COVID-19 Case Management

Intermittent Monitoring

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

2. Client 1 - Case – Intermittent Monitoring June 10

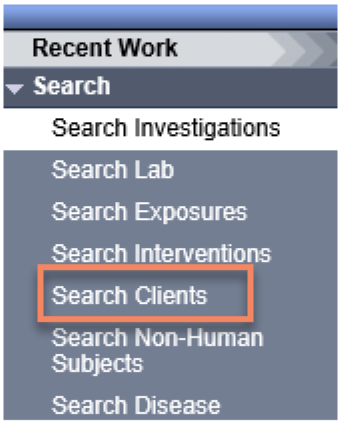
3. Client 2 - Case- Intermittent Monitoring June 10

4. Client 3 – Contact Case – Intermittent Monitoring – June 12

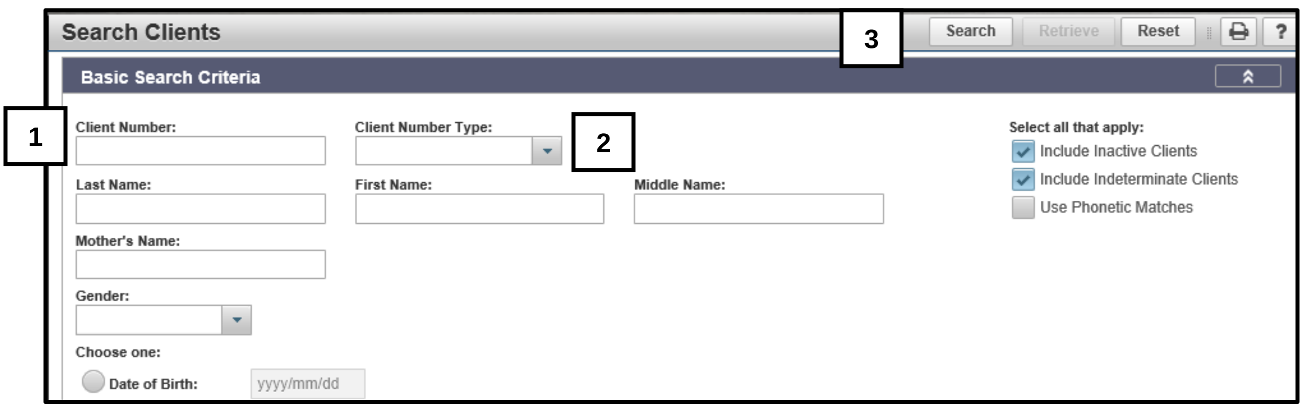
5. Client 3 – Contact Case – Intermittent Monitoring – June 21

6. Client 1 – Case – Intermittent Monitoring – June 13

Search for a Client



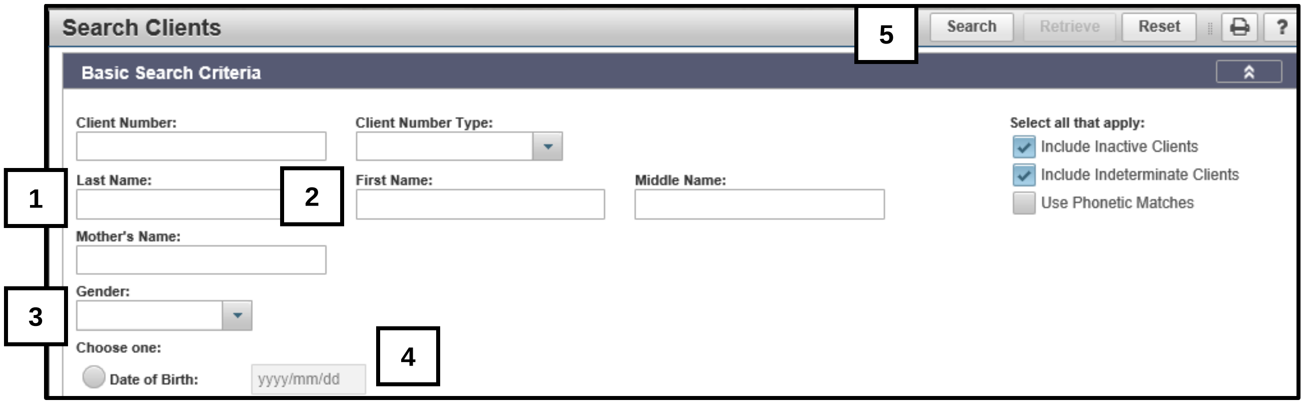
From the left-hand navigation bar, click on **Search Clients**



Health Card Number is the preferred search for a client

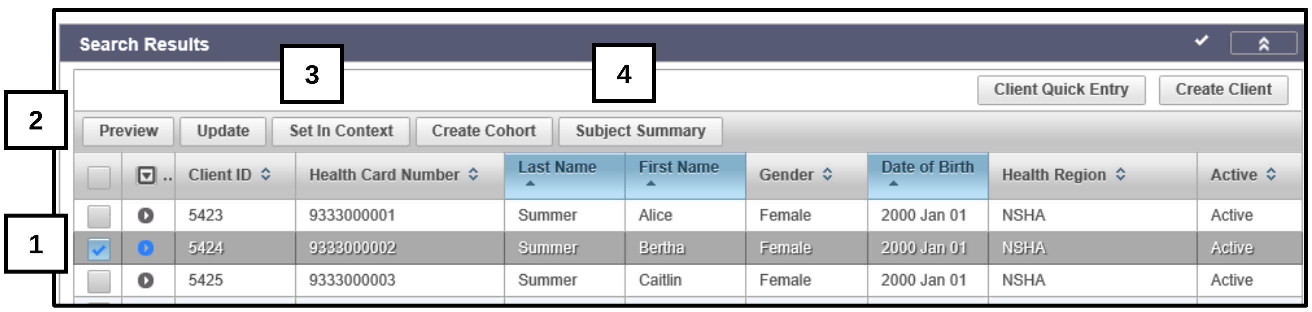
1. **Client Number** - Enter the client's Health Card Number. You need to enter all 10 digits
2. **Client Number Type** - Select **Health Card Number** from the drop down list
3. Click on the **Search** button

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



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

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



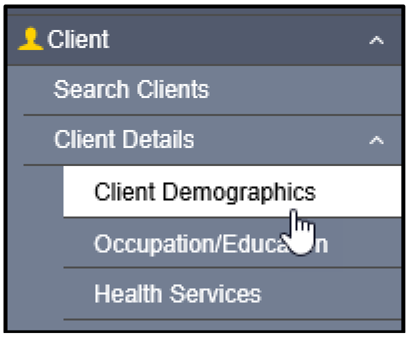
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

If no search results are returned:

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

Update Client Telephone Number, Create a Temporary Address & Email Address

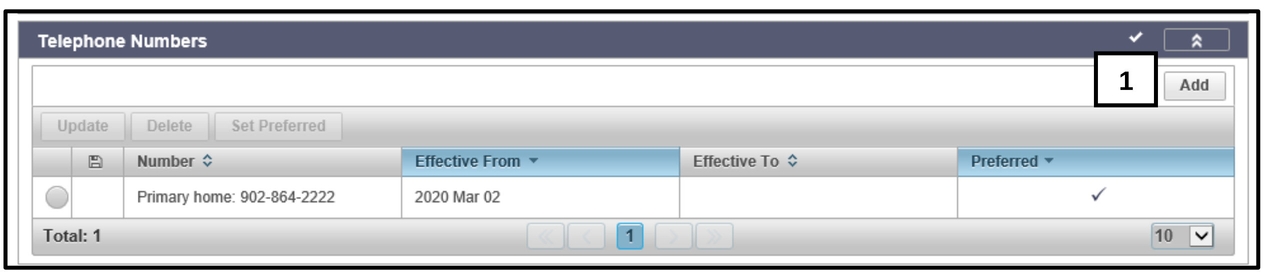
Note: The nightly Provincial Client Registry load updates the **Primary Home** and **Workplace** telephone numbers & the **Postal Address** and **Primary Home** addresses in Panorama.



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

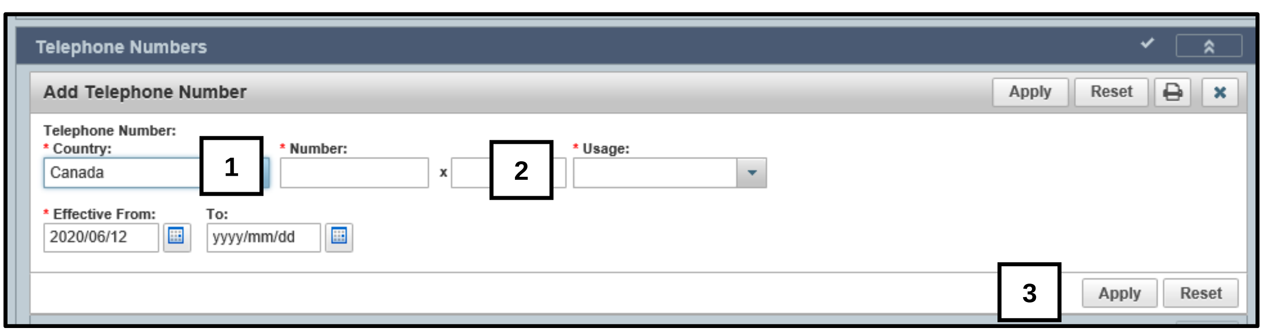
Telephone Number

View the client's telephone numbers.



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

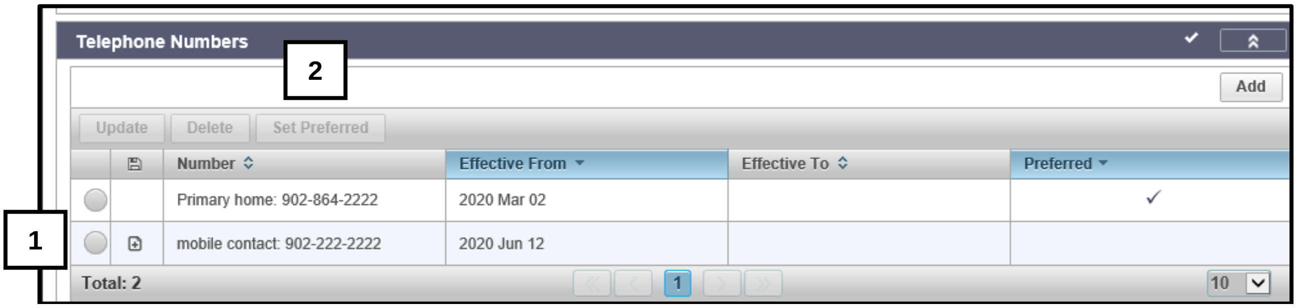
1. Click on the **Add** button



1. **Number** – enter the telephone number
2. **Usage** – select mobile contact from the drop-down list

3. Click on the **Apply** button

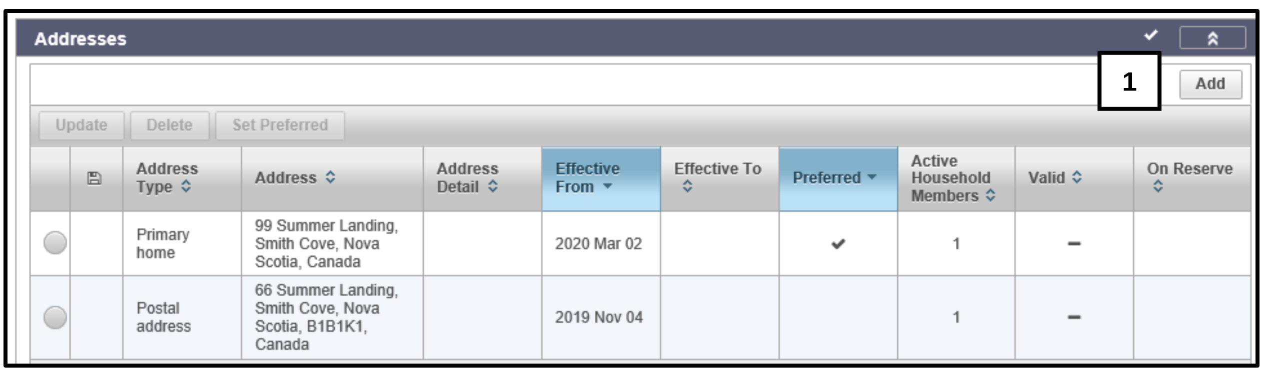
You need to set the mobile contact to preferred.



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

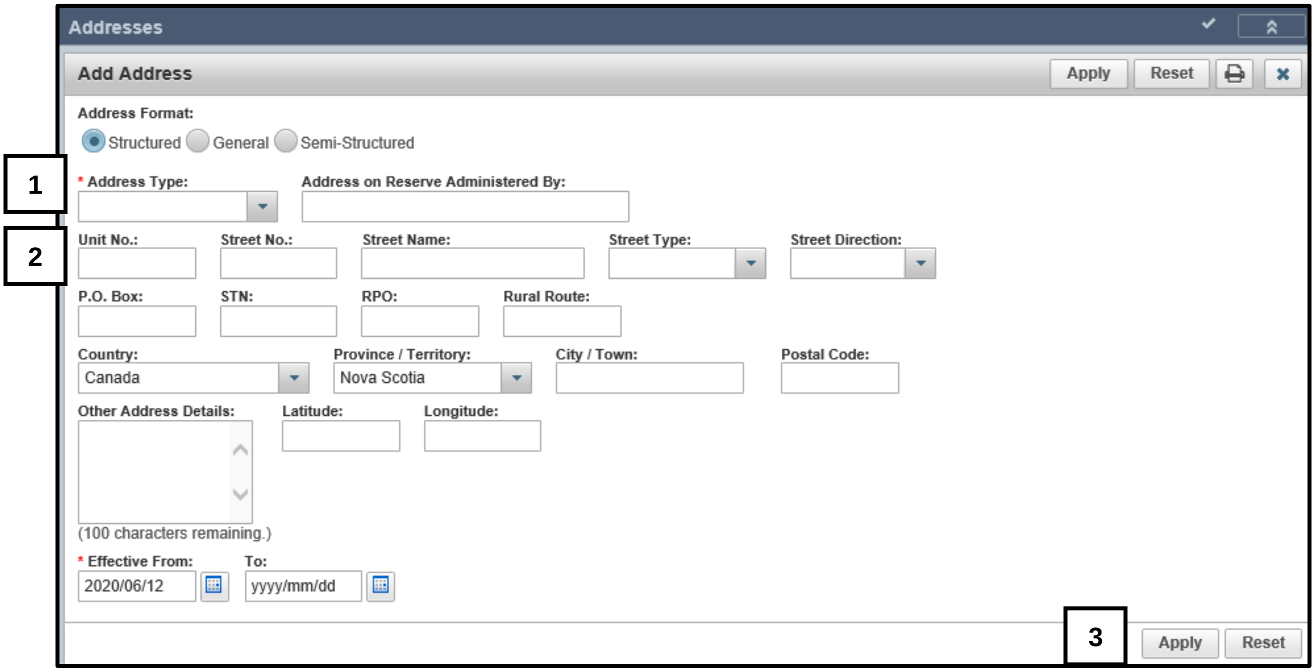
Address

View the client's address(es)



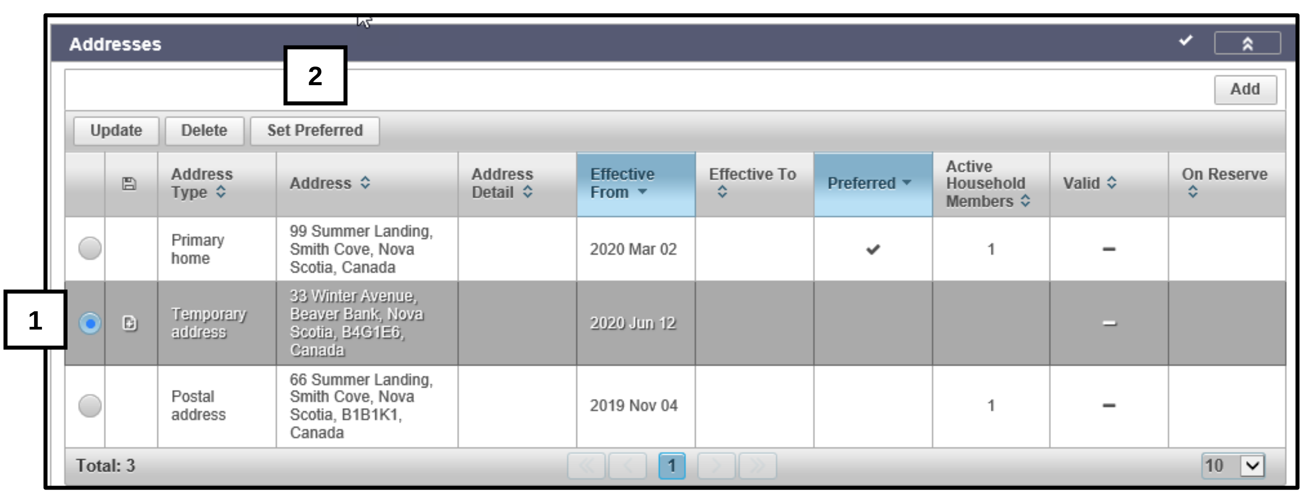
If the client's address in Panorama does not contain a postal code or the address is different than the address the client provided, you will need to add the address.

1. Click on the **Add** button



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

You need to set the temporary address to preferred.

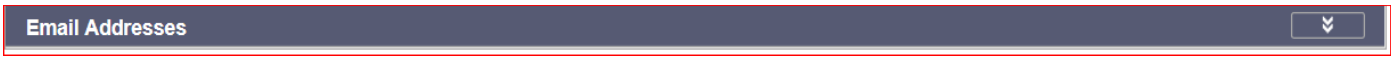


1. Click on the radio button for temporary address
2. Click on the **Set Preferred** button
3. Click on the **Save** button (top right-hand area of the screen)

Entering Email Address

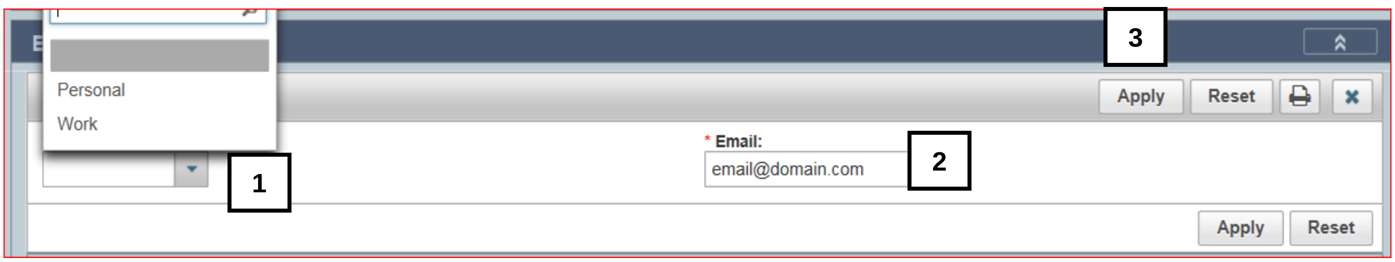
Email Address

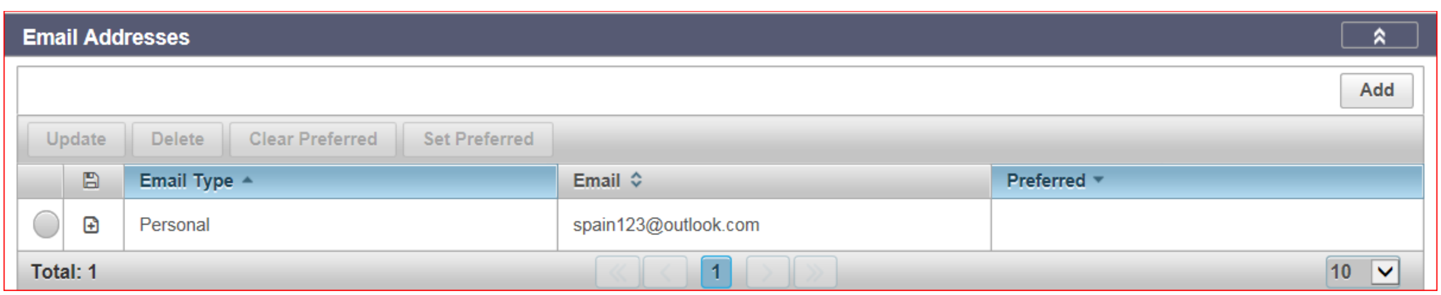
1. Expand the email tab by clicking on the down arrows



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.

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

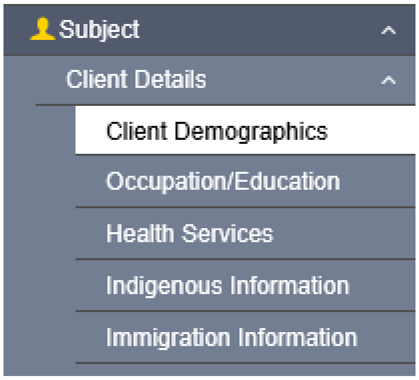




Click **Save** at the top of the page.

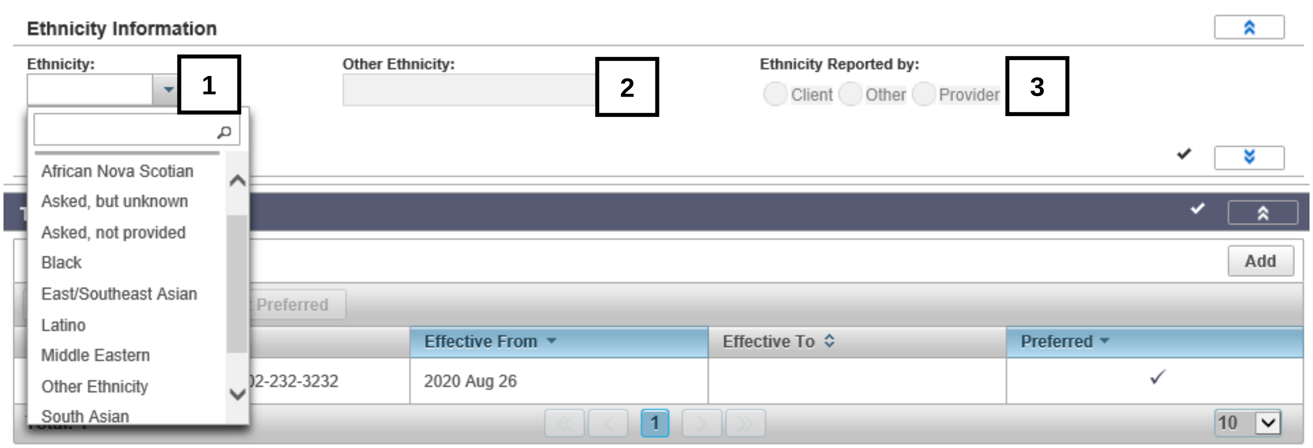
Entering Ethnicity Information

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.**

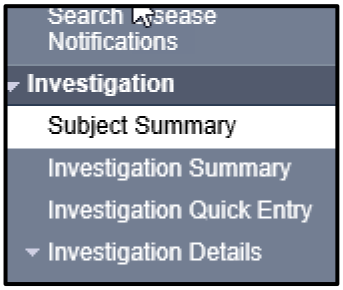
1. Expand the Ethnicity Information tab by clicking on the down arrows.



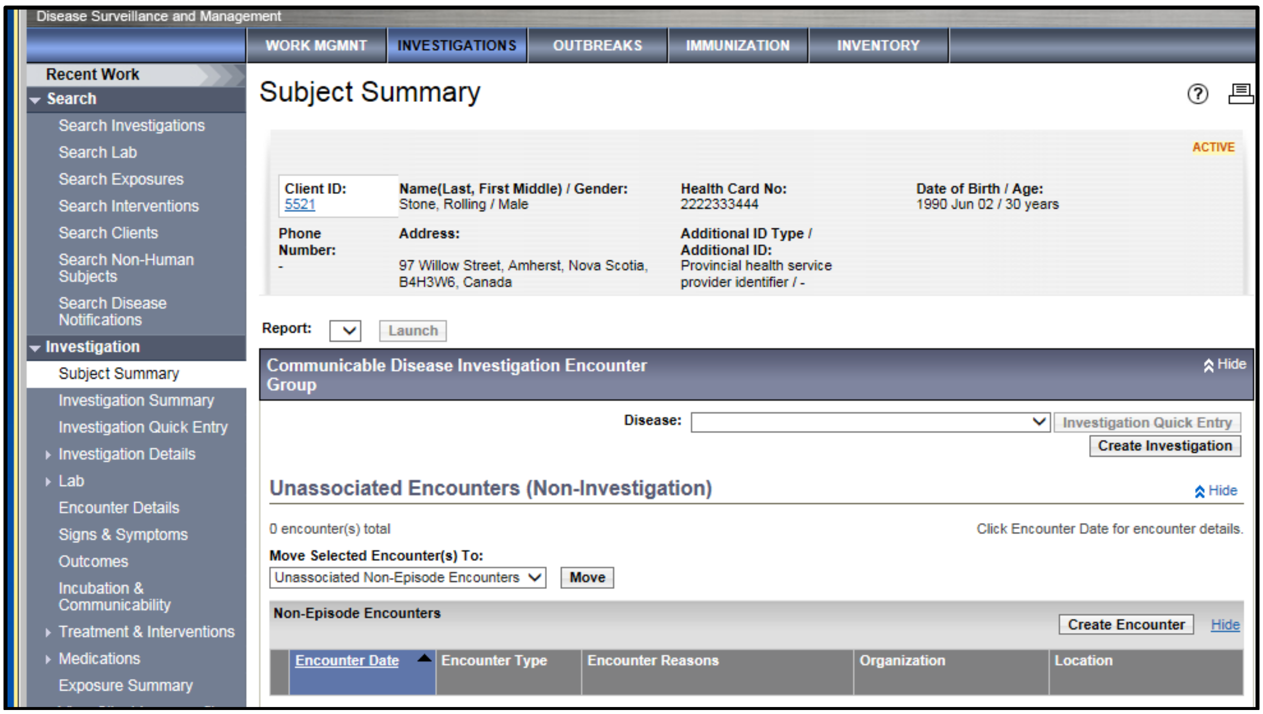
1. Select the Ethnicity value from the drop-down list. If the client identifies with an Ethnicity that is not in the list, choose “Other Ethnicity” and go to step 2.
2. If “Other Ethnicity” is chosen in step 1, type in the Ethnicity the client identifies with.
3. Select who provided the Ethnicity information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

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

Create a Covid-19 Investigation

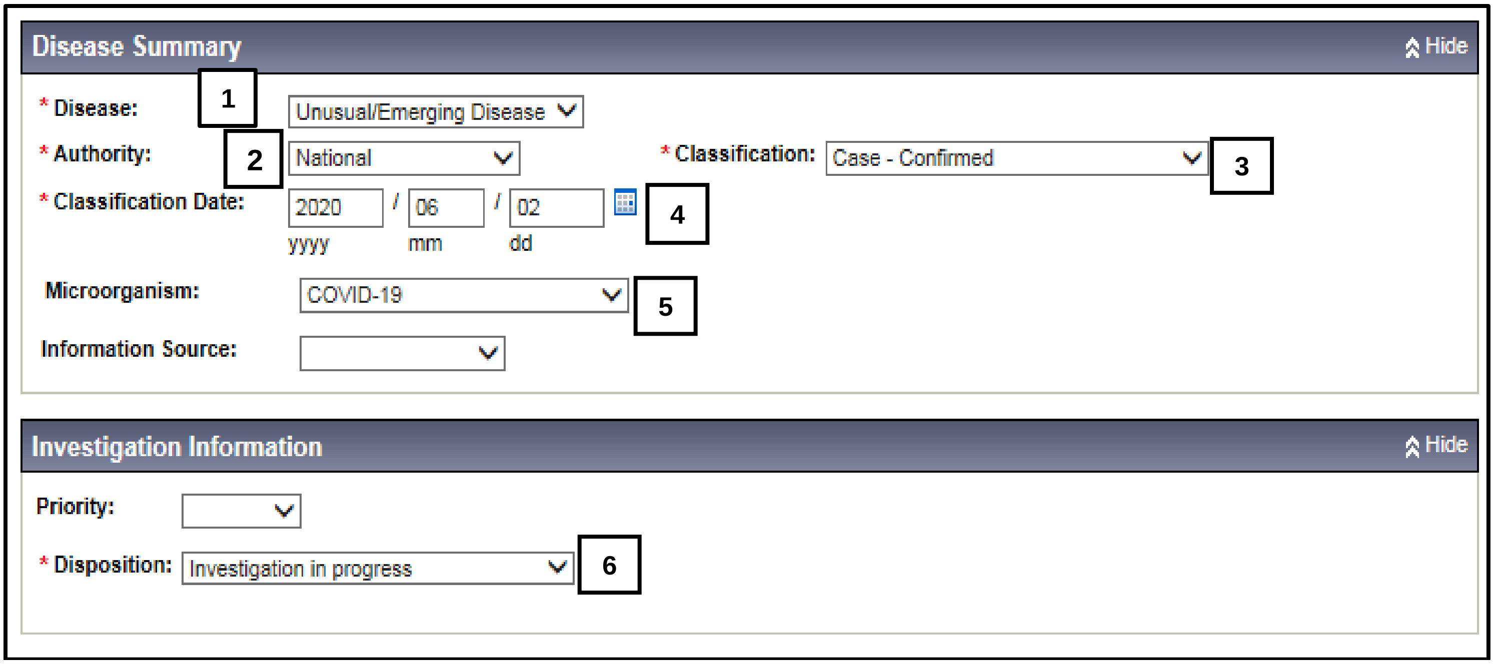


From the left-hand navigation, click on **Subject Summary**



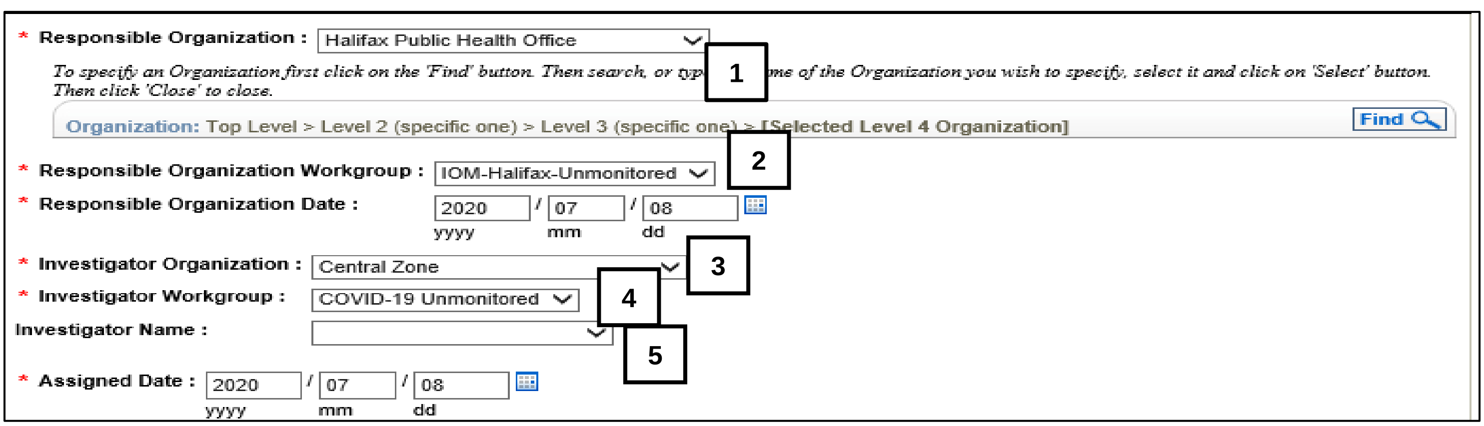
Confirm that there is not another COVID-19 investigation.

Click **Create Investigation** under Communicable Disease Encounter group



Enter the following information:

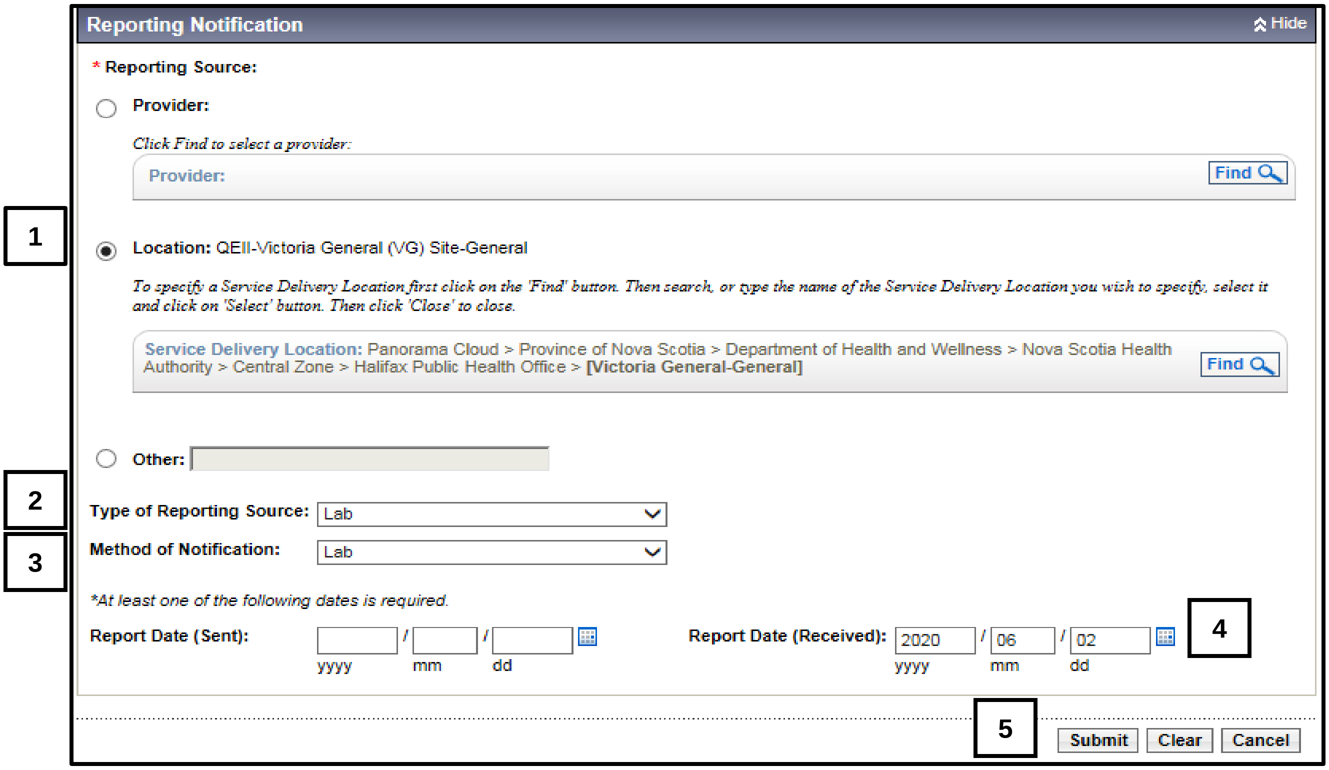
1. **Disease**- select Unusual/Emerging from drop-down list
2. **Authority**- select National from drop-down list
3. **Classification -** select the classification which fits current case definition (PUI, Probable, Confirmed) from drop-down list
4. **Classification Date**- will auto populate to current date
5. **Microorganism**- select COVID-19 from drop-down list
6. **Disposition**- select Investigation in progress from drop-down list



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

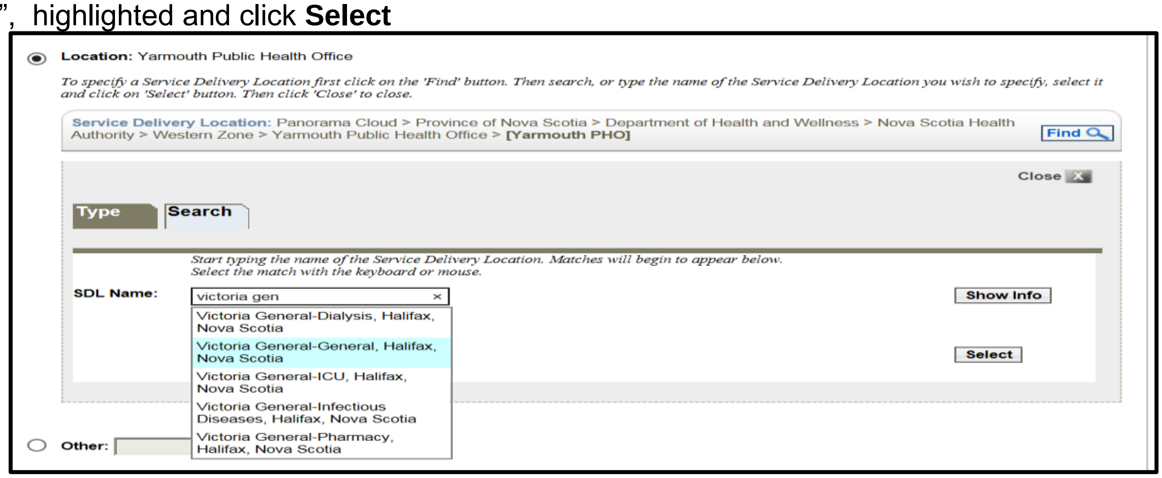
Enter the following information:

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



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**



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**

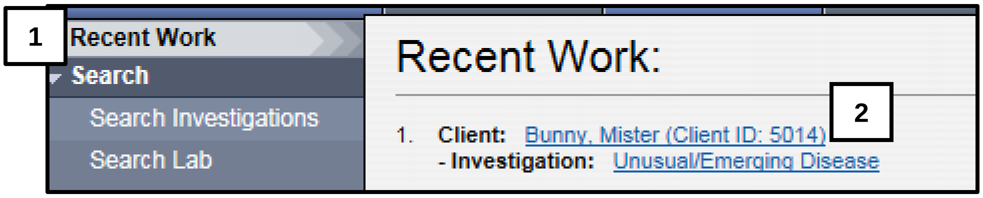
After creating an investigation, you are taken to the **Disease Summary** screen.

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.

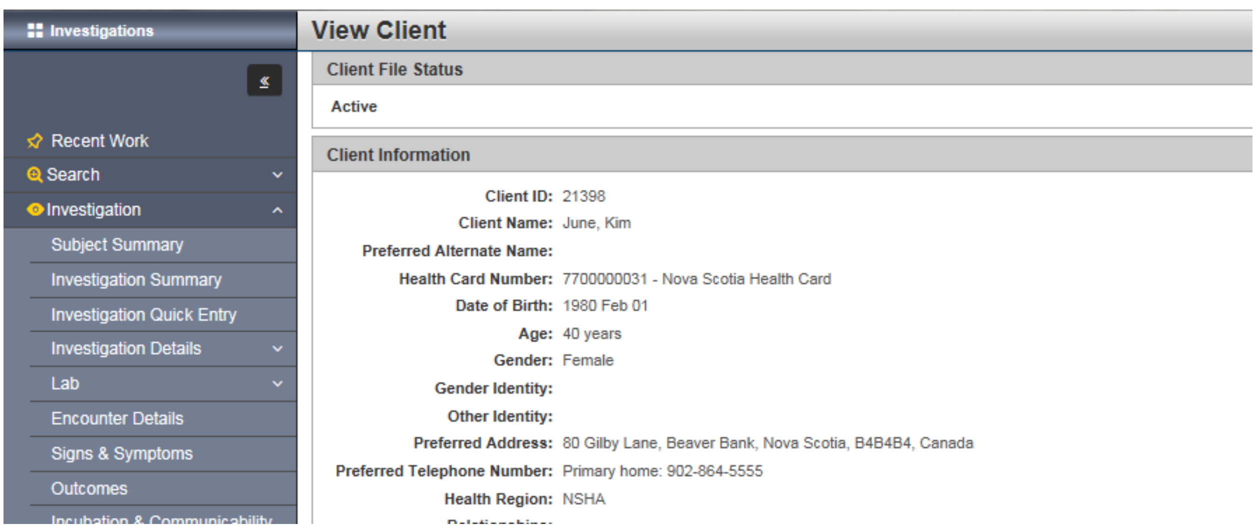
Making a Lab Pertinent to an investigation

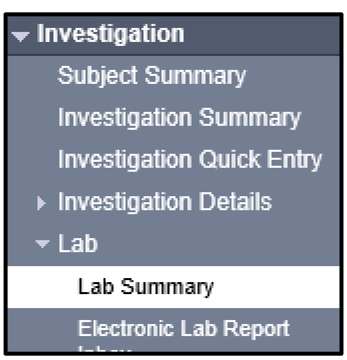
When a lab has been processed from the Electronic Lab Report Inbox, it sits at the **Subject Summary** level until it is attached to an Investigation by an Investigator.

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

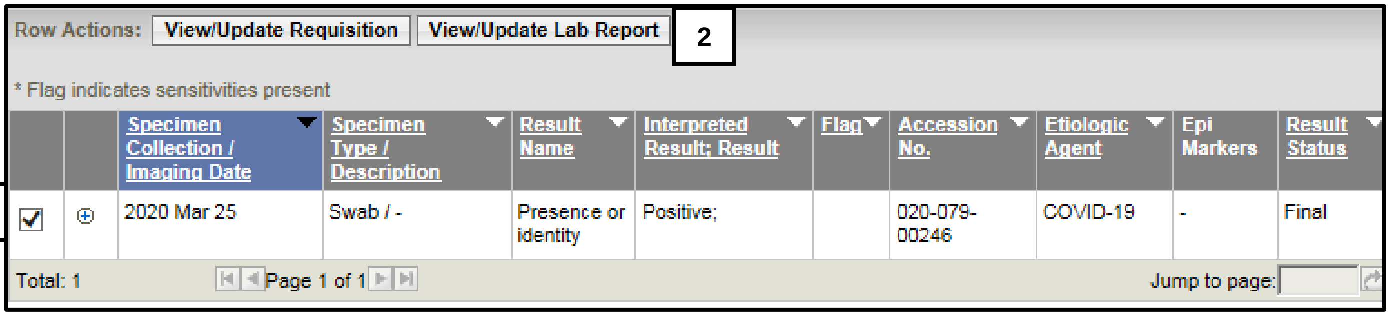


1. Go to Recent Work
2. Click on the client (not the investigation) hyperlink.
3. This takes you to the view client page.



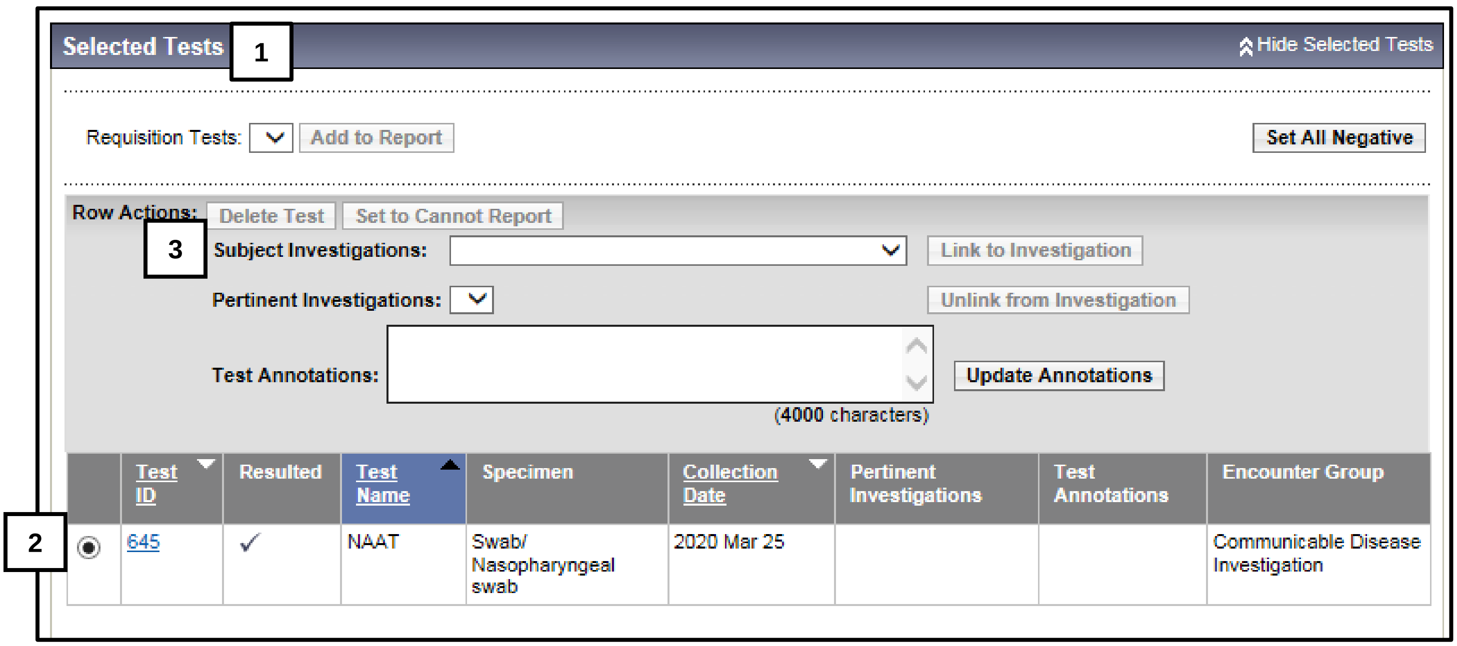


From the left-hand navigation, click on **Lab Summary**



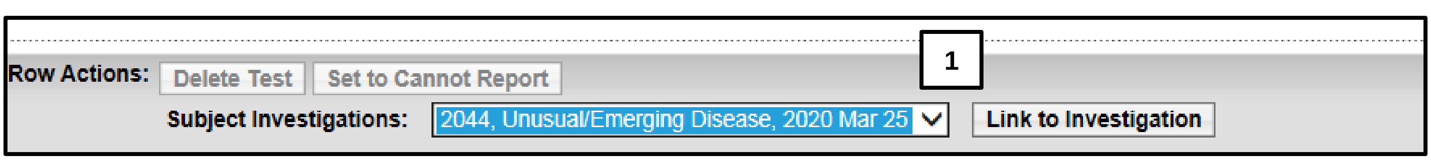
On the Lab Summary screen, scroll down to the summary table

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

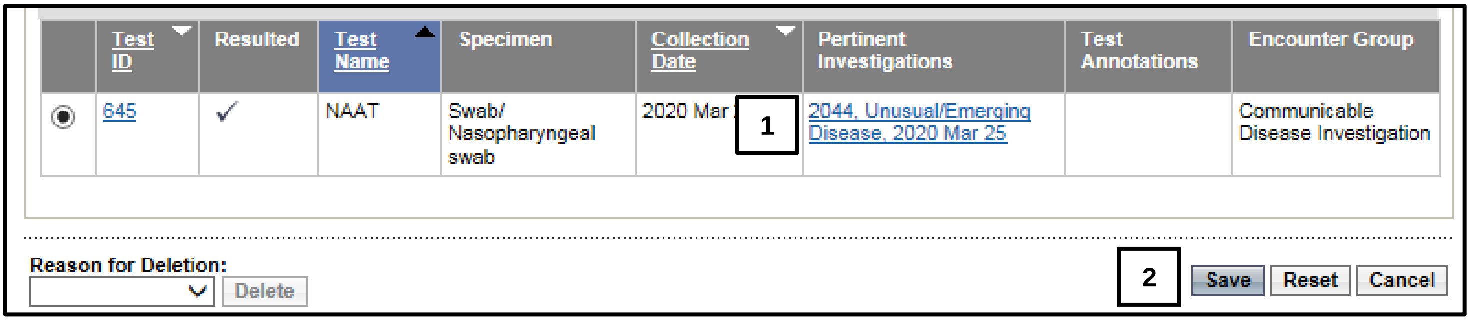


On the Human Lab Report Screen

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



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

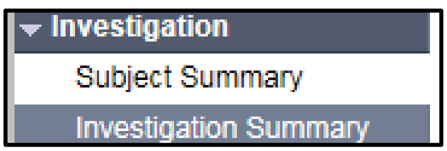


1. The lab is now pertinent to the investigation
2. Click the **Save** button

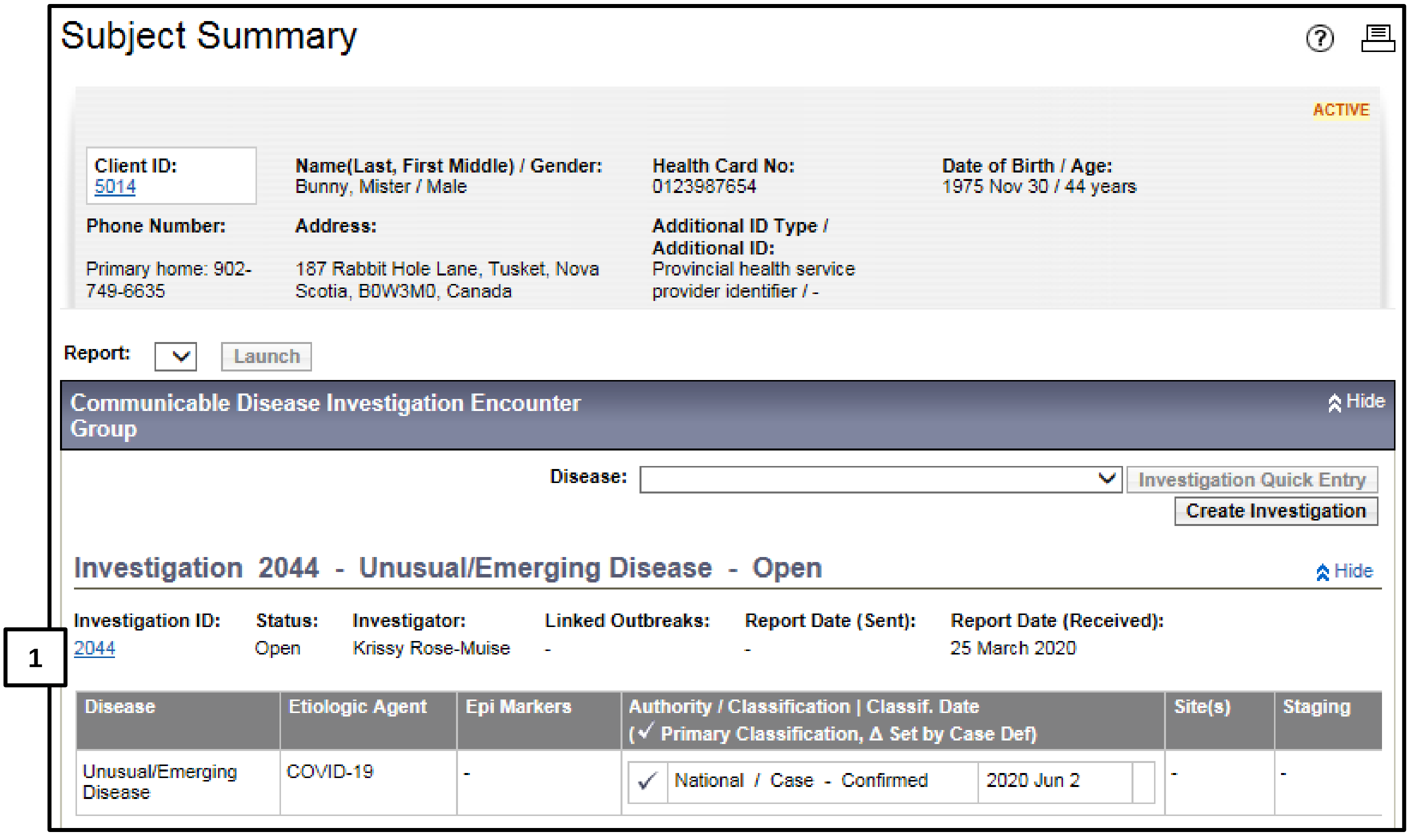
Note:

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

To put the investigation into context:

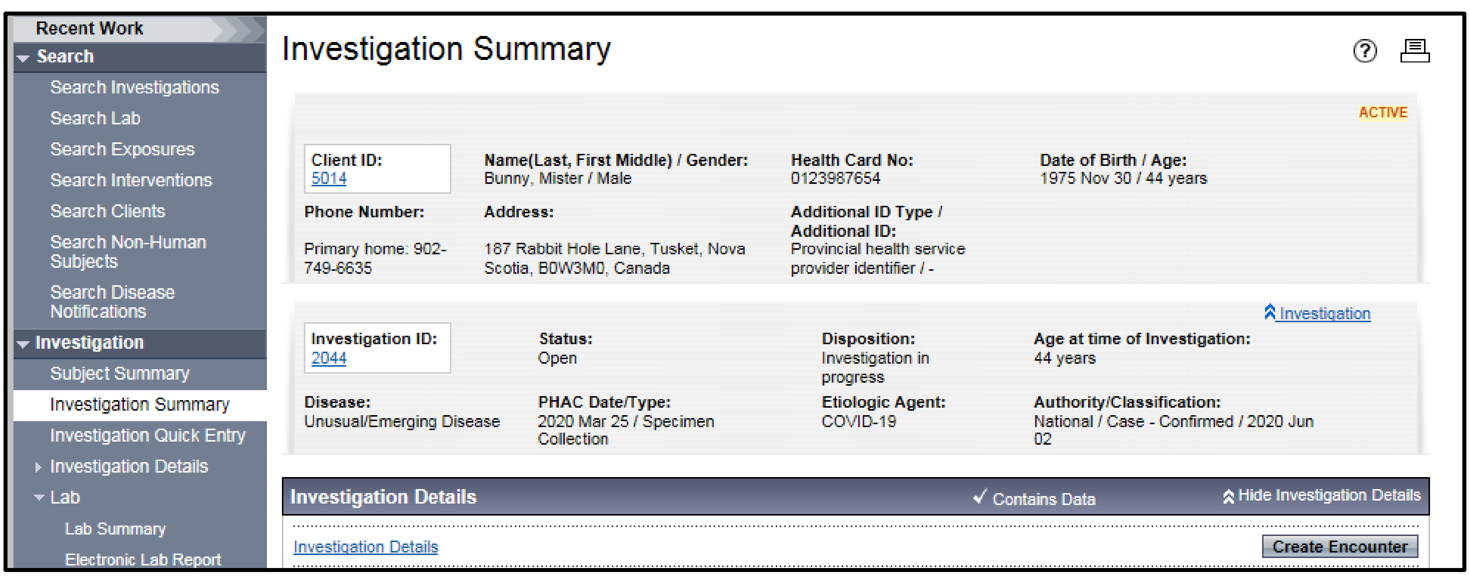


From the Left-Hand navigation, click on **Subject Summary**.

