 15	-	Halifax PHO

1. Click on the isolation intervention of the intervention that has a disposition of "In progress"





	Intervention Details				A Hide Intervention Details
	* Required field				
	Encounter Group:	r <u>i i ri</u> se l	nvestigation		
1	* Intervention Type:	Completed Deceased	~	* Intervention Sub Type:	Isolation V
	Intervention Disposition:	In progress			
	* Outcome:	Lost fo follow-up Pending Refused		2	
	* Start Date:			End Date:	



- Intervention Type select from the drop-down list

 Completed if client finished required isolation

 - b. Deceased client died before completing isolation
 - c. Lost to follow up client is lost to follow up
- 2. Click the Save button (right hand portions of screen, top or bottom)

2. 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.

* Required field		
Investigation	Information	
Priority: 1 Disposition: * Status:	Completed, further action not required Entered in error In Province referral Investigation in progress Lost to follow-up Medical Surveillance Out of Province referral Pending	Date: 2020 / 04 / 02 yyyy mm dd e: 2020 Apr 2





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

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

1. Click on the Close Investigation button

	Close Investigation	Reset
* Required field	Merged Investigation	No(s):
Close Investigation		
* 'Closed' Status Date: 2020 / 06 / 16 III 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.



1. Click the **OK** button





Adding a Clinical Note



From the left-hand navigation, click on Notes.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Cli	ient: Car, Honda	Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progre	Age at time of Investigation: ess 20 years	
Disease: Unusual/Emerging Dis	PHAC Date/Type: 2020 Jun 01 / Date	Etiologic Agent: Reported COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01	
Encounter Date: 2020 Jun 19	Encounter Group / Communicable Disea	Гуре: ise investigation / Intervention	<u>Â Encounter</u> Encounter Activity: -	
Notes			☆ Hide Note	ies
Display Notes Fo	Encounter: 2020 Jun 19	Include Related	Entities:	

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

Recent Work	Recent Work:
Search	Recent work.
Search Investigations	1. Client: Contact. Case June (Client ID: 5829)
Search Lab	- Investigation: Unusual/Emerging Disease

From the left-hand navigation, click on **Recent Work** and click on the **Investigation** hyperlink.





isplay Notes For:	Client:	smith, jody			~	nclude Related E	ntities: 🔽]			<u> </u>
Subject Line:						Status:	[~	
Workgroup for Author:					~	Workgroup for Transcriber:	[~
Author:					~	Transcriber:					~
Note Type:					~						
Note Date: Fi	om:	уууу	/ 	/dd		To:	уууу	/ 	/ dd		
										Displ	ay Clear
results found.					To view a N	ote below, click on	its Note D	ate. The F	reflects the	records you l	have access to
ow Actions: View	All No	otes in Ta	ble Upd	ate Note	View Note C	orrections		1	Author	Note Tran	scribe Note

2. Click on **Author Note** button

1	Note is being cr	eated for Investigation ID 2503
	Note ID: - * Required Field	Status: -
	Author:	Sampson, Judy Role: NS_IMMS_IOM_NURSE
2	Subject:	
3	Note Date:	2020 / 06 / 16 . Note Time: 16 : 31 : ADT yyyy mm dd hh mm
Ч	Note Type:	✓
	Common Phrases:	V Add to Note
4	Note:	
	T Normal V	T Arial ∨ 7pt ∨ b i u ≧≧≣ ≒ ≔ ≱≣≰≣
		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





Client 1 - Intermittent Monitoring – June 13

Investigation <u>has</u> recorded Signs and Symptoms & Daily Monitoring indicates <u>no</u> Signs and Symptoms

The investigation has recorded S&S with a present of Yes (other than Asymptomatic) and does not have a Recovery Date and <u>the S&S is no longer reported by the client</u>, you need to end date the S&S by entering the Recovery Date