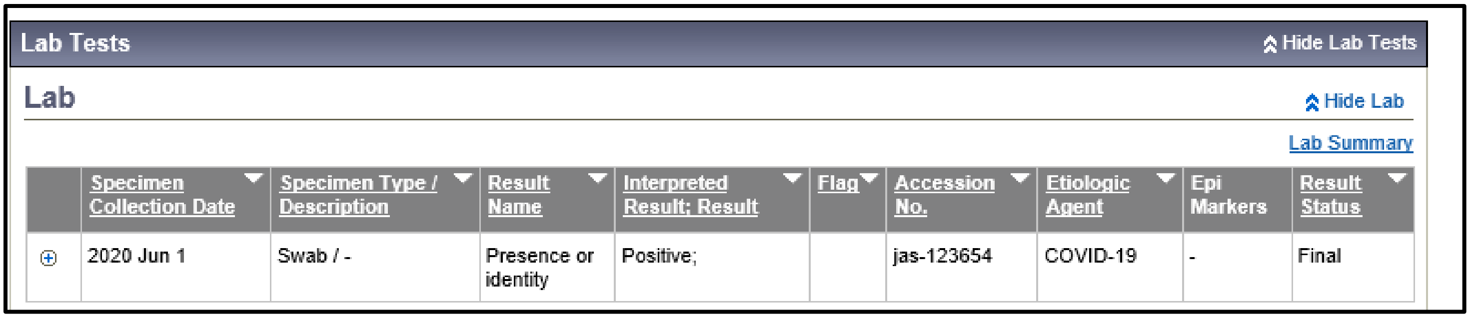


1. Click the Hyperlink associated to the current investigation

Note: The Investigation is now back in Context:



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

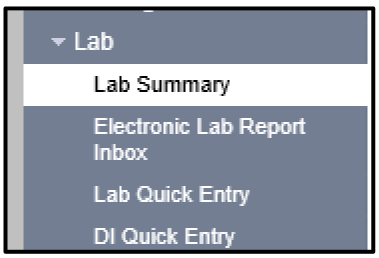

Lab Tests — Hide Lab Tests

Lab — Hide Lab

Lab Summary

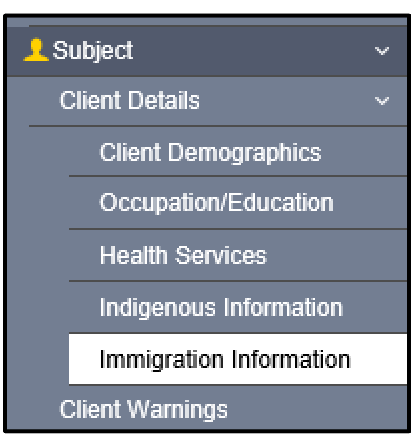
	Specimen Collection Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status
⊕	2020 Jun 1	Swab / -	Presence or identity	Positive;		jas-123654	COVID-19	-	Final

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

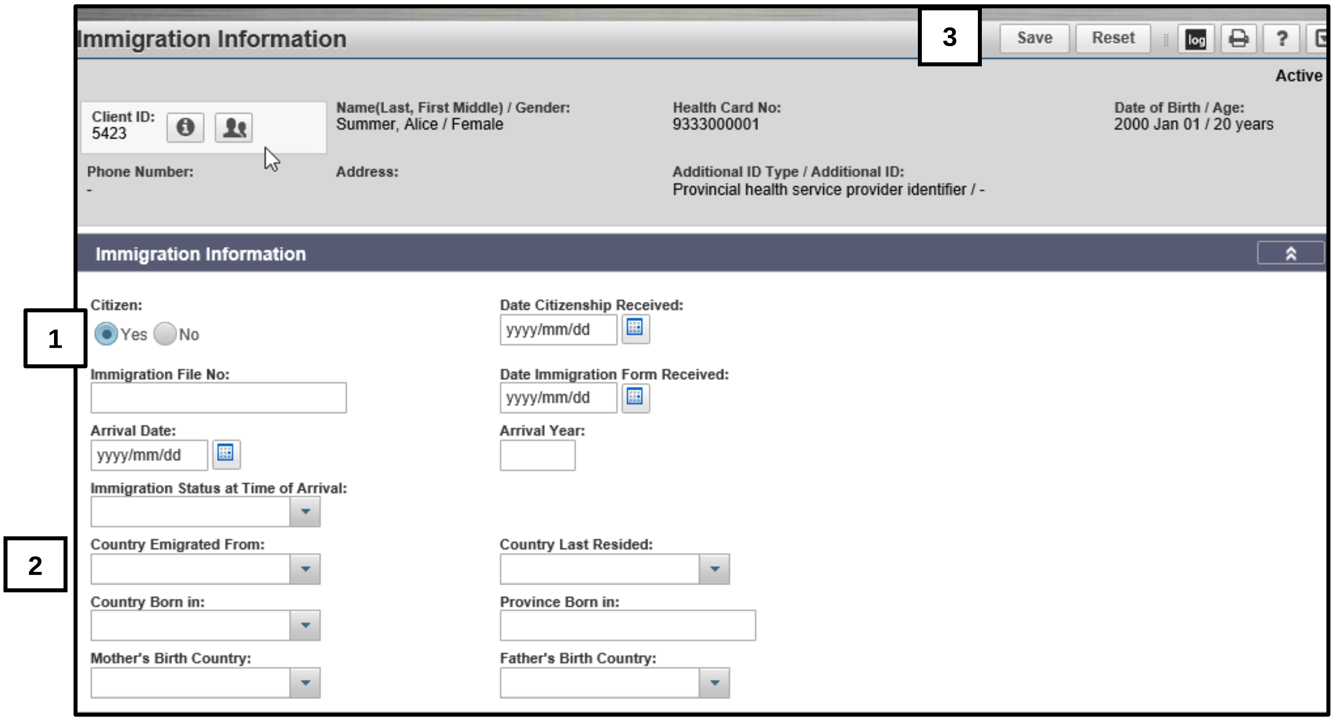


From the left-hand navigation, click on **Lab Summary**

Updating Immigration Information



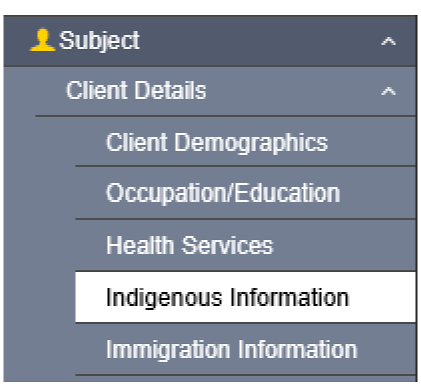
From the left-hand navigation, click on Immigration Information



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

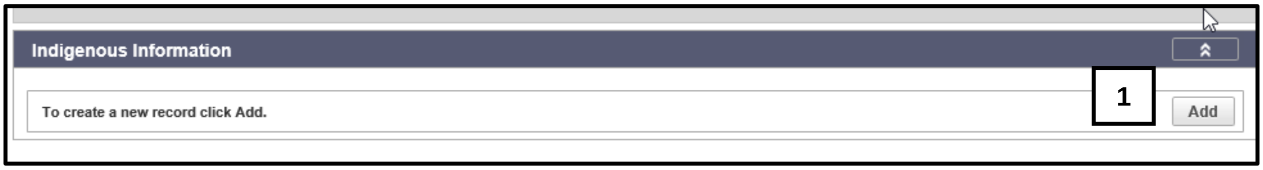
Adding Indigenous Status

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

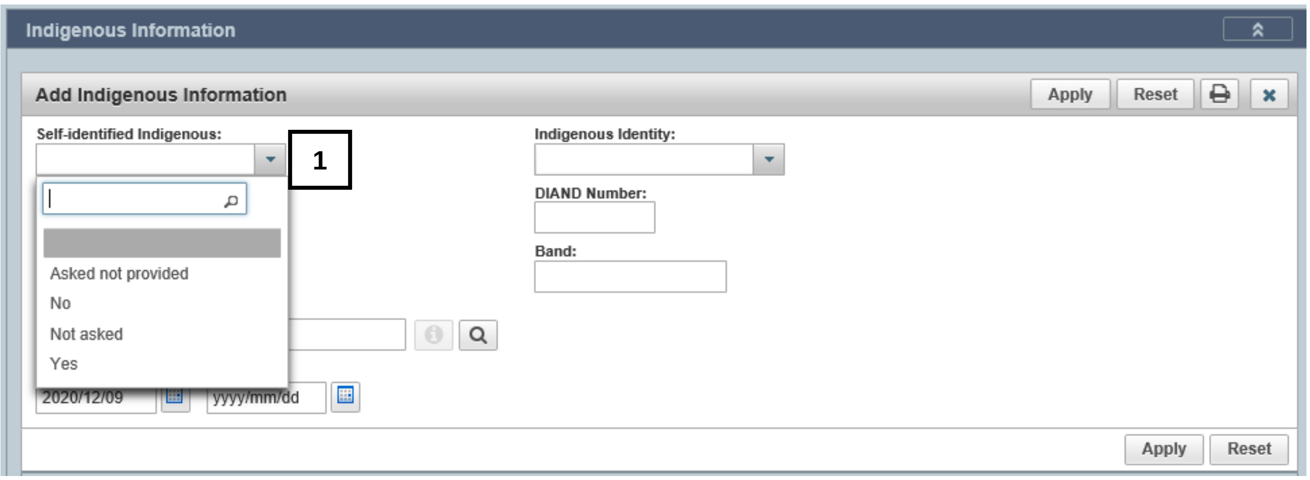


From the left-hand navigation, click on **Indigenous Information.**

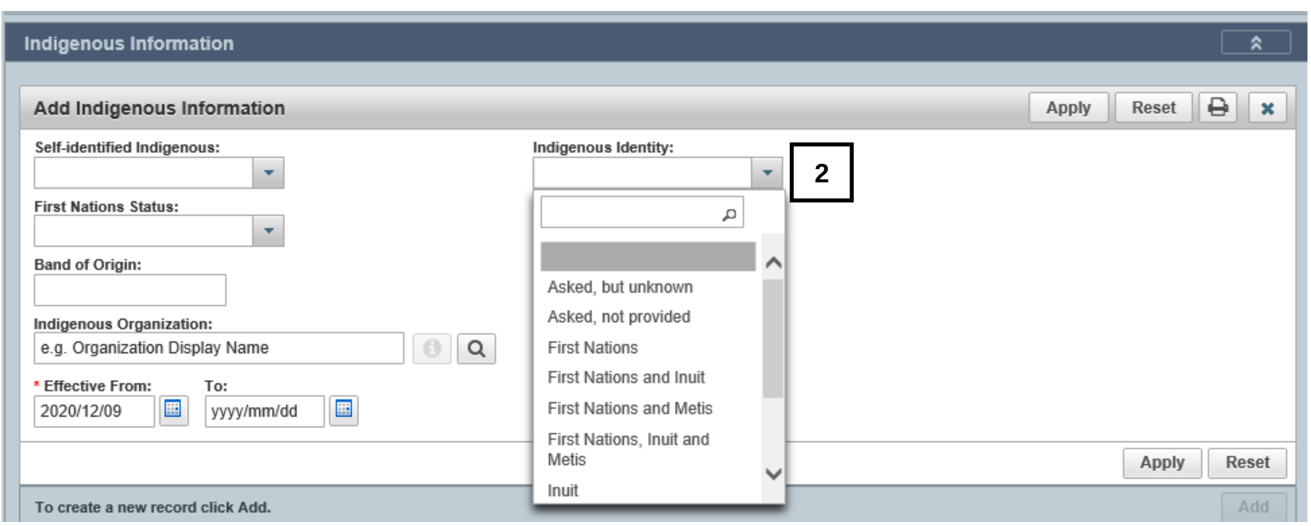
If the client does not have Indigenous Information in Panorama, you will need to add it.



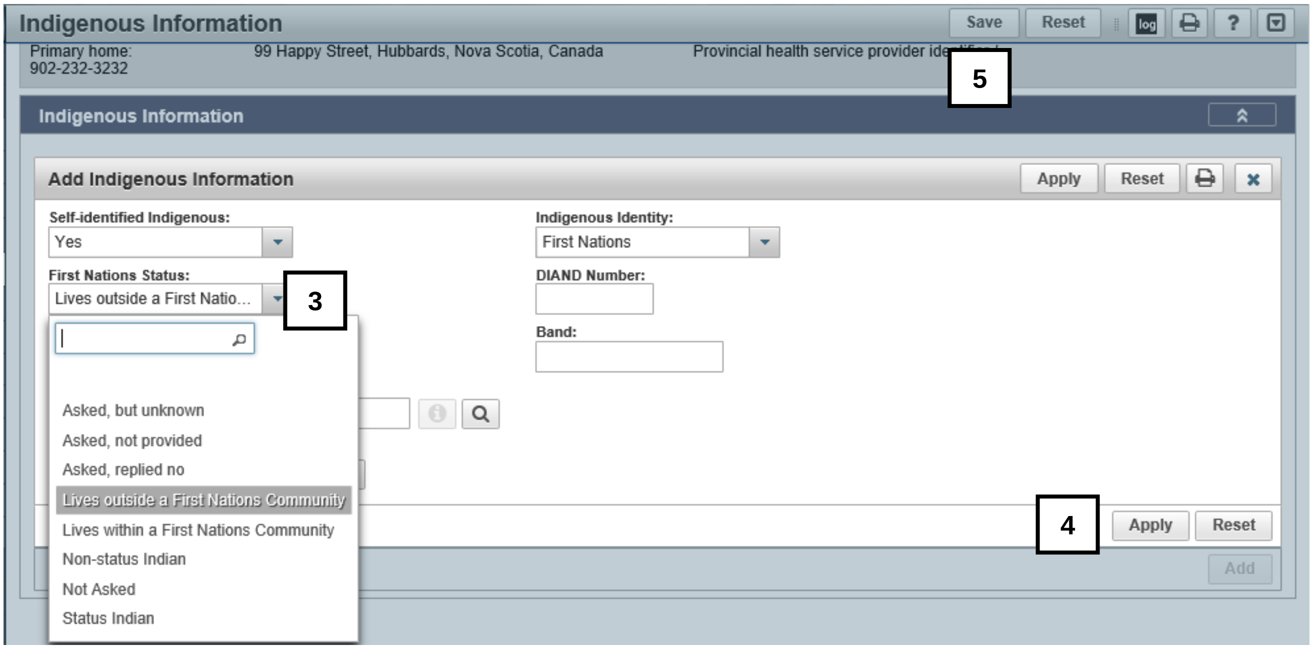
2. Click on the **Add** button



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



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



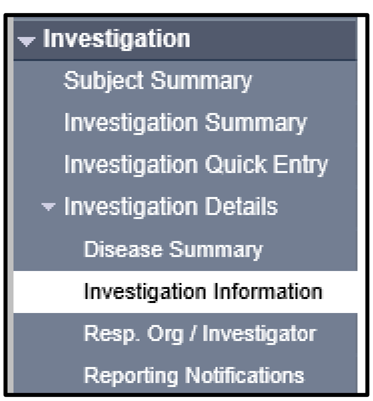
3. Select the First Nations Status (if applicable) from the drop-down list.
   If the client has answered "No" to Self-identified Indigenous but lives in a First Nations Community, you would identify here. If client says "No" to living in First Nations Community, select Lives Outside a First Nations Community.

You do not need to enter information in the other fields

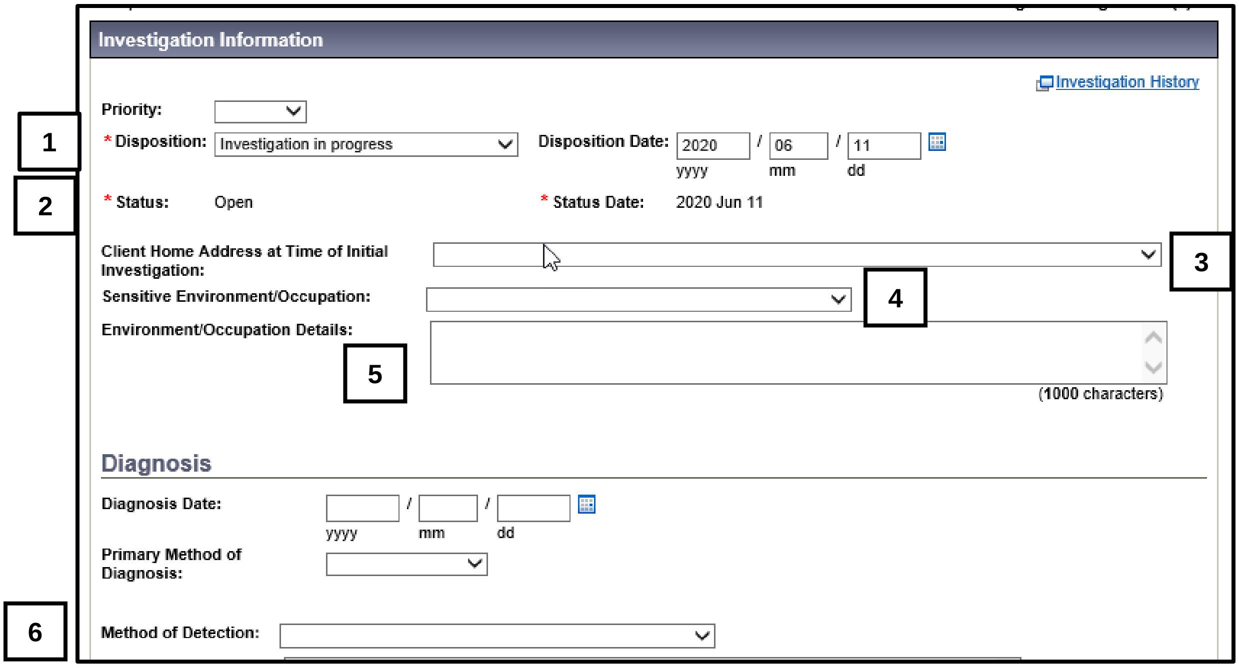
4. Click the **Apply** Button
5. Click the **Save** Button

Completing Investigation Information

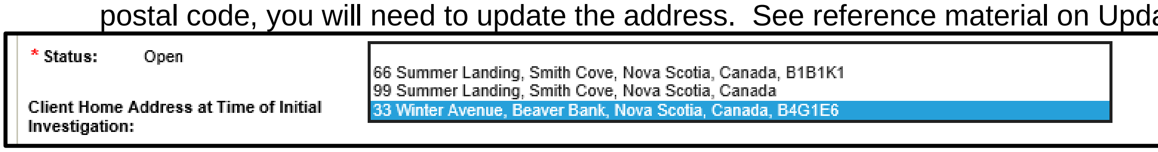
Additional information needs to be entered into Panorama once the investigation has been created and client interviewed.



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

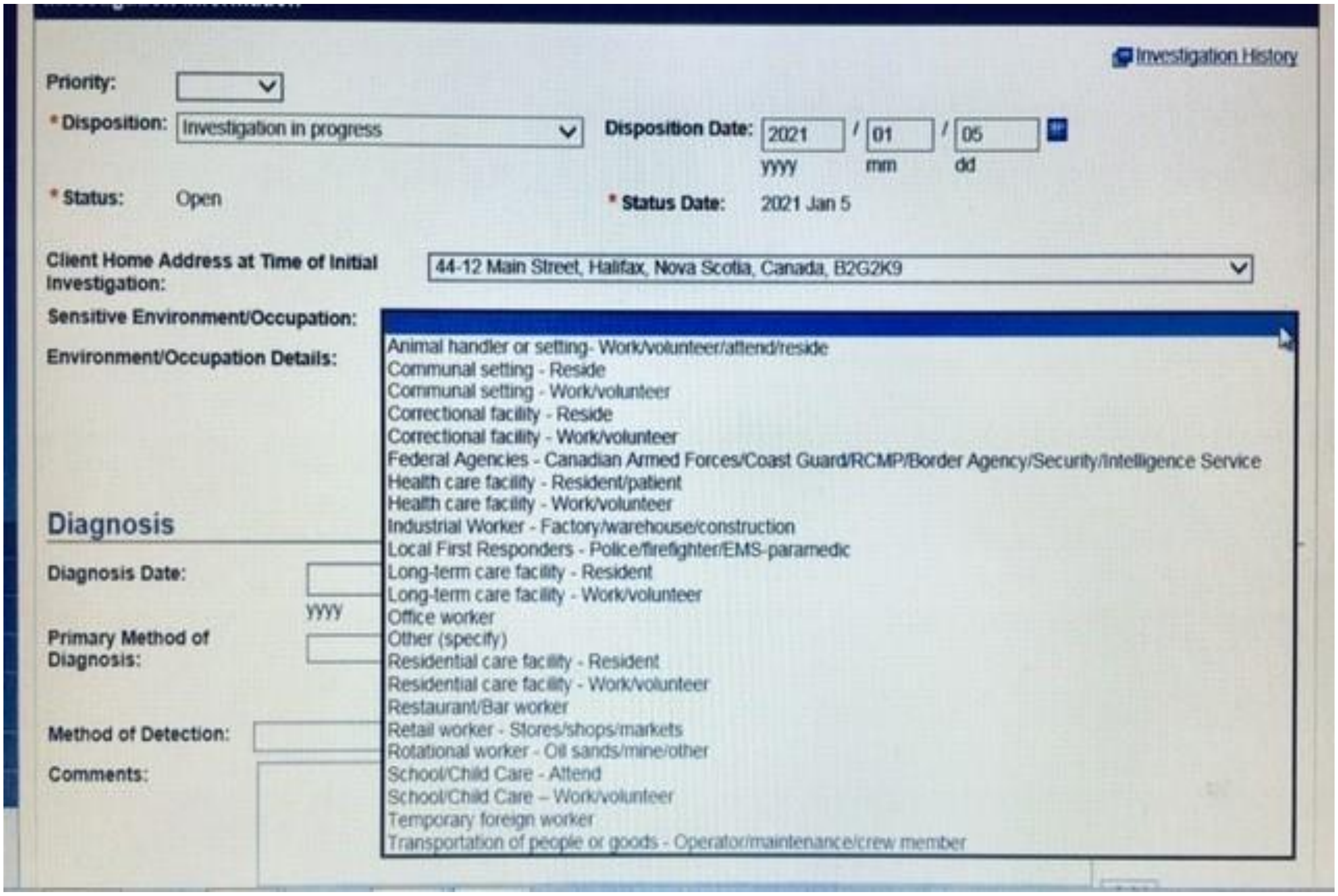


1. **Disposition and Disposition Date** – are auto-populated when the investigation was created
2. **Status and Status Date** – are auto-populated when the investigation was created
3. **Client Home Address at Time of Initial Investigation** – select the client's address which includes the **Postal Code** 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.



4. **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



- **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

5. **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.

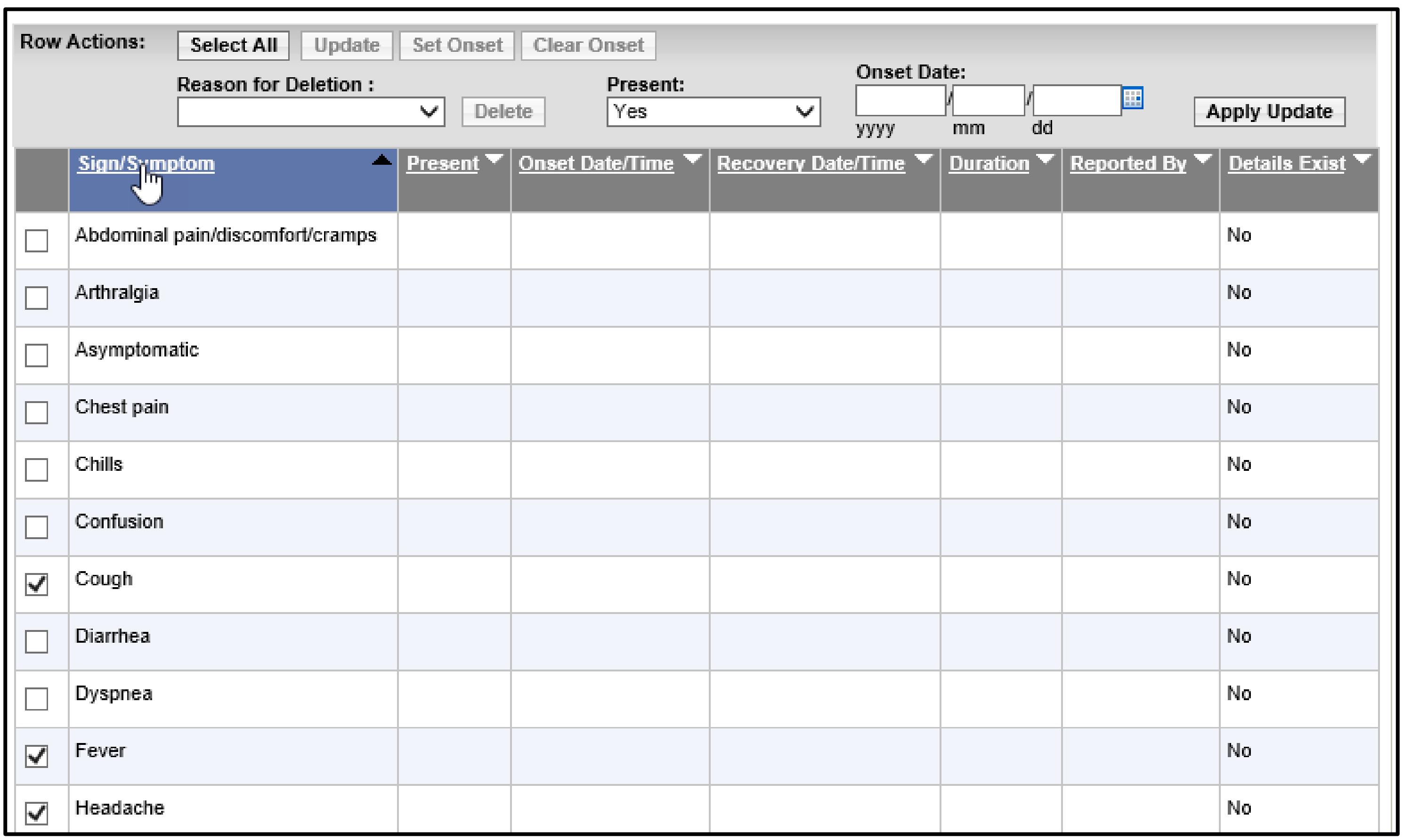
Note: For a CoVid-19 Investigation, **we DO NOT fill out the Diagnosis Date and Primary Method of Diagnosis.**

6. **Method of Detection** – Upcoming configuration updates PENDING. Leave Blank for Now
   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)



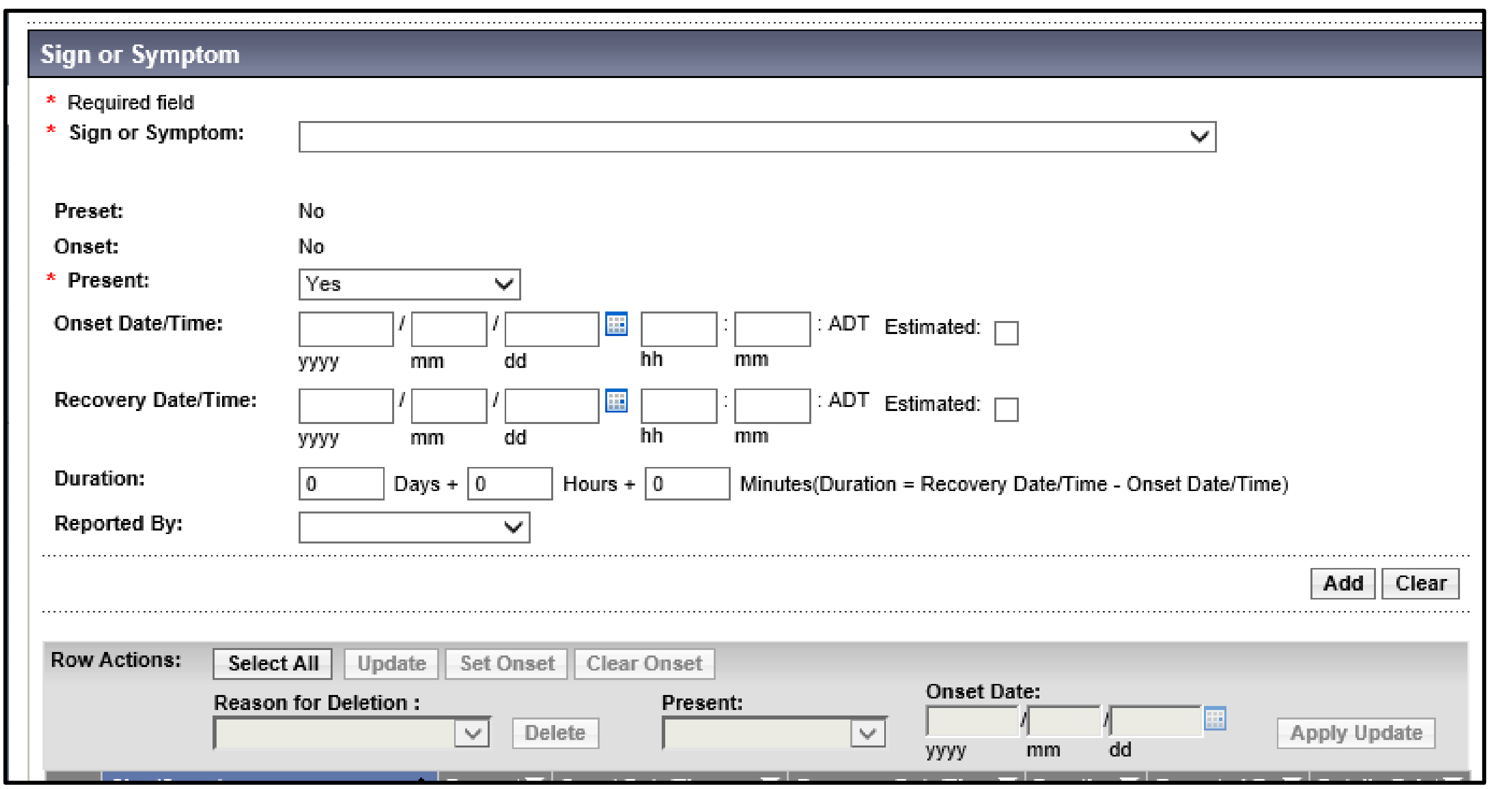
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Abdominal pain/discomfort/cramps						No
☐	Arthralgia						No
☐	Asymptomatic						No
☐	Chest pain						No
☐	Chills						No
☐	Confusion						No
☑	Cough						No
☐	Diarrhea						No
☐	Dyspnea						No
☑	Fever						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)

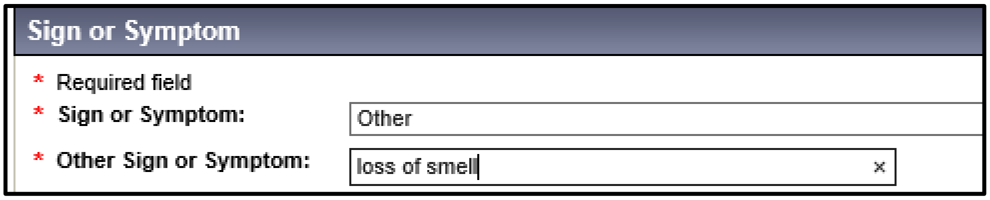
Cough	Yes	2020 Jun 15 00:00 ADT				No
Diarrhea						No
Dyspnea						No
Fever	Yes	2020 Jun 15 00:00 ADT				No
Headache	Yes	2020 Jun 15 00:00 ADT				No

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.



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 updated in the table (see below)

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

U

When client indicates there is no Fever:

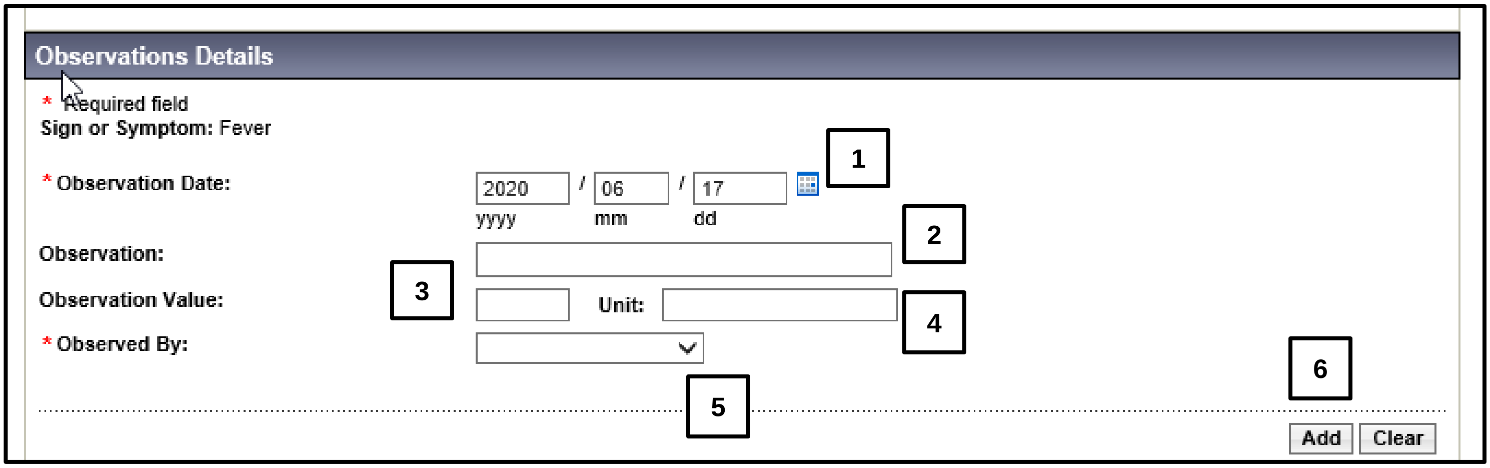
☑	Fever						No

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

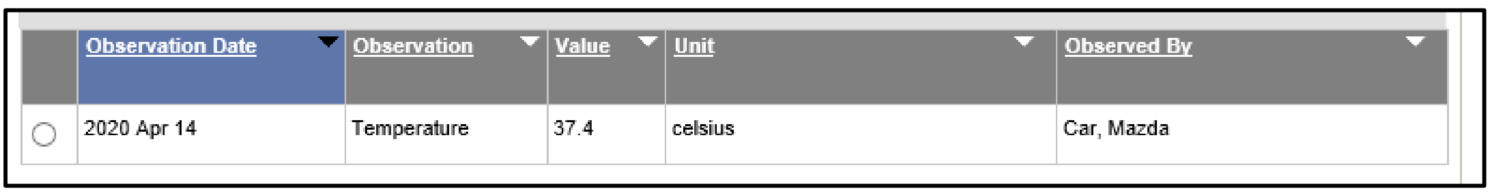
Add the temperature observation

☐	Fever	No					No 1

1. Click on the No hyperlink

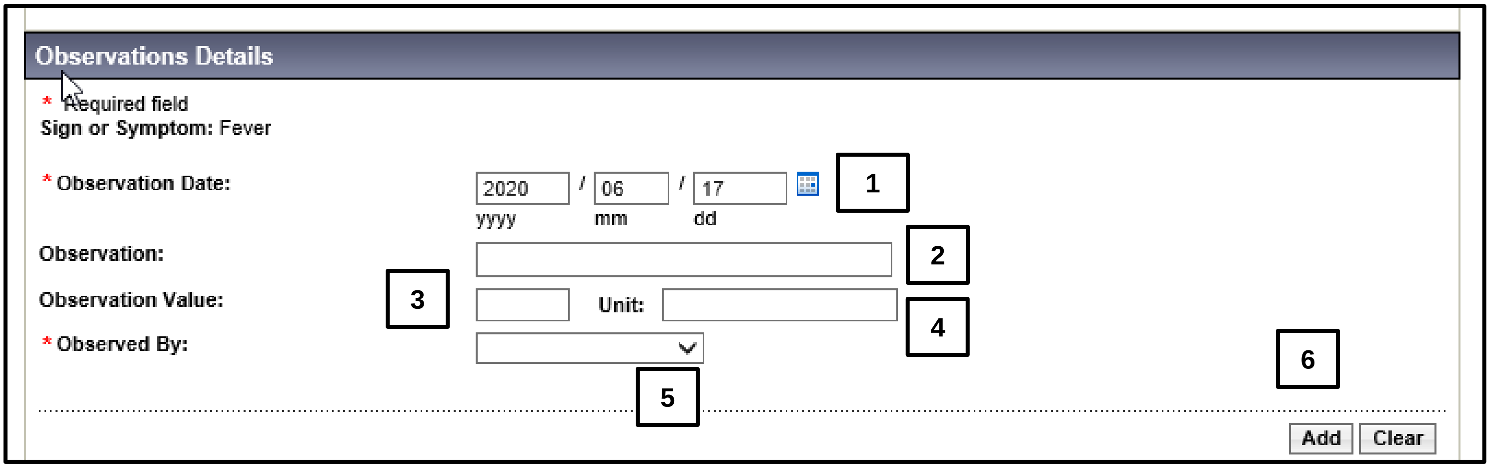


1. **Observation Date** - Enter date of the observation
2. **Observation field** - Enter word Temperature If the client is unable to provide temperature, add Unable to provide temperature, denies feeling feverish or chills.
3. **Observation Value** - Enter temperature value.
4. **Unit** - Enter Celsius
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)



When the client indicates there is a fever:

1. Click on the No hyperlink

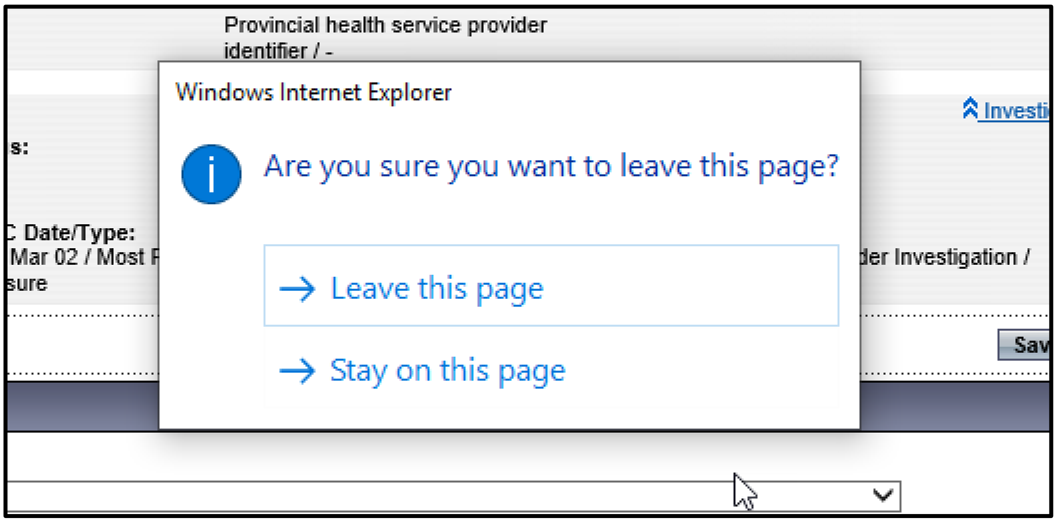


1. **Observation Date** - Enter date of the observation
2. **Observation field** - Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature. I.E.. Unable to provide temperature. Experiencing chills, warmth, and flushed cheeks.
3. **Observation Value** - 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	Value	Unit	Observed By
○	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.



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.

2

Row Actions: Select All | Update | Set Onset | Clear Onset

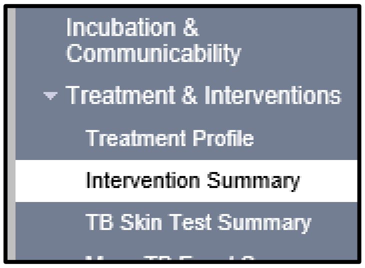
Reason for Deletion : | Delete | Present: | Onset Date: yyyy / mm / dd | Apply Update

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Abdominal pain/discomfort/cramps						No
☐	Arthralgia						No
☐	Asymptomatic	Yes	2020 Jun 1 00:00 ADT	2020 Jun 7 00:00 ADT	6 d 0 h 0 m		No
☐	Chest pain						No
☐	Chills						No
☐	Confusion						No
1 ☑	Cough	Yes	2020 Jun 7 00:00 ADT				No

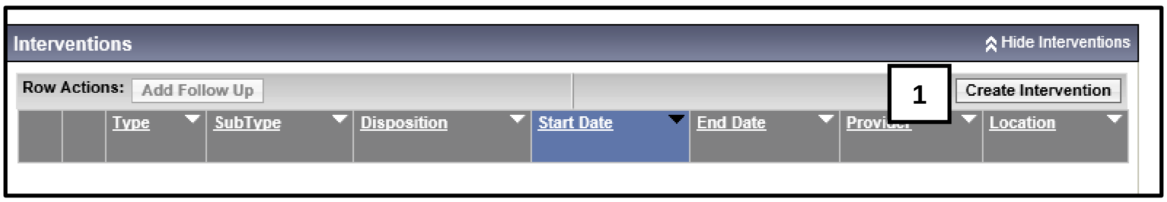
1. Click on the **checkbox** by the onset sign/symptom
2. Click on the **Onset** button
3. The sign/symptom is now updated as the onset sign/symptom (see below). Note: this will update the PHAC date in investigation banner.

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

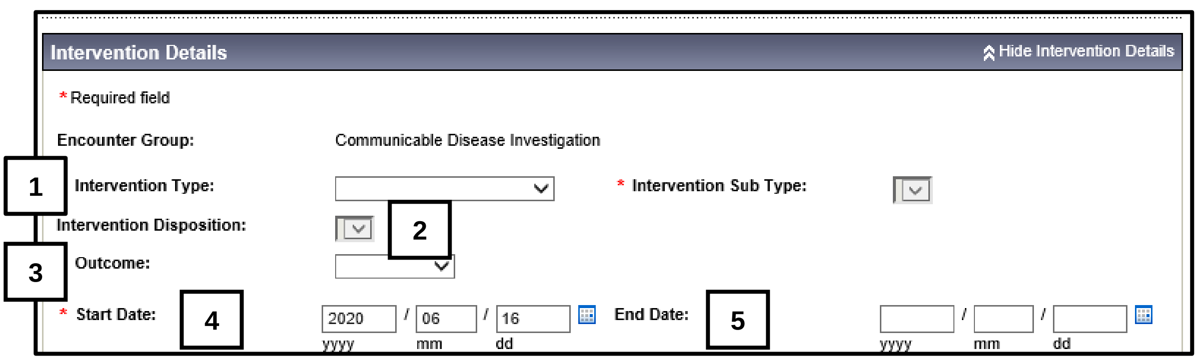
Adding an Isolation Intervention



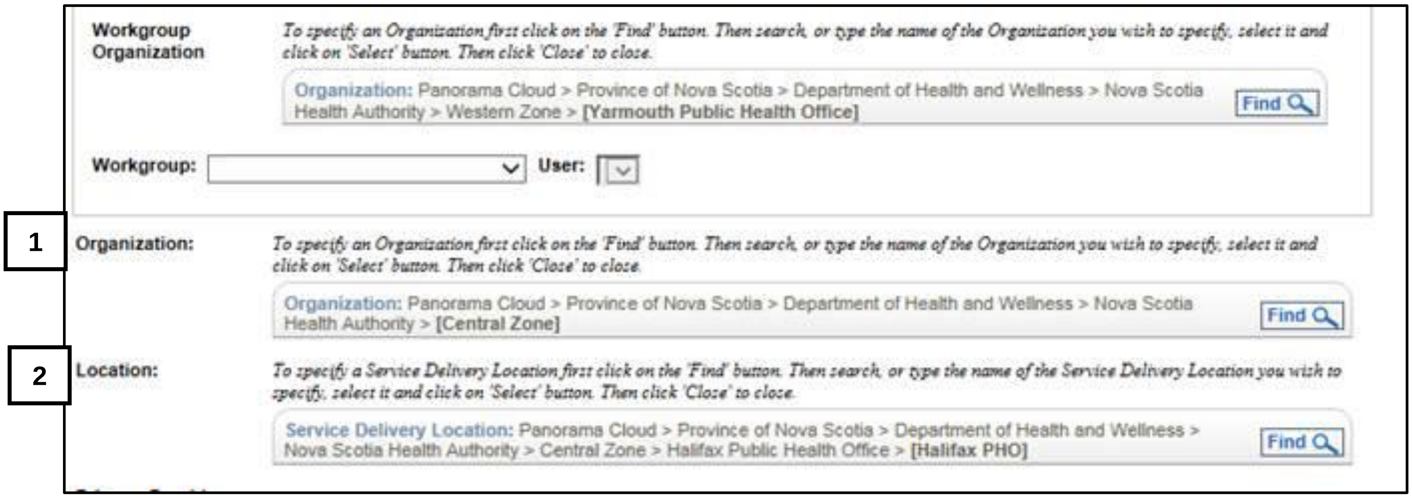
From the left-hand navigation, click on **Intervention Summary.**



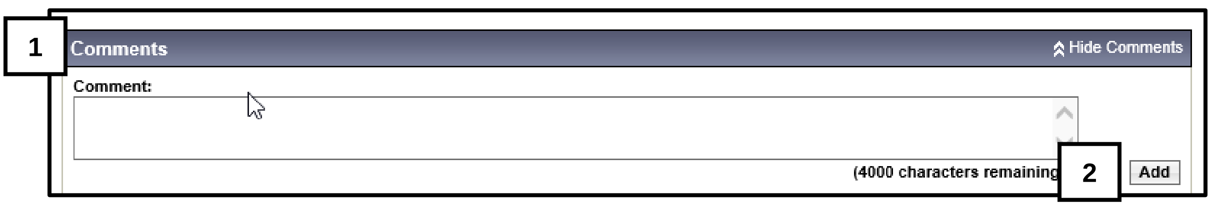
1. Click on the **Create Intervention** button



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.



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



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

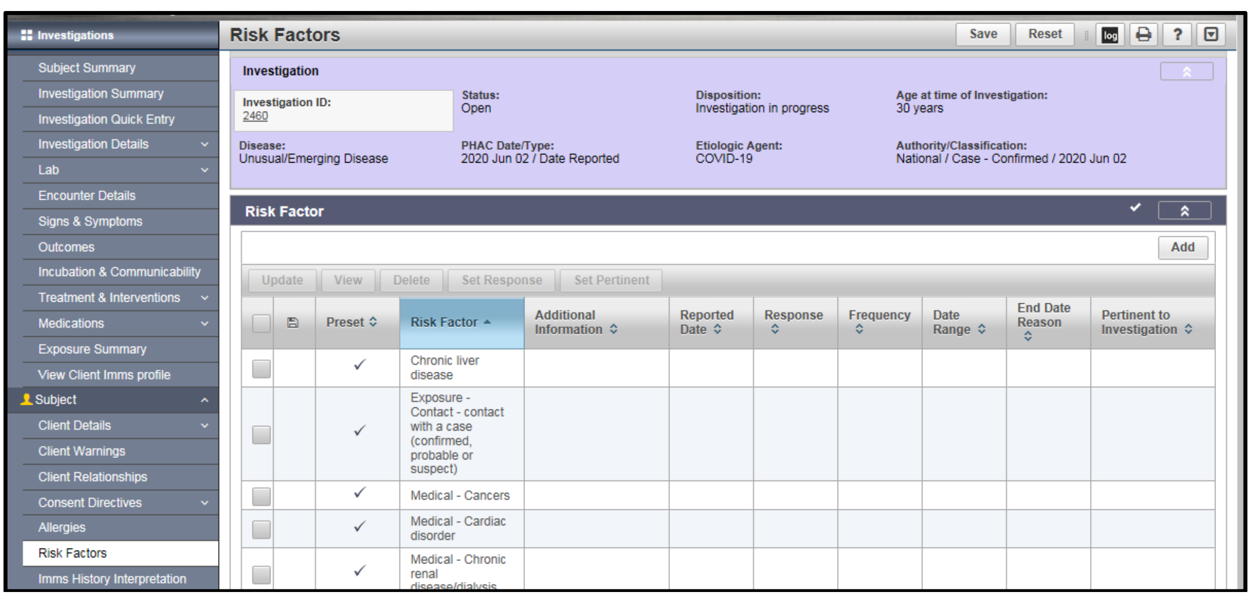
Comments	Recorded By
Positive Case with symptom onset May 2, 2021. Projected isolation end date May 12, 2021 at 2359 hours if client meets recovered criteria.	Chisholm, Rachel

Ensure you take the intervention out of context

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

Documenting Risk Factors

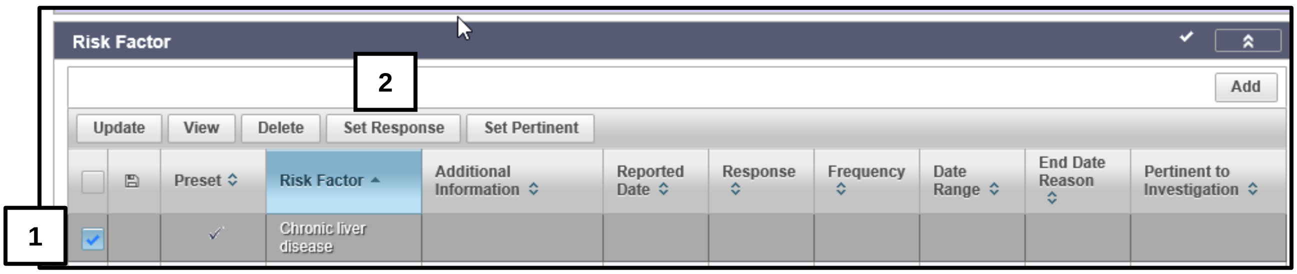
From the left-hand navigation, click on **Risk Factors**



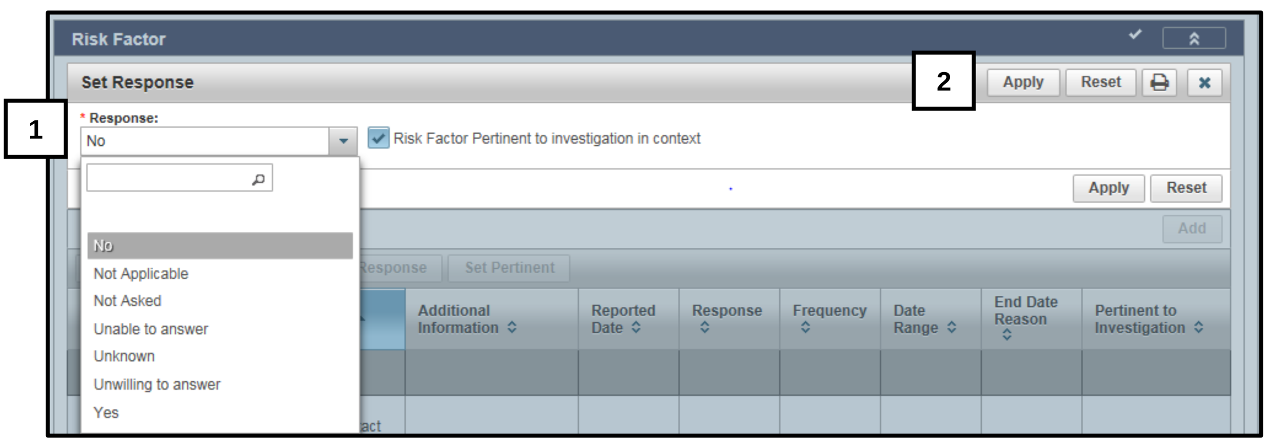
1. The risk factor table is populated with all presets defined for Unusual/Emerging disease for COVID-19. Ensure all preset risk factors are showing by clicking the **Drop-down** in the right- hand corner and changing from 10 to “all”:

Note: All preset risk factors require a response

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

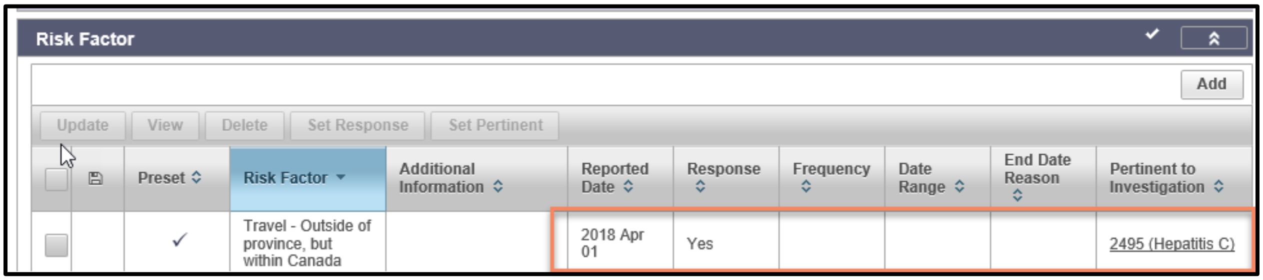


1. Click on the **Checkbox** beside the risk factor. You can select all risks that have the same response.
2. Click the **Set Response** button



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

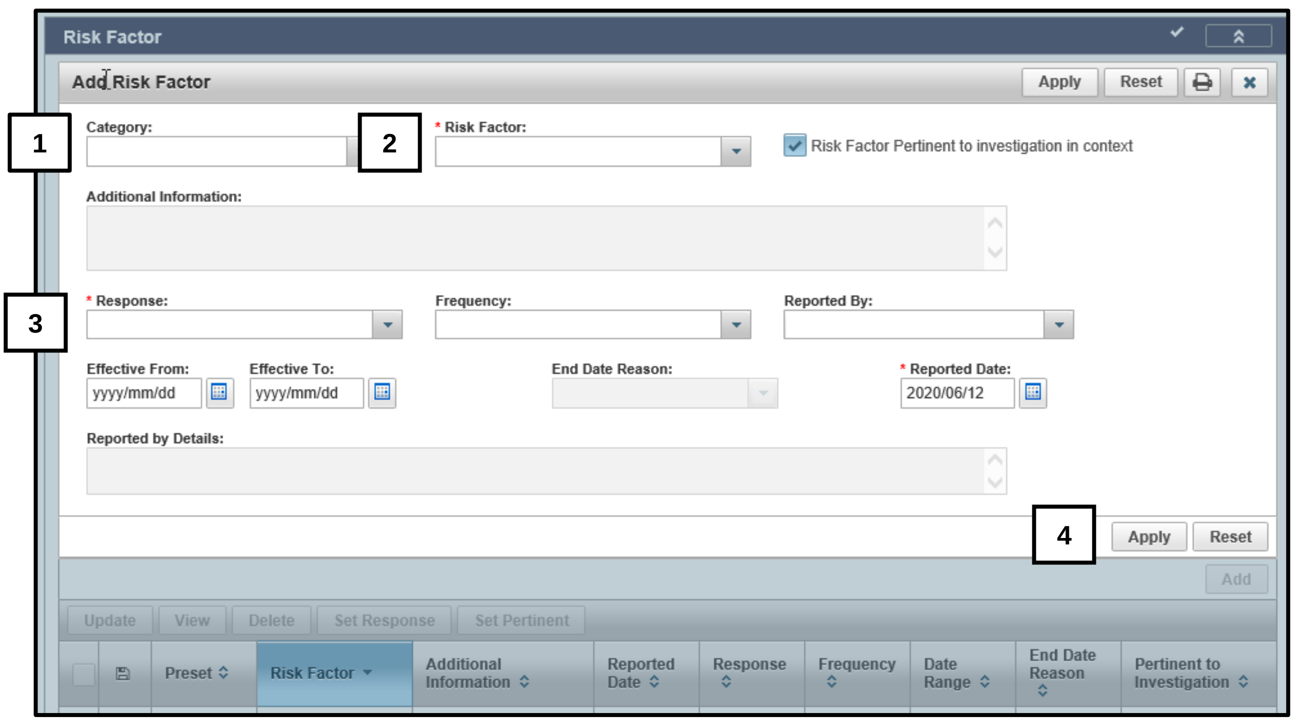
For a preset risk factors that contains a response Pertinent to another Investigation or to add a risk factor that is not a preset:



<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

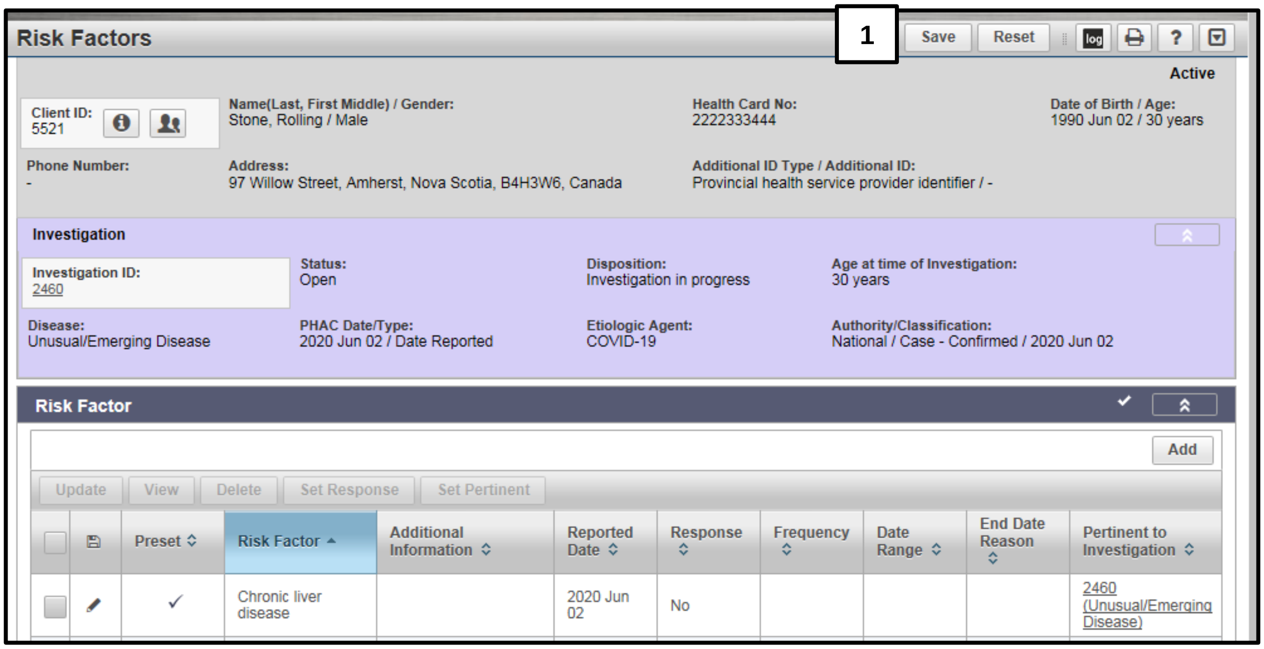
An area will open above the Risk Factor table. This is where you add a risk factor.



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

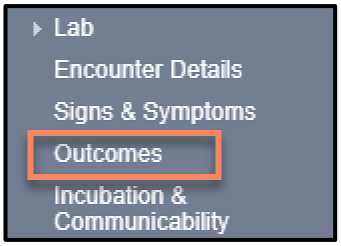
The added risk factor is now in the Risk Factor table.

	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
	✓	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)

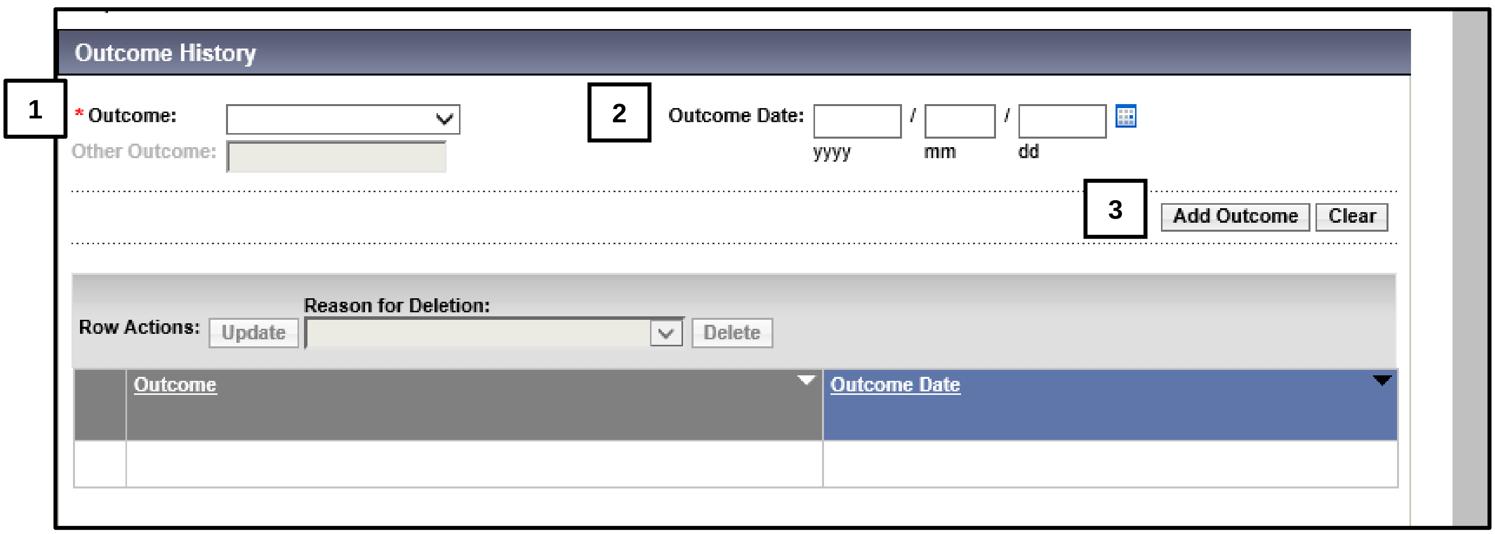


1. Ensure **ALL risk factors** have a response and
2. Click the **Save** button when done adding any additional risk factors.

Adding an Outcome

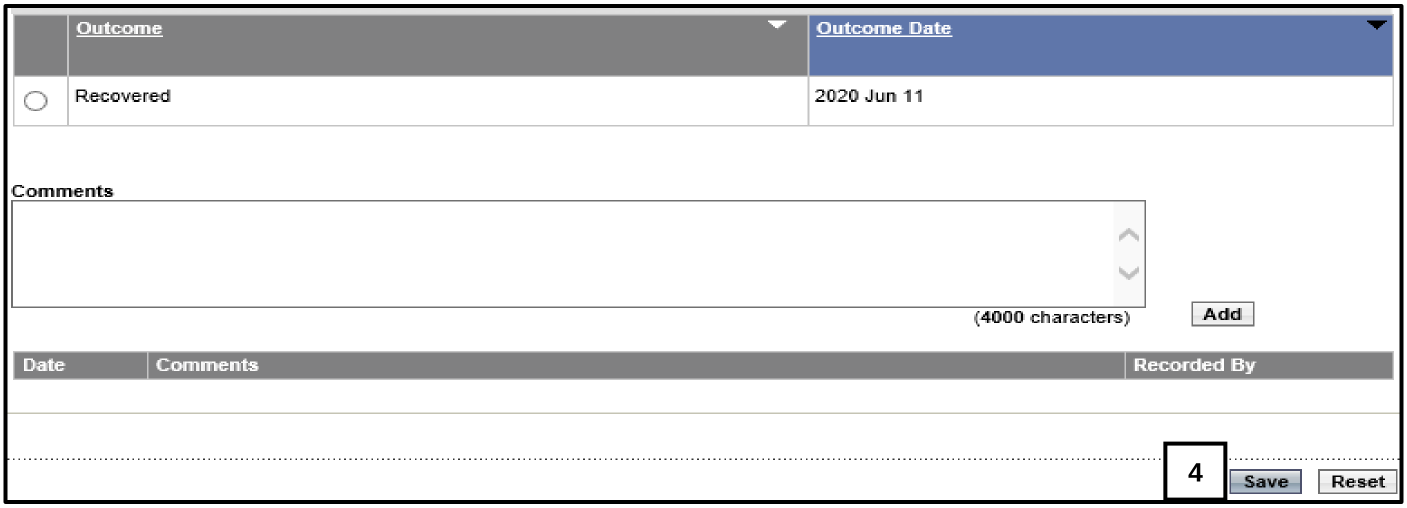


From the left-hand navigation bar, click on **Outcome**



Note: there can be multiple outcomes.

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



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:

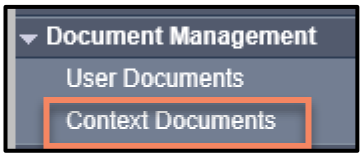
Outcome	Outcome Date
Recovered	2021 May 13
Alive-Not Hospitalized	2021 May 11
Alive-Hospitalized	2021 May 10
Alive-Hospitalized-ICU	2021 May 7
Alive-Hospitalized	2021 May 5
Alive-Not Hospitalized	2021 May 2

OR

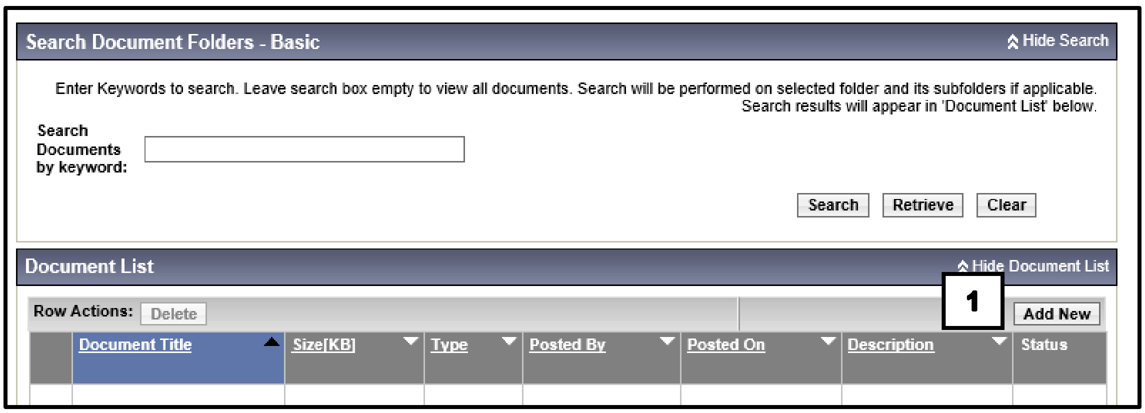
Outcome	Outcome Date
Recovered	2021 May 13
Alive-Not Hospitalized	2021 May 2

Uploading a Document to an Investigation

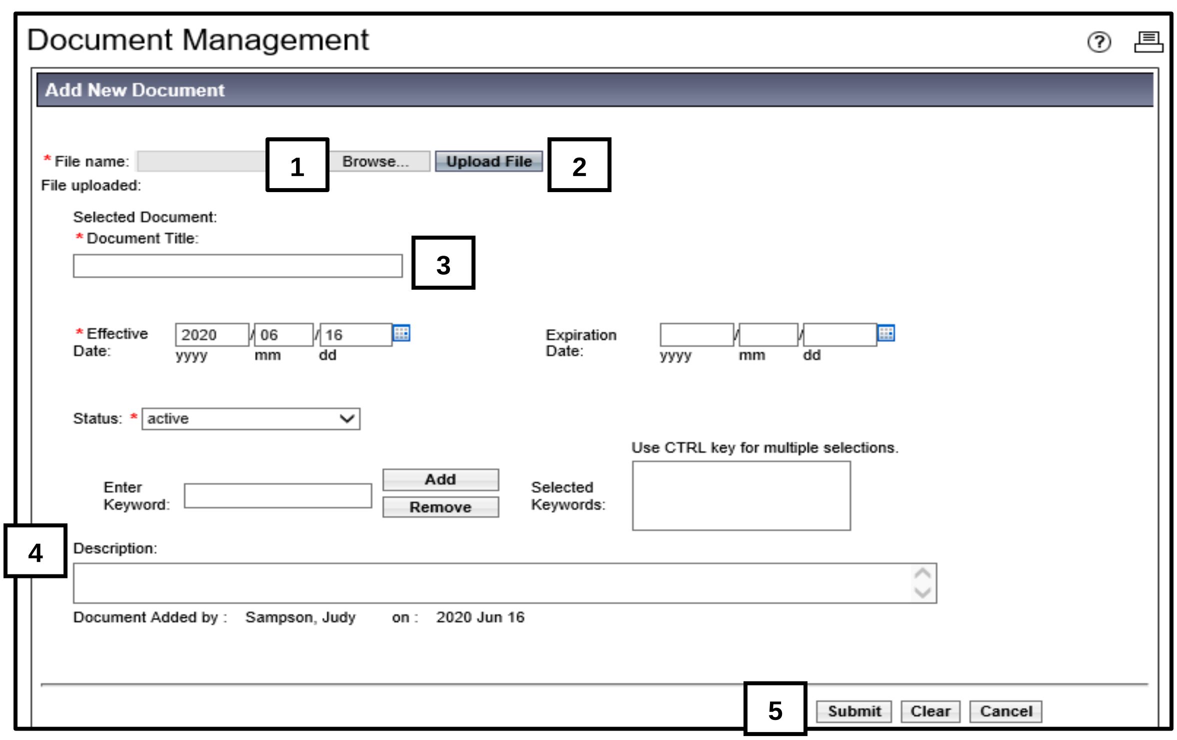
Note: Before you upload a document, ensure that the Encounter is not in the context banner. To take the encounter out of context, go to recent work and click on the investigation.



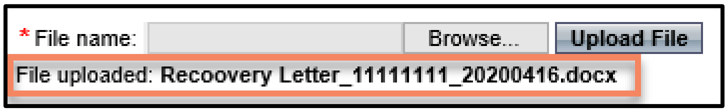
From the left-hand navigation, click on **Context Documents. Do not use User Documents.**



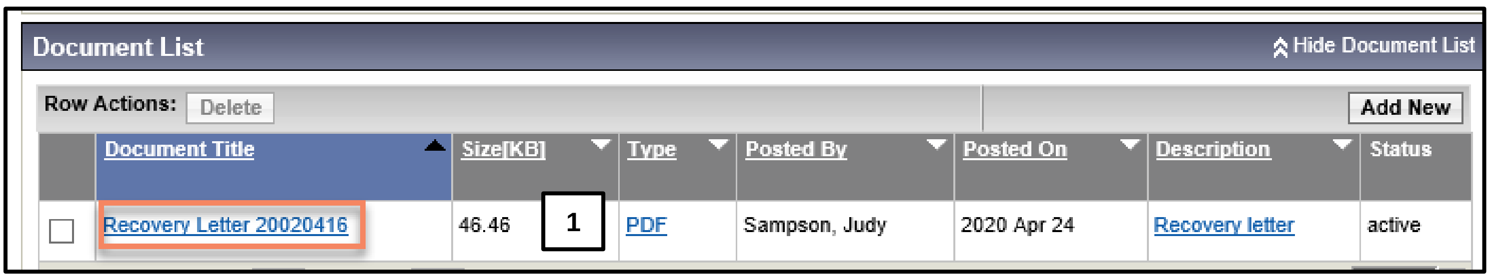
1. Click the **Add New** button



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

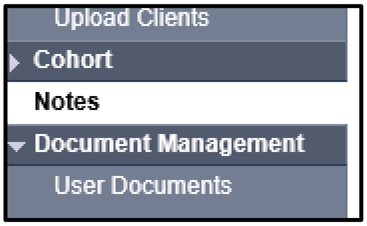


2. Click the **Upload File** button. You will see that the file is uploaded
3. **Document Title** – enter the document title
4. **Description** – enter the document description
5. Click the **Submit** button

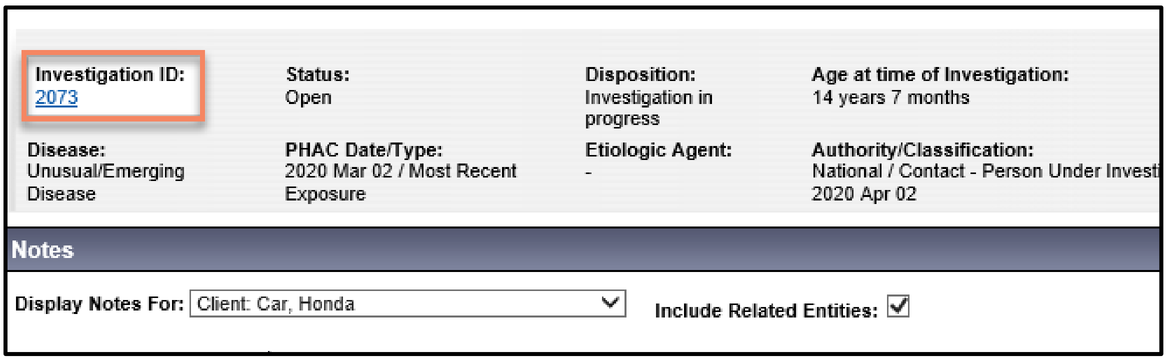


1. You can view the document by clicking on the hyperlinked PDF in the **Type** column

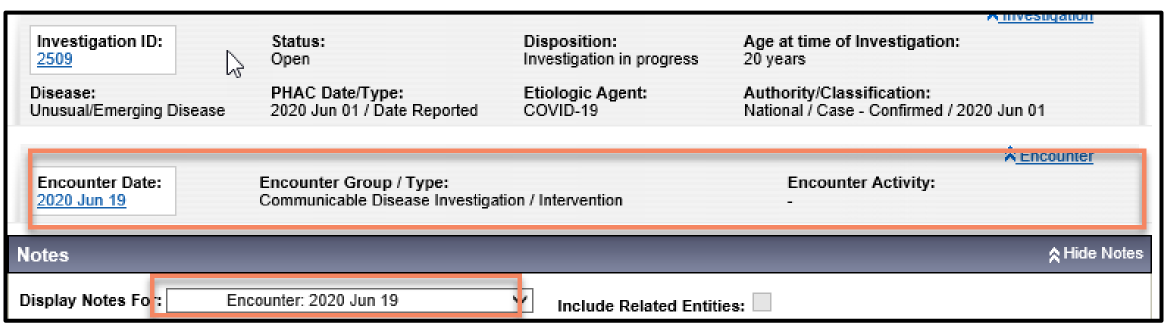
Adding a Clinical Note to an Investigation



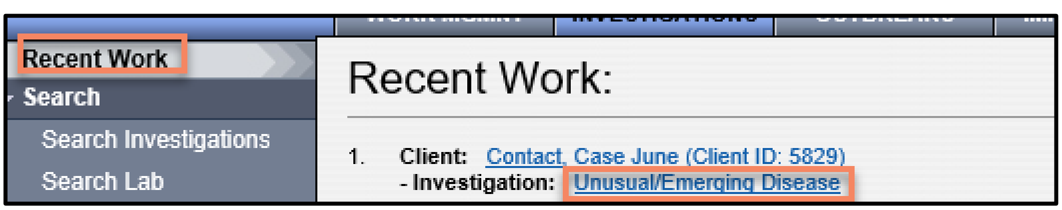
From the left-hand navigation, click on **Notes.**



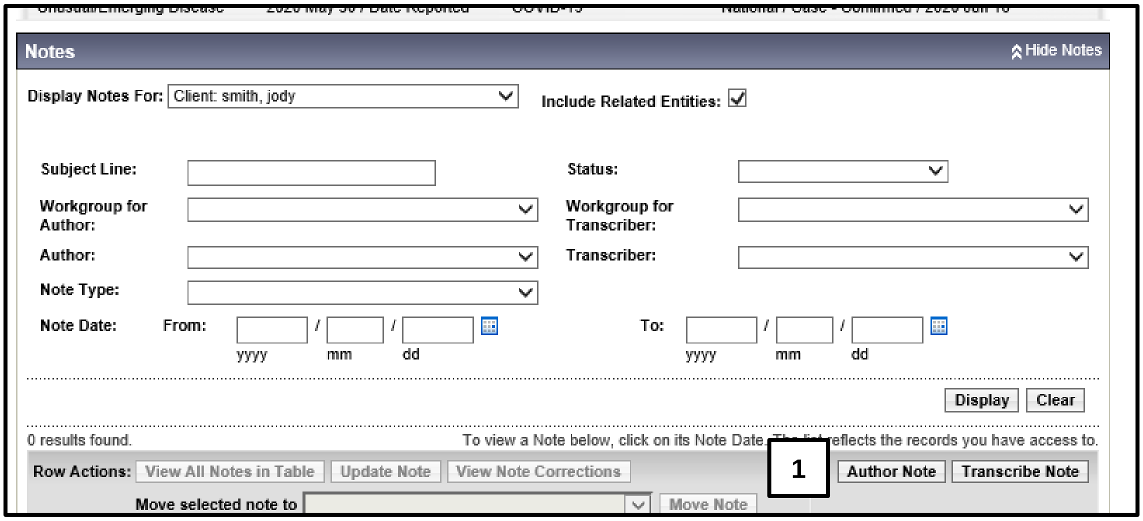
Ensure your investigation is in context. Do not add the note if only the client is in context.



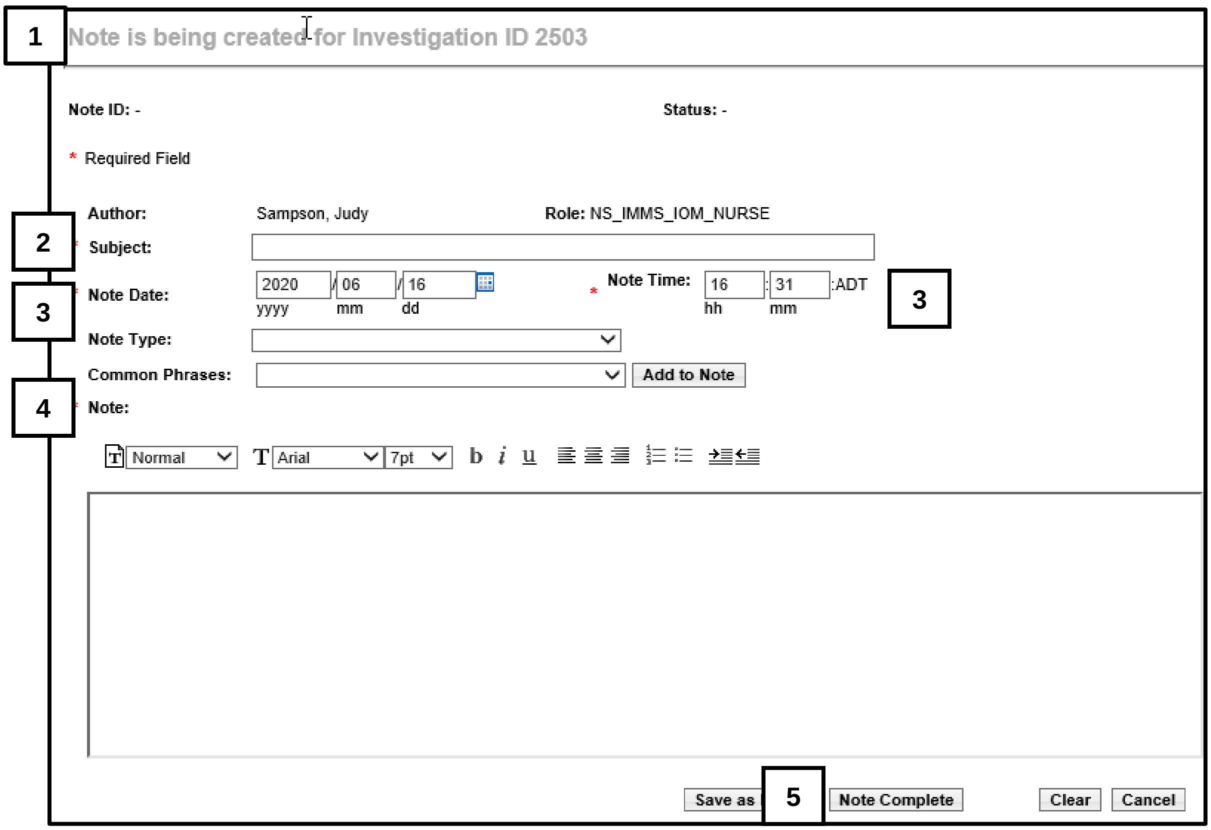
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



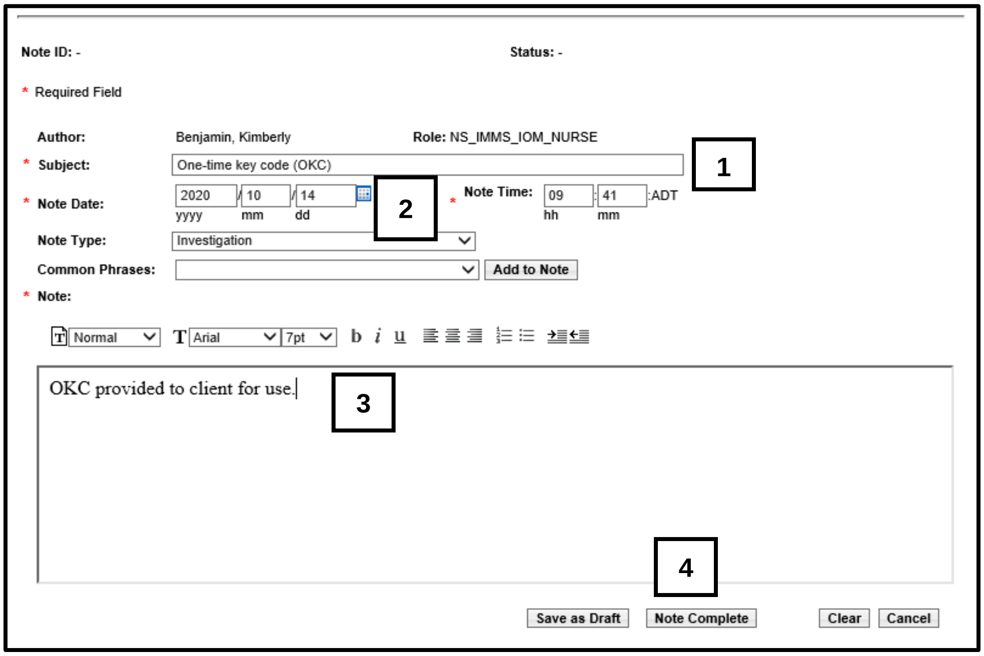
1. Click on **Author Note** button



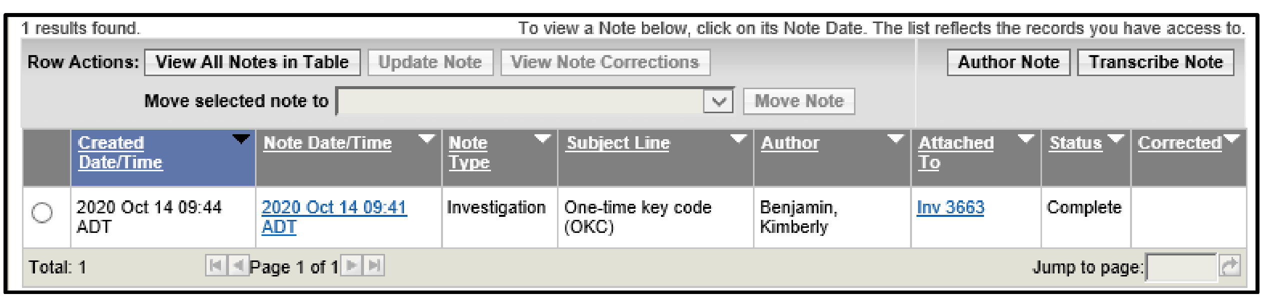
1. Ensure the note is being added for an investigation ID only
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details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



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 results found. To view a Note below, click on its Note Date. The list reflects the records you have access to.

Row Actions: View All Notes in Table | Update Note | View Note Corrections | Author Note | Transcribe Note

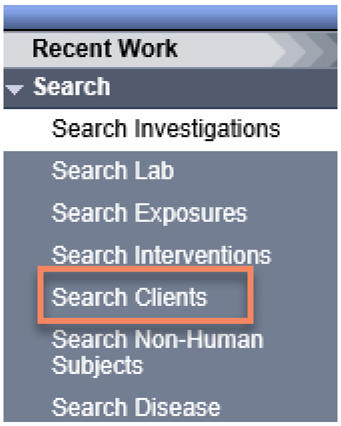
Move selected note to | Move Note

	Created Date/Time	Note Date/Time	Note Type	Subject Line	Author	Attached To	Status	Corrected
○	2020 Oct 14 09:44 ADT	2020 Oct 14 09:41 ADT	Investigation	One-time key code (OKC)	Benjamin, Kimberly	Inv 3663	Complete	

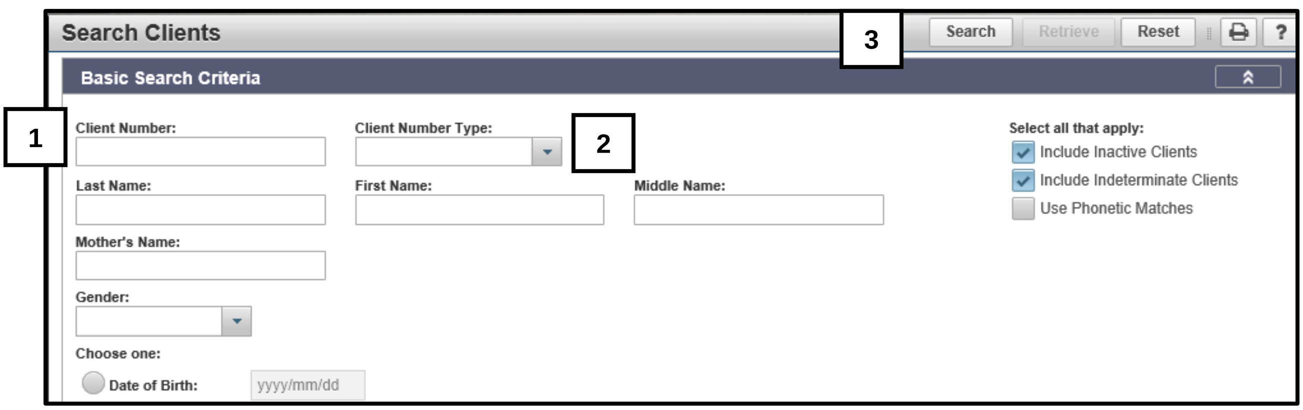
Total: 1 Page 1 of 1 Jump to page:

Client 2 - Contact Case to Confirmed Case:

Search for a Client



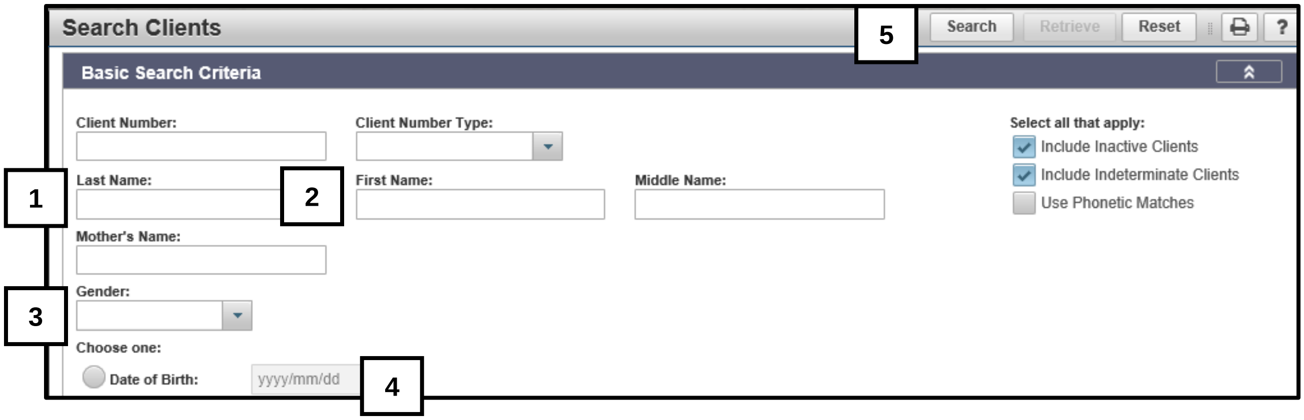
From the left-hand navigation bar, click on **Search Clients**



Health Card Number is the preferred search for a client

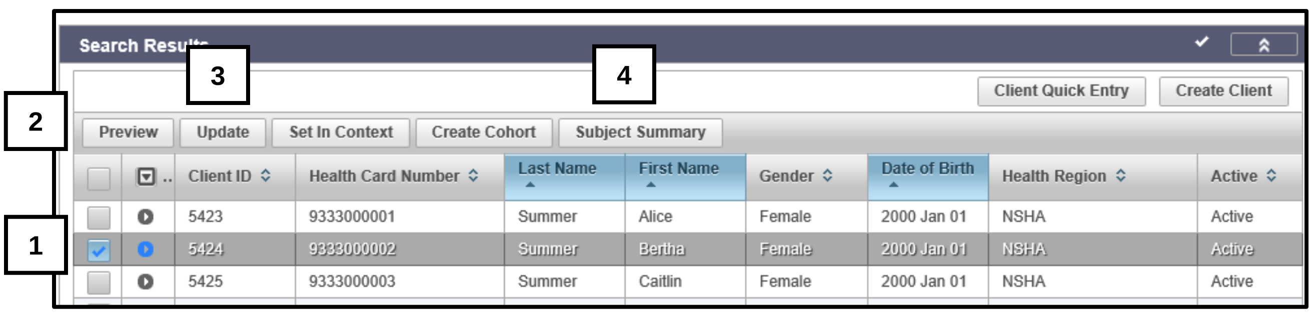
1. **Client Number** - Enter the client's Health Card Number. You need to enter all 10 digits
2. **Client Number Type** - Select **Health Card Number** from the drop down list
3. Click on the **Search** button

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



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

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



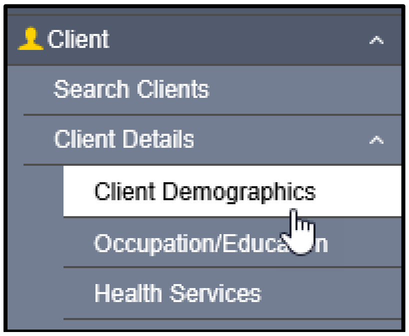
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

If no search results are returned:

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

Update Client Telephone Number, Create a Temporary Address Add Email Address

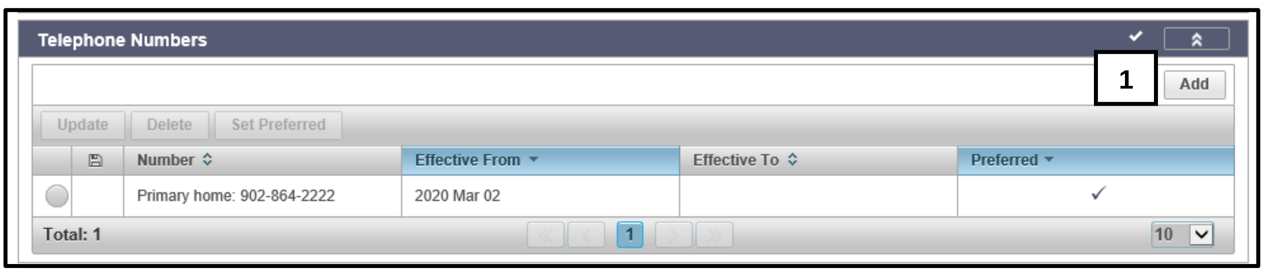
Note: The nightly Provincial Client Registry load updates the **Primary Home** and **Workplace** telephone numbers & the **Postal Address** and **Primary Home** addresses in Panorama.



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

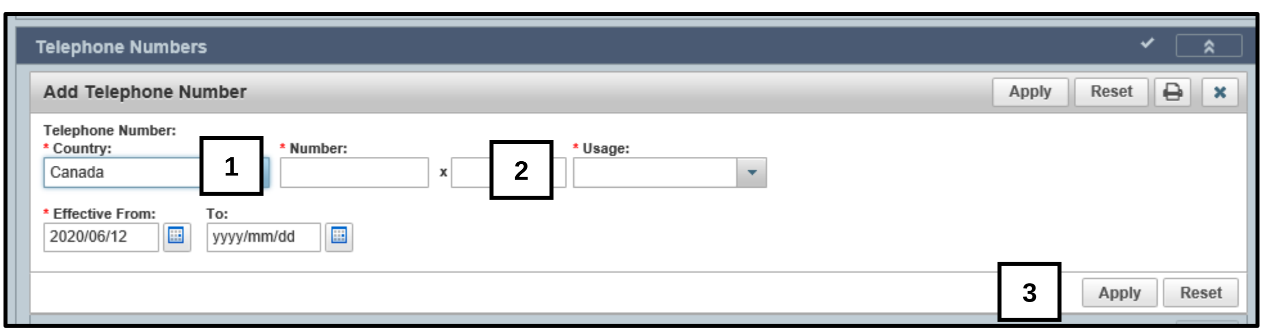
Telephone Number

View the client's telephone numbers.



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

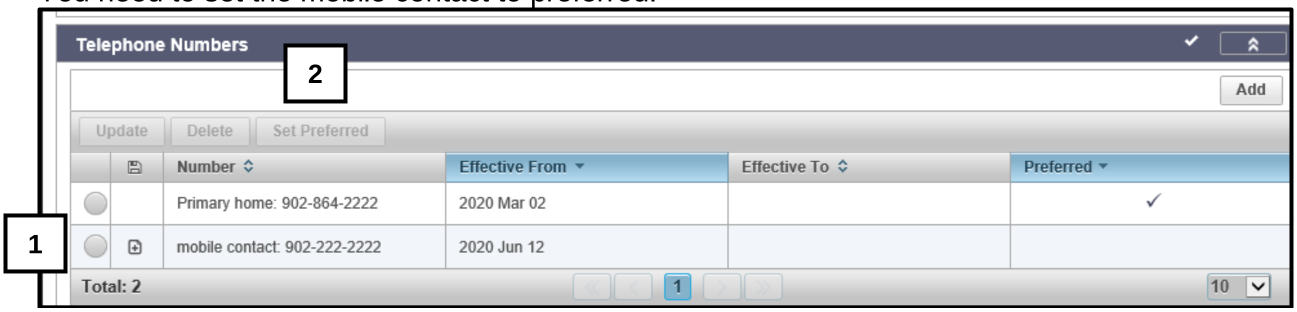
1. Click on the **Add** button



1. **Number** – enter the telephone number
2. **Usage** – select mobile contact from the drop-down list

3. Click on the **Apply** button

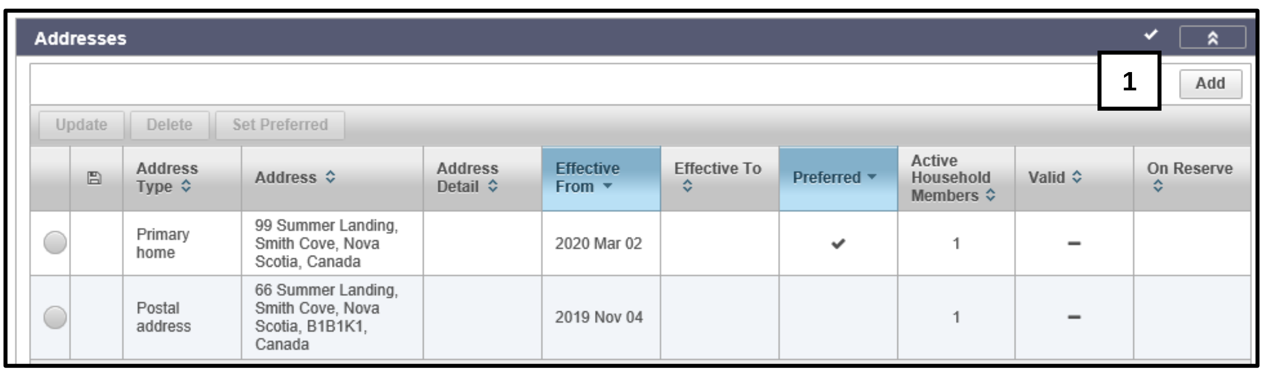
You need to set the mobile contact to preferred.