Sign or Symptom						
* Required field Sign or Symptom:	Rhinorrhea					
Preset:	Yes					
Onset:	No 63					
* Present:	Yes 🗸					
Onset Date/Time:	2020 / 06 / 0 yyyy mm dd	i3	: ADT Estimated:]		
Recovery Date/Time:	yyyy mm de	d hh mm	: ADT Estimated:]		
Duration:	0 Days + 0	Hours + 0 Mir	utes(Duration = Recovery	Date/Time - Onset	Date/Time)	
Reported By:	`					
					Apply Update	Clear
Row Actions: Select	t All Update Set Or	iset Clear Onset				
Reason	for Deletion :	Delete Present:	Onset Da	nte: ////// mm dd	Apply U	pdate
Sign/Symptom	Presen	t Onset Date/Time	Recovery Date/Time	Duration	Reported By Det	ails Exist
Vomiting					No	
Rhinorrhea	Yes	2020 Jun 3 00:00 ADT			No	

- 6. Click on the **Checkbox** for the S&S
- 7. Click the **Update** button
- 8. Recovery Date enter the date the client is no longer reporting the S&S
- 9. Click the Apply Update button
- 10. The S&S is now updated in the Sign & Symptom list

ADT m	Rhinorrhea Y	Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12.d 0.h 0 m		<u>No</u>
-------	--------------	-----	----------------------	--------------------------	-----------------	--	-----------





Add temperature observation:

On Fever No:

Fever	2	No			<u>Yes</u>
Fever		Yes	2020 Jun 15 00:00 ADT		<u>Yes</u>

2. Click on the Yes hyperlink

Observations Details	
* Aequired field Sign or Symptom: Fever	
* Observation Date:	2020 / 06 / 17 III yyyy mm dd
Observation:	
Observation Value:	Unit:
* Observed By:	
	Add Clear

- 1. Observation Date Enter date of the observation
- 2. **Observation field** Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
- 3. Observation Value Enter temperature value.
- 4. Unit Enter Celsius
- 5. Observed by select from the drop-down list
- 6. Click the **Add** Button. The observation will be added to the observation list (see below)

	Observation Date	Observation	<u>Value</u> 🔻	<u>Unit</u>	Observed By
0	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

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.

	Provincial health service provider identifier / -	
-	Windows Internet Explorer	<u> </u>
s:	Are you sure you want to leave this page?	
C Date/Type: Mar 02 / Most F sure	\rightarrow Leave this page	der Investigation /
	\rightarrow Stay on this page	Sav
	2	~

The following needs to be completed when closing a COVID-19 Case investigation:

1. Complete the Intervention



From the left-hand navigation, click on Intervention Summary

In	Interventions Aride Interventions														
d P	Row Actions: Add Follow Up													C	create Intervention
			Туре		<u>SubType</u>		Disposition		Start Date	•	End Date		Provider	•	Location
	< ·	1	Isolation		Isolation		In progress		2020 Jun 1		2020 Jun 15		-		Halifax PHO

1. Click on the isolation intervention of the intervention that has a disposition of "In progress"





	Intervention Details			☆ Hide Intervention Details
	* Required field			
	Encounter Group:	se Invest	igation	
1	* Intervention Type:	Completed Deceased V	* Intervention Sub Type:	Isolation 🗸
	Intervention Disposition:	In progress		
	* Outcome:	Lost fo follow-up Pending Refused	G₂	
	* Start Date:		End Date:	



- 2. Intervention Type select from the drop-down list
 - a. Completed if finished required isolation
 - b. Deceased client died before completing isolation
 - c. Lost to follow up -client is lost to follow up
- 3. Click the Save button (right hand portions of screen, top or bottom)

2. Add the final Outcome



From the left-hand navigation bar, click on Outcome

Note: there can be multiple outcomes.





Outcome History	
Outcome:	2 Outcome Date: / / / III / IIII yyyy mm dd 3 Add Outcome Clear
Reason for Deletion:	Delete
Outcome	Outcome Date

- 1. Outcome Select the outcome from the drop-down list
- 2. Outcome Date Enter the outcome date. For daily monitoring entry enter the call date
- 3. Click the Add Outcome button to add the outcome to the outcome table

	Outcome	Outcome Date
0	Recovered	2020 Jun 11
Comn	nents	
		~
		(4000 characters) Add
		(1000 citatacicis)
Date	Comments	Recorded By
		1 Save Reset

1. Click the **Save** button

Note: All Cases require a final outcome. Choose Recovered if client meets recovered criteria.