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

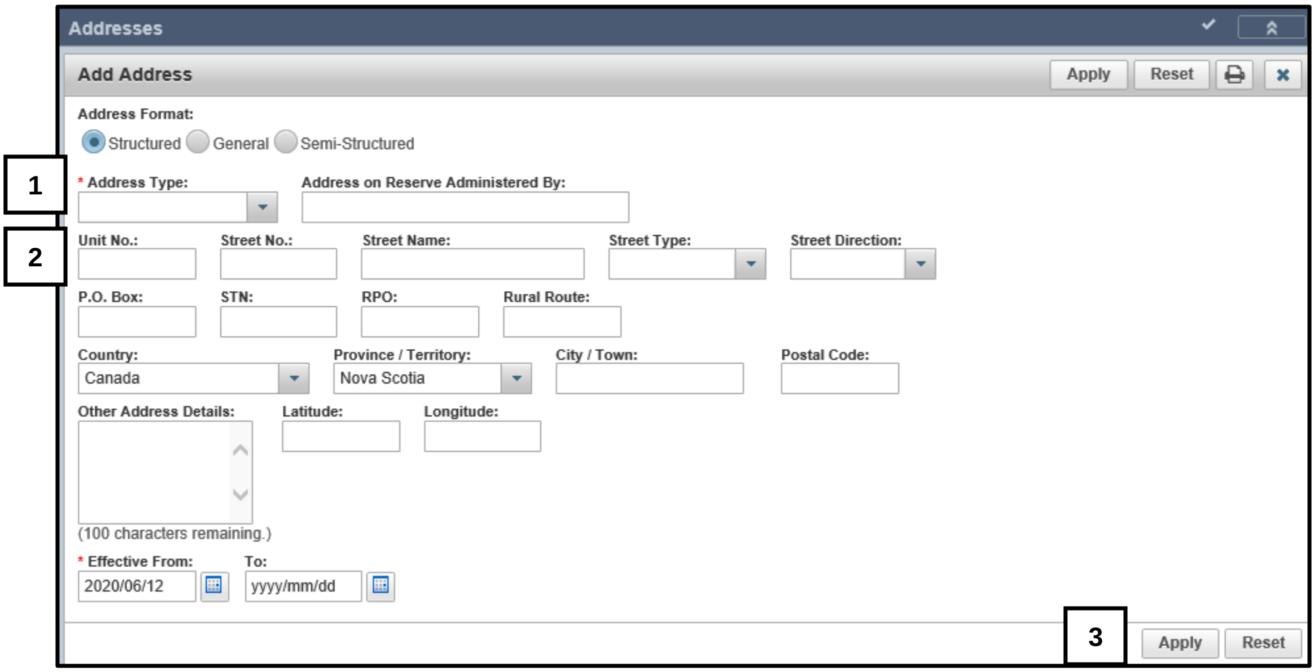
Address

View the client's address(es)

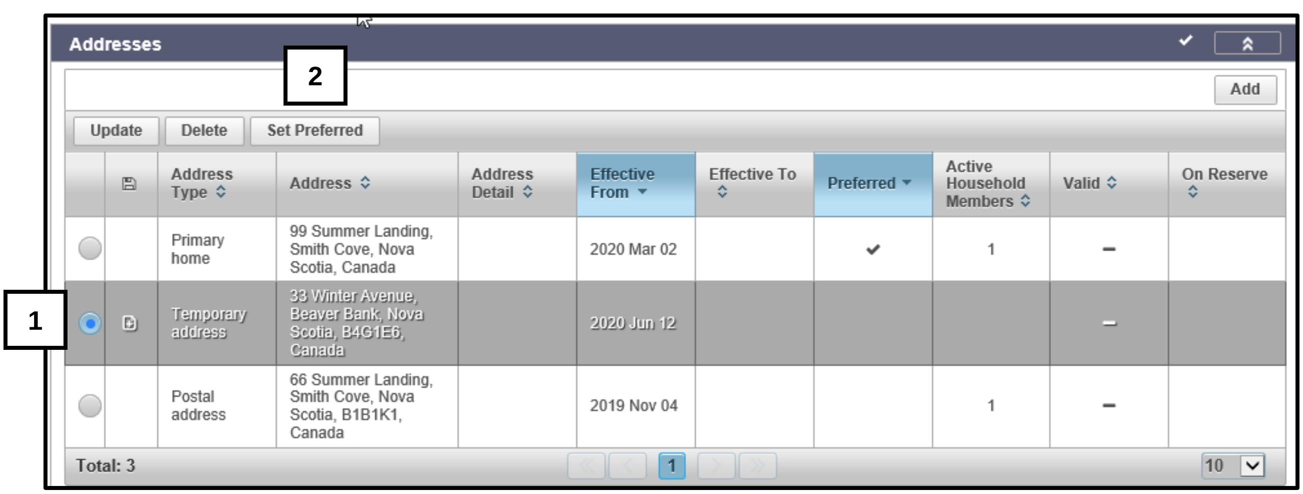


If the client's address in Panorama does not contain a postal code or the address is different than the address the client provided, you will need to add the address.

1. Click on the **Add** button



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



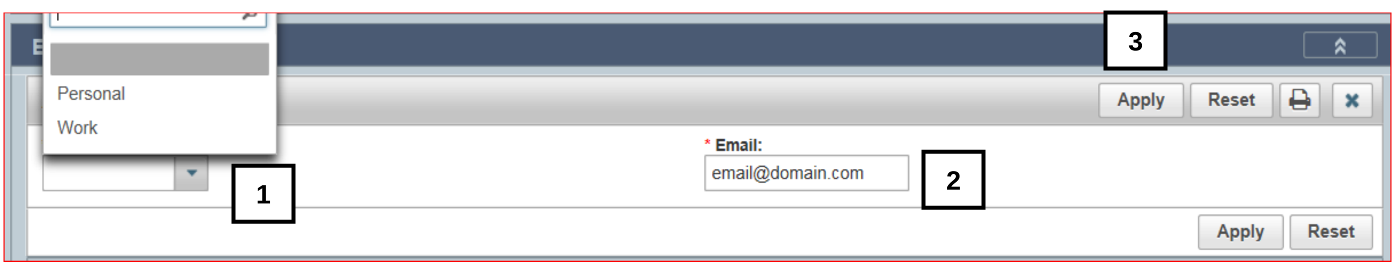
1. Click on the radio button for temporary address
2. Click on the **Set Preferred** button
3. Click on the **Save** button (top right-hand area of the screen)

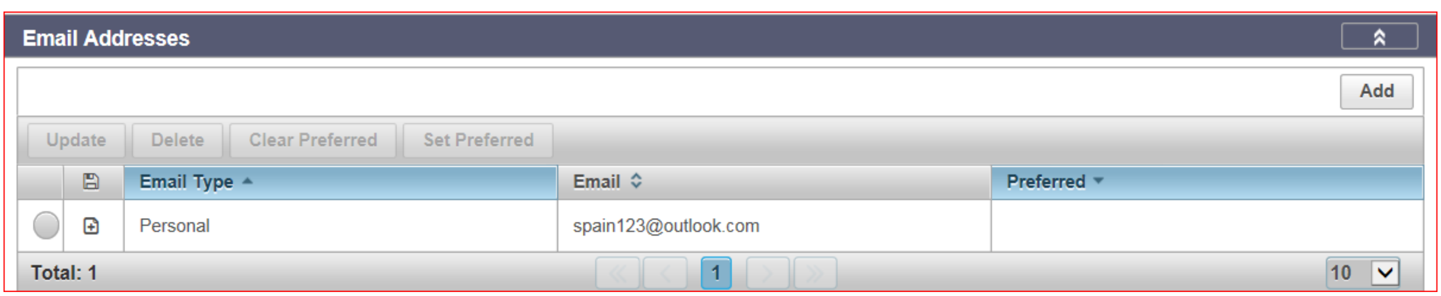
Email Address

1. Expand the email tab by clicking on the arrows

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.

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

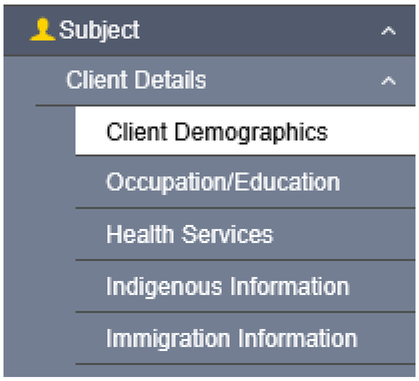




Click **Save** at the top of the page.

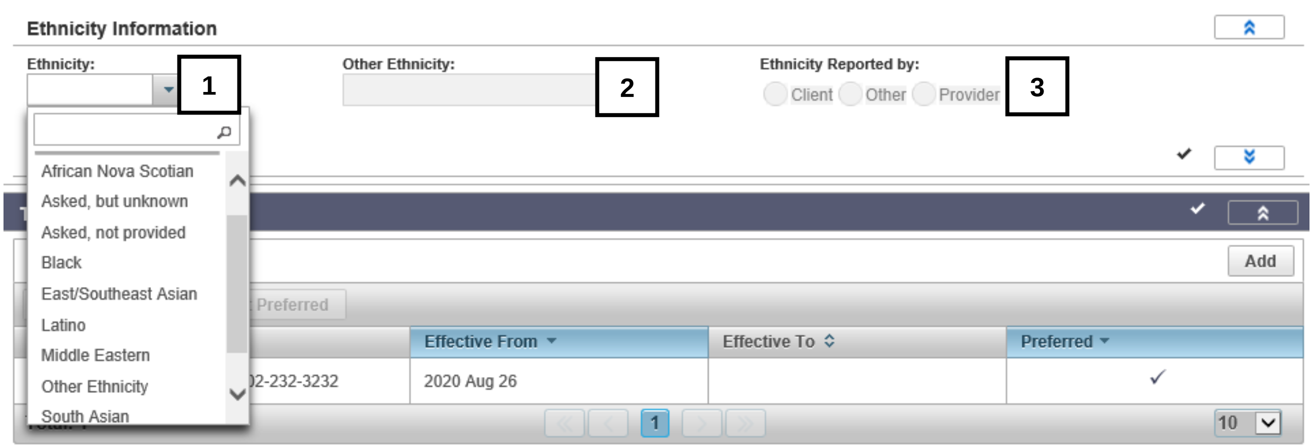
Entering Ethnicity Information

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.**

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

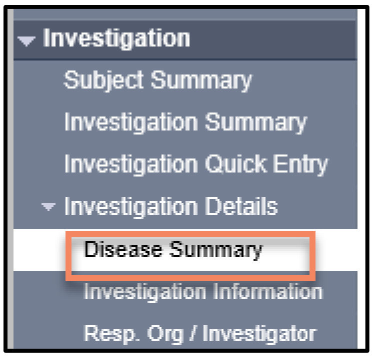


1. Select the Ethnicity value from the drop-down list. If the client identifies with an Ethnicity that is not in the list, choose “Other Ethnicity” and go to step 2.
2. If “Other Ethnicity” is chosen in step 1, type in the Ethnicity the client identifies with.
3. Select who provided the Ethnicity information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

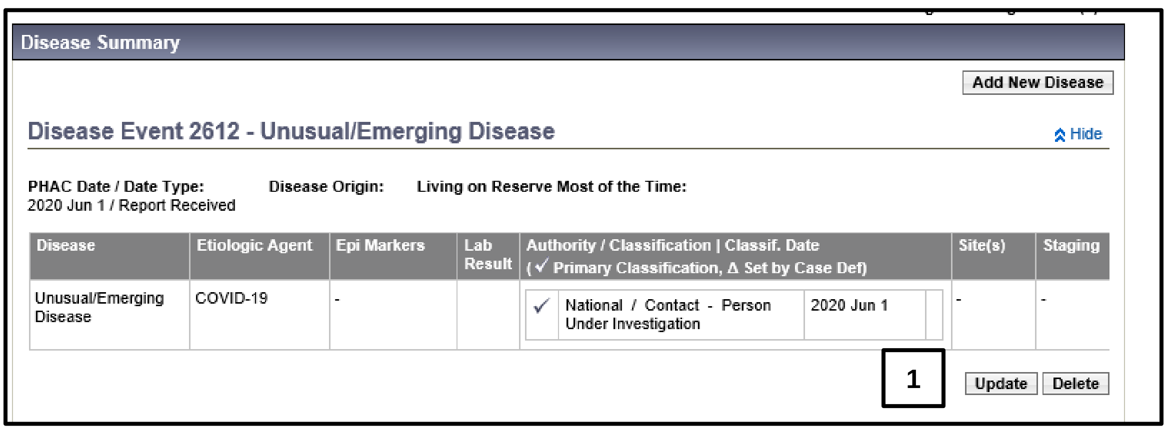
Click **Save** at the top of the page.

Changing the Investigation Classification

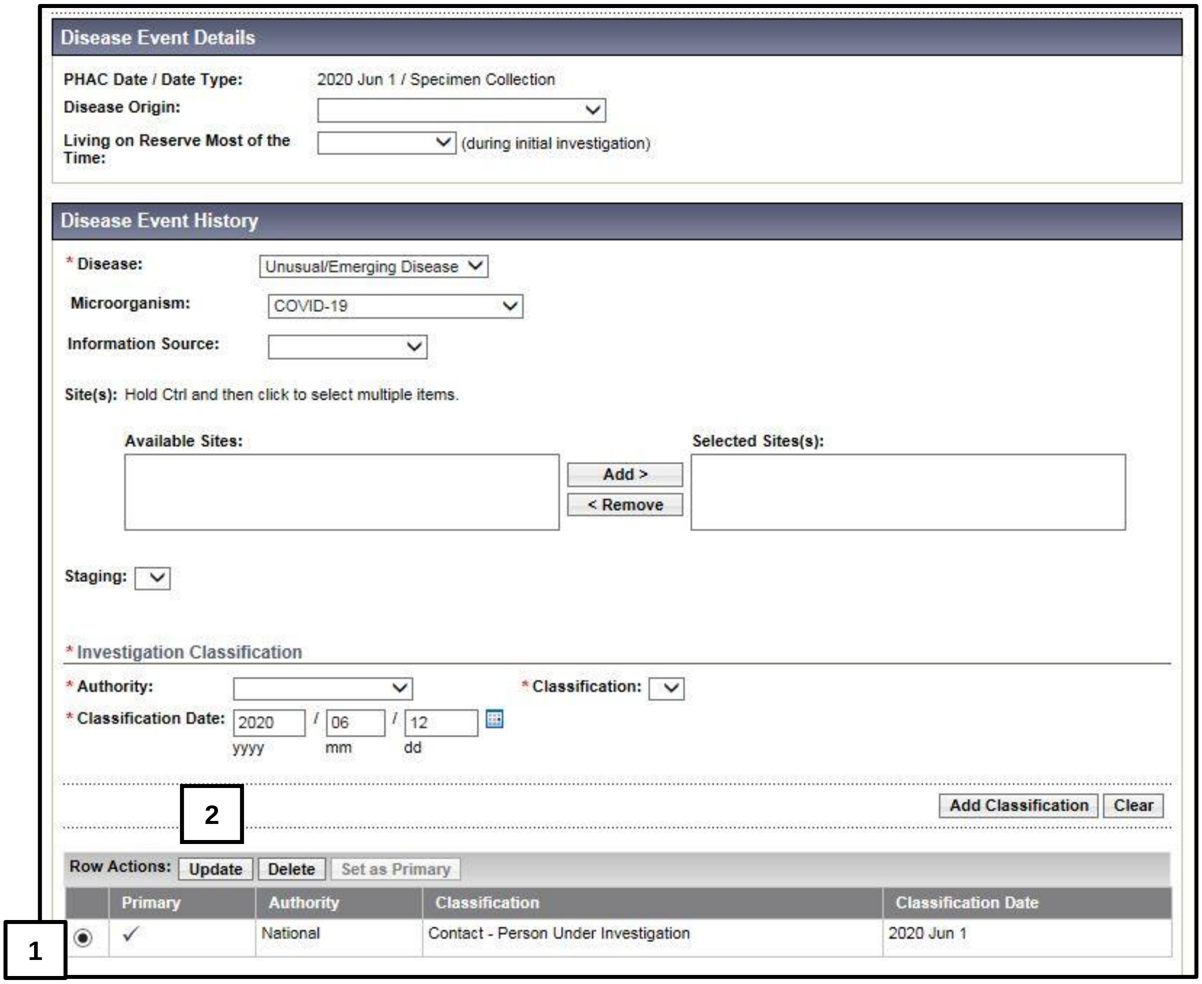
When an investigation already in progress needs to be have the Classification changed based on new information, the Disease Summary needs to be updated (i.e. Case PUI to Case Confirmed or Contact PUI to Case Confirmed).



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



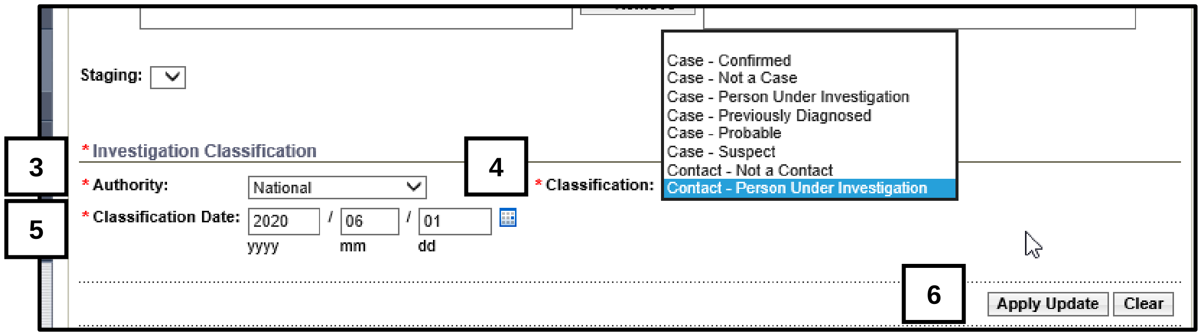
1. Click on the Update Button



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.

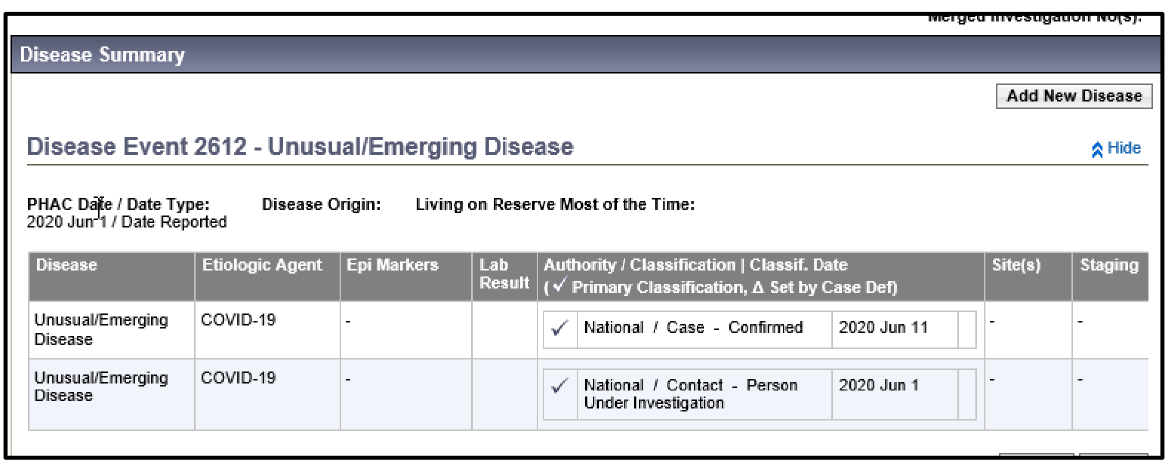
1. Click on the **Radio** button for the current classification. This will activate the Row Action buttons.
2. Click on the **Update** button



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)

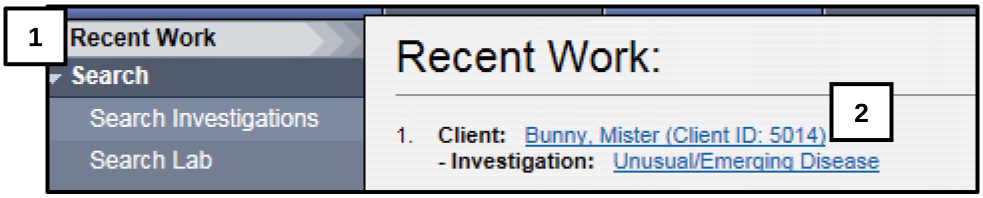
On the Disease Summary screen, you will see the history of the Authority/Classification



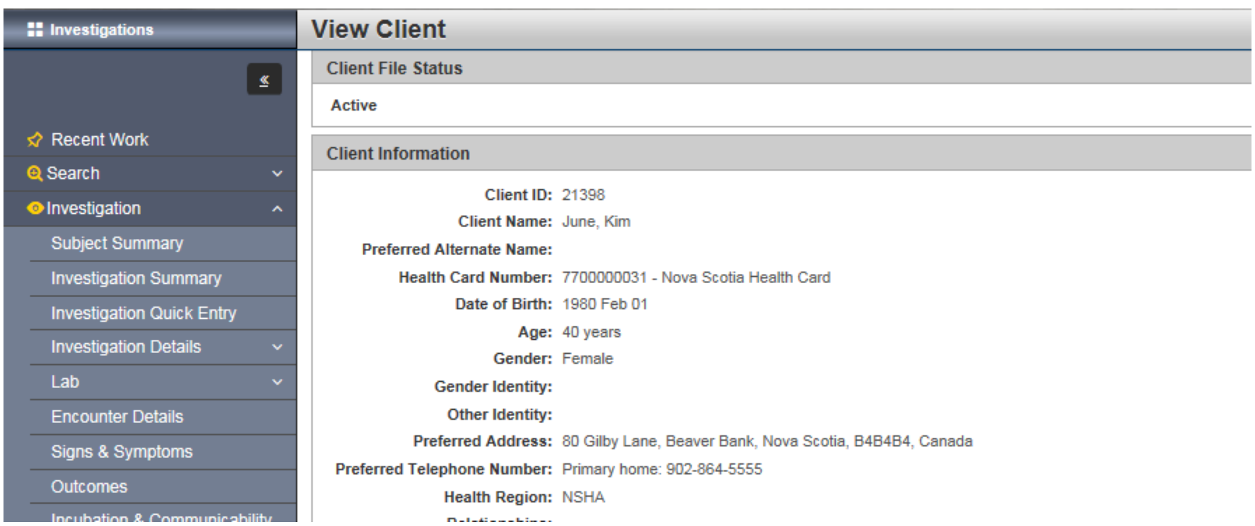
Making a Lab Pertinent to an investigation

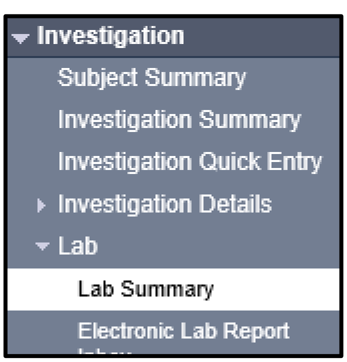
When a lab has been processed from the Electronic Lab Report Inbox, it sits at the **Subject Summary** level until it is attached to an Investigation by an Investigator.

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

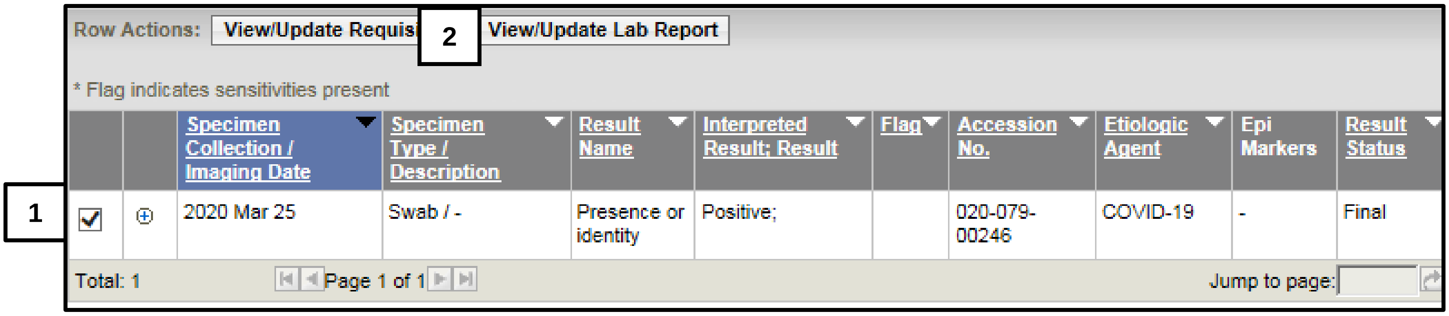


1. Go to Recent Work
2. Click on the client (not the investigation) hyperlink.
3. This takes you to the View Client page



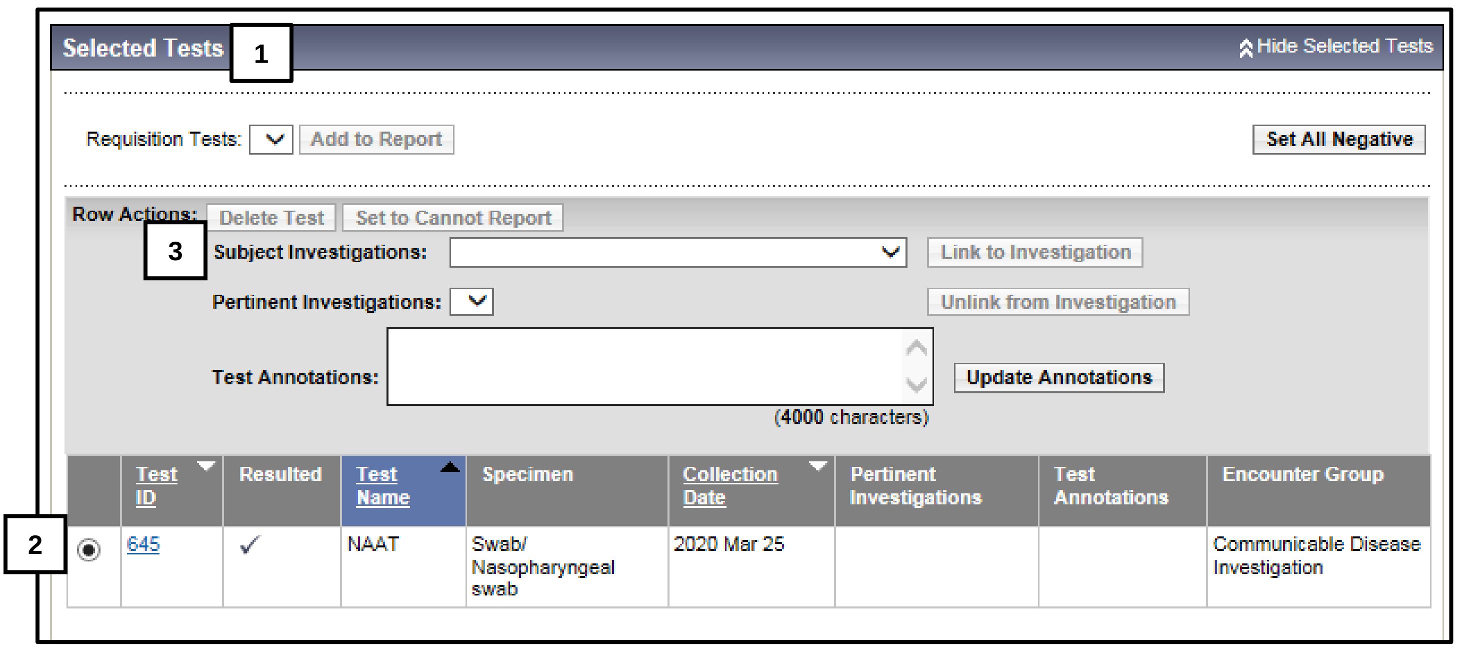


From the left-hand navigation, click on **Lab Summary**



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

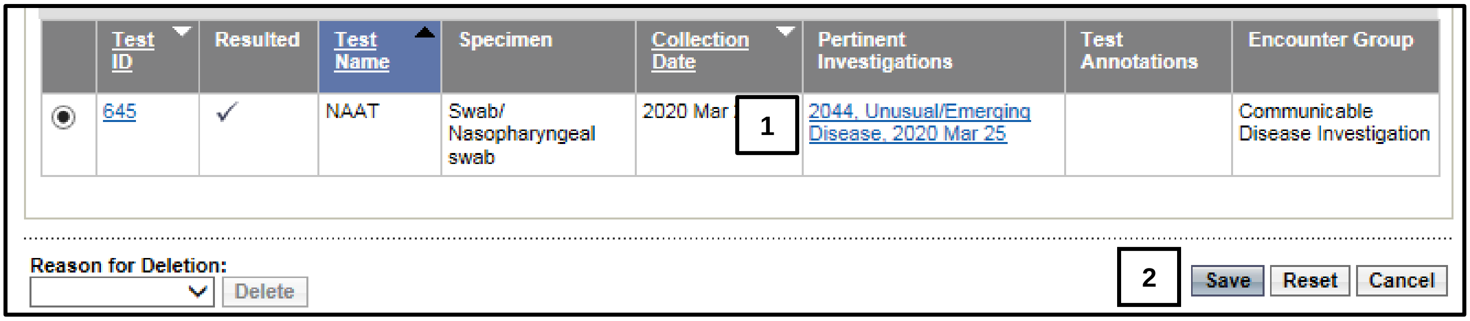
3. Click the **Radio** button for the lab result that you want to make pertinent to the investigation
4. Click the **View/Update Lab Report** button



On the Human Lab Report Screen

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

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

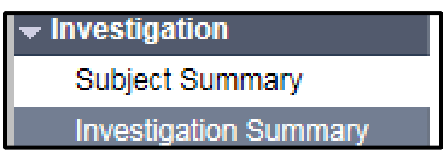


1. The lab is now pertinent to the investigation
2. Click the **Save** button

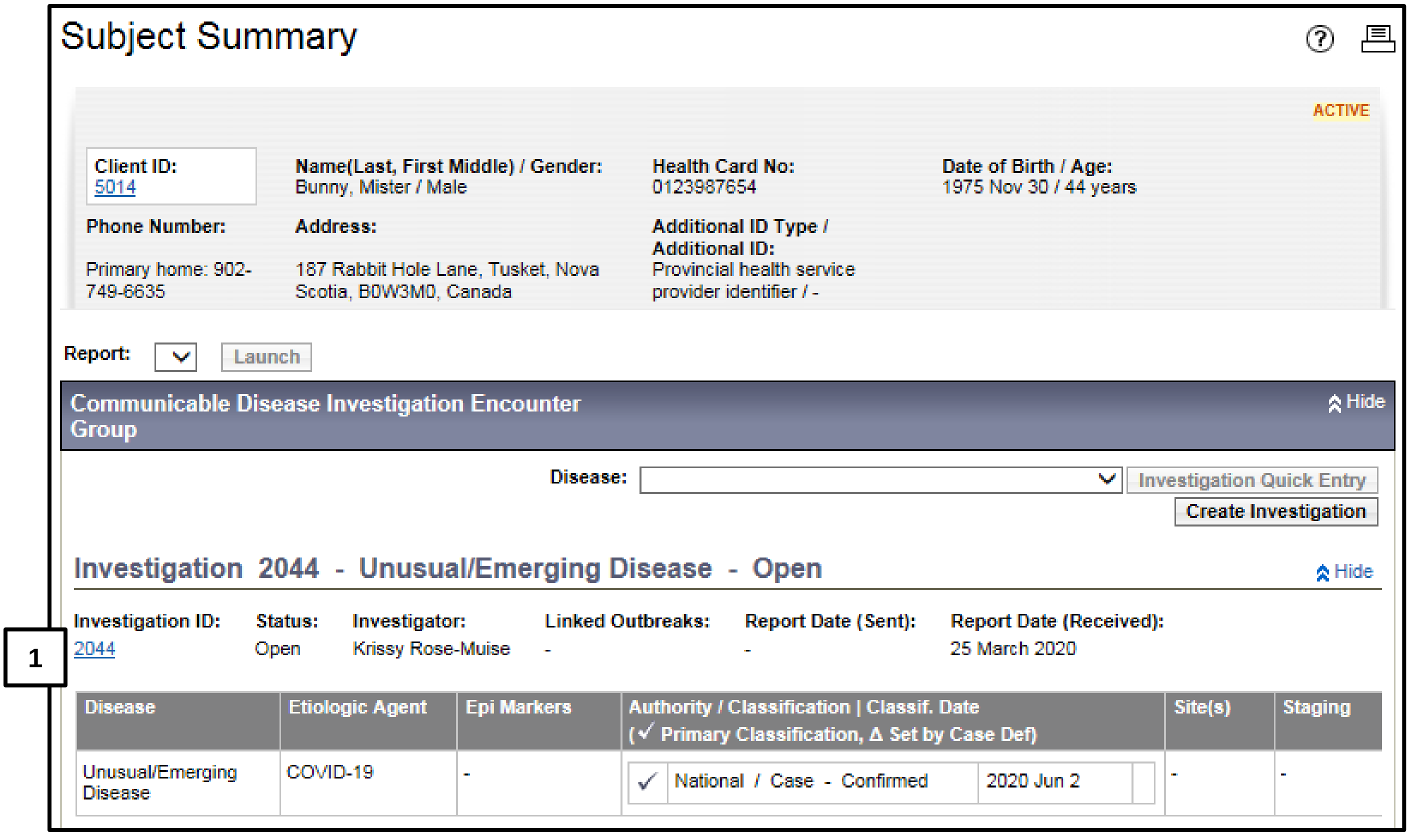
Note:

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

To put the investigation into context:

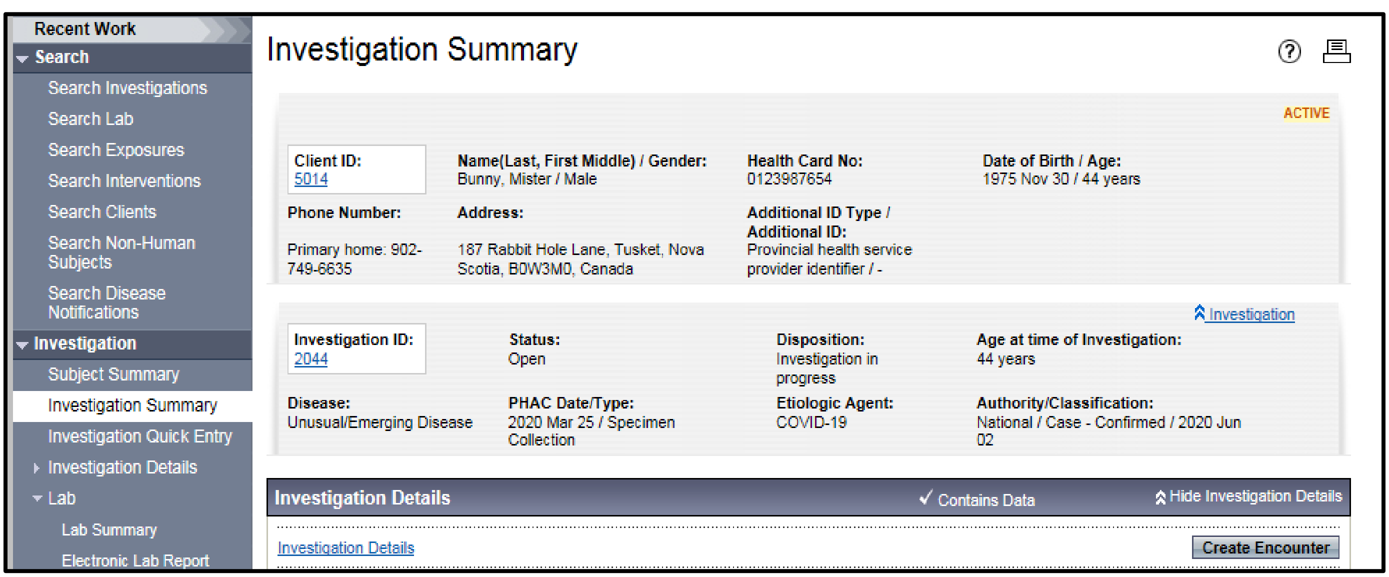


From the Left-Hand navigation, click on **Subject Summary**.

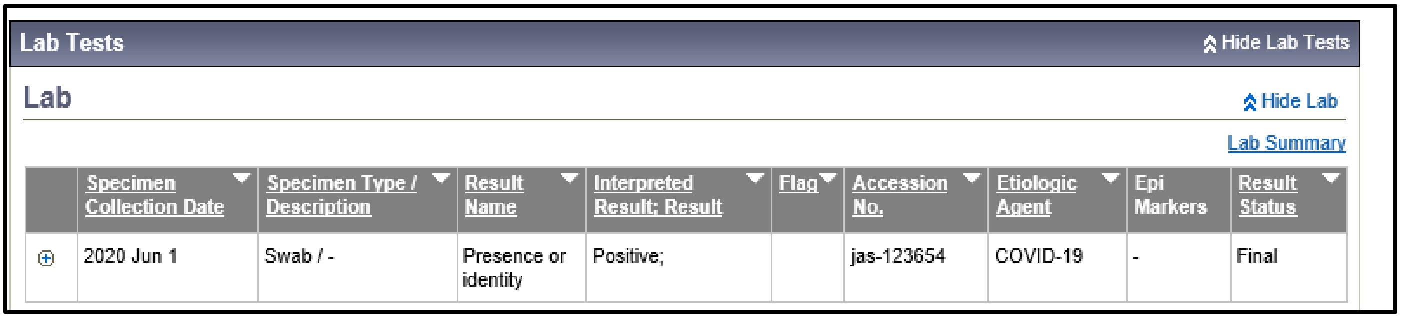


2. Click the Hyperlink associated to the current investigation

Note: The Investigation is now back in Context:

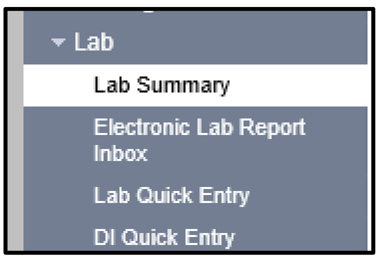


You can view the Lab by scrolling down the Investigation Summary screen



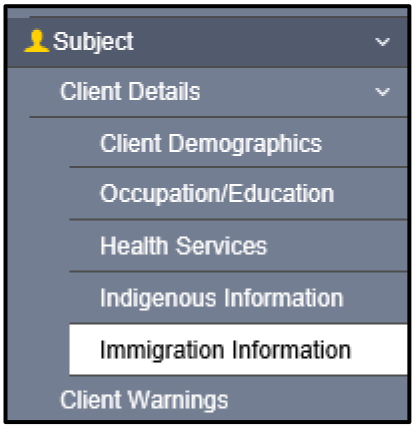
	Specimen Collection Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status
⊕	2020 Jun 1	Swab / -	Presence or identity	Positive;		jas-123654	COVID-19	-	Final

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

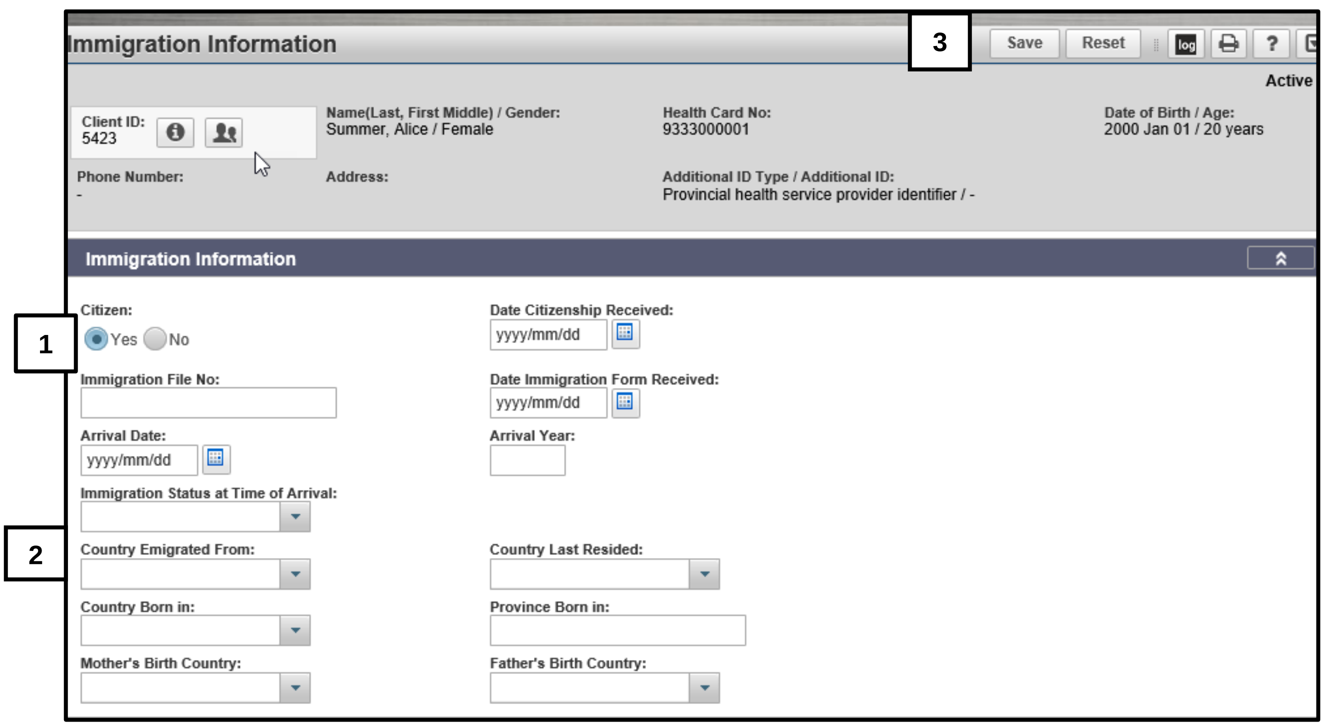


From the left-hand navigation, click on **Lab Summary**

Updating Immigration Information



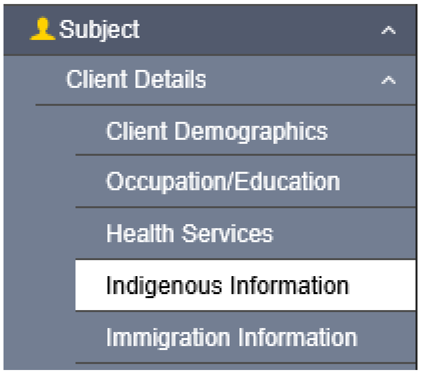
From the left-hand navigation, click on Immigration Information



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

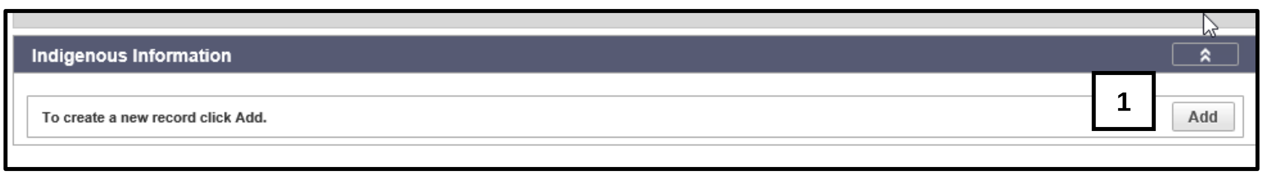
Adding Indigenous Status

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.

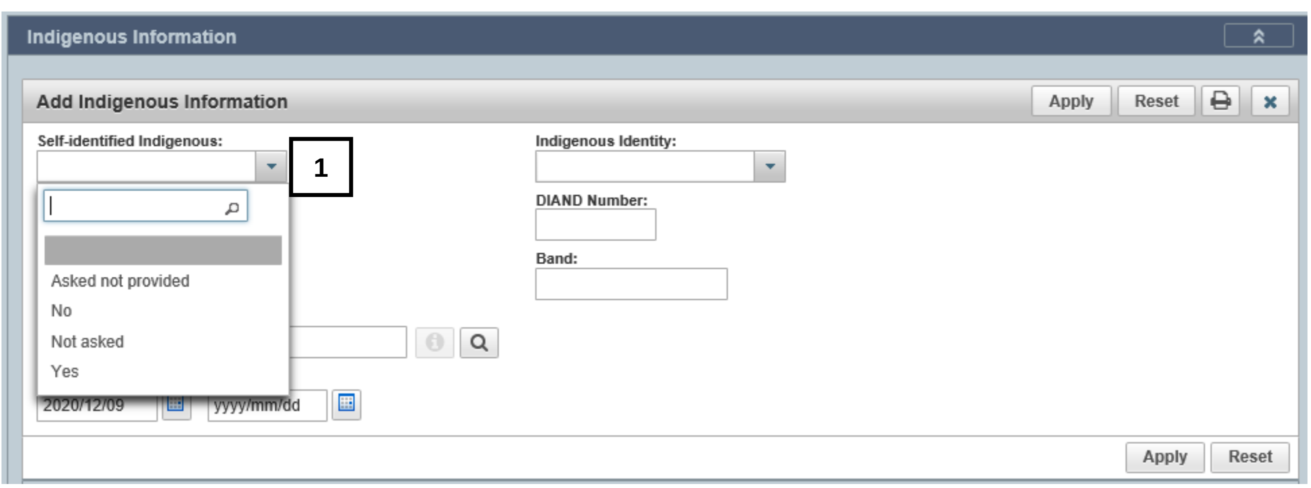


From the left-hand navigation, click on **Indigenous Information.**

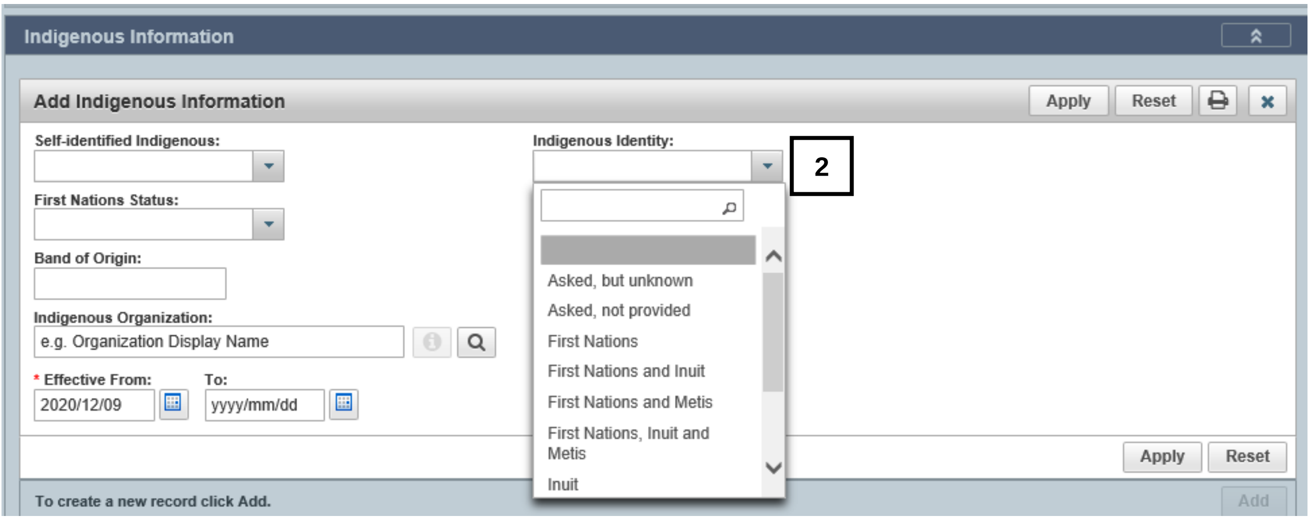
If the client does not have Indigenous Information in Panorama, you will need to add it.



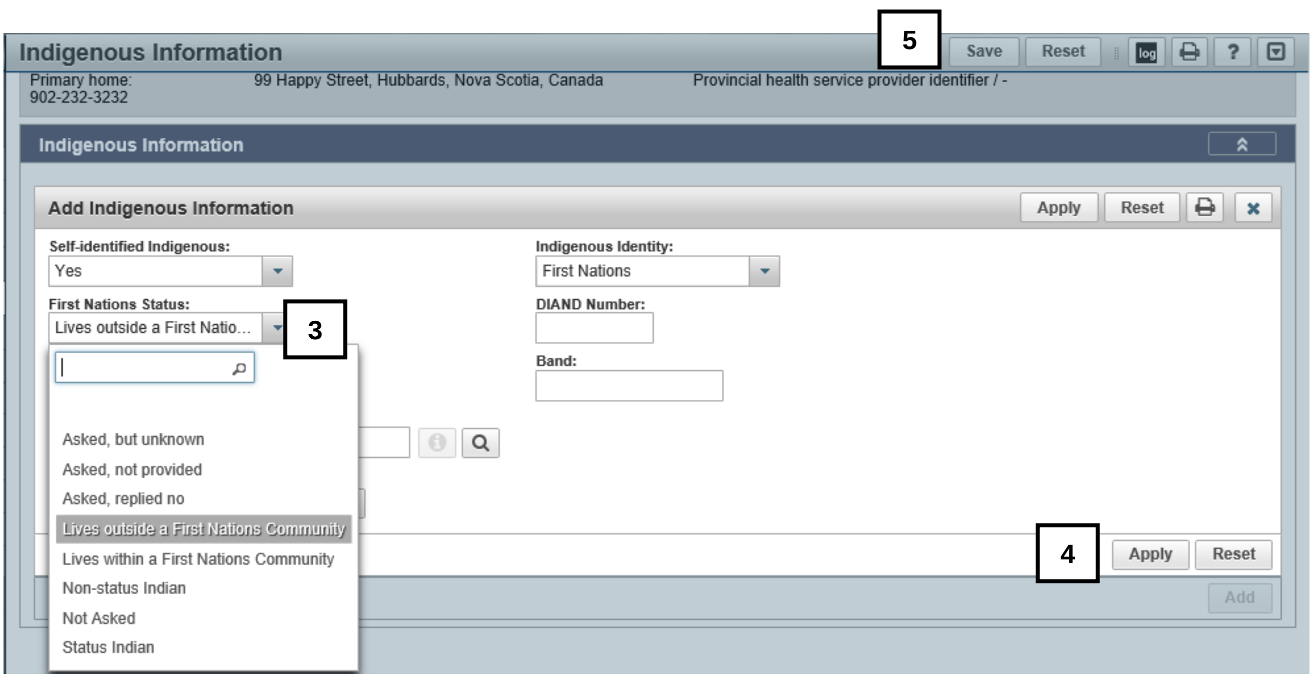
1. Click on the **Add** button



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



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



3. Select the First Nations Status from the drop-down list.

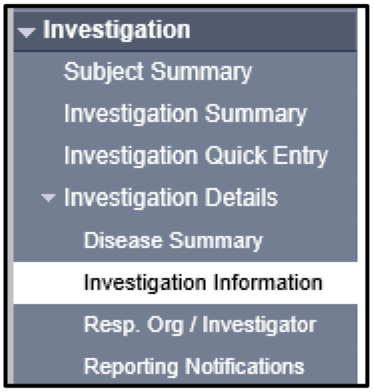
If the client has answered "No" to Self-identified Indigenous but lives in a First Nations Community, you would identify here. If client says "No" to living in First Nations Community, proceed to step 4

You do not need to enter information in the other fields

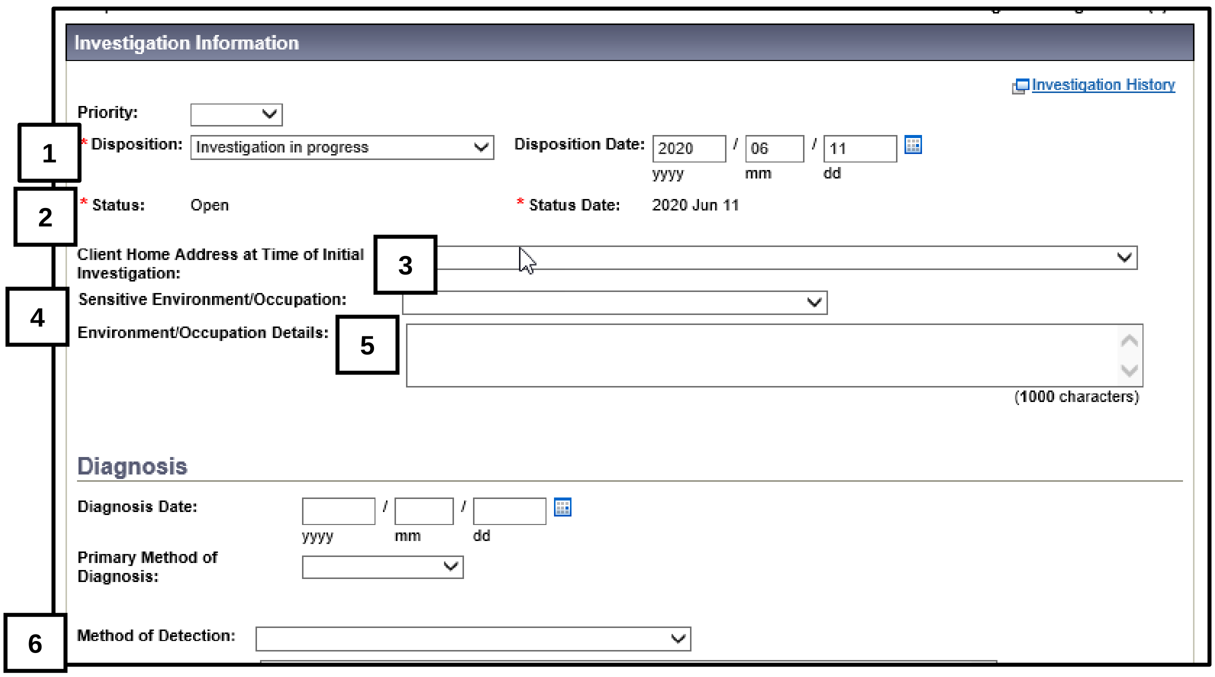
4. Click the **Apply** Button
5. Click the **Save** Button

Completing Investigation Information

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



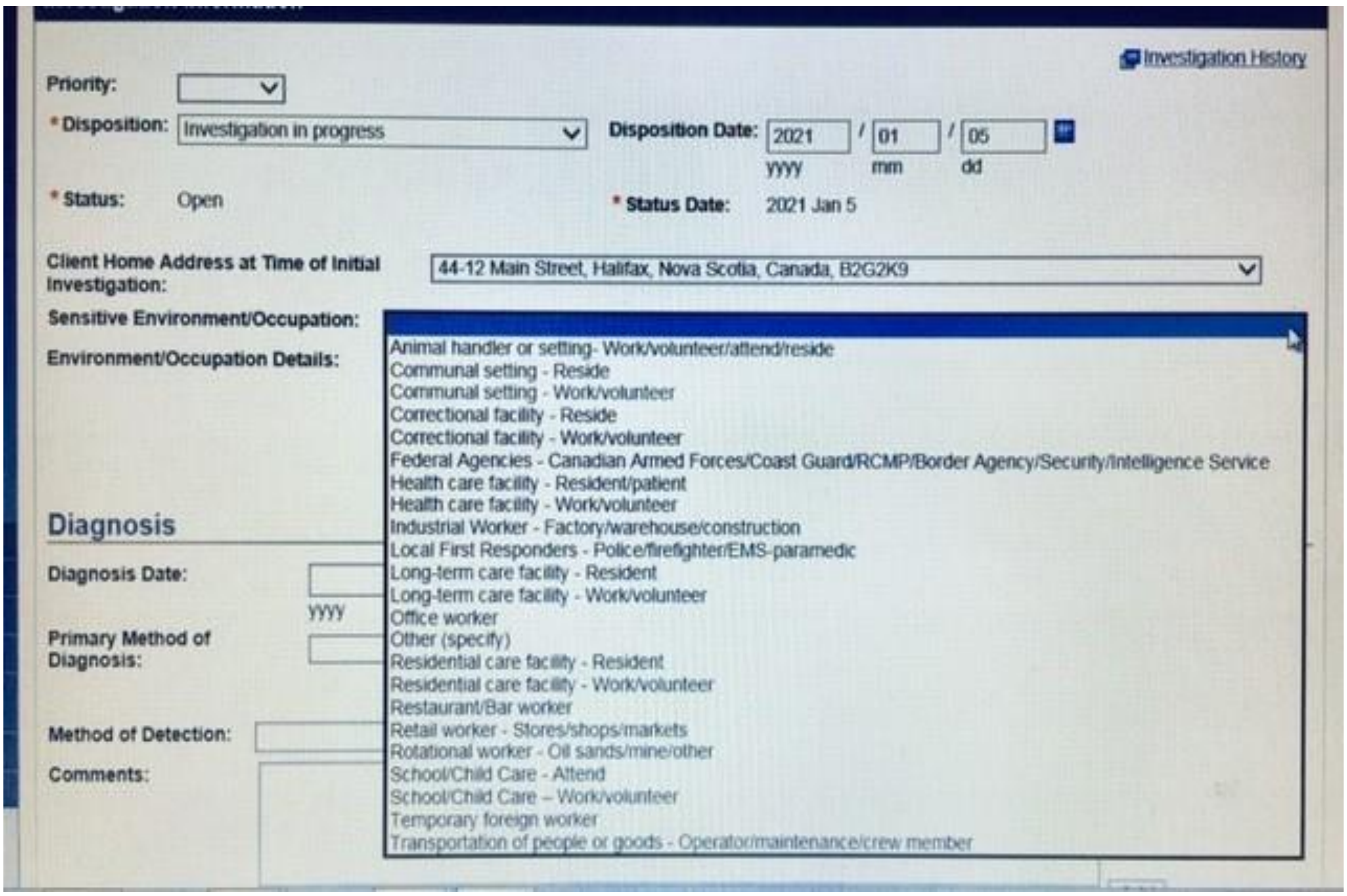
From the left-hand navigation, click on **Investigation Information**



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.

4. **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**)



- **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

5. **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.

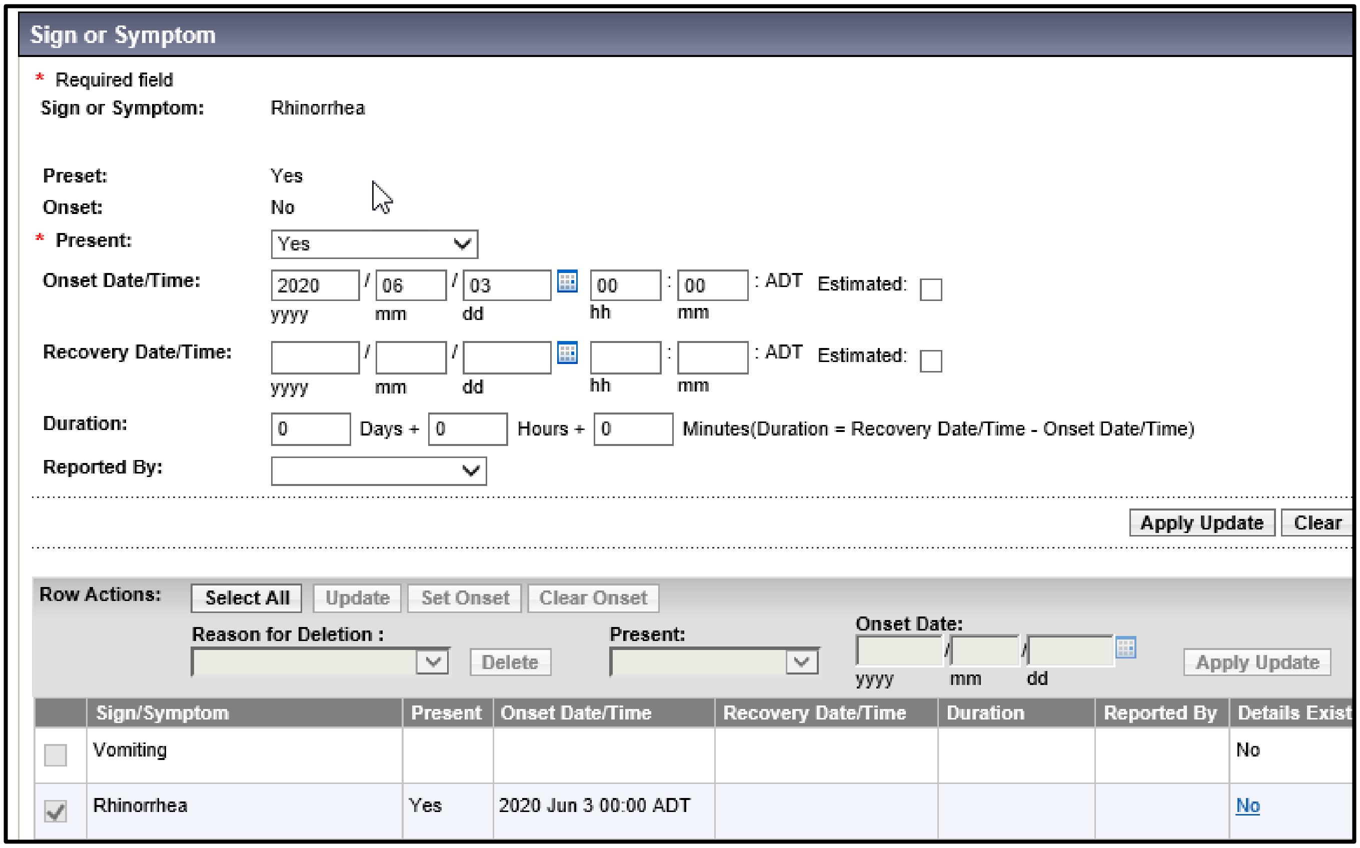
Note: For a CoVid-19 Investigation, **we DO NOT fill out the <u>Diagnosis Date</u> and <u>Primary Method of Diagnosis.</u>**

6. **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 has recorded Signs and Symptoms & Intermittent Monitoring Report indicates Signs and Symptoms present

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



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

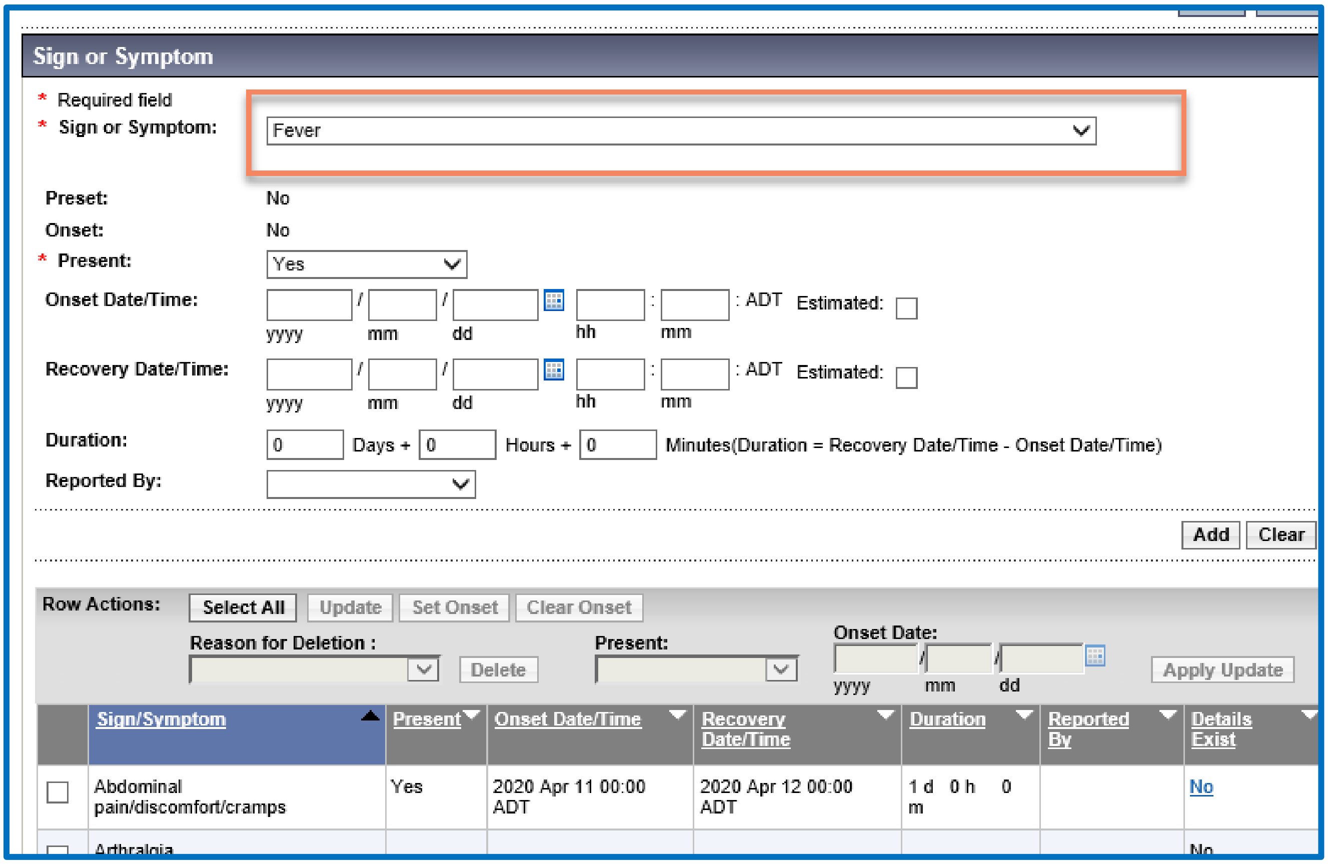
Sign and Symptom – reported by client and already present - Yes without a recovery date.

Cough	Yes	2020 Jun 15 00:00 ADT				No

- 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



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

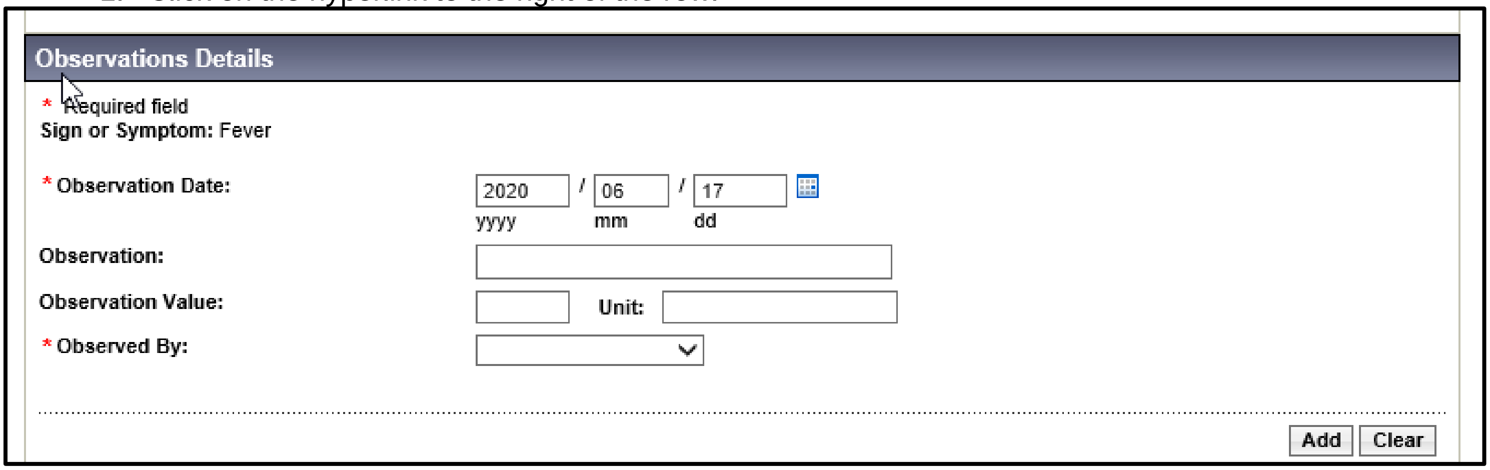
Add temperature observation

On the appropriate Fever S&S:

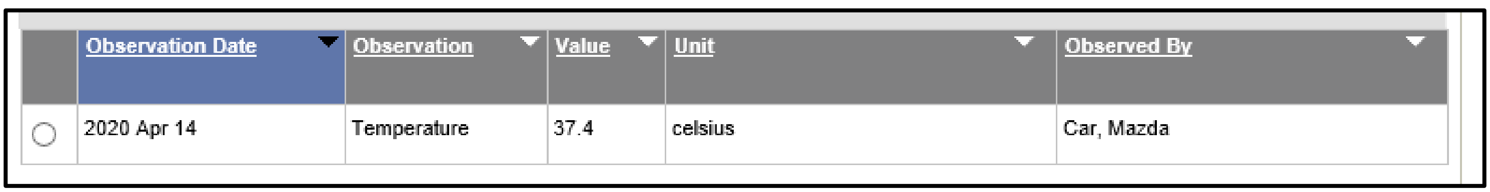
- if client reported fever record on active Fever – Yes (no recovery date)
- if client did not report a fever or did not report a temperature record on the Fever – No

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

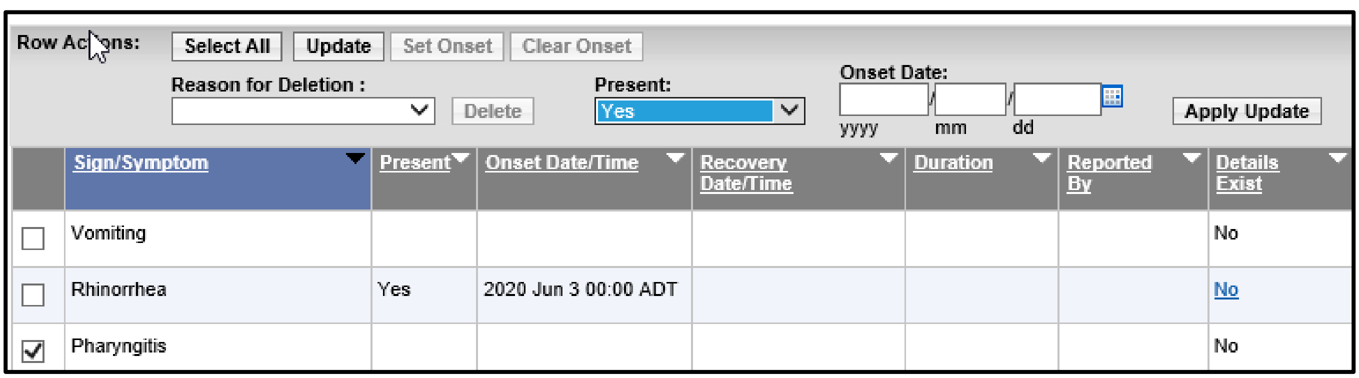
1. Click on the hyperlink to the right of the row.



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)



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



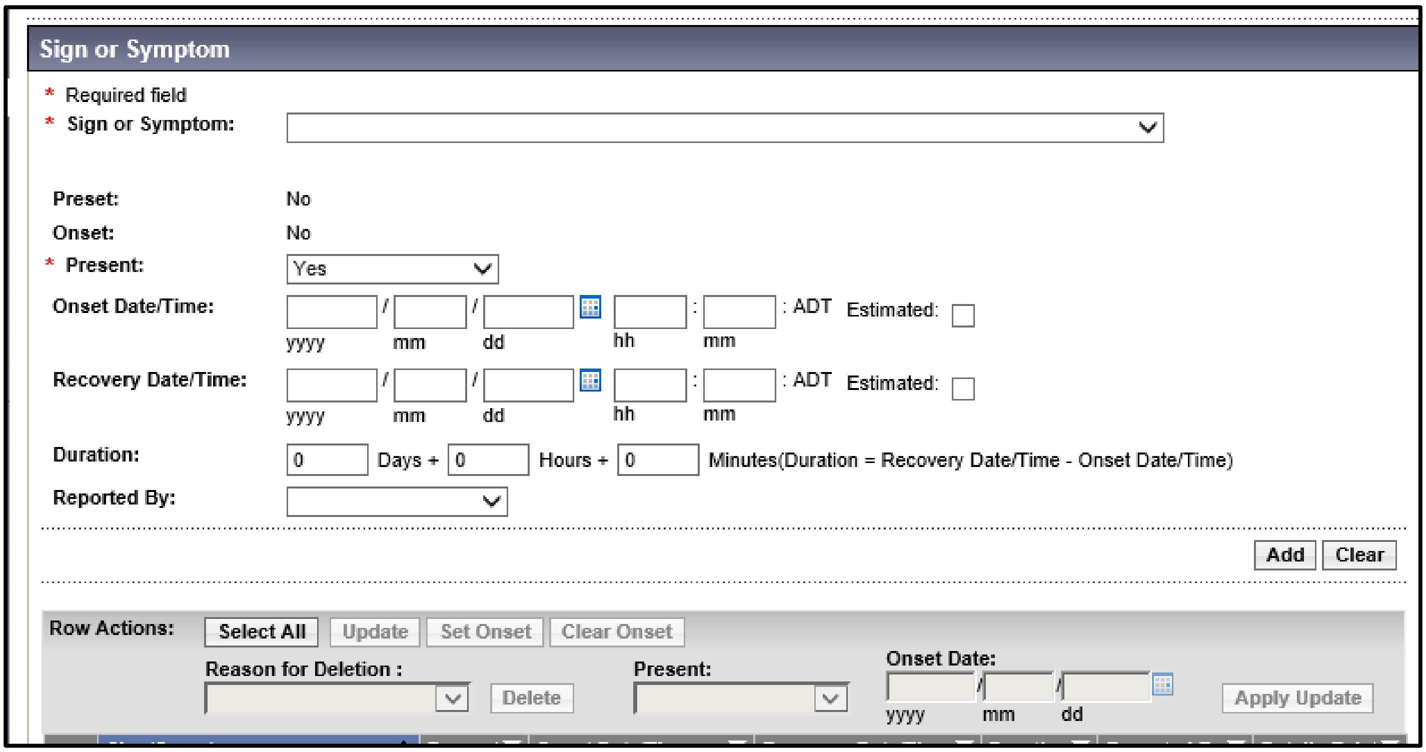
1. Click **Checkbox(s)** for S&S. You can multi-select S&S that have the same onset date.
2. **Present** - Select Yes from drop-down
3. **Onset Date** - Enter the date the client reported the S&S
4. Click **Apply Update** button

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

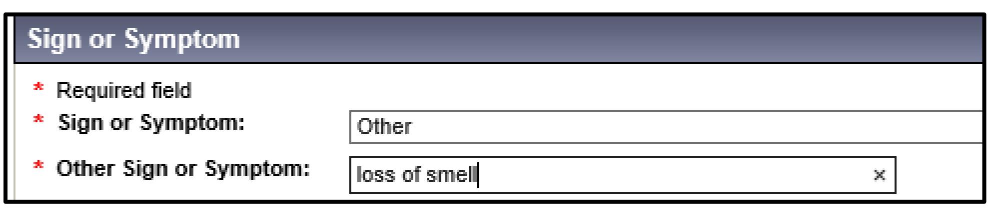
Pharyngitis	Yes	2020 Jun 16 00:00 ADT				No

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.



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

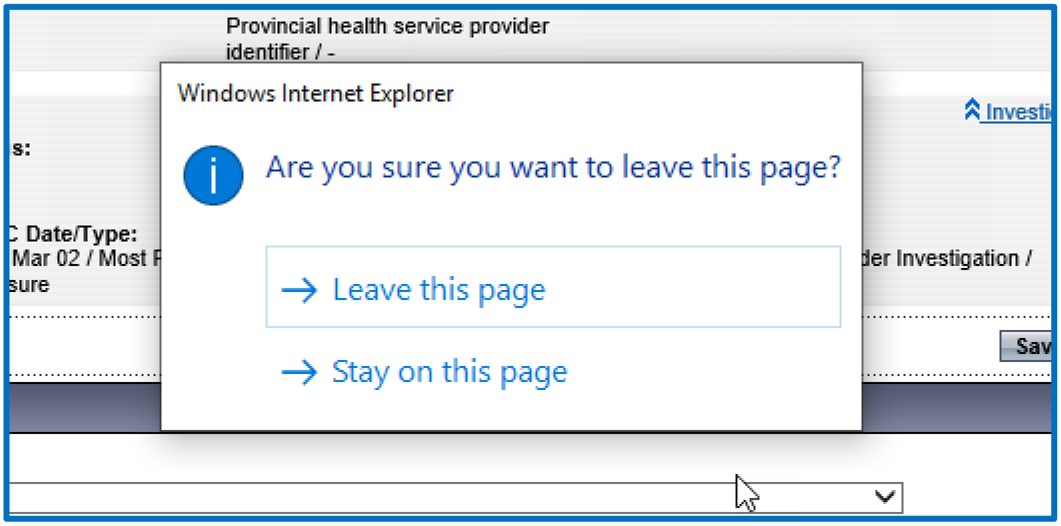


2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button
4. The S&S will now be updated in the table (see below)

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

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

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



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 2 | Set Onset | Clear Onset

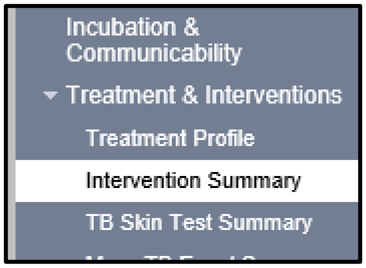
Reason for Deletion: Delete | Present: | Onset Date: yyyy / mm / dd | Apply Update

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Abdominal pain/discomfort/cramps						No
☐	Arthralgia						No
☐	Asymptomatic	Yes	2020 Jun 1 00:00 ADT	2020 Jun 7 00:00 ADT	6 d 0 h 0 m		No
☐	Chest pain						No
☐	Chills						No
☐	Confusion						No
1 ☑	Cough	Yes	2020 Jun 7 00:00 ADT				No

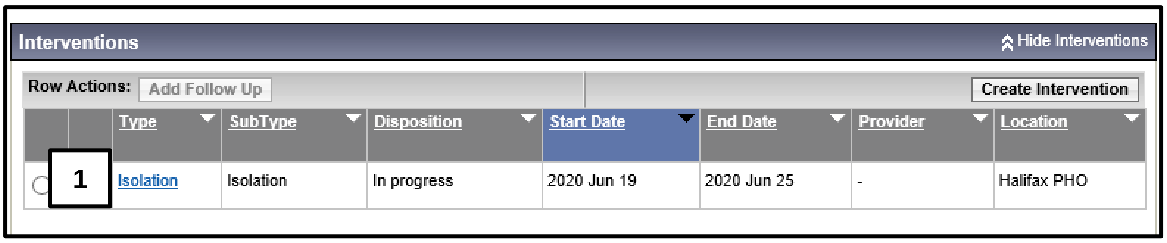
1. Click on the **checkbox** by the onset sign/symptom
2. Click on the **Onset** button
3. The sign/symptom is now updated as the onset sign/symptom (see below). Note: this will update the PHAC date in investigation banner.

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

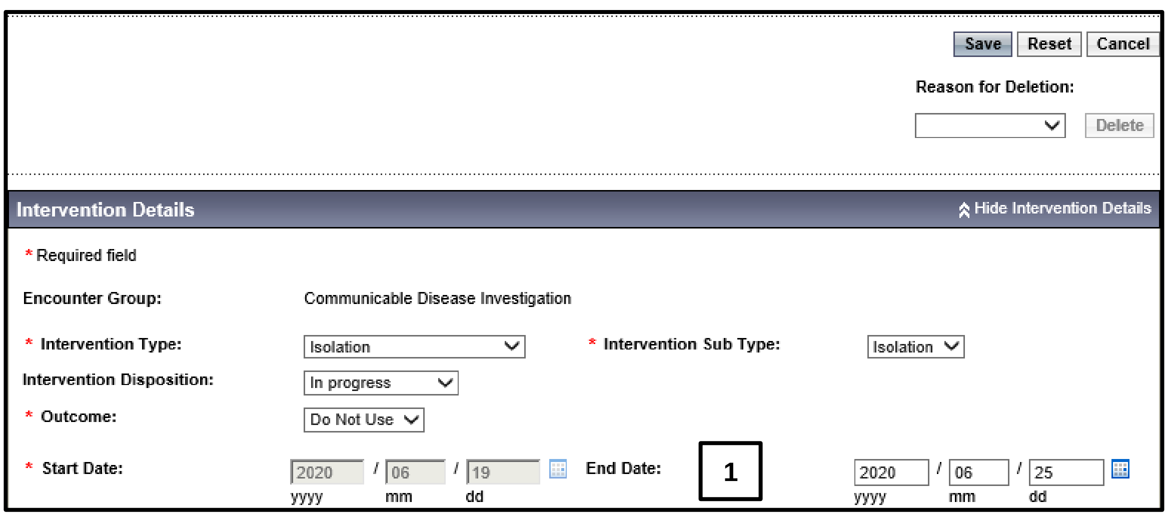
Updating the End Date on the Isolation Intervention



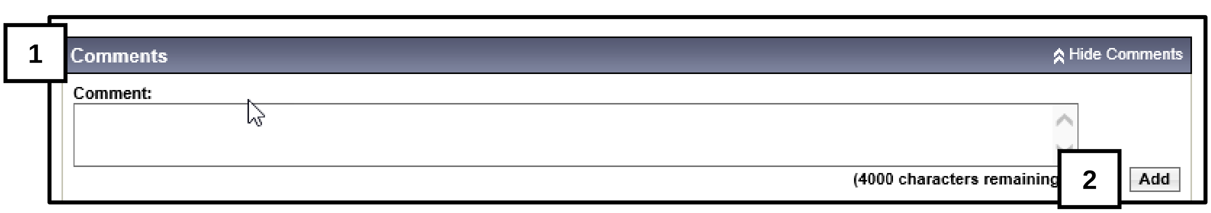
From the left-hand navigation, click on **Intervention Summary.**



1. Click on the Isolation hyperlink



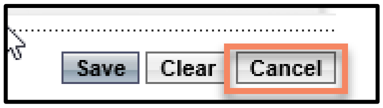
1. **End Date** - enter the revised end date



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

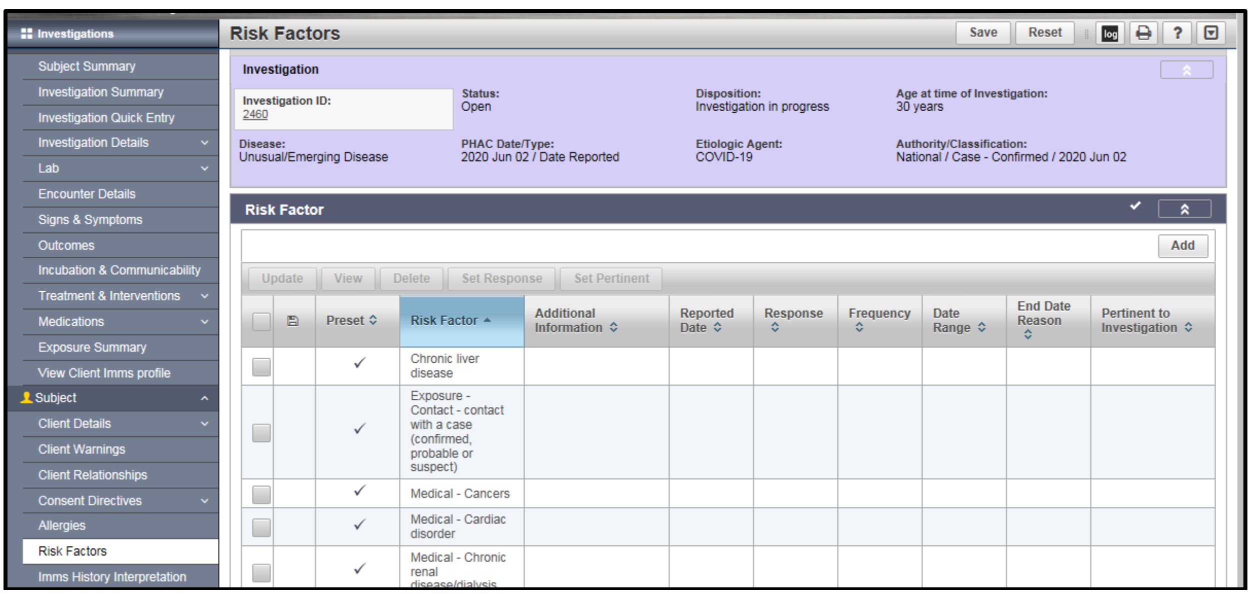
Ensure you take the intervention out of context



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

Documenting Risk Factors

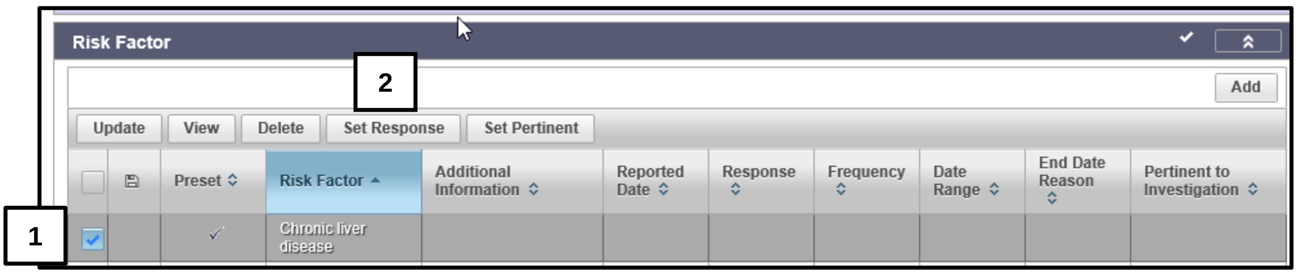
From the left-hand navigation, click on **Risk Factors**



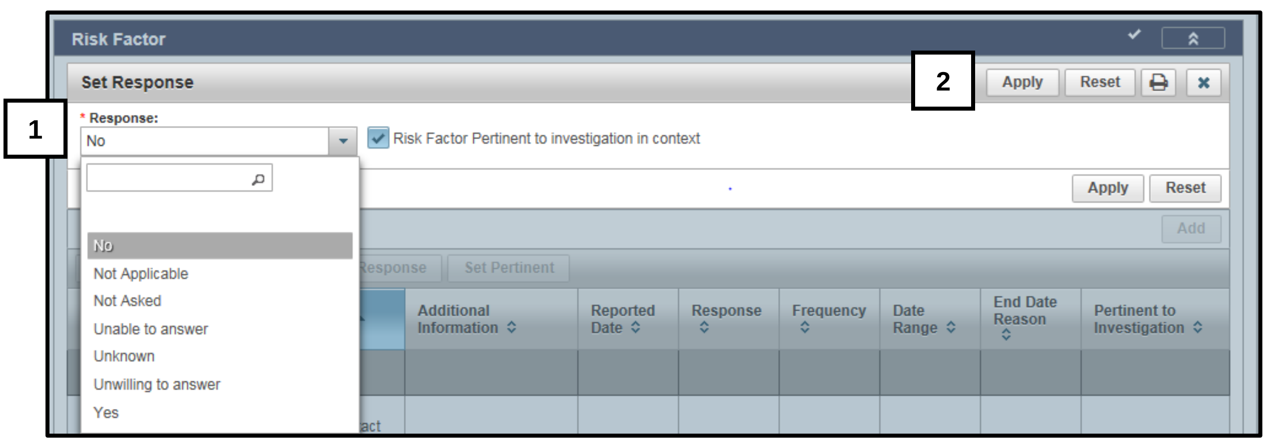
1. The risk factor table is populated with all presets defined for Unusual/Emerging disease for COVID-19. Ensure all preset risk factors are showing by clicking the **Drop-down** in the right- hand corner and changing from 10 to “all”:

Note: All preset risk factors require a response

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



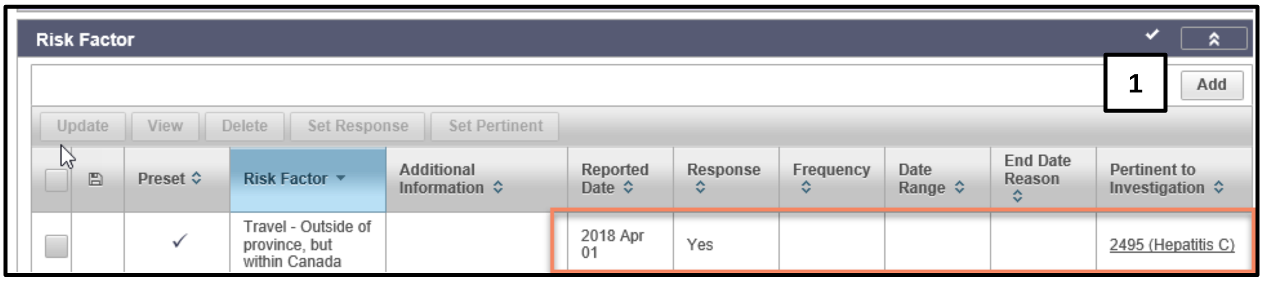
1. Click on the **Checkbox** beside the risk factor. You can select all risks that have the same response.
2. Click the **Set Response** button



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

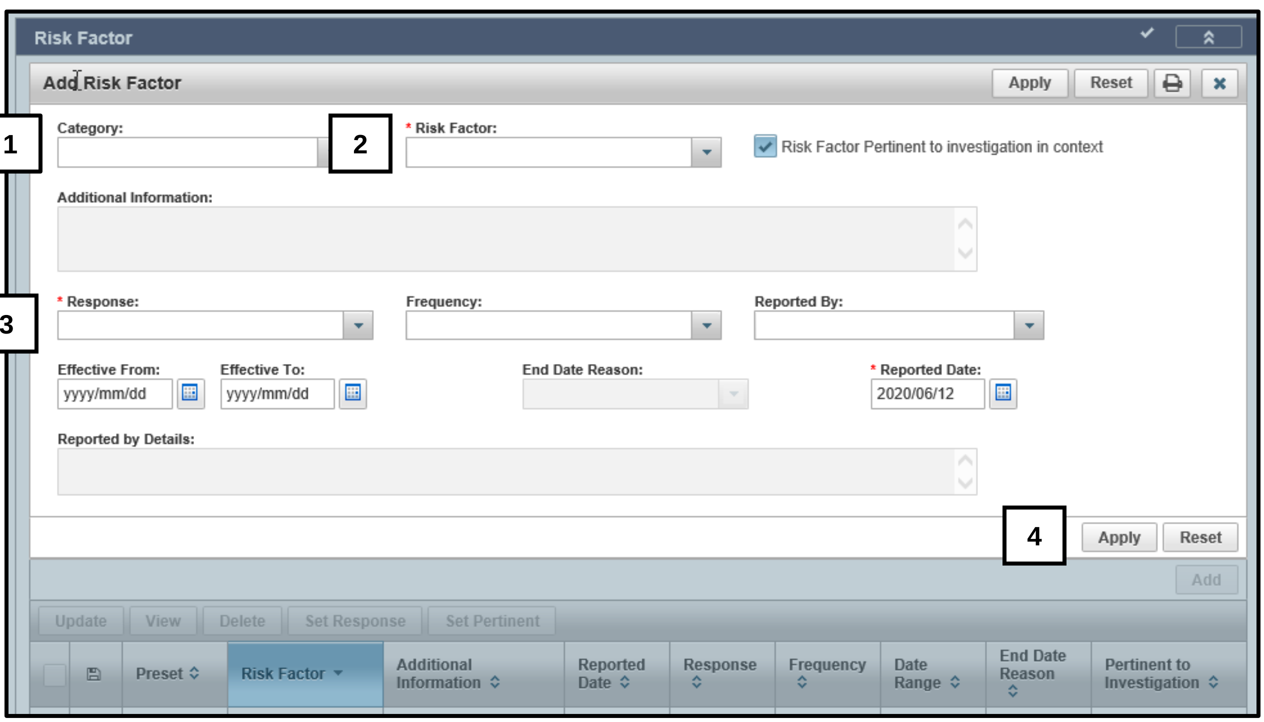
For a preset risk factors that contains a response Pertinent to another Investigation or to add a risk factor that is not a preset:

Do not update a preset Risk Factor that contains a response Pertinent to another Investigation. You will need to add the Risk Factor for the COVID-19 investigation.



1. Click the **Add** button

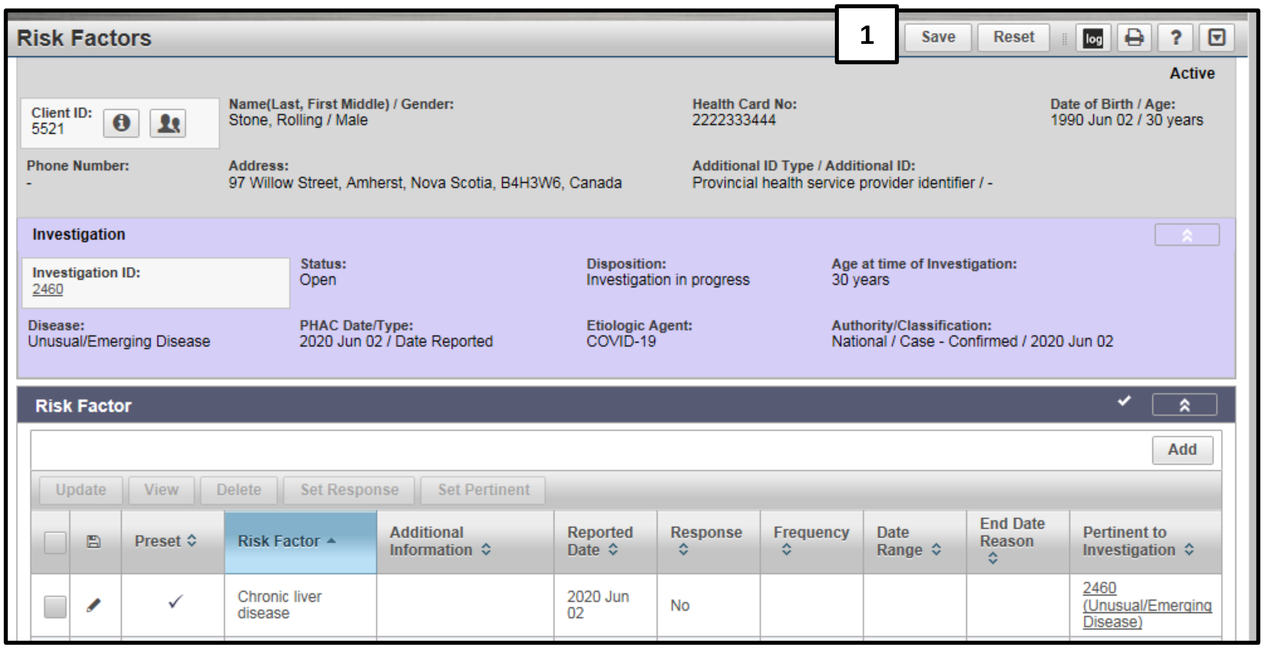
An area will open above the Risk Factor table. This is where you add a risk factor.



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.

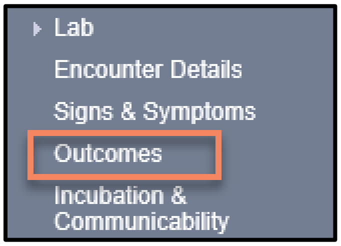
	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
	✓	Travel - Outside of province, but within Canada		2018 Apr 01	Yes				2495 (Hepatitis C)
	✓	Travel - Outside of province, but within Canada		2020 Jun 12	No				2494 (Unusual/Emerging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



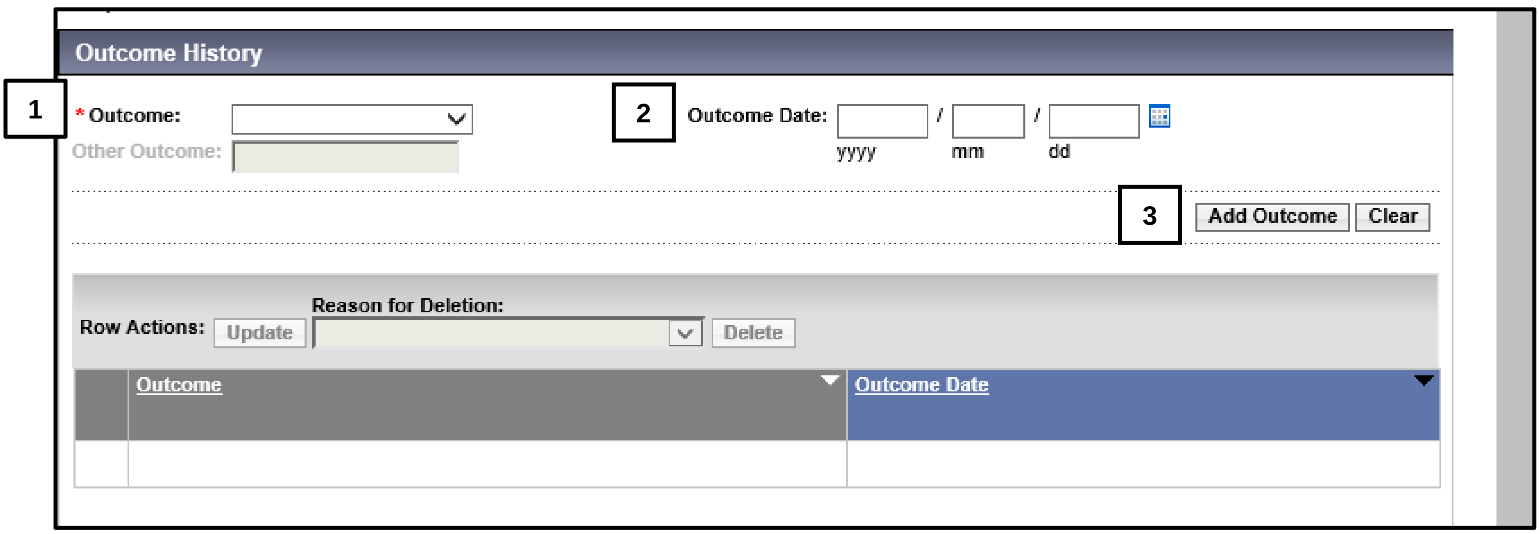
Ensure **ALL risk factors** have a response

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

Adding an Outcome

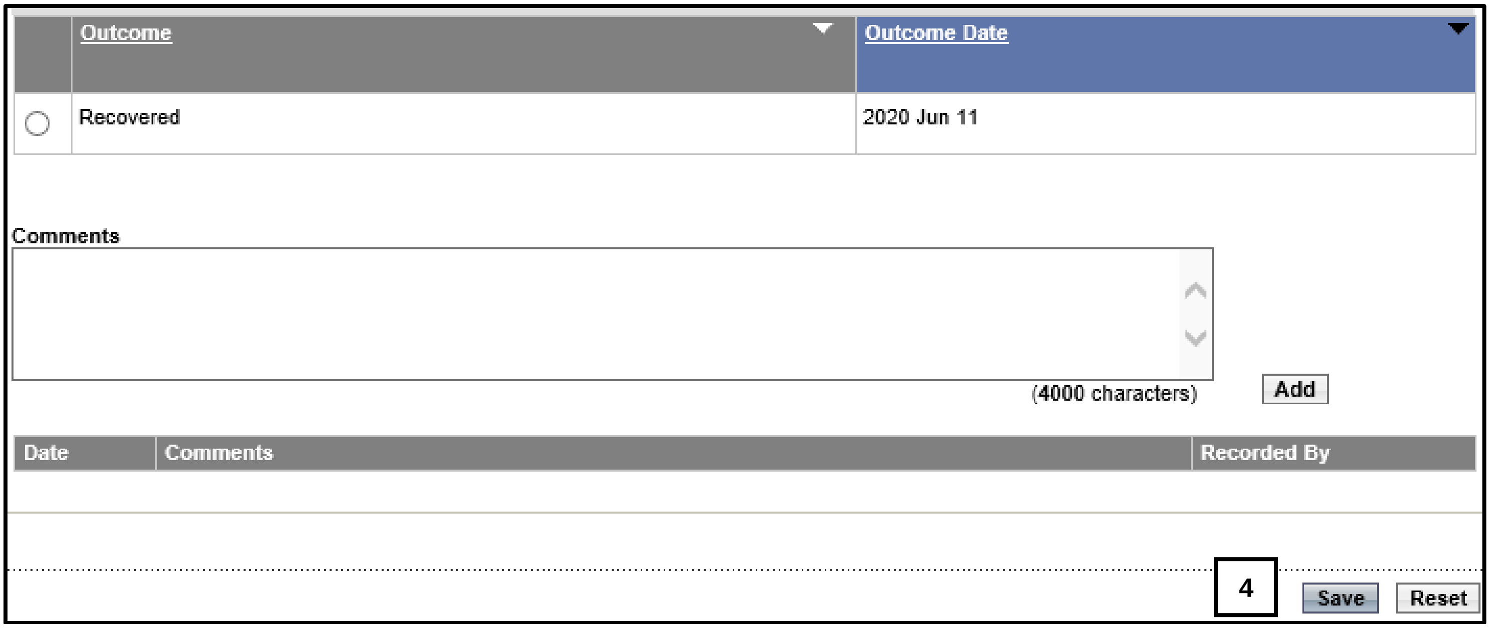


From the left-hand navigation bar, click on **Outcome**



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



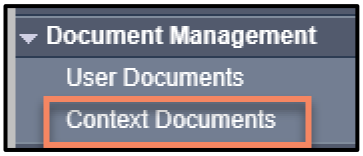
4. Click the **Save** button

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

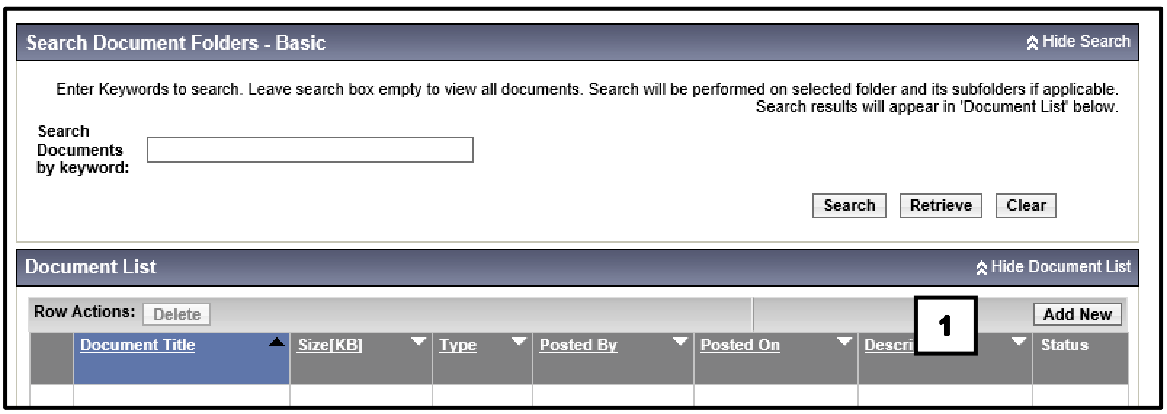
Outcomes are only changed if the status of the case's outcome changes during our investigation

Uploading a Document to an Investigation

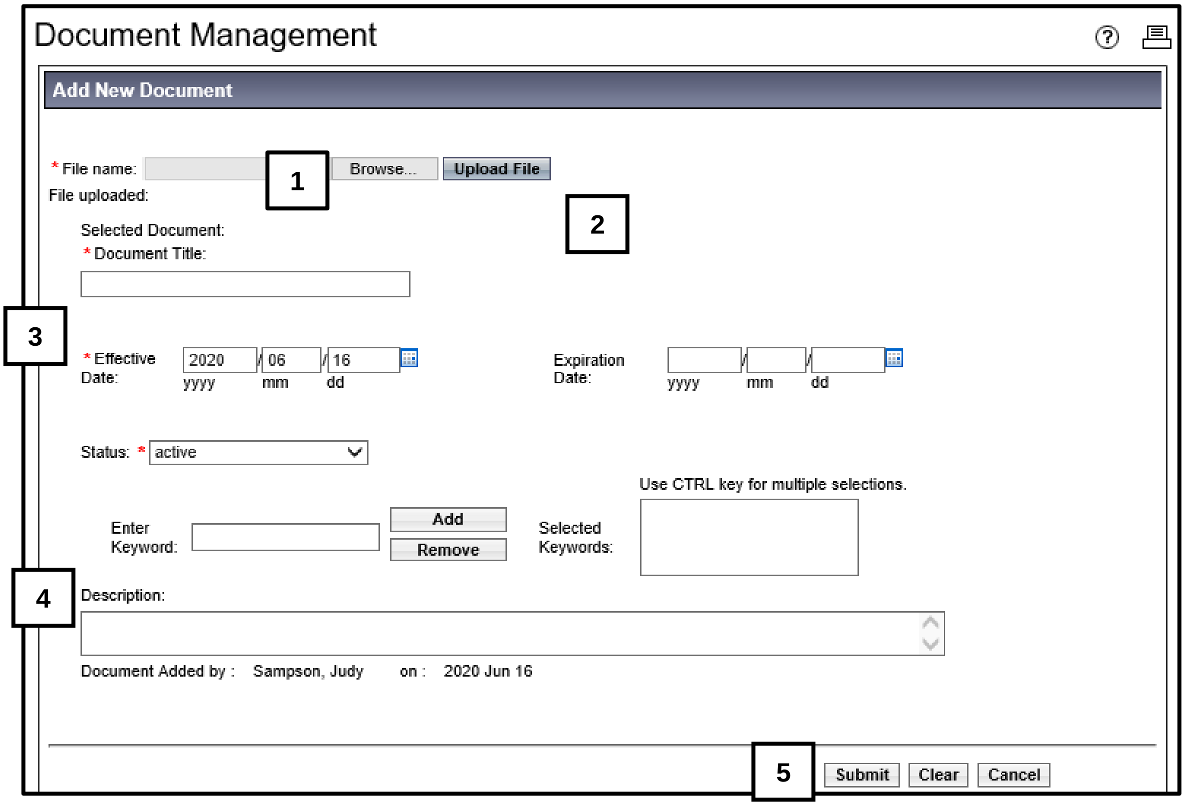
Note: Before you upload a document, ensure that the Encounter is not in the context banner. To take the encounter out of context, go to recent work and click on the investigation.