3. Upload letter – Recovery or Lost to Follow Up (if the investigation was a case. Not applicable for a contact investigation)



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

Search Docur	nent Folders - E	asic					☆ Hide Search			
Enter Keywo Search Documents	Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.									
by keyword:						Search Retrieve	Clear			
Document Lis	ŧ						A Hide Document List			
Row Actions:	Delete	<u>Size[KB]</u>	▼ <u>Түре</u> ▼	Posted By	Posted On	Description	1 Add New Status			

1. Click the Add New button

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





1. Click the **Browse** button to search for the document you are uploading. The document name will appear in the file name field.

* File name:	Browse	Upload File
File uploaded: Recoovery Letter_1111	1111_20200410	6.docx

- 2. Click the Upload File button. You will see that the file is uploaded
- 3. **Document Title** enter the document title
- 4. **Description** enter the document description
- 5. Click the Submit button

Document List					☆ Hide D	ocument List
Row Actions: Delete					[Add New
Document Title	▲ <u>Size[KB]</u> ▼	Туре 🔻	Posted By	Posted On 🔻	Description 🔻	Status
Recovery Letter 20020416	1 5.46	PDF	Sampson, Judy	2020 Apr 24	Recovery letter	active

- 1. You can view the letter by clicking on the hyperlinked name in the Type column
- 4. Update the investigation disposition and close the investigation



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





* Required field			
Investigation	Information		
Priority: 1 Disposition: * Status:	Completed, further action not required Entered in error In Province referral Investigation in progress Lost to follow-up Medical Surveillance Out of Province referral Pending	Disposition Date:	2020 / 04 / 02 yyyy mm dd 2020 Apr 2

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

1	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

	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.







1. Click the **OK** button





Adding a Clinical Note



From the left-hand navigation, click on Notes.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent:	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: Clien	nt: Car, Honda	Include Relat	ted Entities: 🗹

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

Investigation ID: 2509	Status:	Disposition: Investigation in progress	Age at time of Investigation: 20 years		
Disease: Unusual/Emerging Disea	PHAC Date/Type: se 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01		
Encounter Date: 2020 Jun 19	Encounter Date: 2020 Jun 19 Communicable Disease Investigation / Intervention Communicable Disease Investigation / Intervention				
Notes			☆ Hide Notes		
Display Notes Fo	Encounter: 2020 Jun 19	Include Related Entit	ies:		

If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.

Recent Work	Recent Work:
- Search	Recent WOR.
Search Investigations	1. Client: Contact. Case June (Client ID: 5829)
Search Lab	- Investigation: Unusual/Emerging Disease

From the left-hand navigation, click on Recent Work and click on the Investigation hyperlink.





isplay Notes For	Client:	smith, jody	r		~	nclude Related E	ntities: 🗹				
Subject Line:						Status:				~	
Workgroup for Author:					~	Workgroup for Transcriber:					~
Author:					~	Transcriber:					~
Note Type:					~						
Note Date:	From:	уууу	/ 	/ dd		To:	уууу	/ mm	/ dd		
										Display	Clear
reculte found					To view a N	ote below, click on	its Note Da	te The Sei	reflects the	records you ha	ve access to

1. Click on **Author Note** button

1	Note is being cr	eated for Investigation ID 2503
	Note ID: - * Required Field	Status: -
⊢┛	Author:	Sampson, Judy Role: NS_IMMS_IOM_NURSE
2	Subject:	
3	Note Date:	2020 / 06 / 16 . Note Time: 16 . ADT yyyy mm dd . hh mm
Ц	Note Type:	✓
┍─┘	Common Phrases:	Add to Note
4	Note:	
Т	T Normal 🗸	T Arial \checkmark 7pt \checkmark b <i>i</i> <u>u</u> $≧$ $≧$ $≦$ $≦$ $≦$ $≦$ $≦$
	I	5
		Save as Draft 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