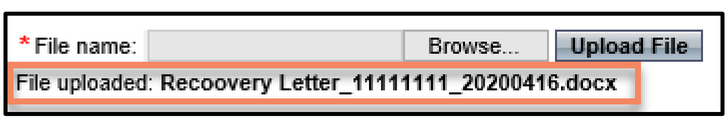
From the left-hand navigation, click on **Context Documents. Do not use User Documents.**



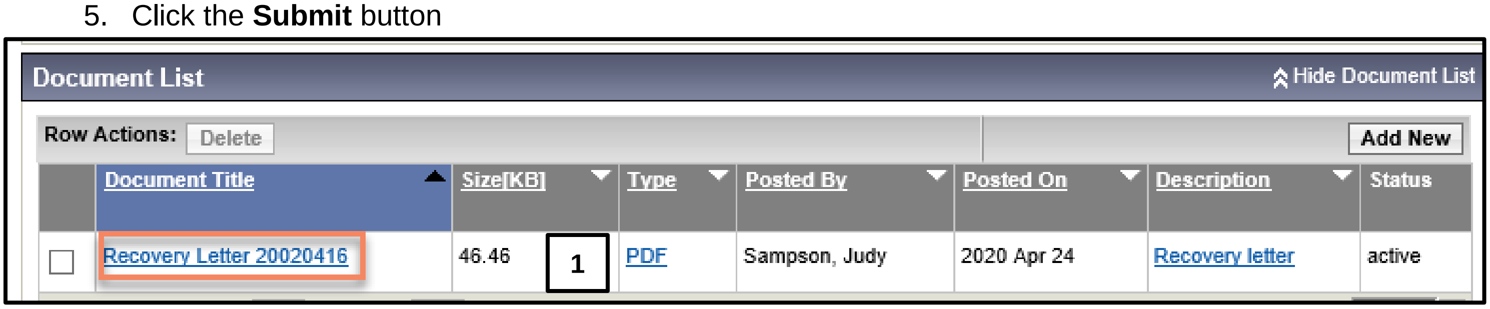
1. Click the **Add New** button



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

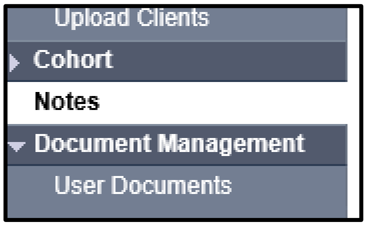


2. Click the **Upload File** button. You will see that the file is uploaded
3. **Document Title** – enter the document title
4. **Description –** enter the document description
5. Click the **Submit** button

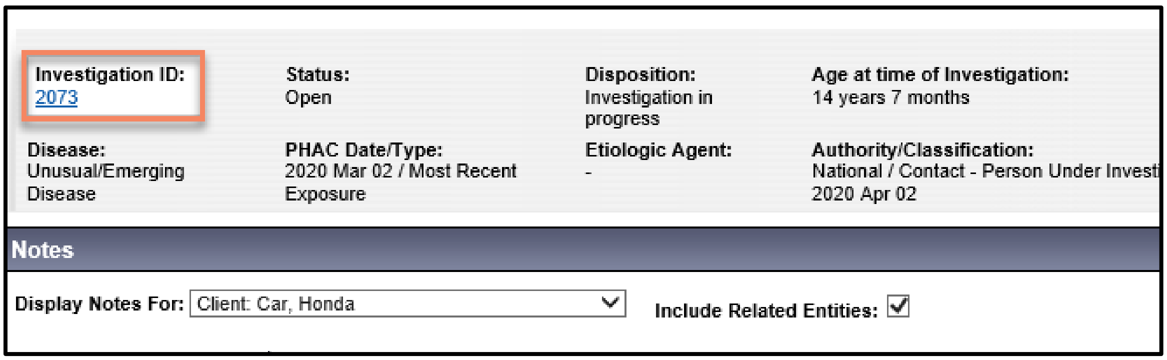


1. You can view the document by clicking on the hyperlinked name in the **Type** column

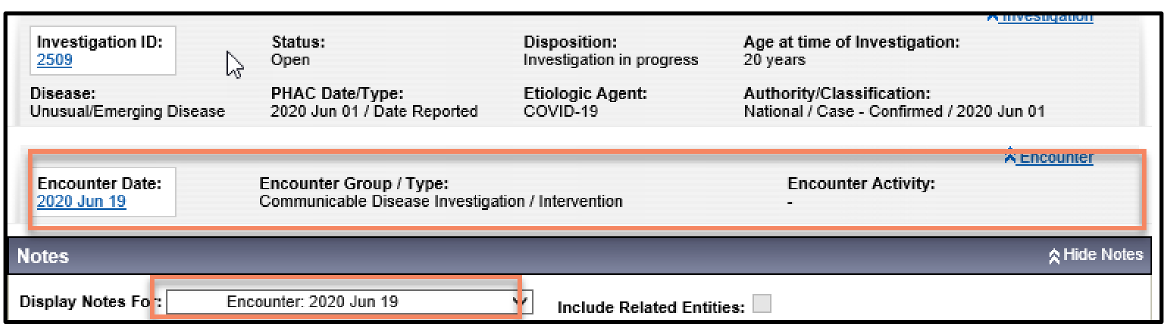
Adding a Clinical Note to an Investigation



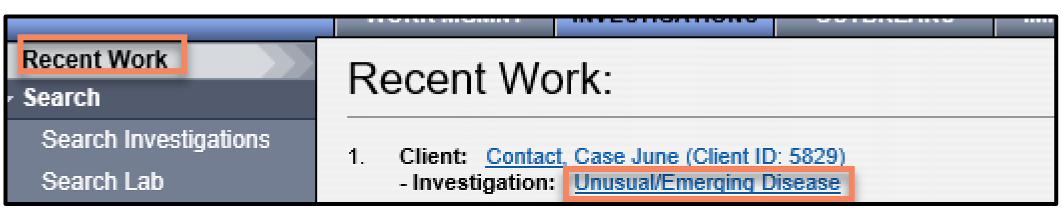
From the left-hand navigation, click on **Notes.**



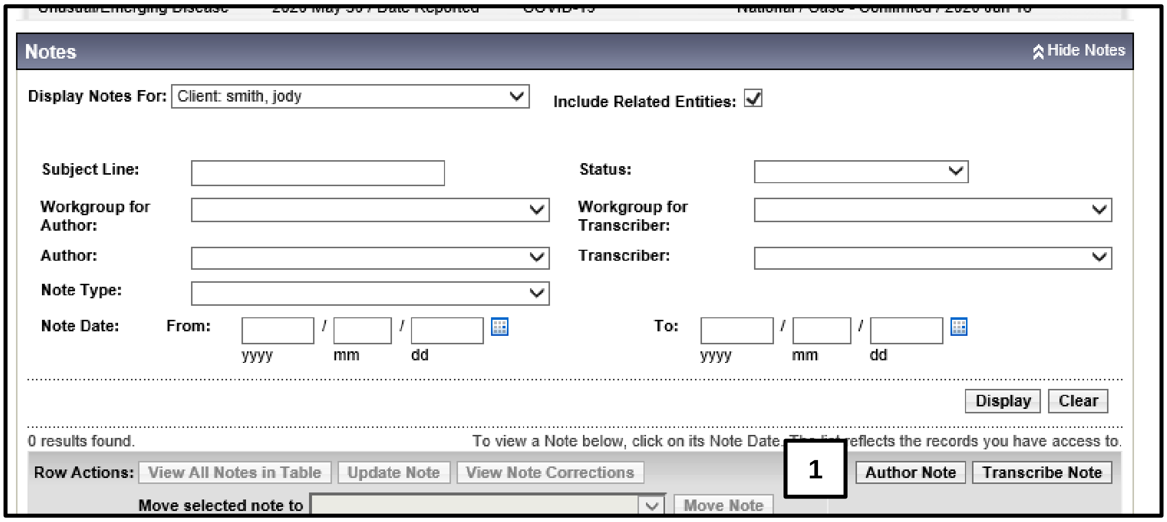
Ensure your investigation is in context. Do not add the note if only the client is in context.



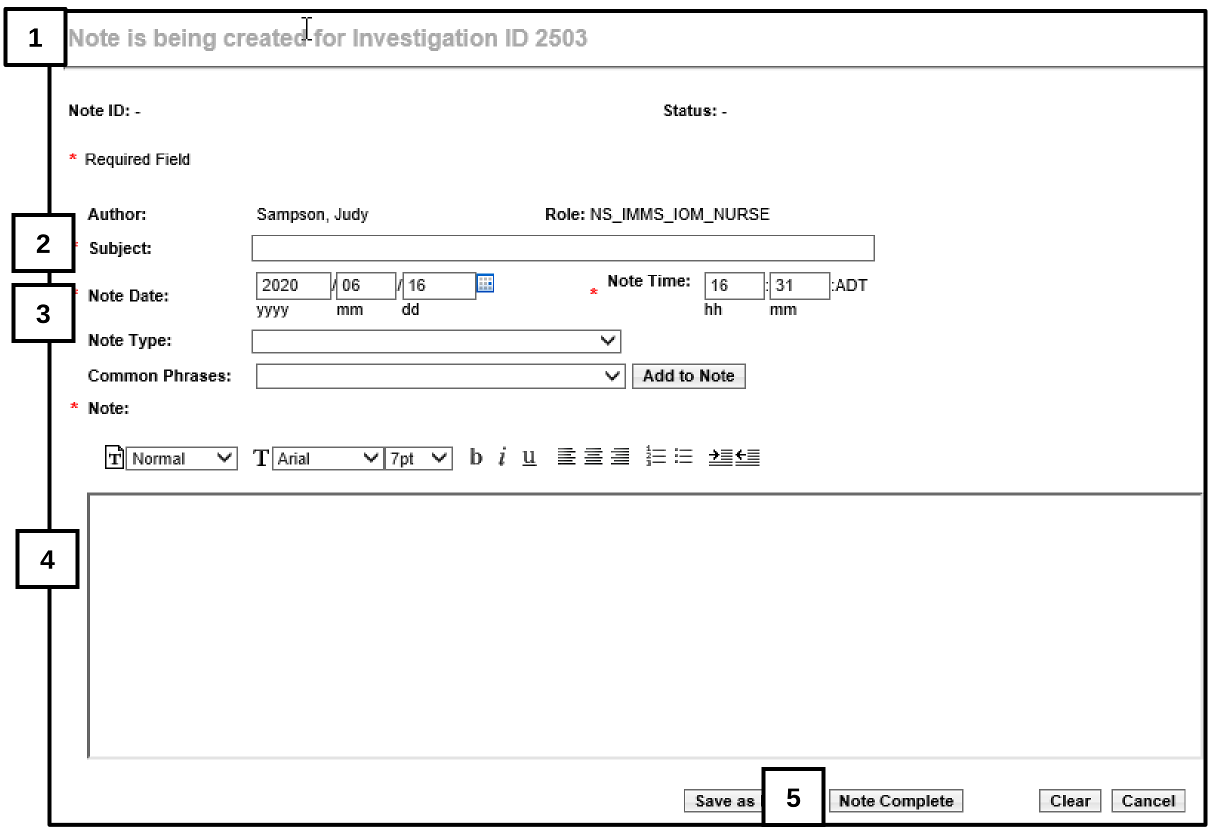
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



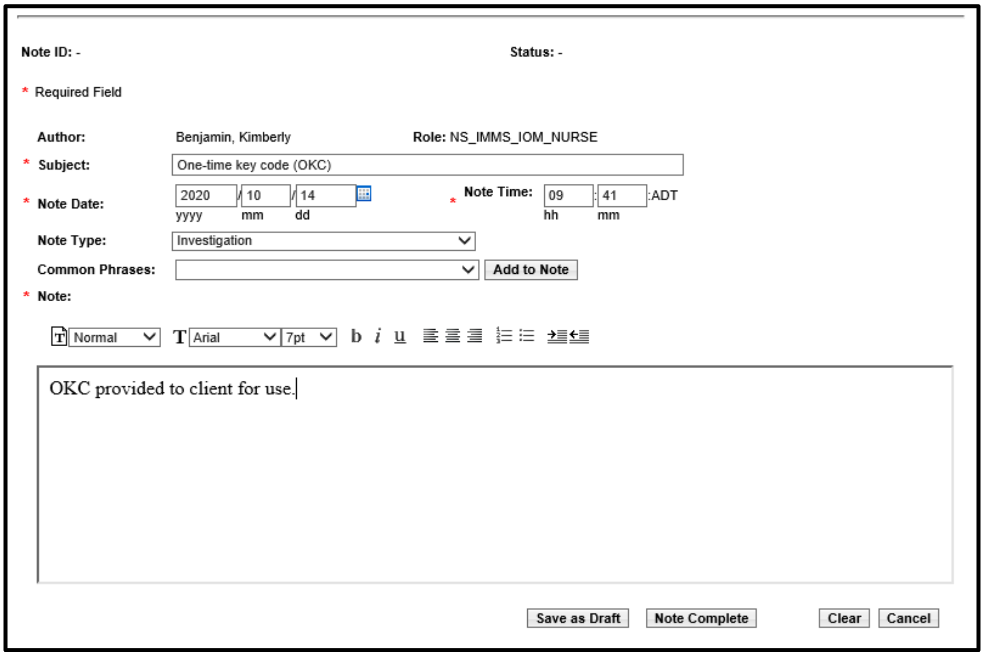
1. Click on **Author Note** button



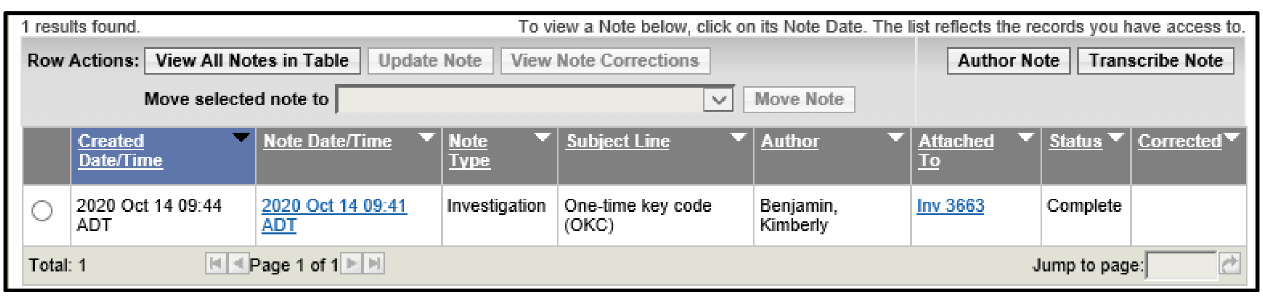
1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details
5. Click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

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: Benjamin, Kimberly
Role: NS_IMMS_IOM_NURSE
* Subject: One-time key code (OKC)
* Note Date: 2020 / 10 / 14 (yyyy mm dd)
* Note Time: 09 : 41 :ADT (hh mm)
Note Type: Investigation
Common Phrases: Add to Note
* Note:
Normal | Arial | 7pt
OKC provided to client for use.
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** – OKC provided for client use
4. Click the **Note Complete** button


1 results found.
To view a Note below, click on its Note Date. The list reflects the records you have access to.
Row Actions: View All Notes in Table | Update Note | View Note Corrections | Author Note | Transcribe Note
Move selected note to | Move Note

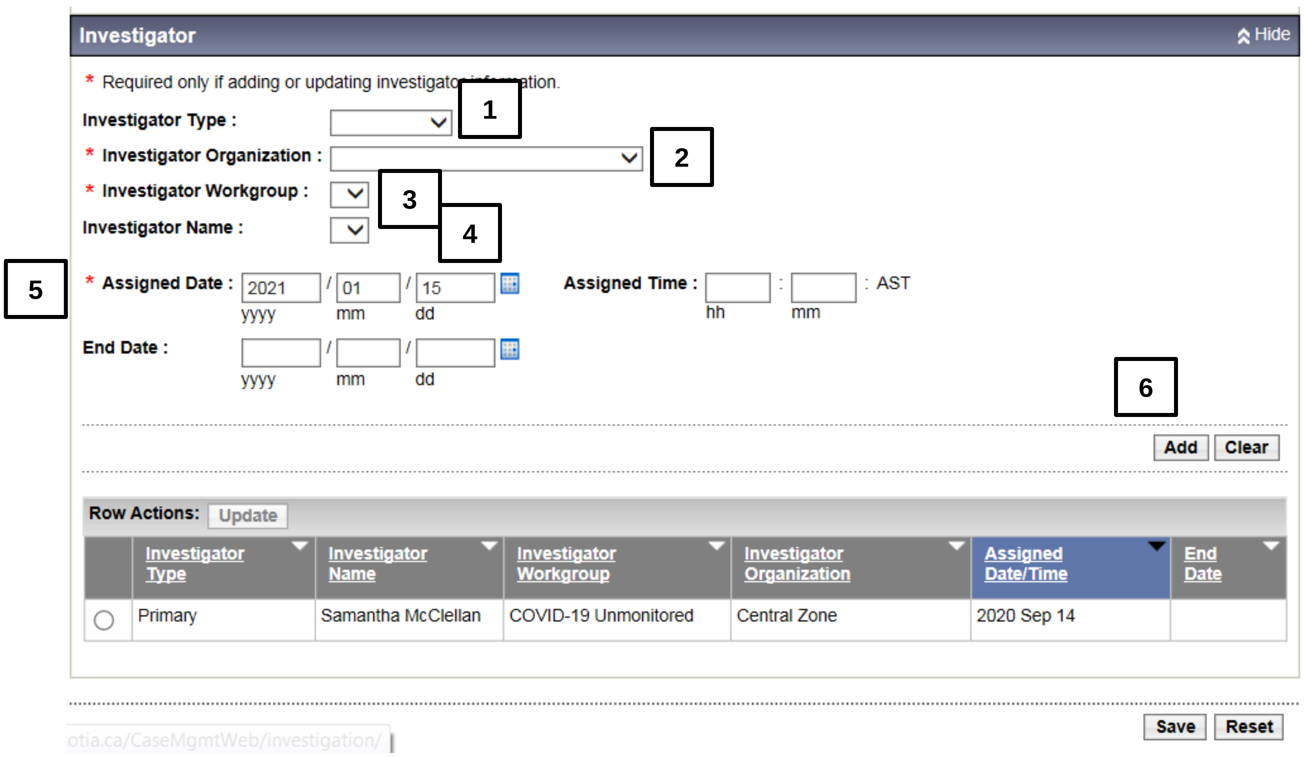
	Created Date/Time	Note Date/Time	Note Type	Subject Line	Author	Attached To	Status	Corrected
○	2020 Oct 14 09:44 ADT	2020 Oct 14 09:41 ADT	Investigation	One-time key code (OKC)	Benjamin, Kimberly	Inv 3663	Complete	

Total: 1 Page 1 of 1 Jump to page:

Adding a Secondary Investigator

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

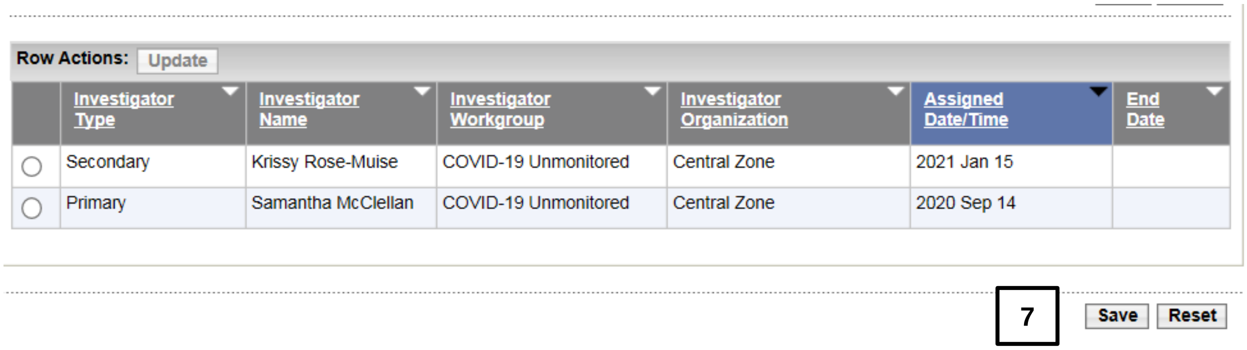
Scroll to bottom of page:



Enter the following information:

1. **Investigator Type**- Secondary
2. **Investigator Organization**- find and select the **Zone** that represents where 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**

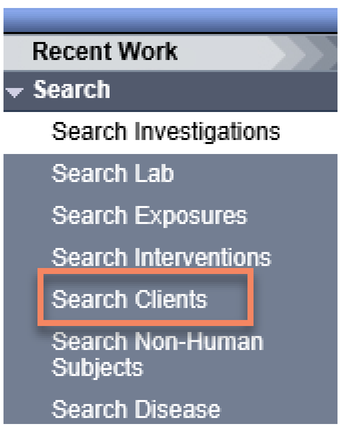
New name will appear in the table below:



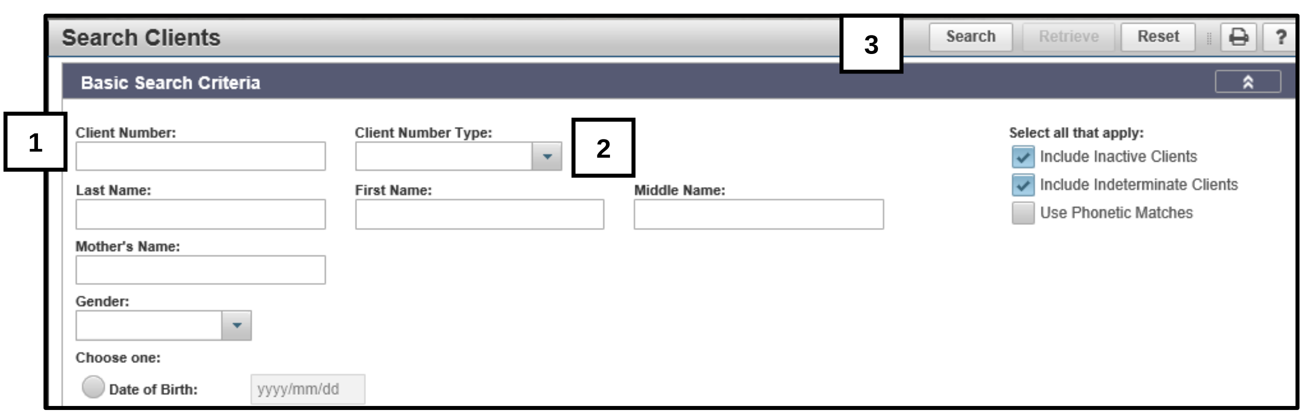
	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
○	Secondary	Krissy Rose-Muise	COVID-19 Unmonitored	Central Zone	2021 Jan 15	
○	Primary	Samantha McClellan	COVID-19 Unmonitored	Central Zone	2020 Sep 14	

7. Click the Save Button

Contacts Considered Low Risk due to Immunization Status



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

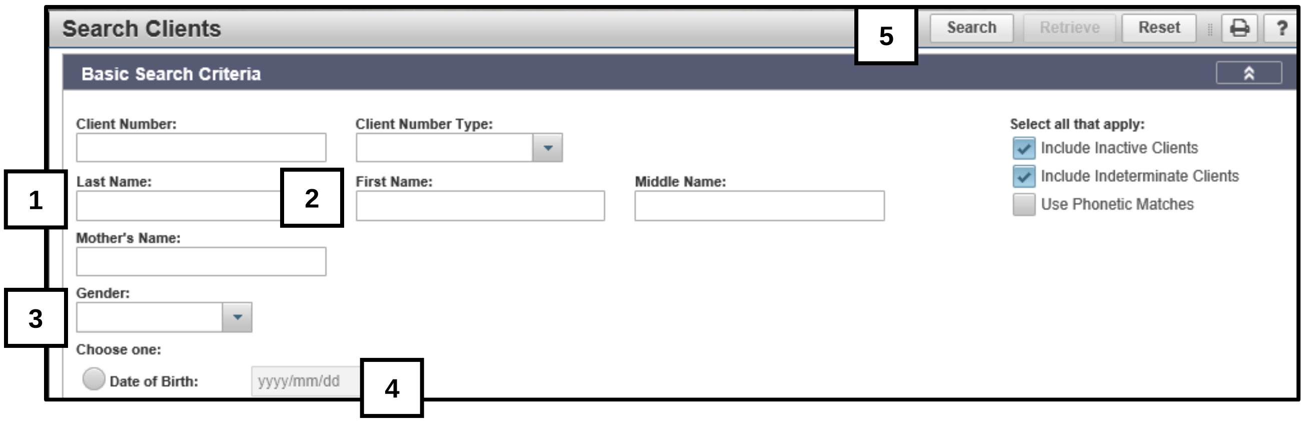


Health Card Number is the preferred search for a client

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

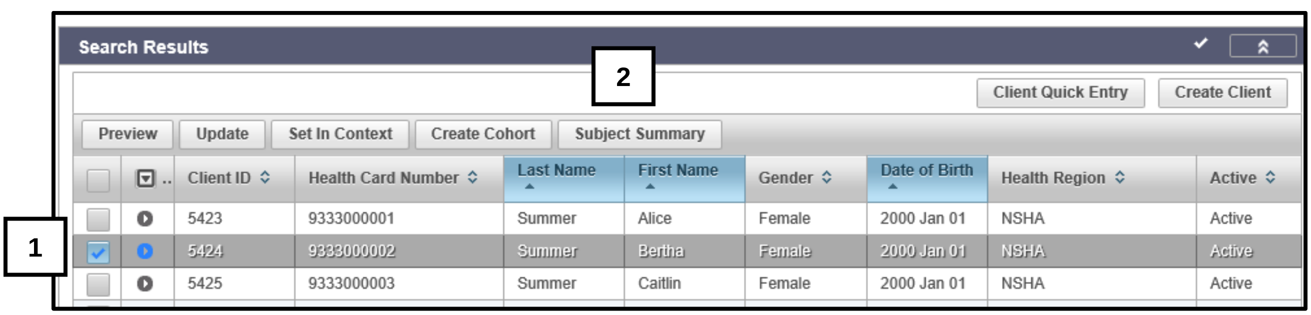
6. Click on the **Search** button

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



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

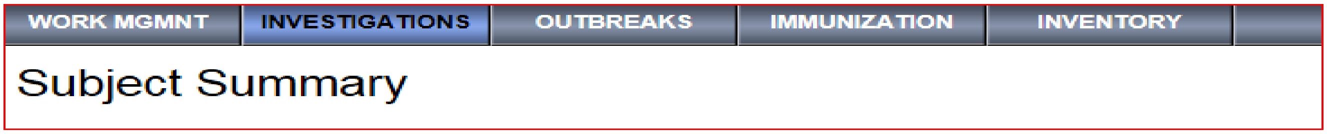


1. Click the **checkbox** for the client that you want to work with.
2. Click the **Subject Summary** button

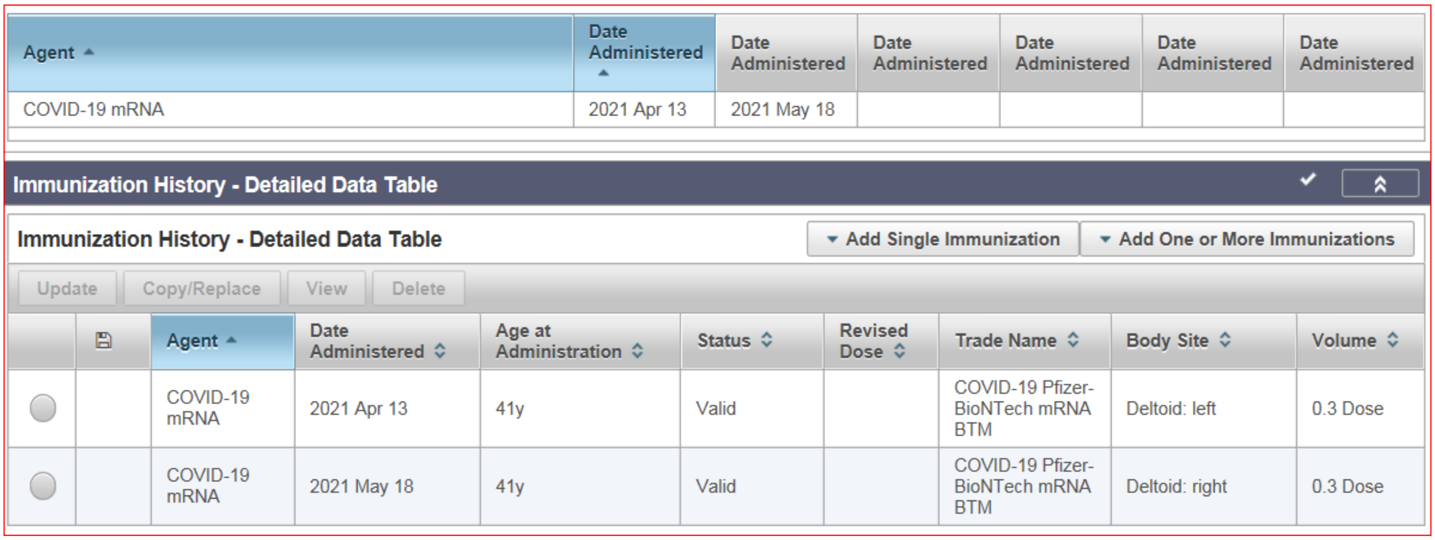
If no search results are returned:

- 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**



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



Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
COVID-19 mRNA	2021 Apr 13	2021 May 18				

Immunization History - Detailed Data Table

Immunization History - Detailed Data Table — Add Single Immunization — Add One or More Immunizations

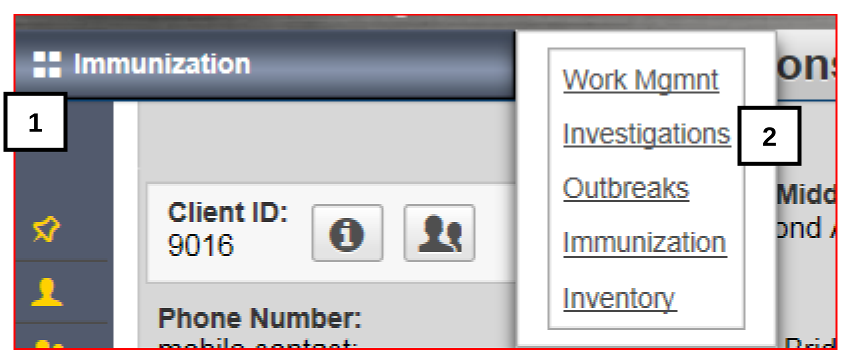
Update | Copy/Replace | View | Delete

		Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
○		COVID-19 mRNA	2021 Apr 13	41y	Valid		COVID-19 Pfizer-BioNTech mRNA BTM	Deltoid: left	0.3 Dose
○		COVID-19 mRNA	2021 May 18	41y	Valid		COVID-19 Pfizer-BioNTech mRNA BTM	Deltoid: right	0.3 Dose

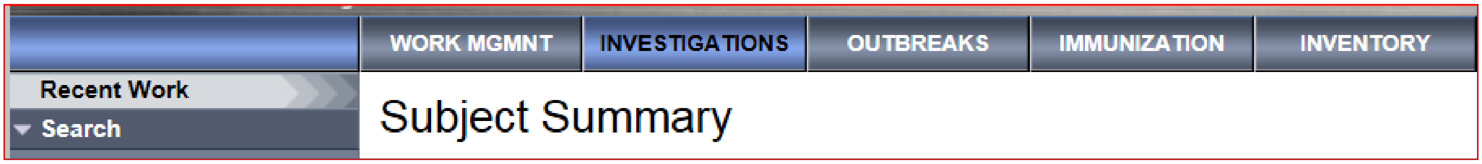
If your contact has two doses of a Health Canada approved Covid-19 vaccine and has been exposed to COVID-19 two weeks after their second dose, they would be treated as a **low** risk exposure. As per the NS Interim Measures document. This direction may change. Please, review the document.

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



Panorama will return to the investigation subject summary page.



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

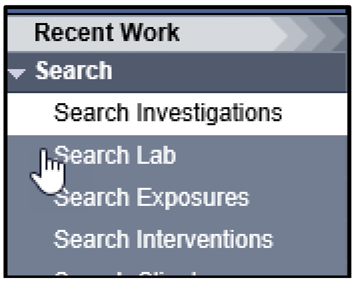
Subject: Low risk contact due to receiving 2 doses COVID Vaccine
Body: this contact has received a 2 dose series of a Health Canada Approved COVID-19 vaccine and has been exposed to COVID-19, 2 weeks after their second dose. This person is a low risk contact. See Immunization record on file.

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.

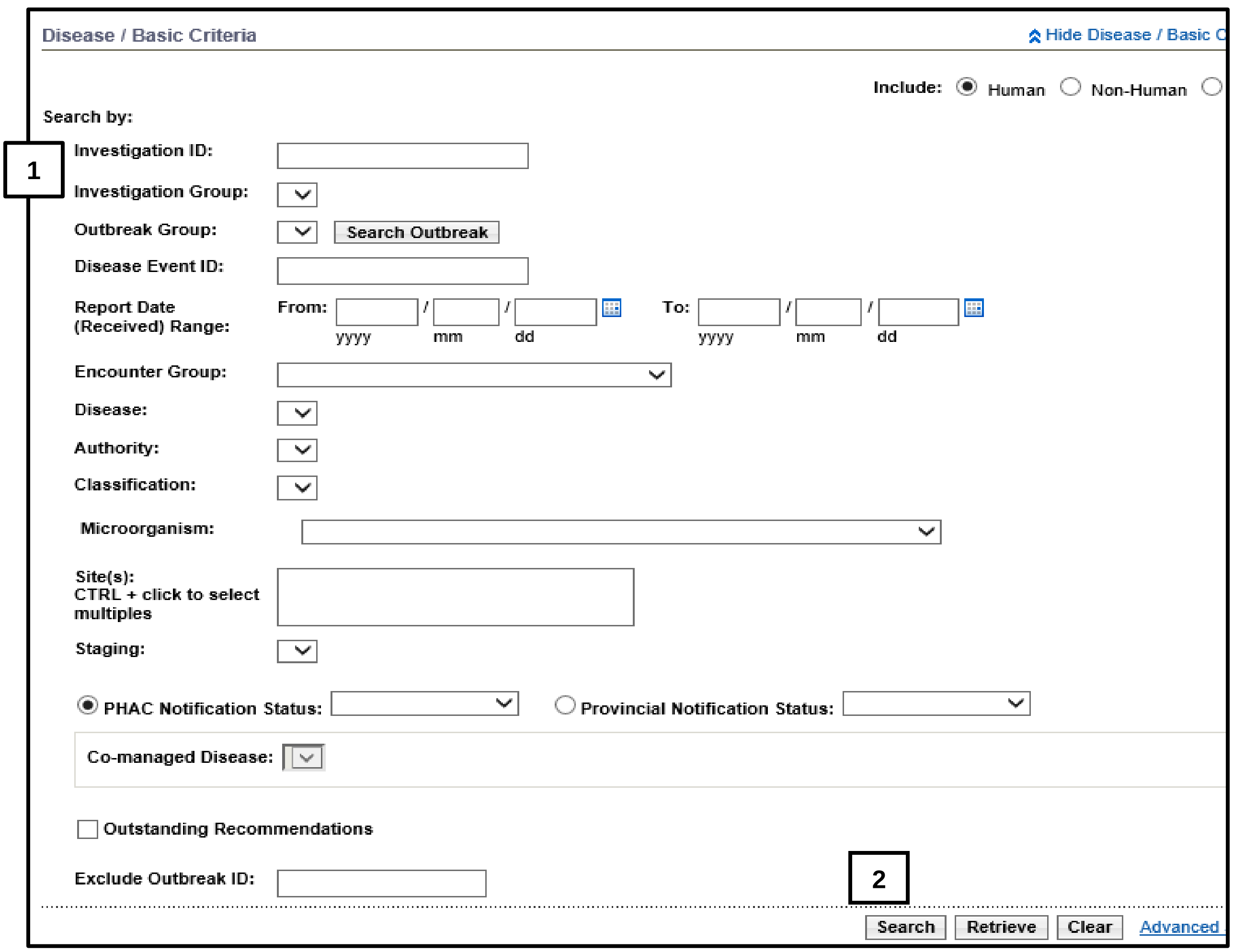
Intermittent Monitoring

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

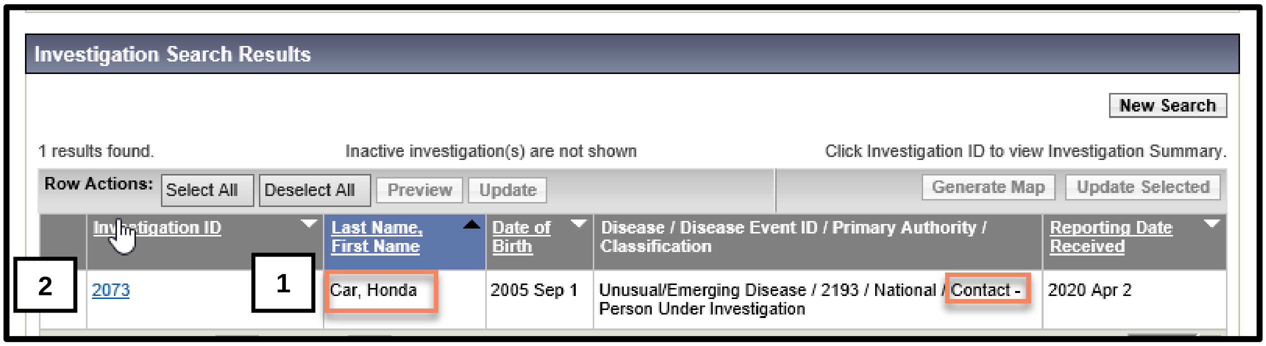
Search for an Investigation



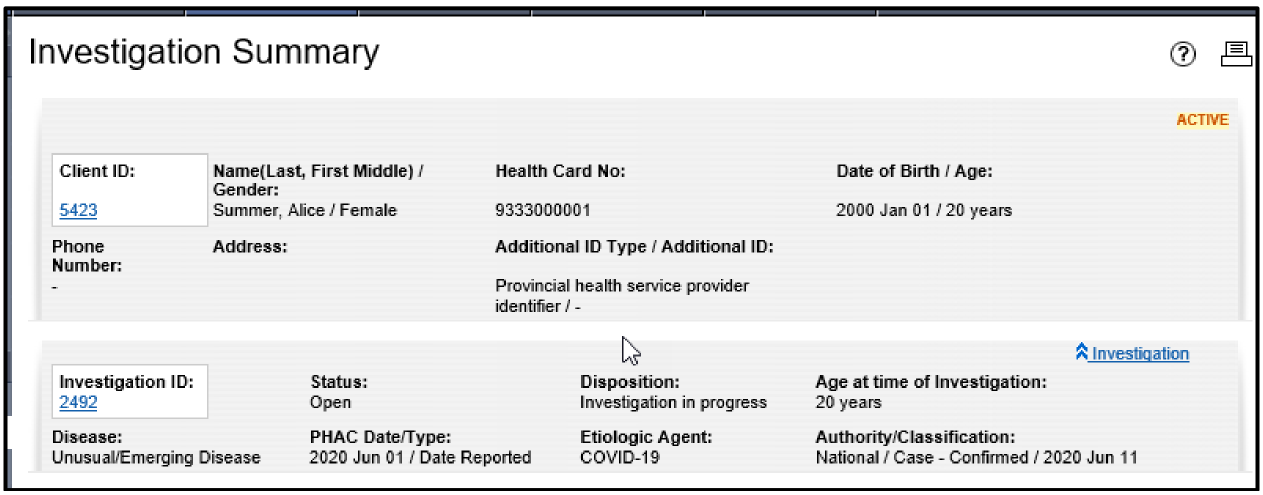
From the left-hand navigation, click on **Search Investigations**



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

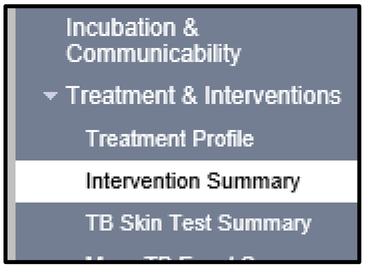


1. In the search results, validate your investigation matches the case or contact and the client name
2. Click on the hyperlink for the investigation



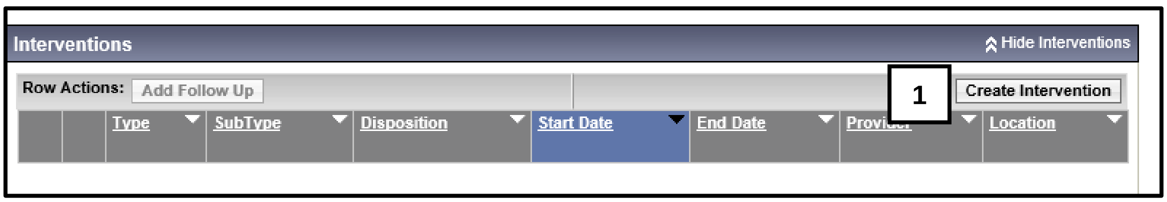
The investigation is now in context.

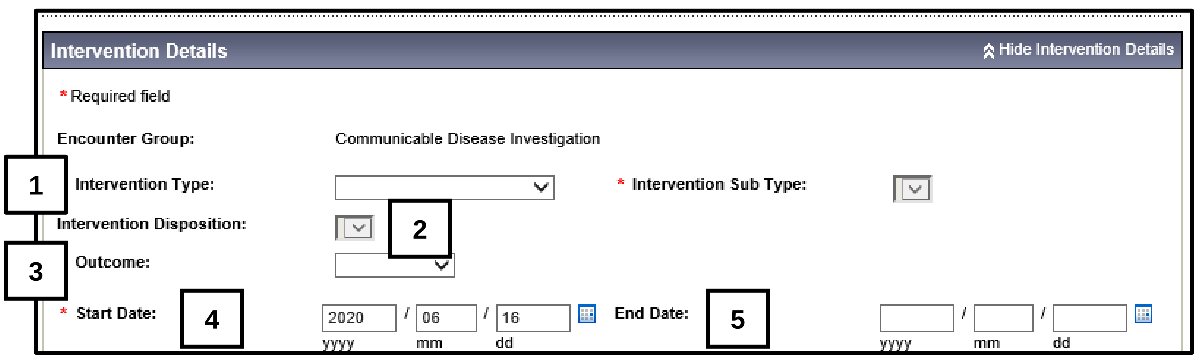
Adding an Isolation Intervention



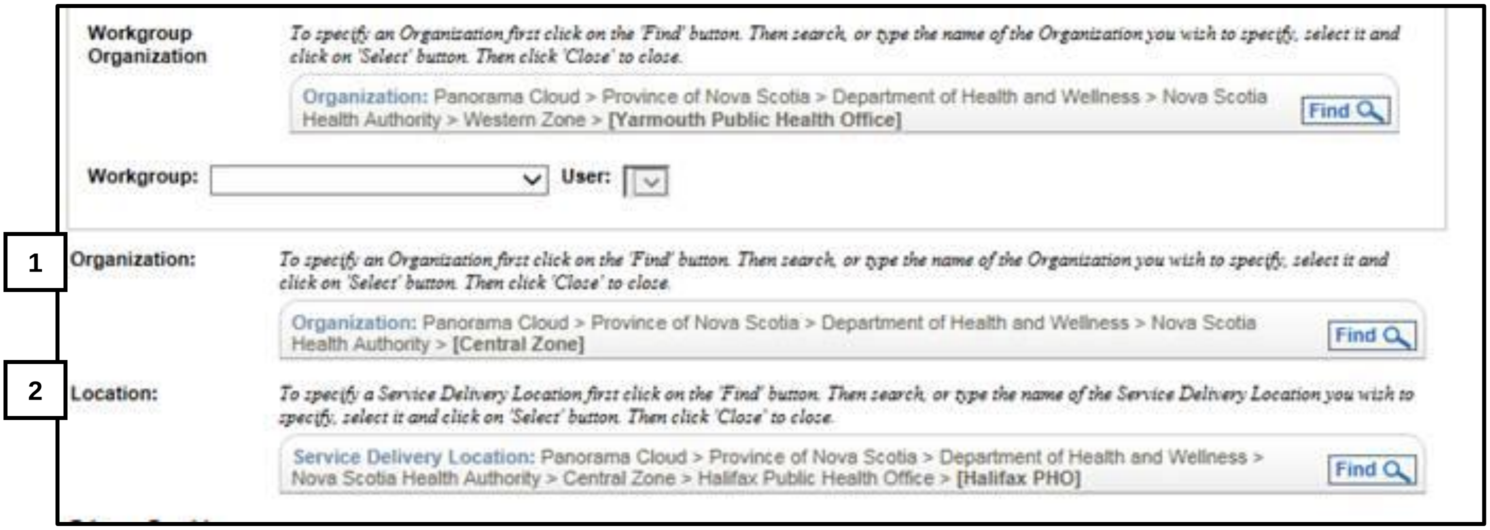
From the left-hand navigation, click on **Intervention Summary.**

1.

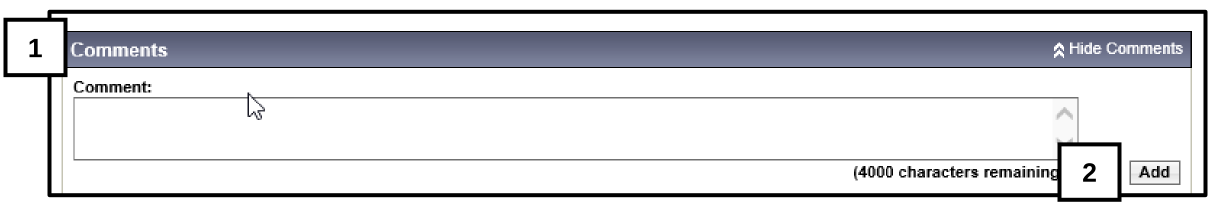




1. **Intervention Type** – Select **Isolation** from the drop-down list
2. **Intervention Disposition** – Select **In Progress** from the drop-down list
3. **Outcome** – Select **DO NOT USE** from the drop-down list
4. **Start Date** – Enter the Isolation Start Date
5. **End Date** – Enter the Isolation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



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



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

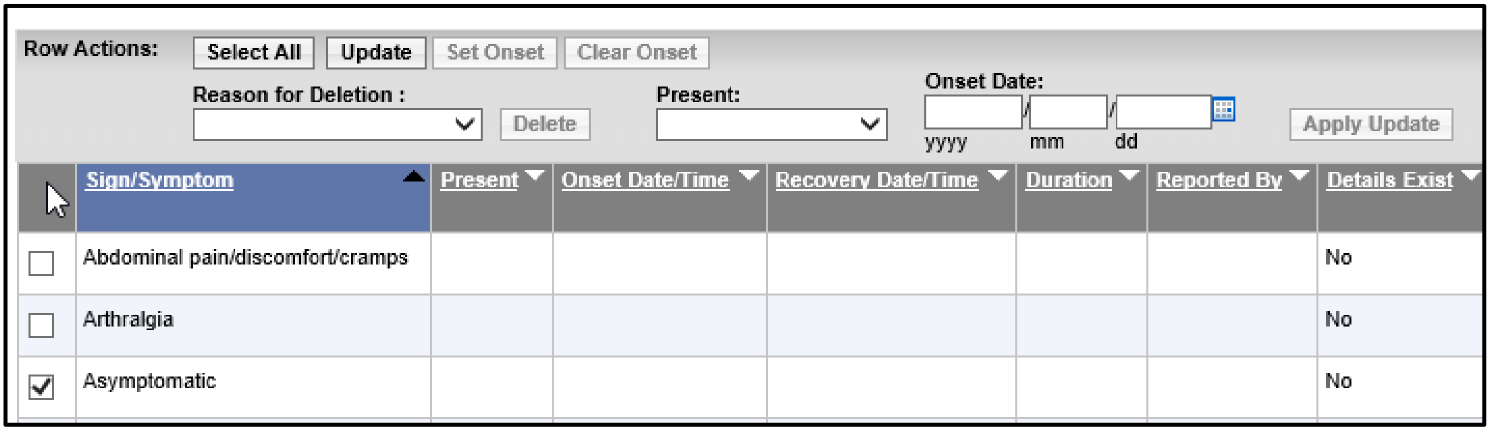
Comments	Recorded By
Positive Case with symptom onset May 2, 2021. Projected isolation end date May 12, 2021 at 2359 hours if client meets recovered criteria.	Chisholm, Rachel

Ensure you take the intervention out of context

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

Signs and Symptoms

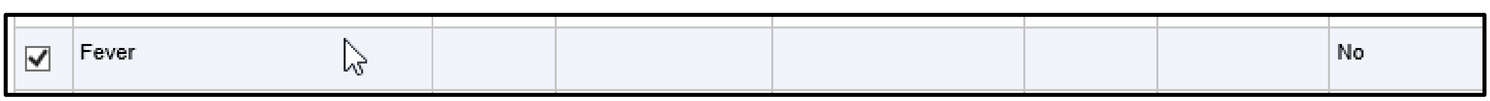
Investigation has no S&S and client indicates NO S&S



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

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)

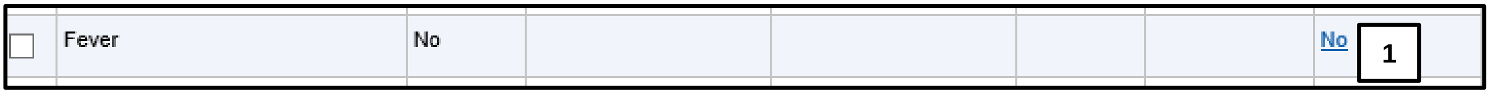
Client indicates no fever:



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

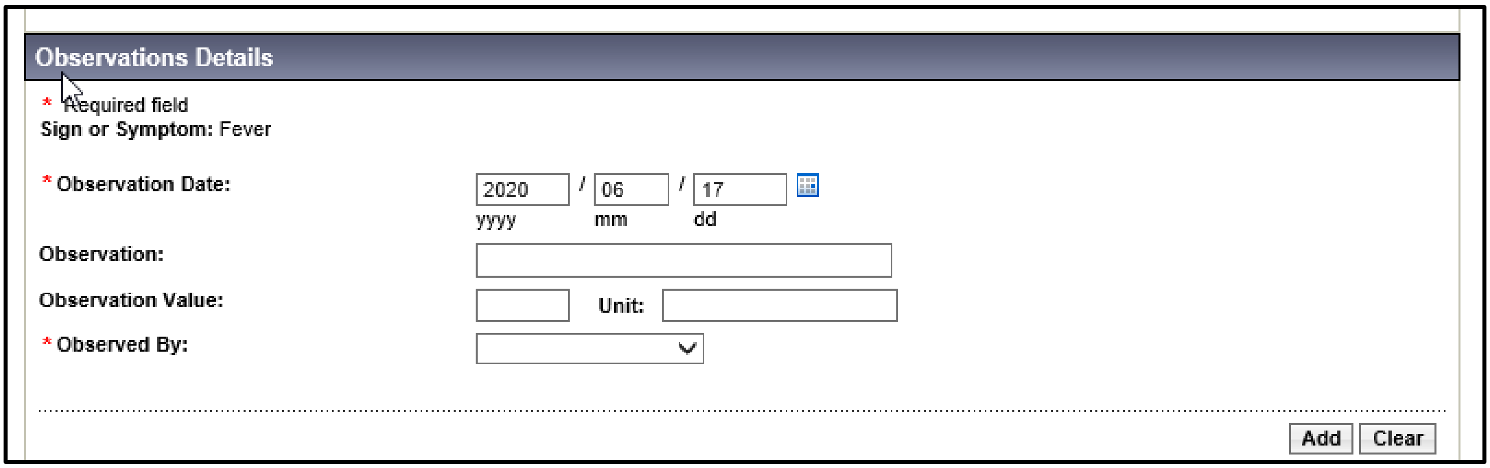
5. The Fever S&S will be updated (see below)

Add temperature observation:



☐	Fever	No					No 1

1. Click on the No hyperlink



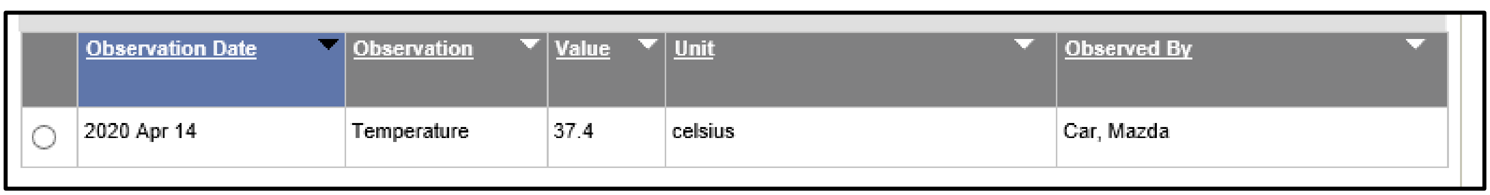
Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: 2020 / 06 / 17 (yyyy mm dd)
Observation:
Observation Value: Unit:
* Observed By:

Add Clear

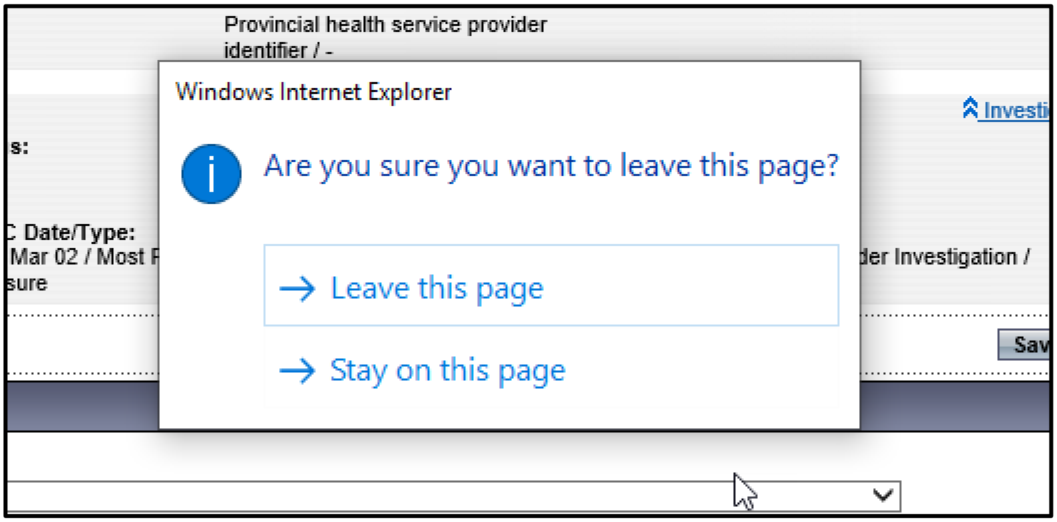
1. **Observation Date** - Enter date of the observation
3. **Observation field** - Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
4. **Observation Value** - Enter temperature value.
5. **Unit** - Enter Celsius
6. **Observed by** – select from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



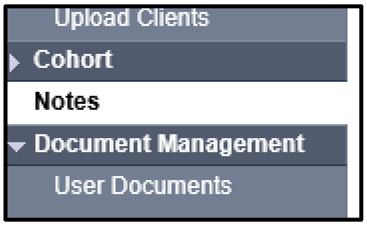
	Observation Date	Observation	Value	Unit	Observed By
○	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

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

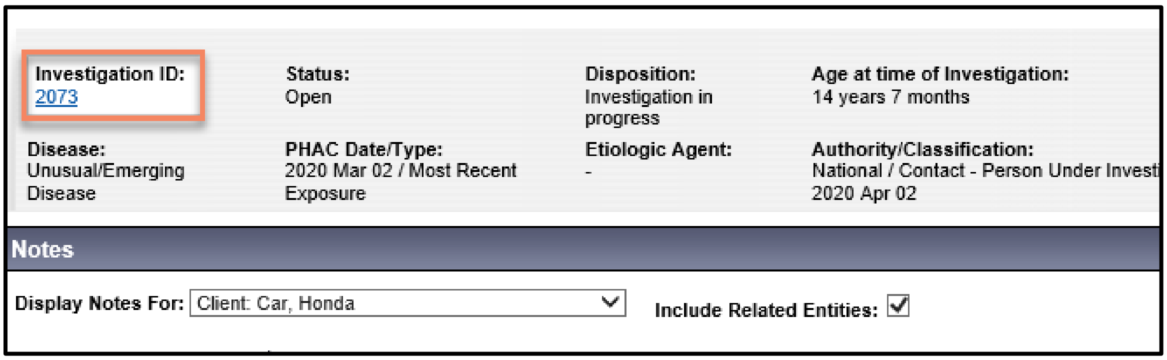
Note: If you see this message it indicates that you are leaving without saving your changes... Click **"→ Stay on this page**" and click the **Save** button.



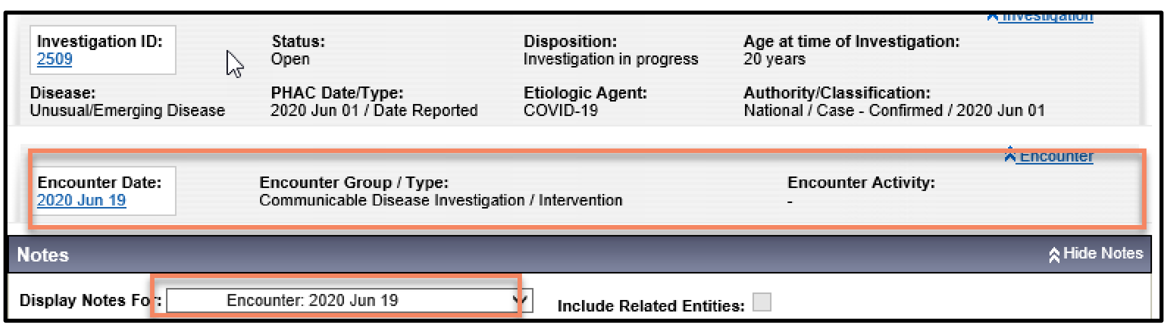
Adding a Clinical Note



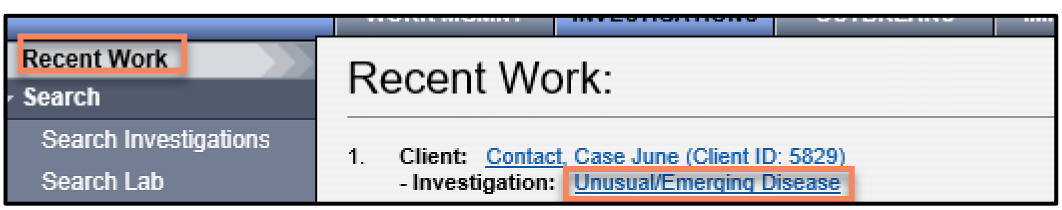
From the left-hand navigation, click on **Notes.**



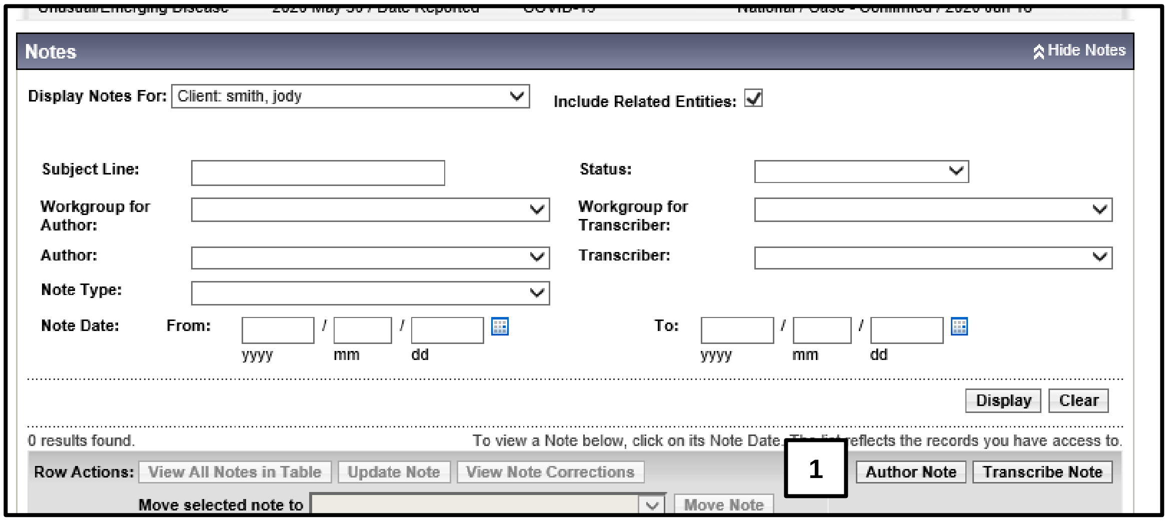
Ensure your investigation is in context. Do not add the note if only the client is in context.



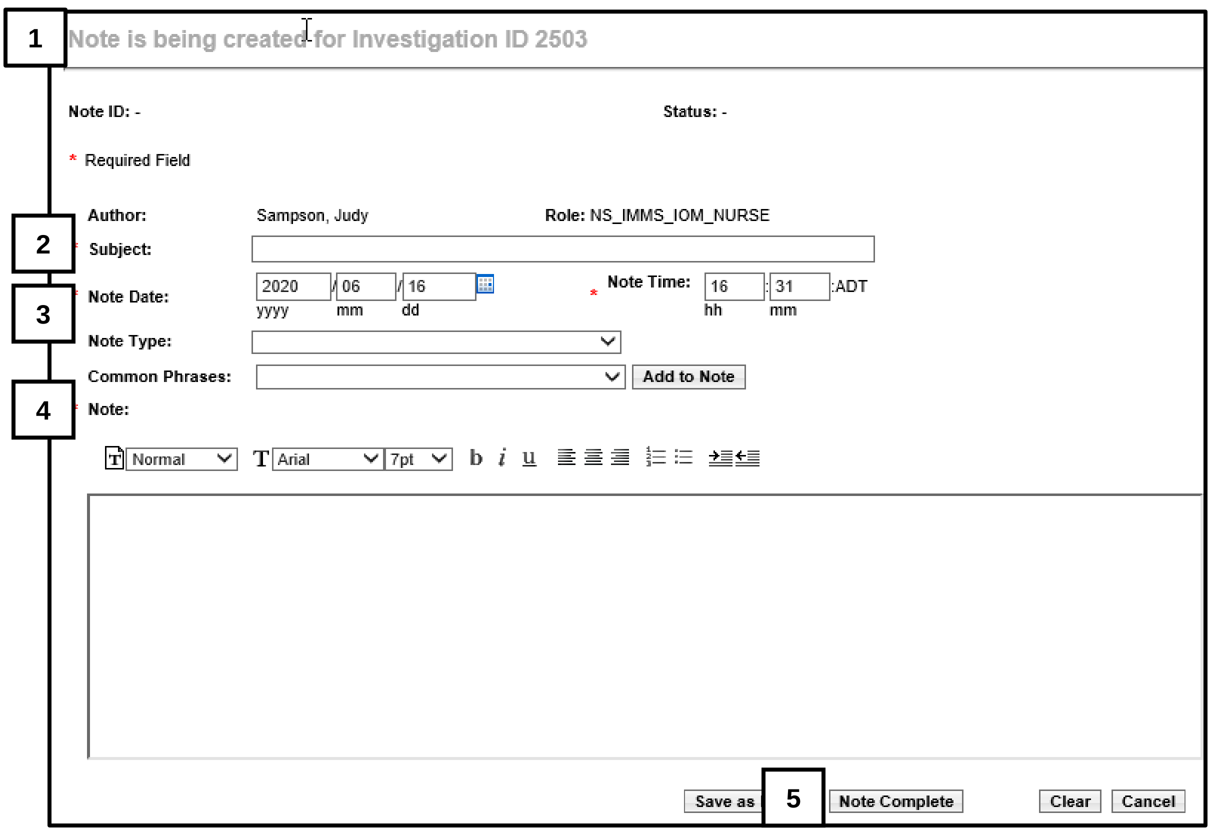
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



1. Click on **Author Note** button

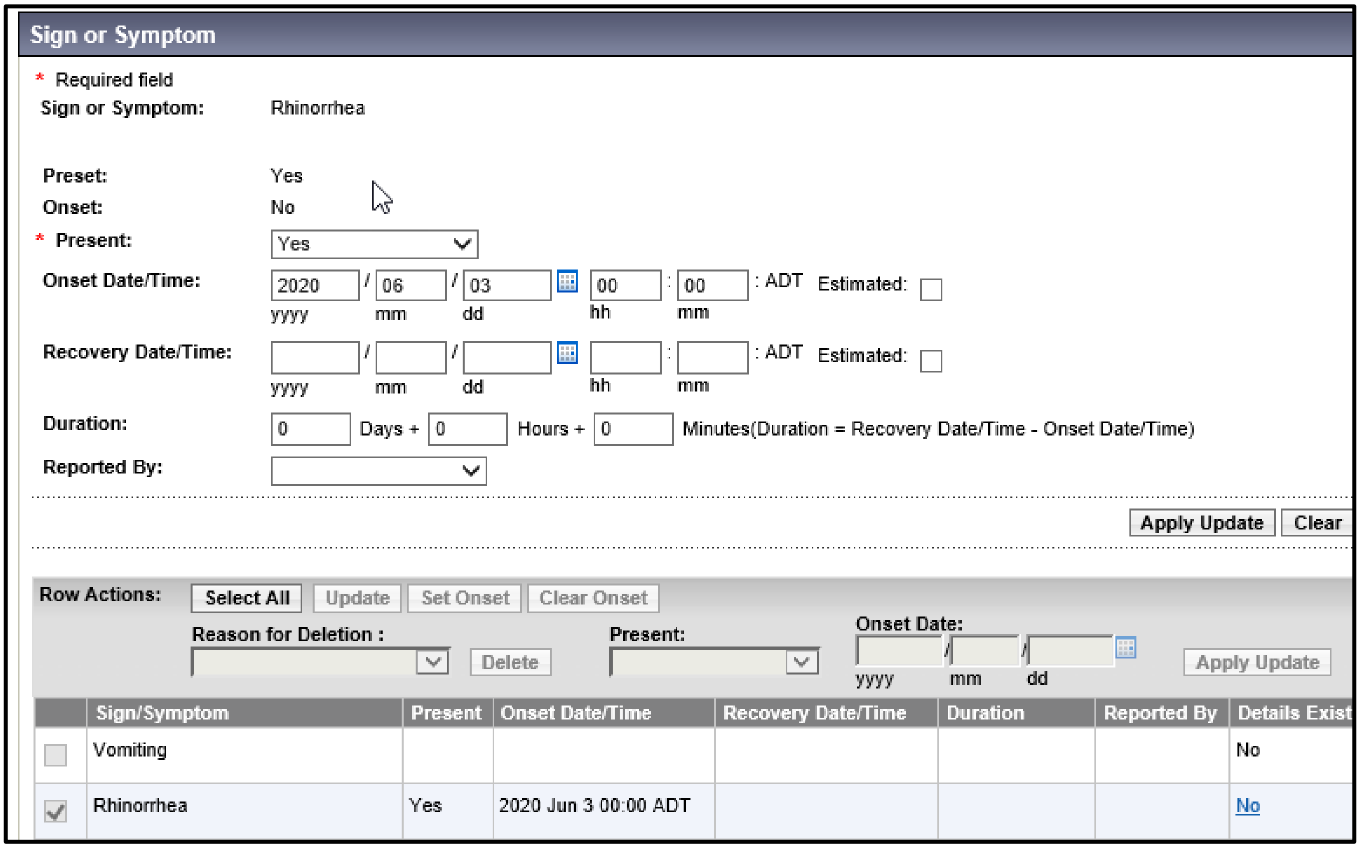


1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details
5. Click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

Client 1 - Case – Intermittent Monitoring – June 10

Investigation has recorded Signs and Symptoms & Daily Monitoring Report indicates Signs and Symptoms present

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



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

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

Sign and Symptom – reported by client and already indicated as present:

Should be Yes without a recovery date, example client still reporting cough:

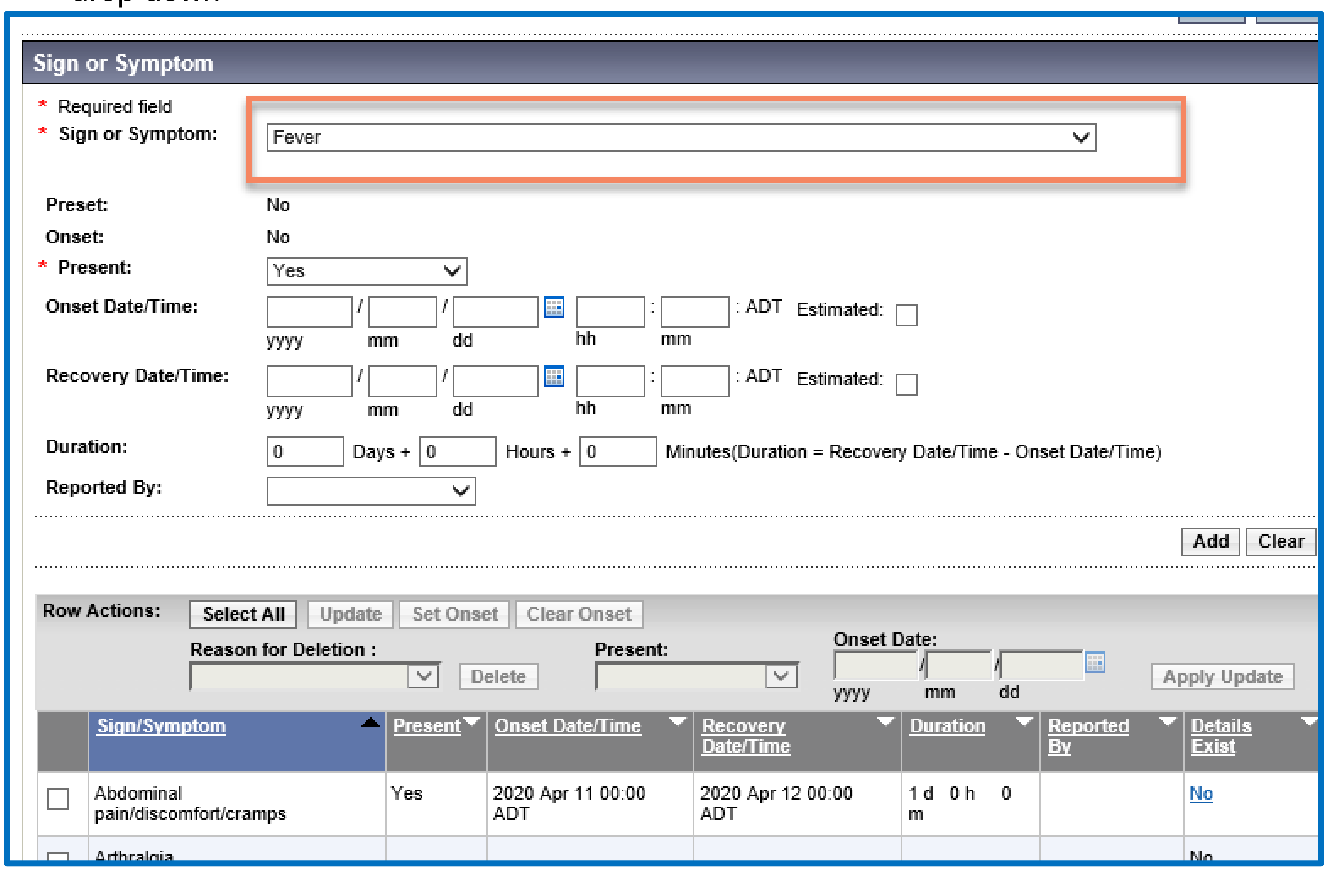
Cough	Yes	2020 Jun 15 00:00 ADT				No

- Do not update or change this S&S

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

Examples – Fever on Investigation Yes and client reporting No or Fever on Investigation is No and client reporting Yes

- 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 hh : mm : ADT Estimated:

Recovery Date/Time: yyyy / mm / dd hh : mm : ADT Estimated:

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 : Delete Present: Onset Date: yyyy mm dd Apply Update

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Abdominal pain/discomfort/cramps	Yes	2020 Apr 11 00:00 ADT	2020 Apr 12 00:00 ADT	1 d 0 h 0 m		No
☐	Arthralgia						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

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

1. Click on the Yes hyperlink

Observations Details

* Required field

Sign or Symptom: Fever

* **Observation Date:** 2020 / 06 / 17 (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. 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	Value	Unit	Observed By
○	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

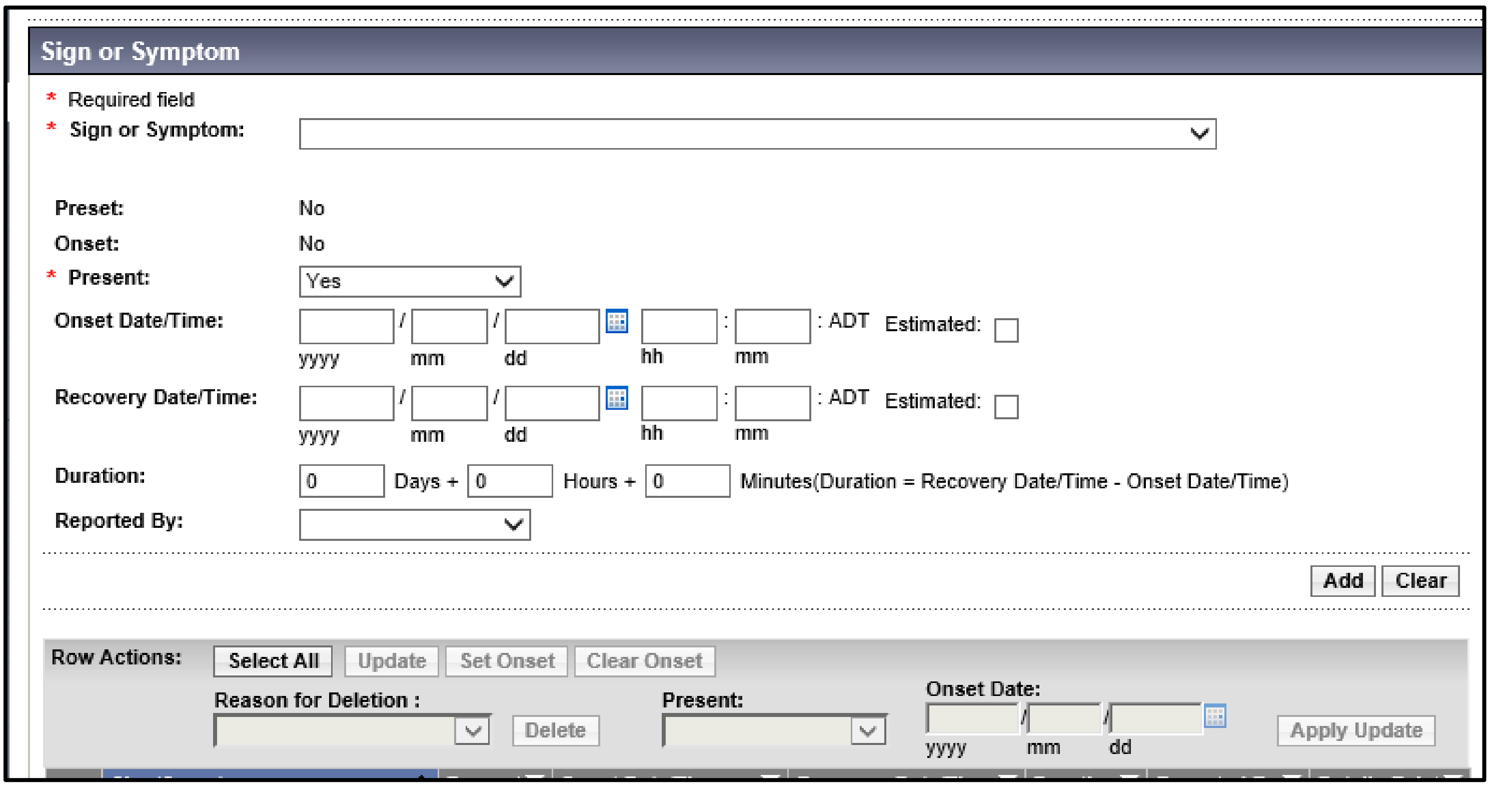
Sign and Symptom – client is reporting and Yes and the S&S has already been reported and has a Recovery Date

Example:

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

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

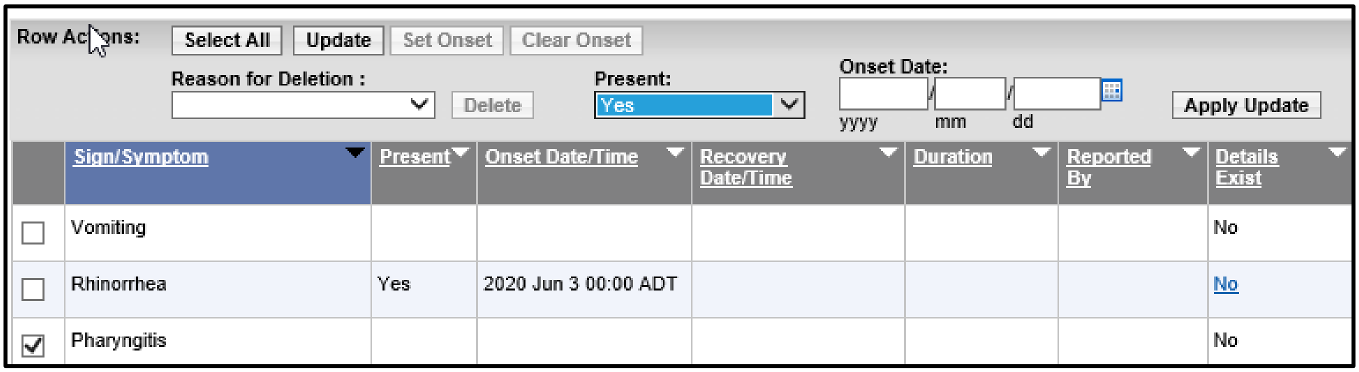
Signs and Symptoms can be added through the top section of the screen.



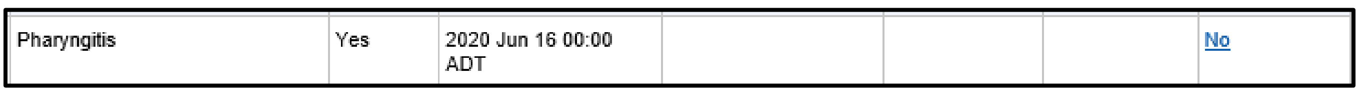
1. **Sign or Symptom** – Select the sign or symptom from the drop-down list. If the Sign or Symptom is not in the list select Other and also enter the sign/symptom in the **Other Sign or Symptom** field
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** 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	9 d 0 h 0 m		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:

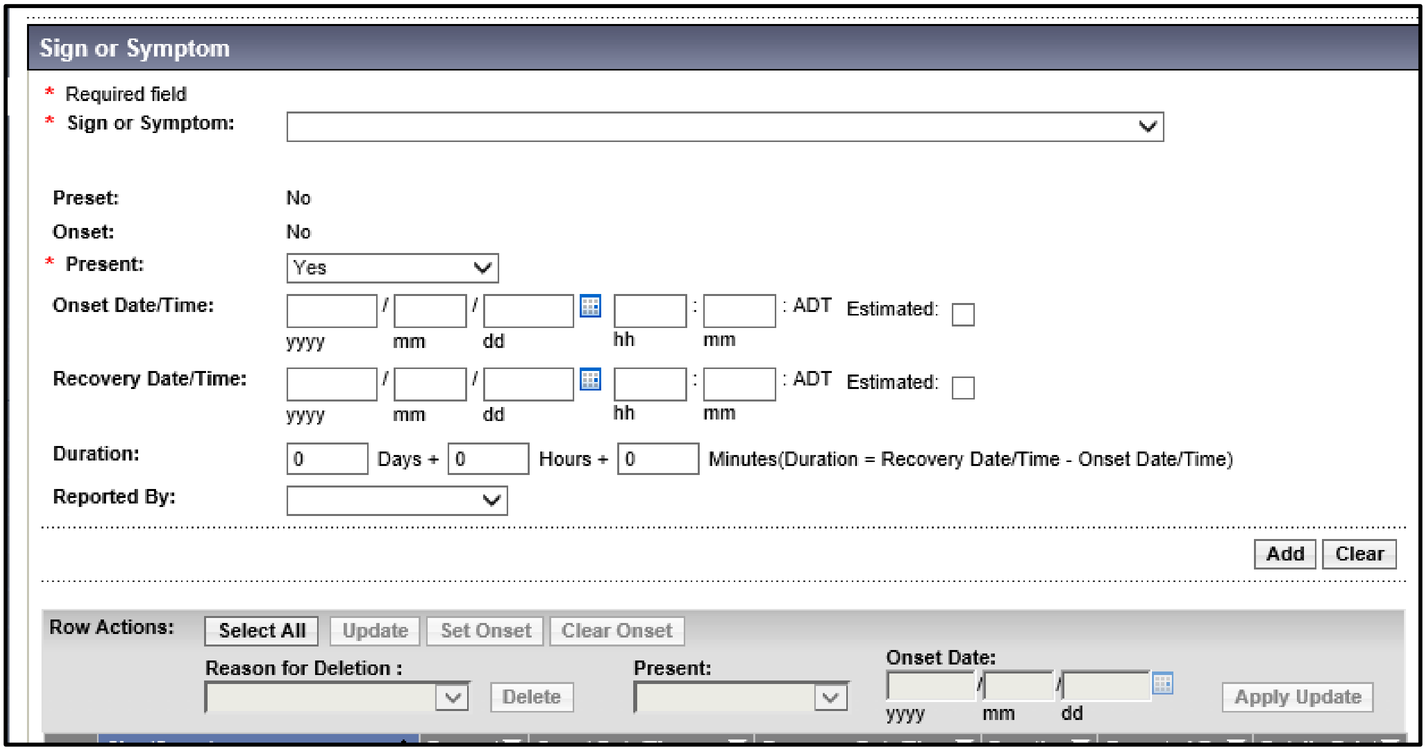


1. Click **Checkbox(s)** for S&S. You can multi-select S&S that have the same onset date.
2. **Present** - Select Yes from drop-down
3. **Onset Date** - Enter the date the client reported the S&S
4. Click **Apply Update** button
5. The S&S will now be updated in the table (see below)

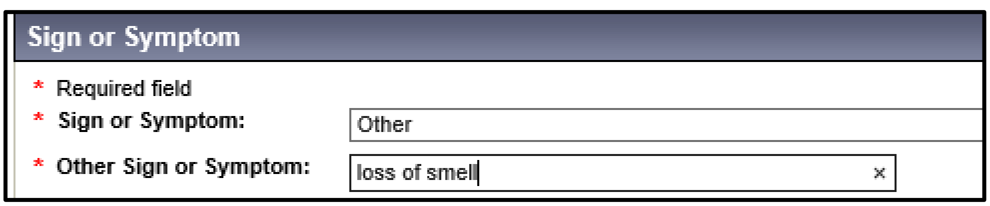


Client reports a symptom that is not in the displayed Signs and Symptoms list, you need to document:

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



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

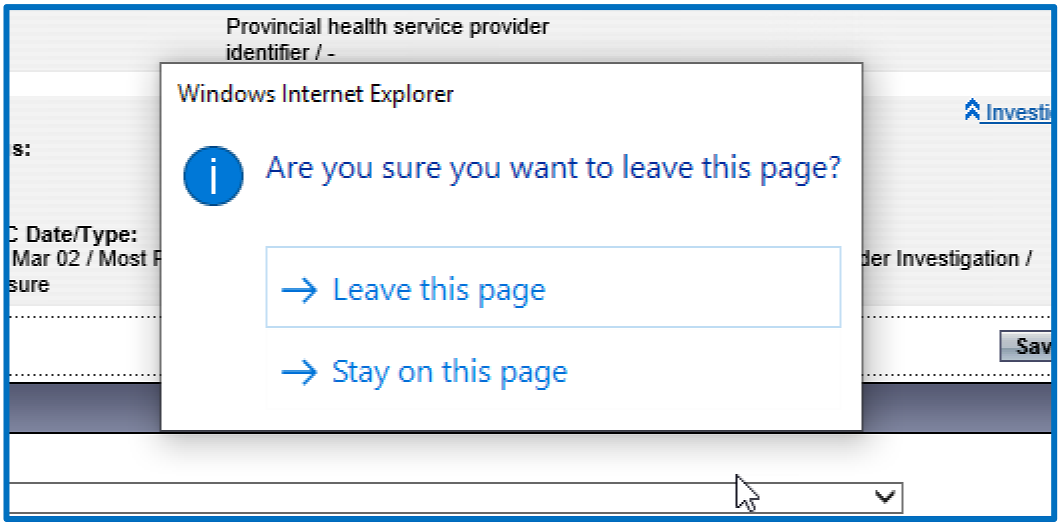


2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button
4. The S&S will now be updated in the table (see below)

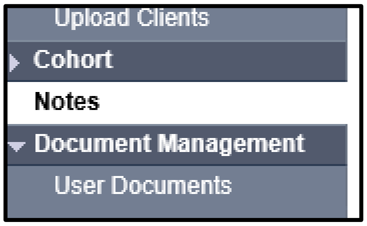
Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				No

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

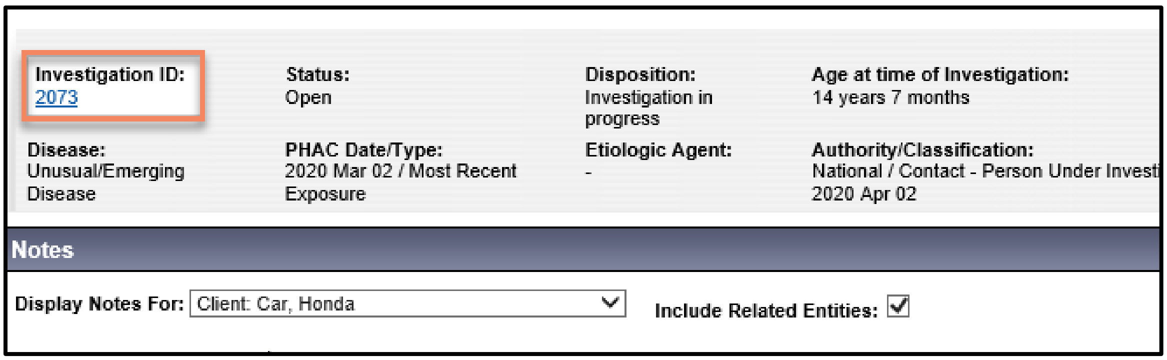
Note: If you see this message it indicates that you are leaving without saving your changes.. Click "→ **Stay on this page**" and click the **Save** button.



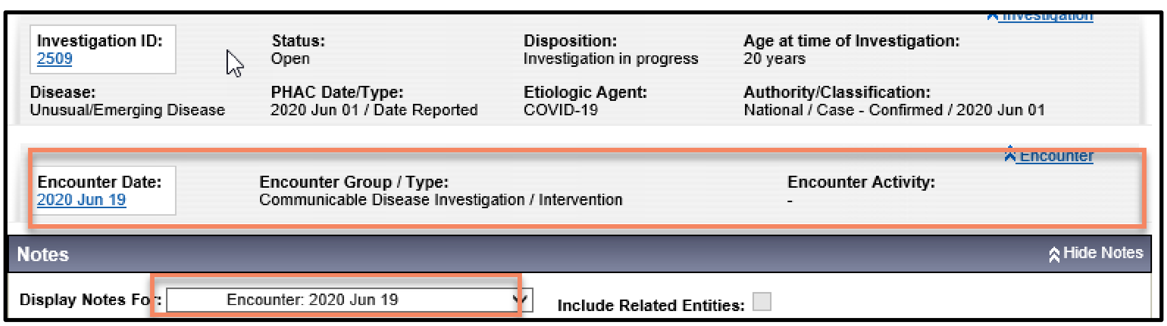
Adding a Clinical Note



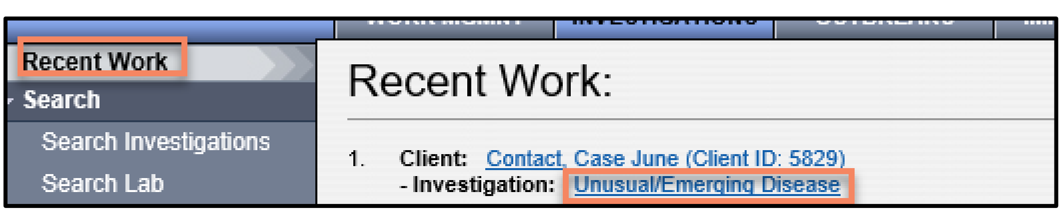
From the left-hand navigation, click on **Notes.**



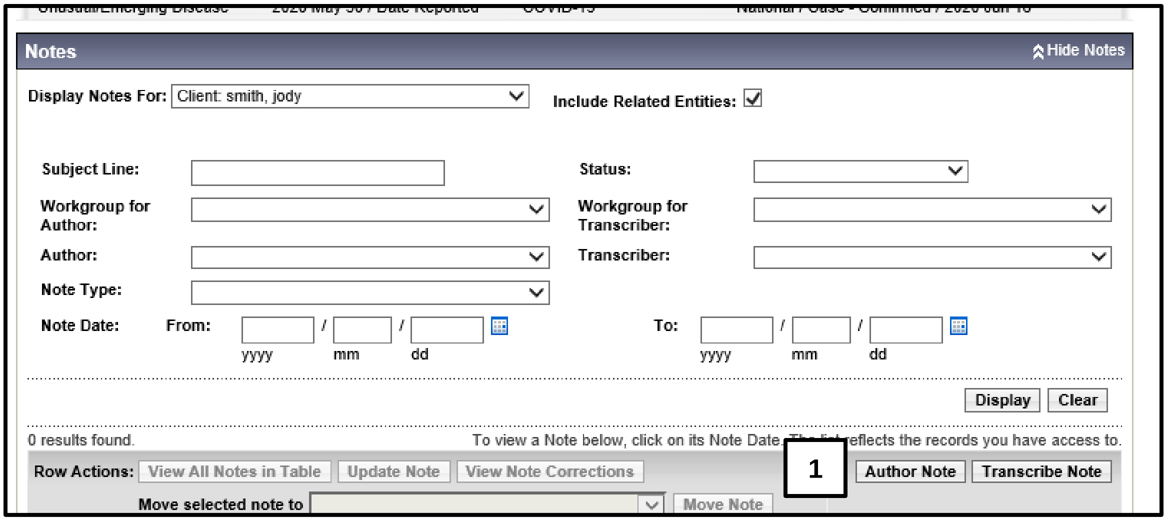
Ensure your investigation is in context. Do not add the note if only the client is in context.



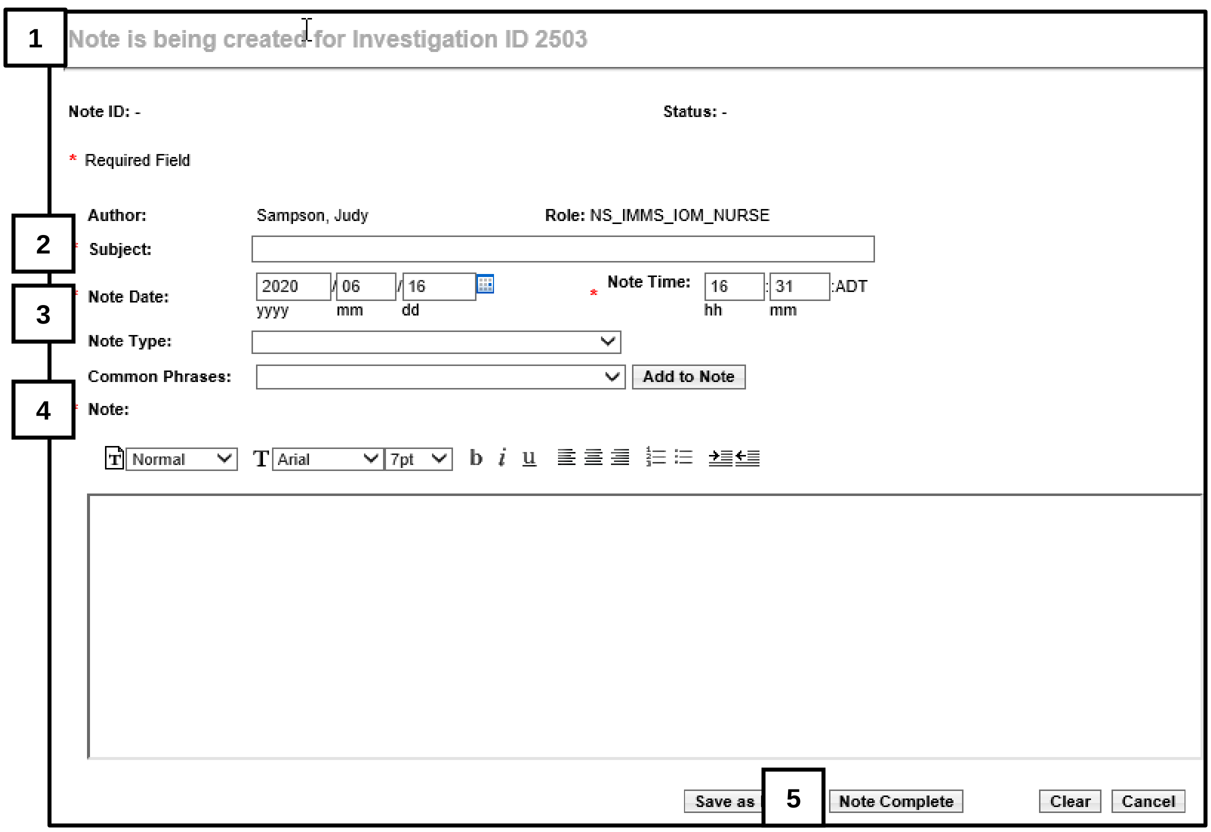
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



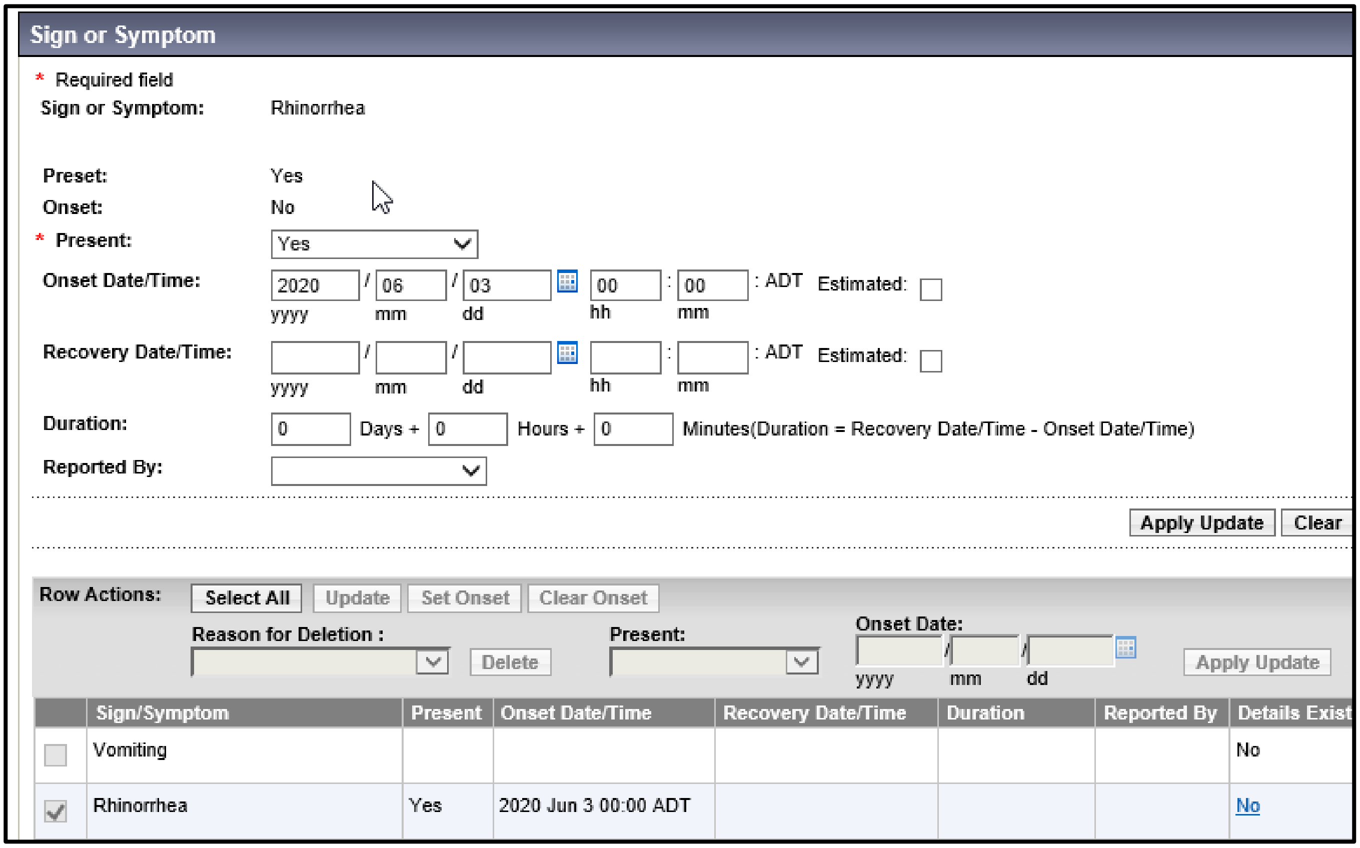
1. Click on **Author Note** button



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

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



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

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

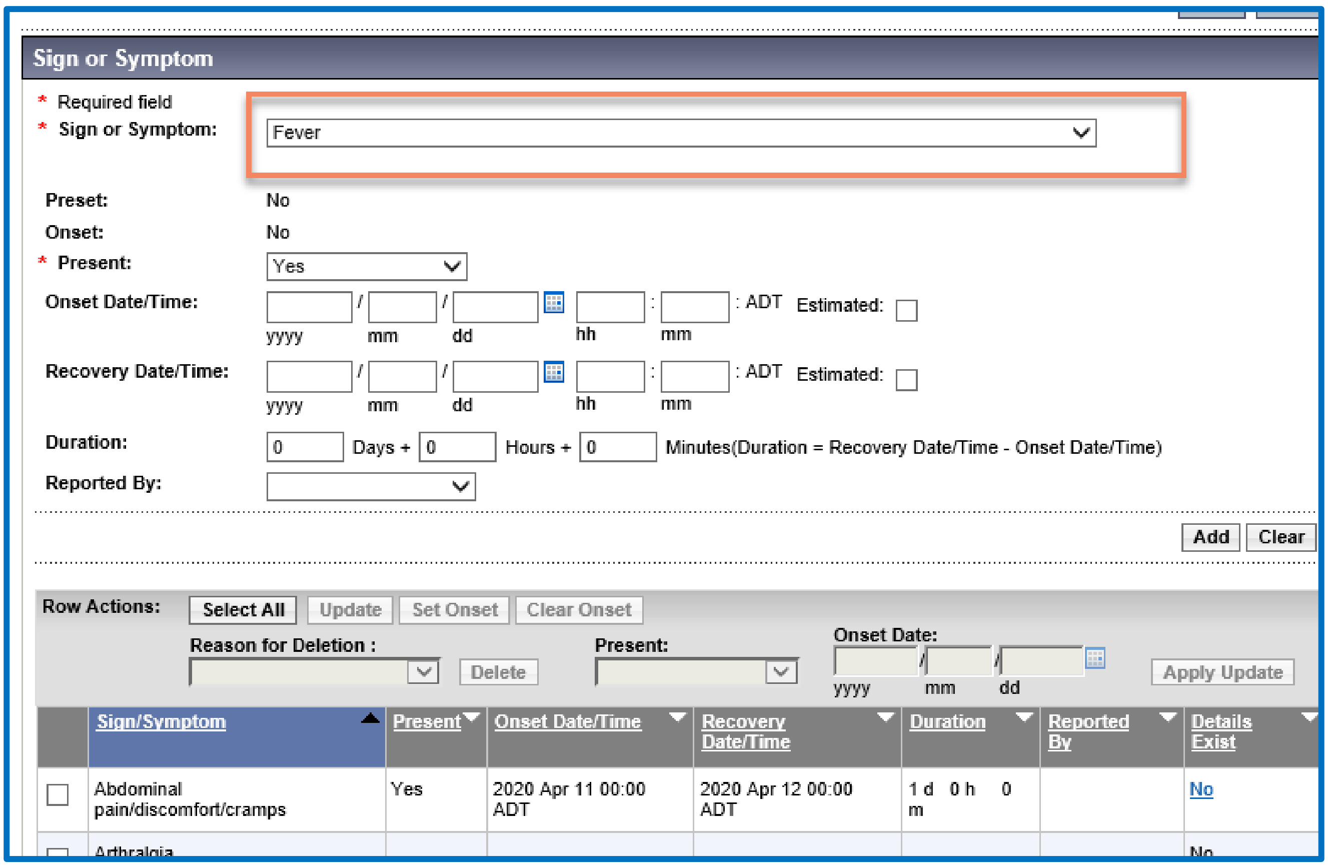
Cough	Yes	2020 Jun 15 00:00 ADT				No

- Do not update

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

Examples – Fever on Investigation Yes and client reporting No or Fever on Investigation is No and client reporting Yes

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



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

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 Yes hyperlink

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: 2020 / 06 / 17 (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	Value	Unit	Observed By
○	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

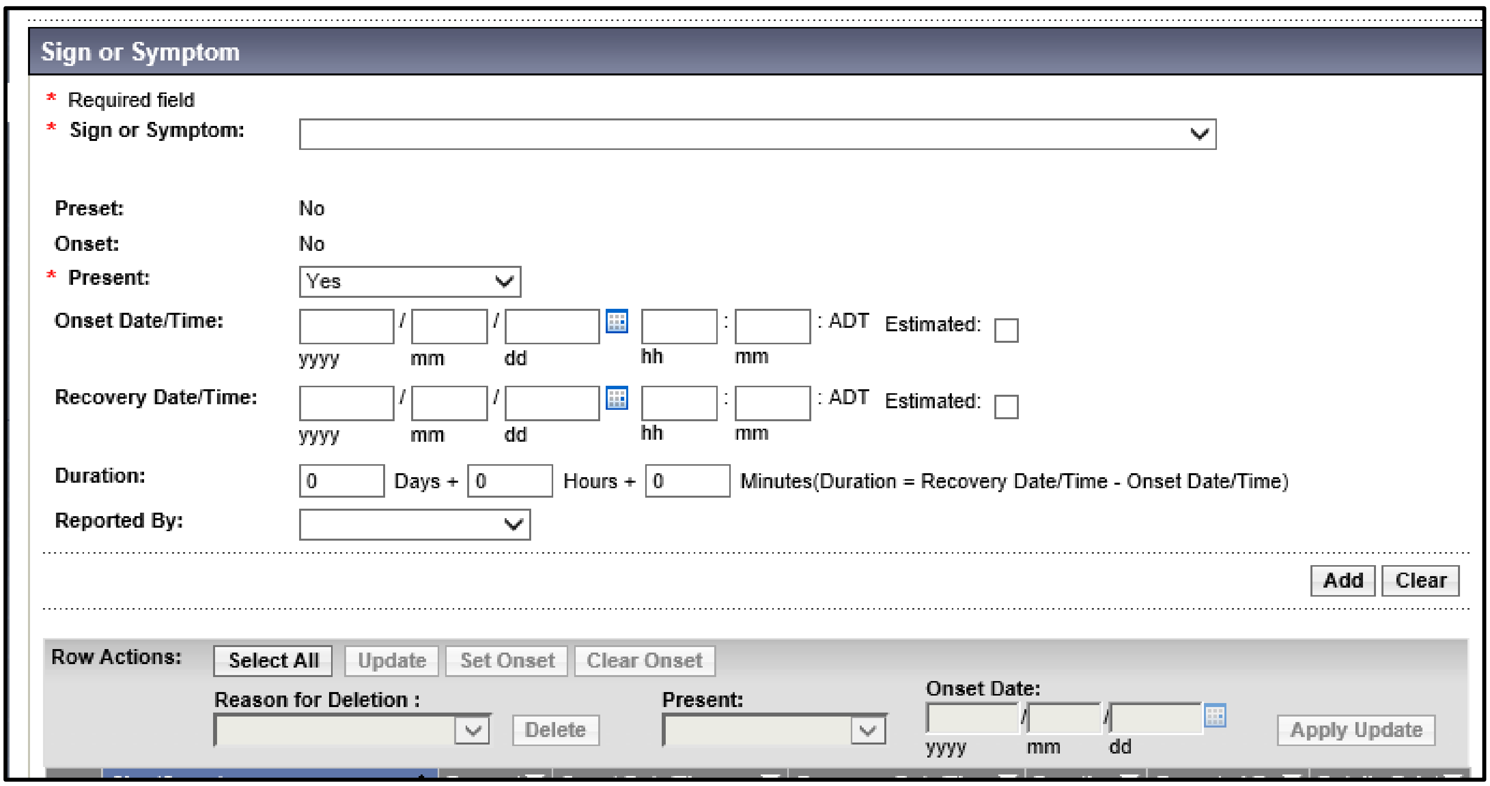
Sign and Symptom – client is reporting a symptom and the symptom has already been reported and recovered:

Example:

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

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

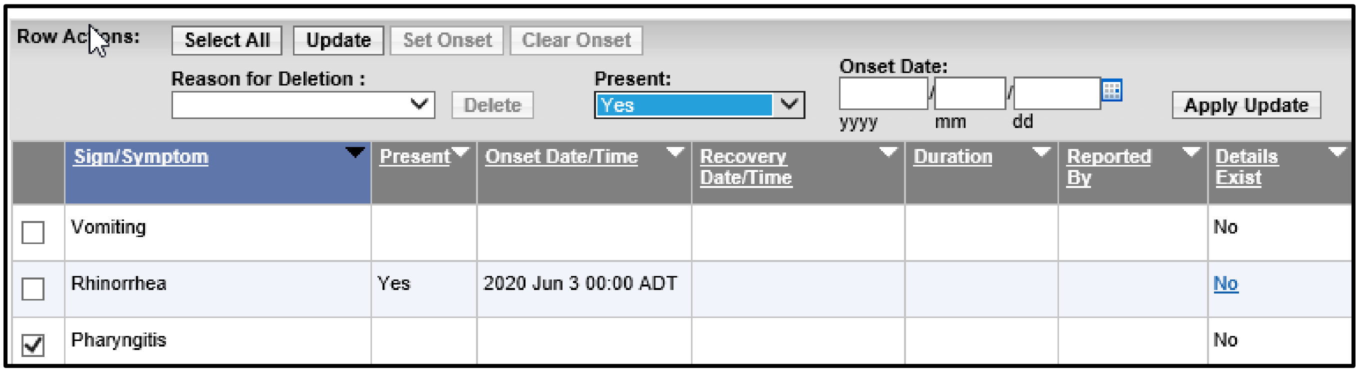
Signs and Symptoms can be added through the top section of the screen:



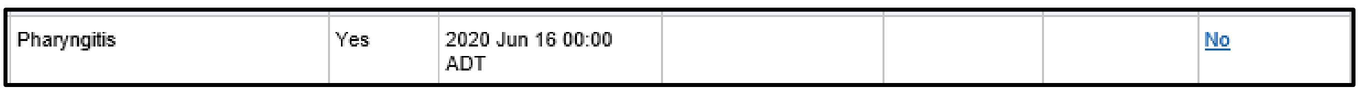
1. **Sign or Symptom** – Select the sign or symptom from the drop-down list. If the Sign or Symptom is not in the list select Other and also enter the sign/symptom in the **Other Sign or Symptom** field
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** 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	9 d 0 h 0 m		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:

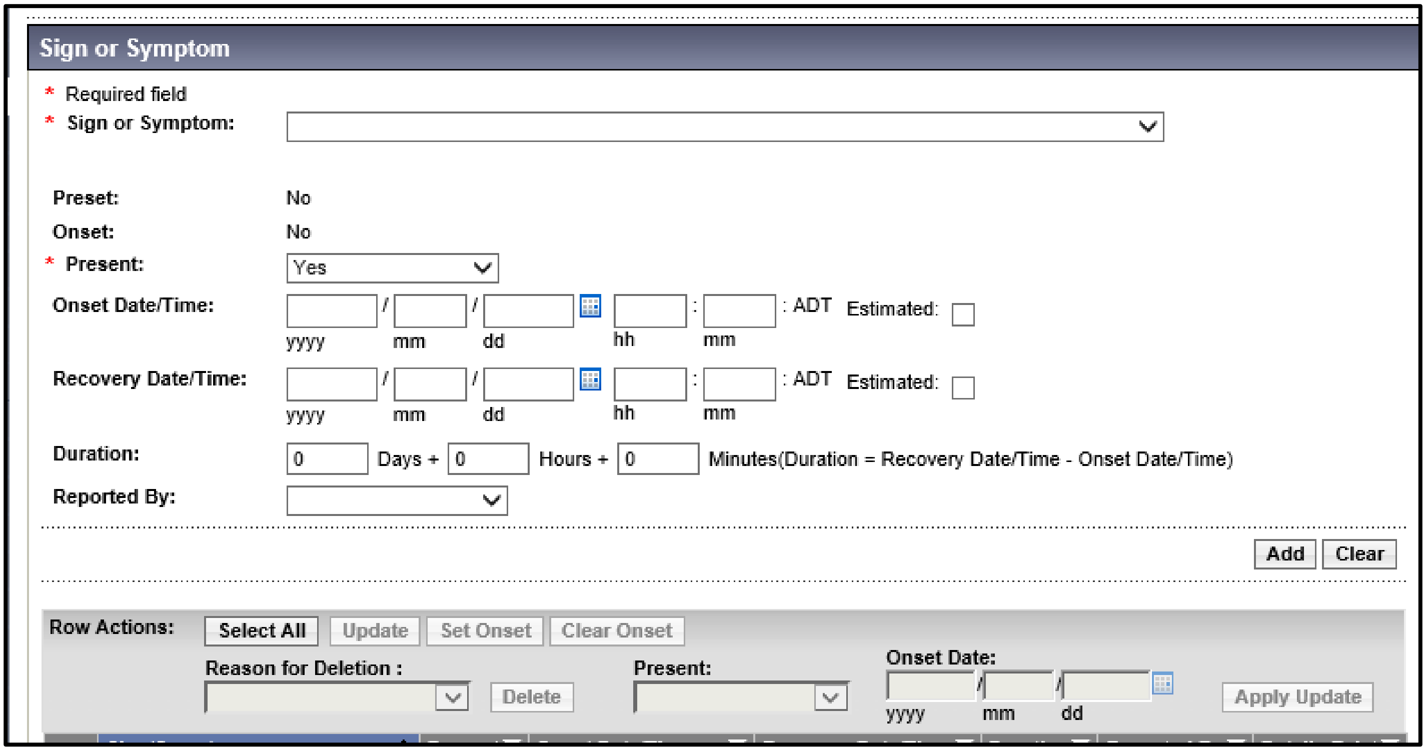


1. Click **Checkbox(s)** for S&S. You can multi-select S&S that have the same onset date.
2. **Present** - Select Yes from drop-down
3. **Onset Date** - Enter the date the client reported the S&S
4. Click **Apply Update** button
5. The S&S will now be updated in the table (see below)

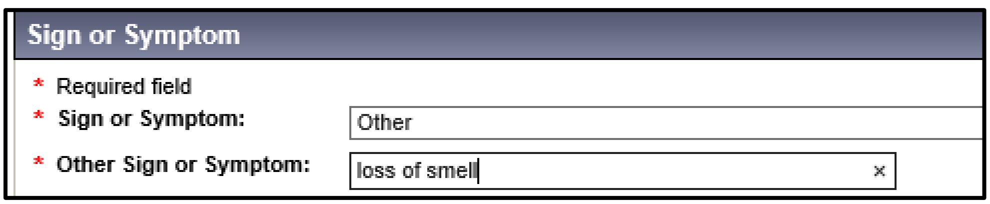


Client reports a symptom that is not in the displayed Signs and Symptoms list, you need to add it

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



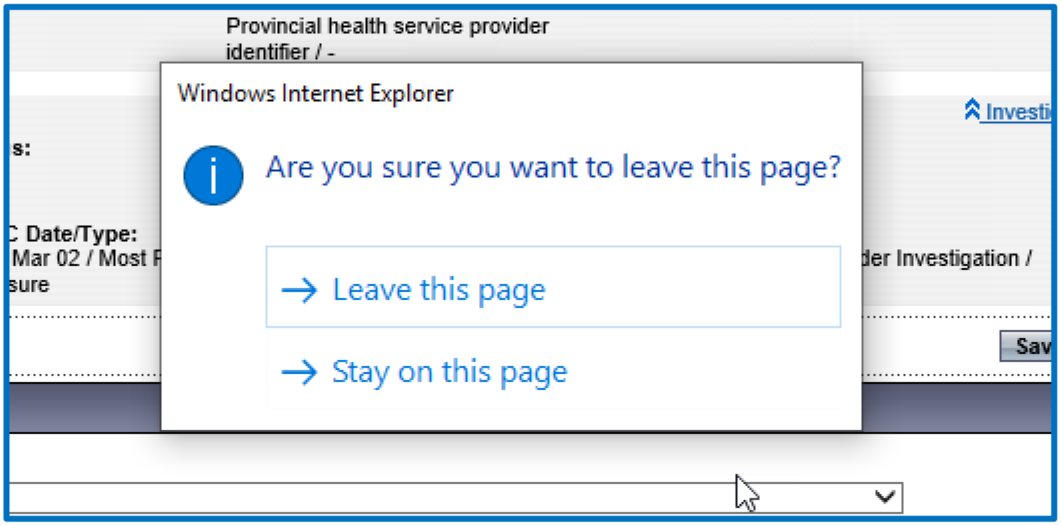
1. **Sign or Symptom** – Select the sign or symptom from the drop-down list. If the Sign or Symptom is not in the list select Other and also enter the sign/symptom in the **Other Sign or Symptom** field



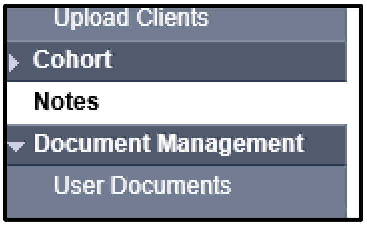
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button
4. The S&S will now be updated in the table (see below)

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

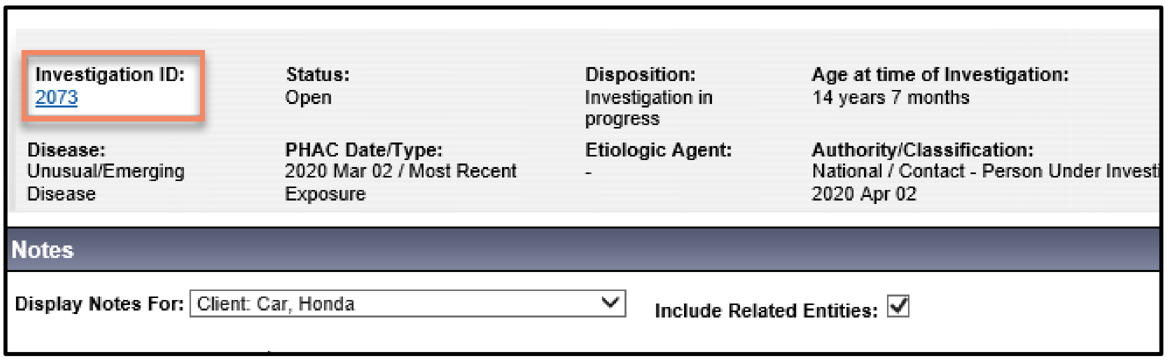
Note: If you see this message it indicates that you are leaving without saving your changes.. Click **"→ Stay on this page**" and click the **Save** button.



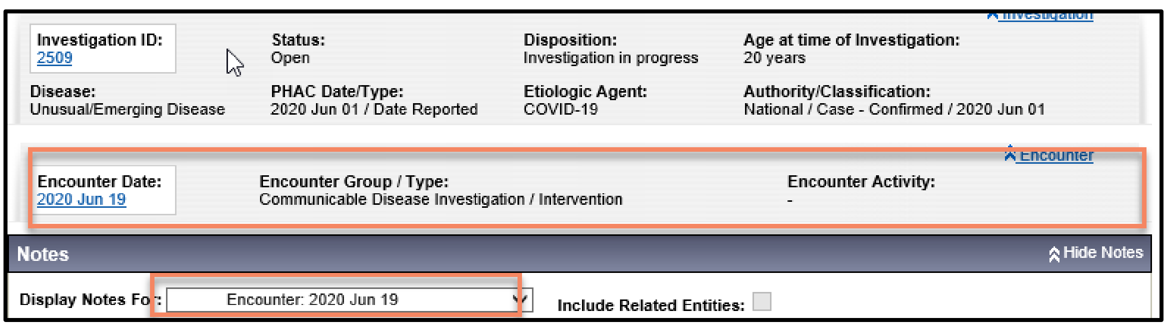
Adding a Clinical Note



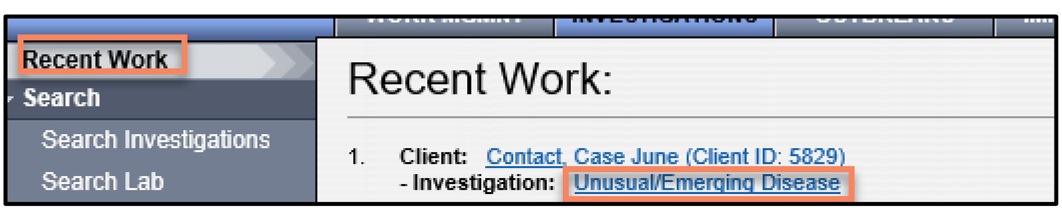
From the left-hand navigation, click on **Notes.**



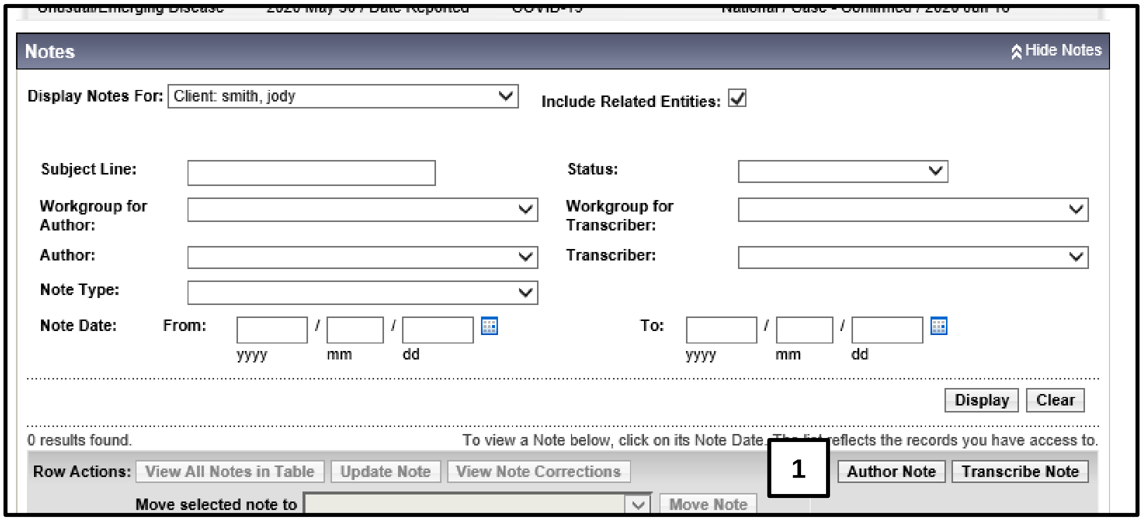
Ensure your investigation is in context. Do not add the note if only the client is in context.



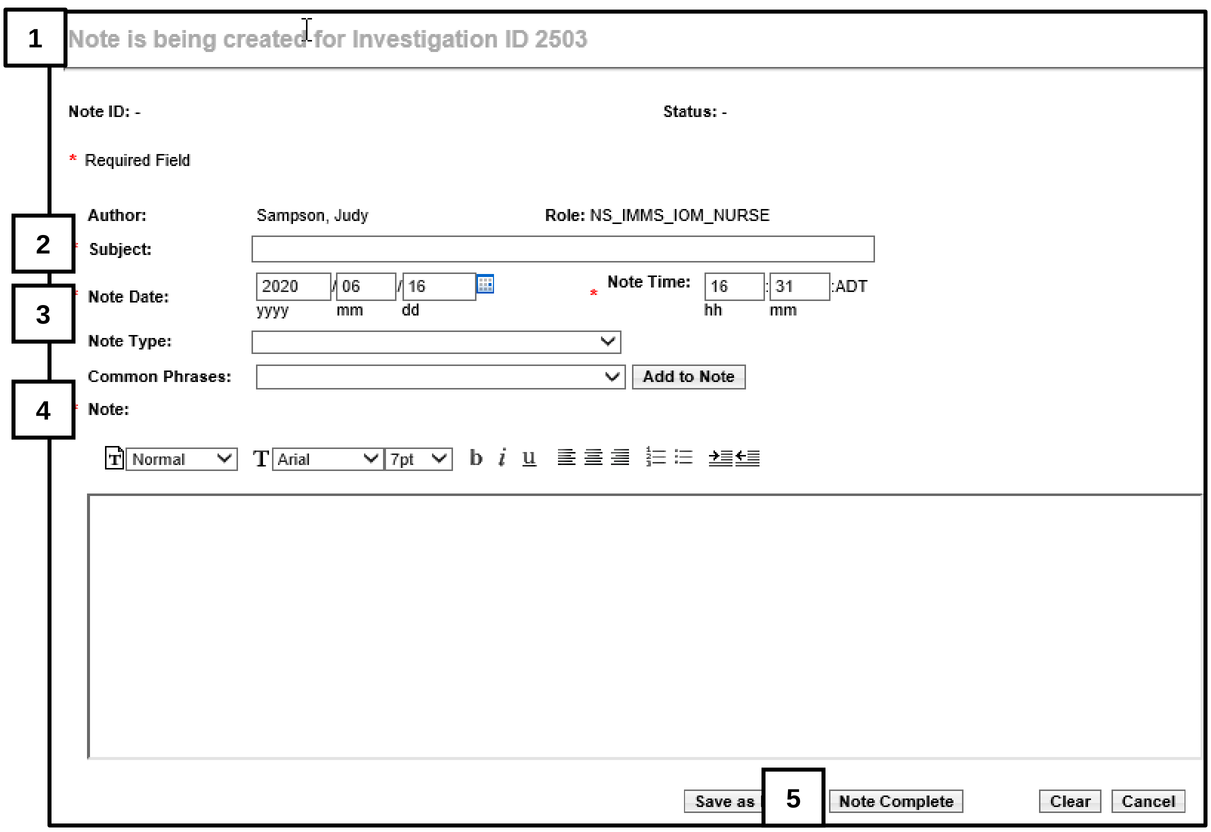
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



1. Click on **Author Note** button

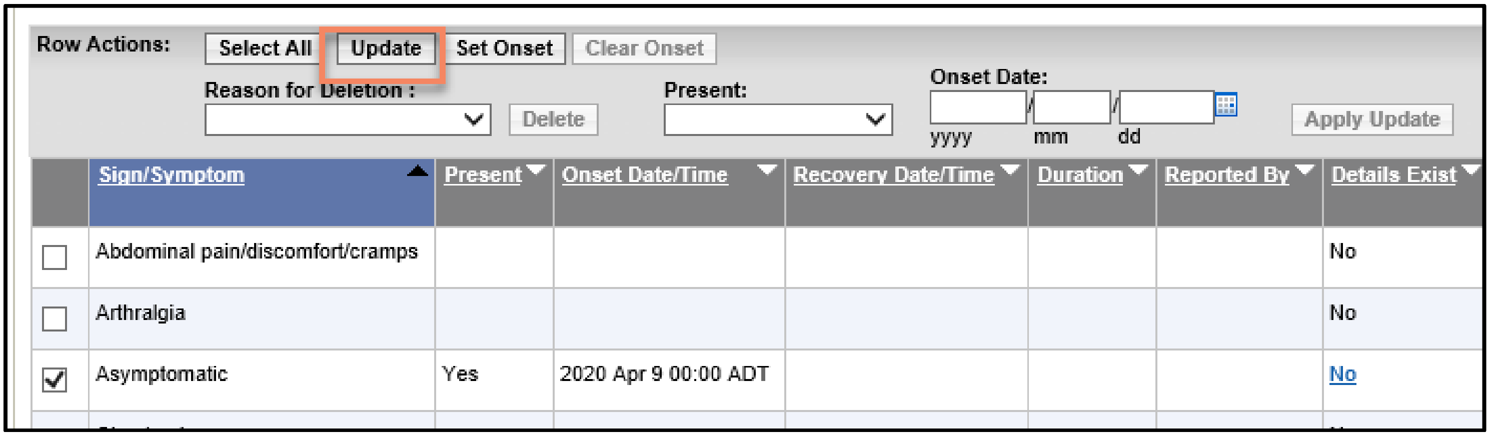


1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details
5. Click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

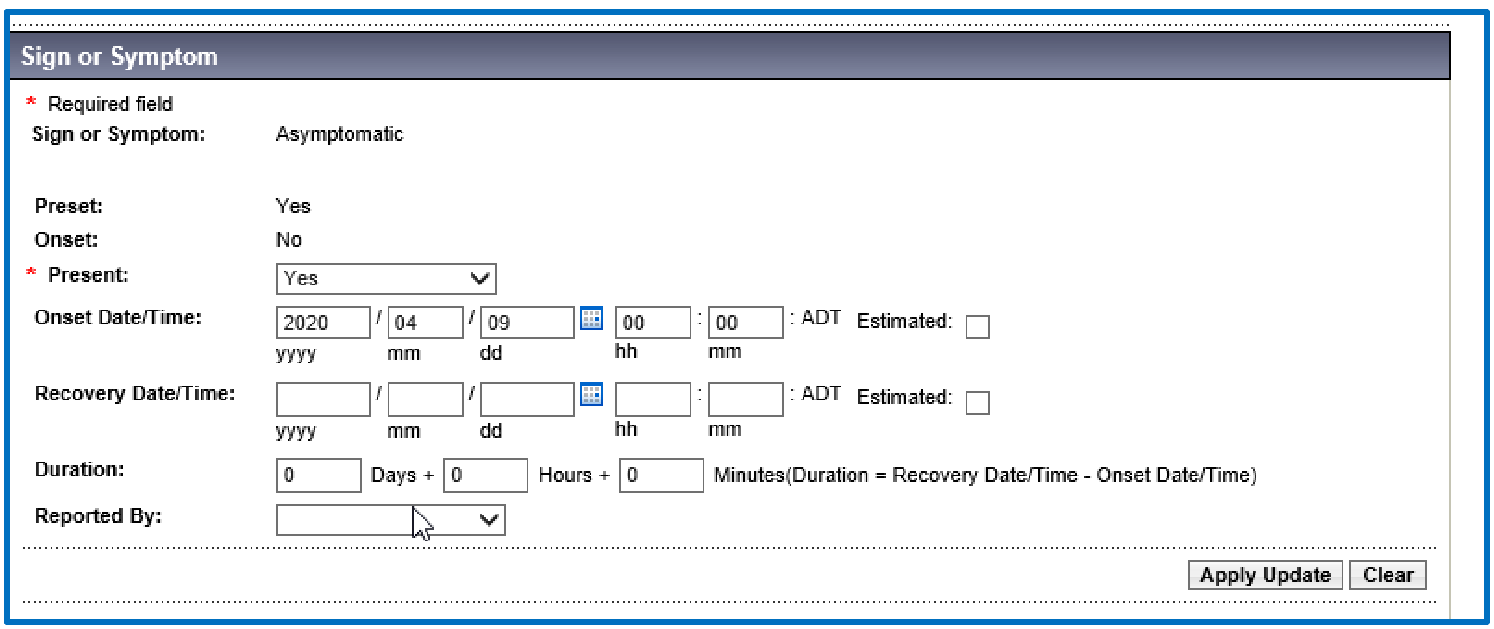
Client 3 – Contact Case – Intermittent Monitoring – June 12

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)



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

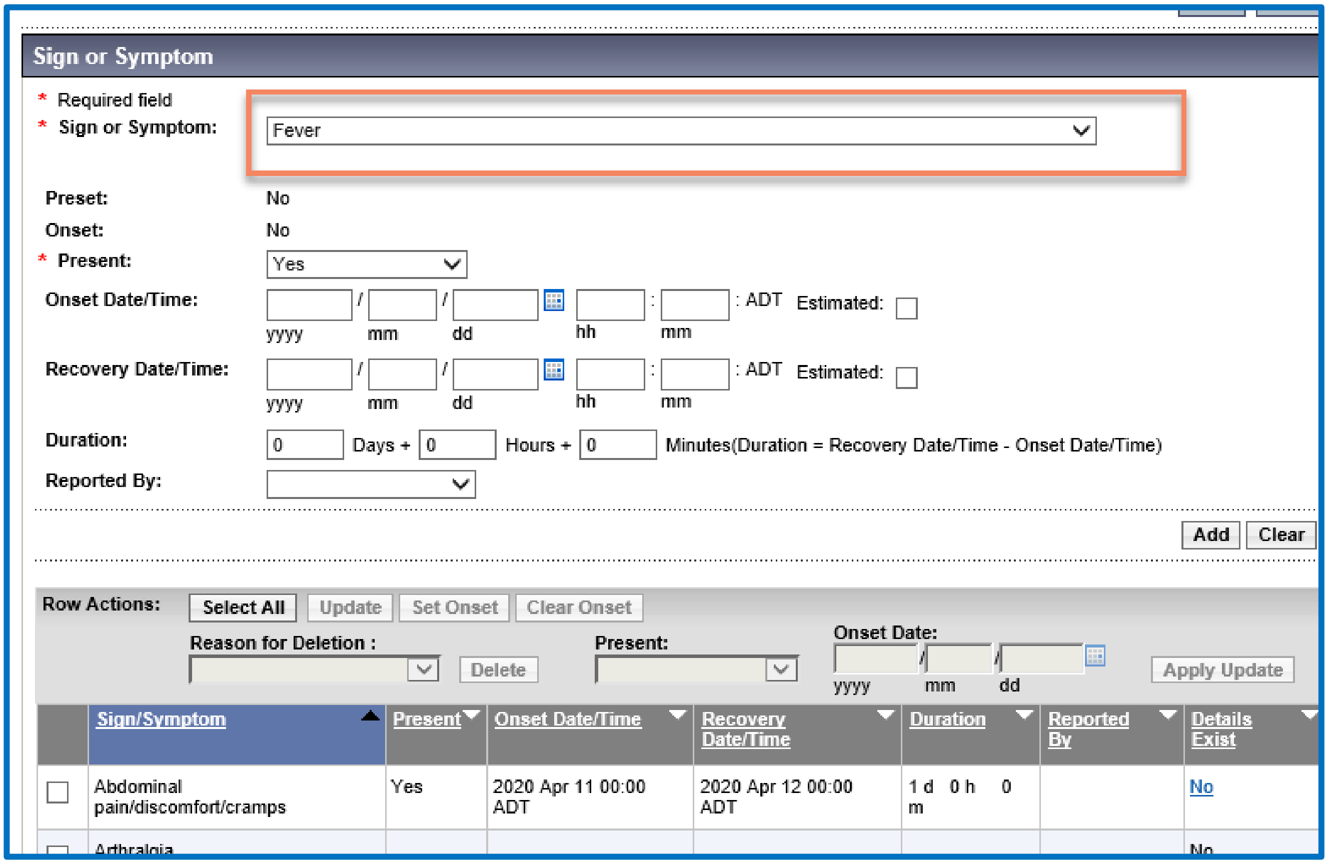


1. **Recover Date** - Enter the date of the call (do not enter a time). Do not change the **Present** or the **Onset date** values.
2. Click the **Apply Update** button
3. The Asymptomatic has been updated in the table. See below

Asymptomatic	Yes	2020 Apr 9 00:00 ADT	2020 Apr 13 00:00 ADT	4 d 0 h 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



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

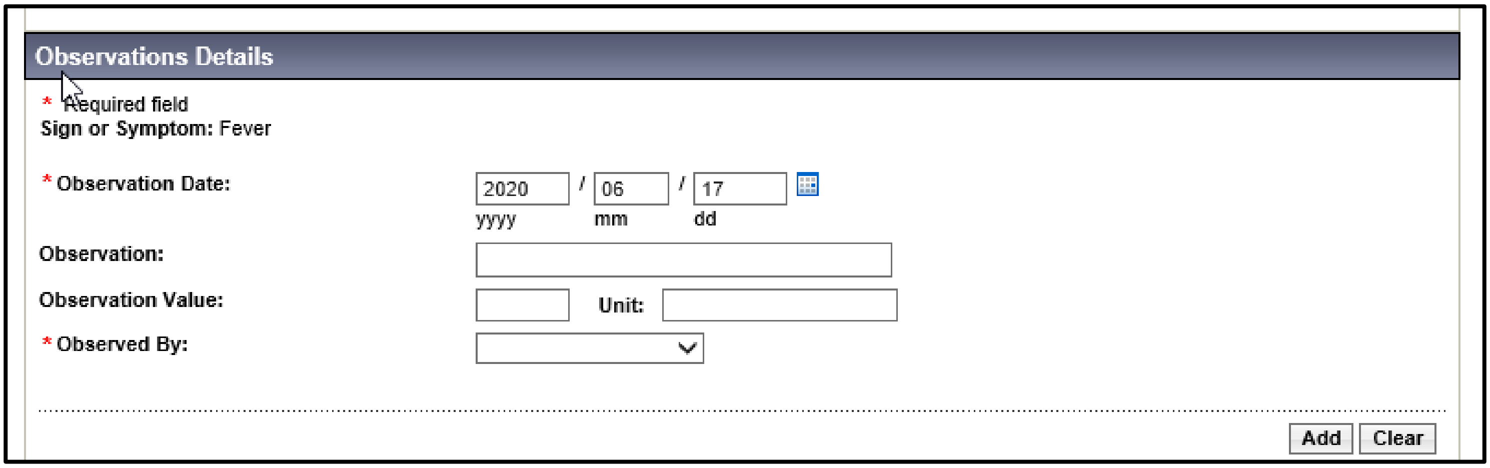
Add temperature observation:

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	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.



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	Value	Unit	Observed By
○	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 Actions: Select All | Update | Set Onset | Clear Onset

Reason for Deletion : Delete

Present: Yes

Onset Date: yyyy / mm / dd

Apply Update

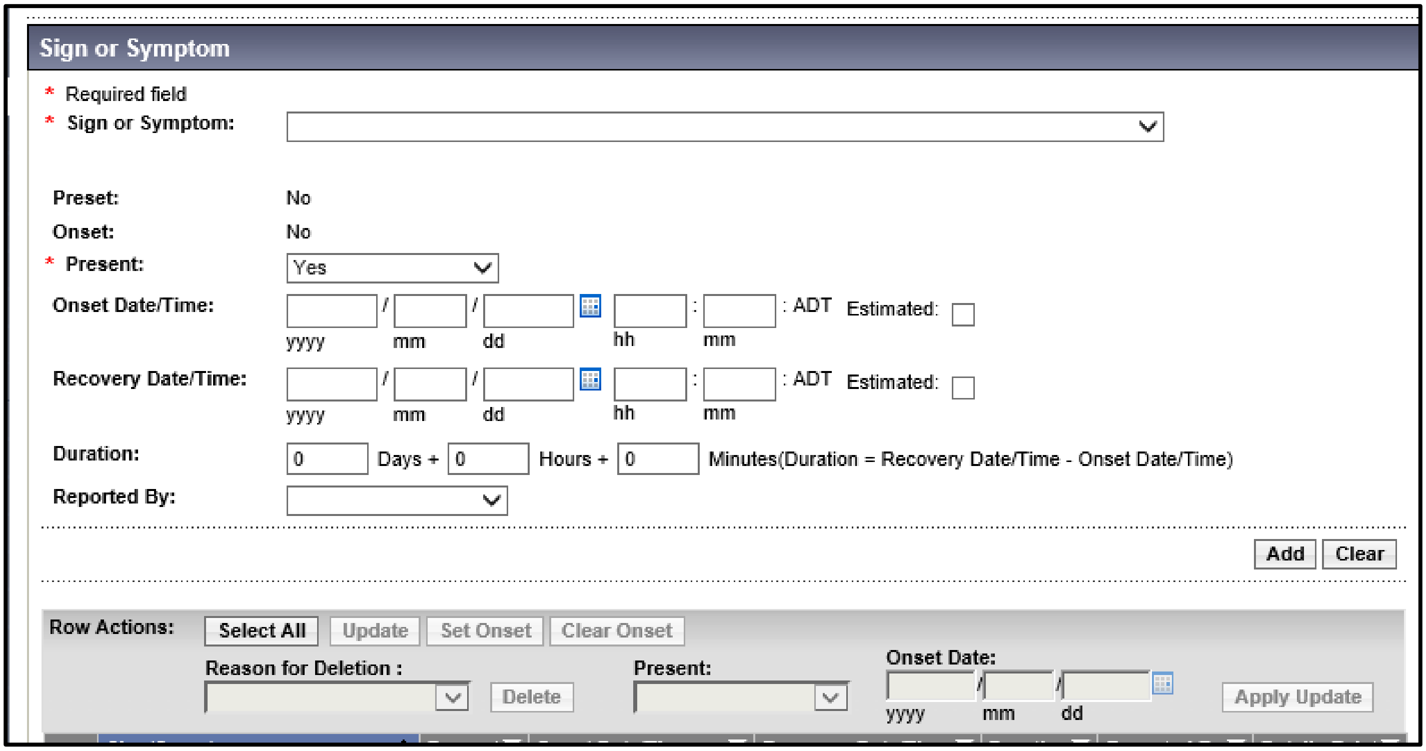
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Vomiting						No
☐	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
☑	Pharyngitis						No

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)

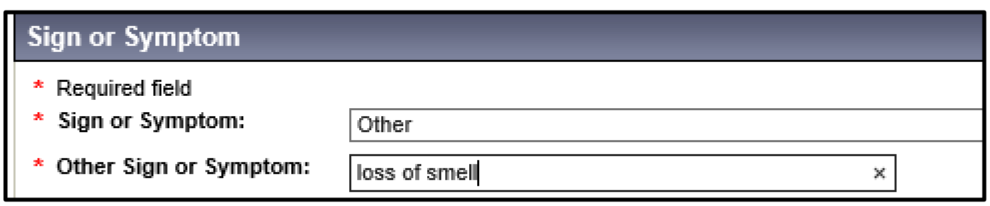
Pharyngitis	Yes	2020 Jun 16 00:00 ADT				No

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.



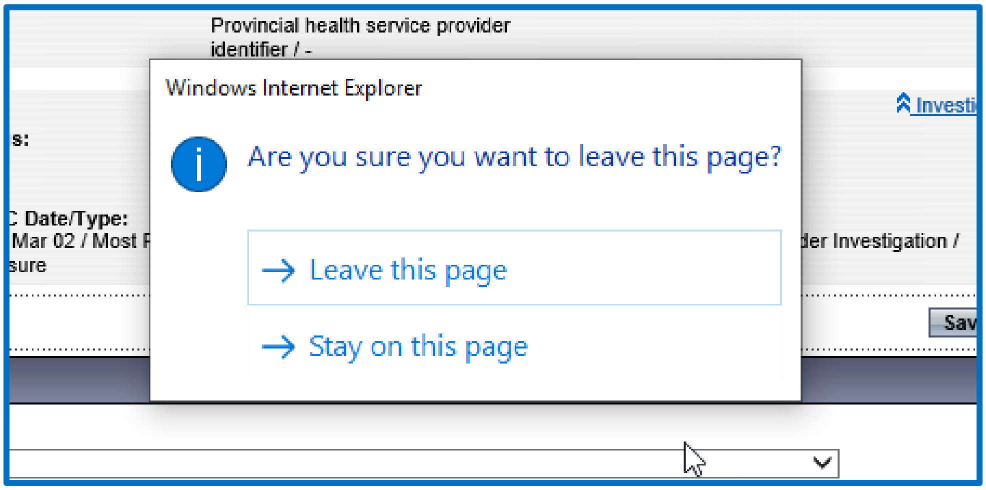
1. **Sign or Symptom** – Select the sign or symptom from the drop-down list. If the Sign or Symptom is not in the list select Other and also enter the sign/symptom in the **Other Sign or Symptom** field



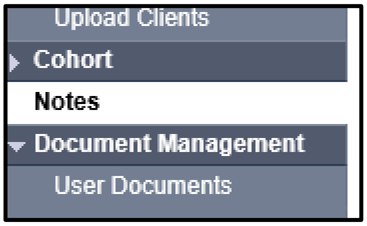
2. **Onset Date** - Enter the date the client reported the S&S. Do not enter a time
3. Click **Add** button
4. The S&S will now be updated in the table (see below)

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

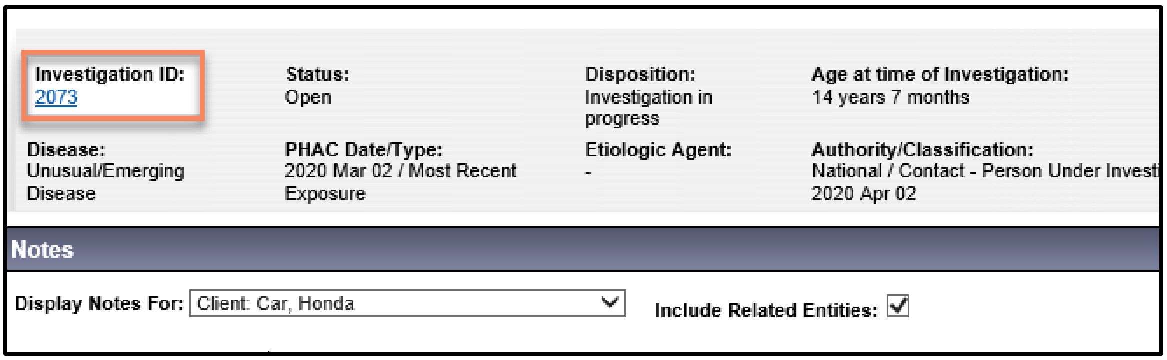
Note: If you see this message it indicates that you are leaving without saving your changes.. Click "→ **Stay on this page**" and click the **Save** button.



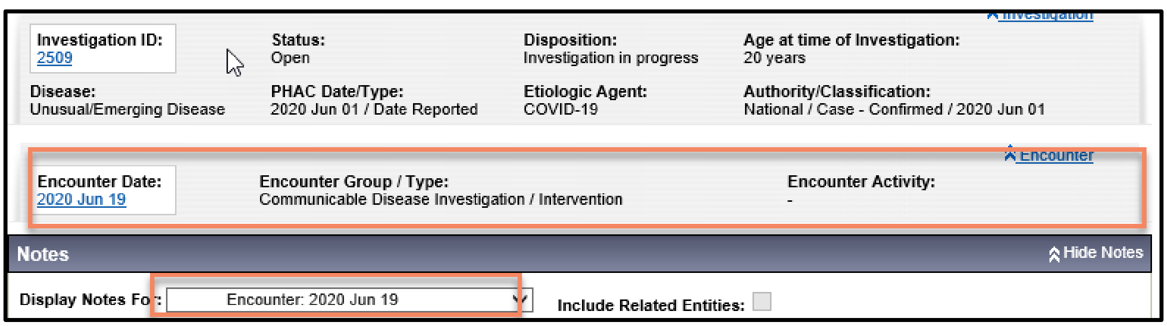
Adding a Clinical Note



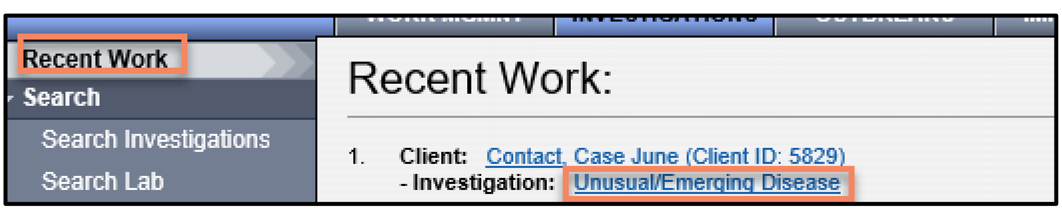
From the left-hand navigation, click on **Notes.**



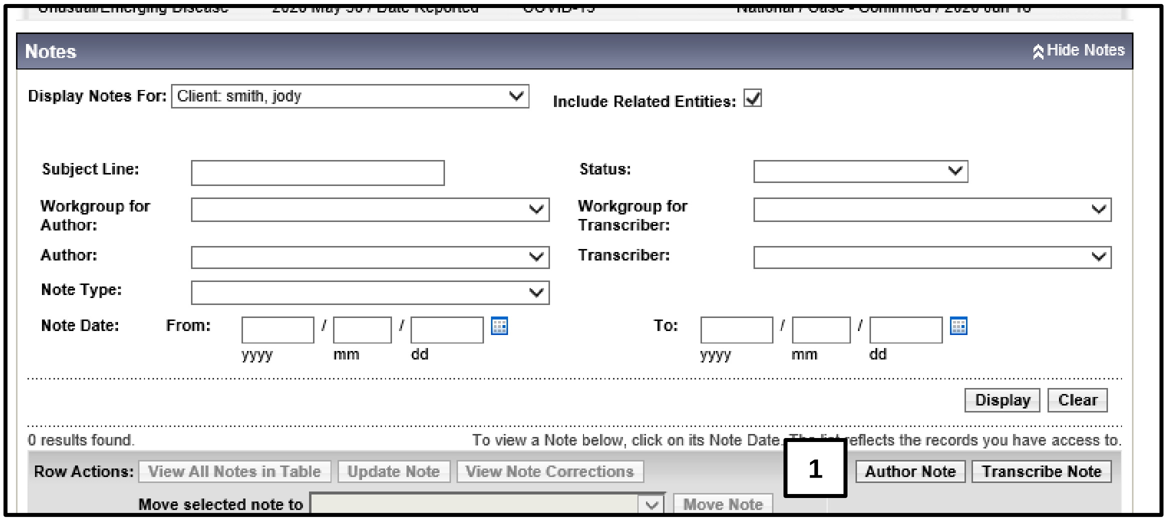
Ensure your investigation is in context. Do not add the note if only the client is in context.



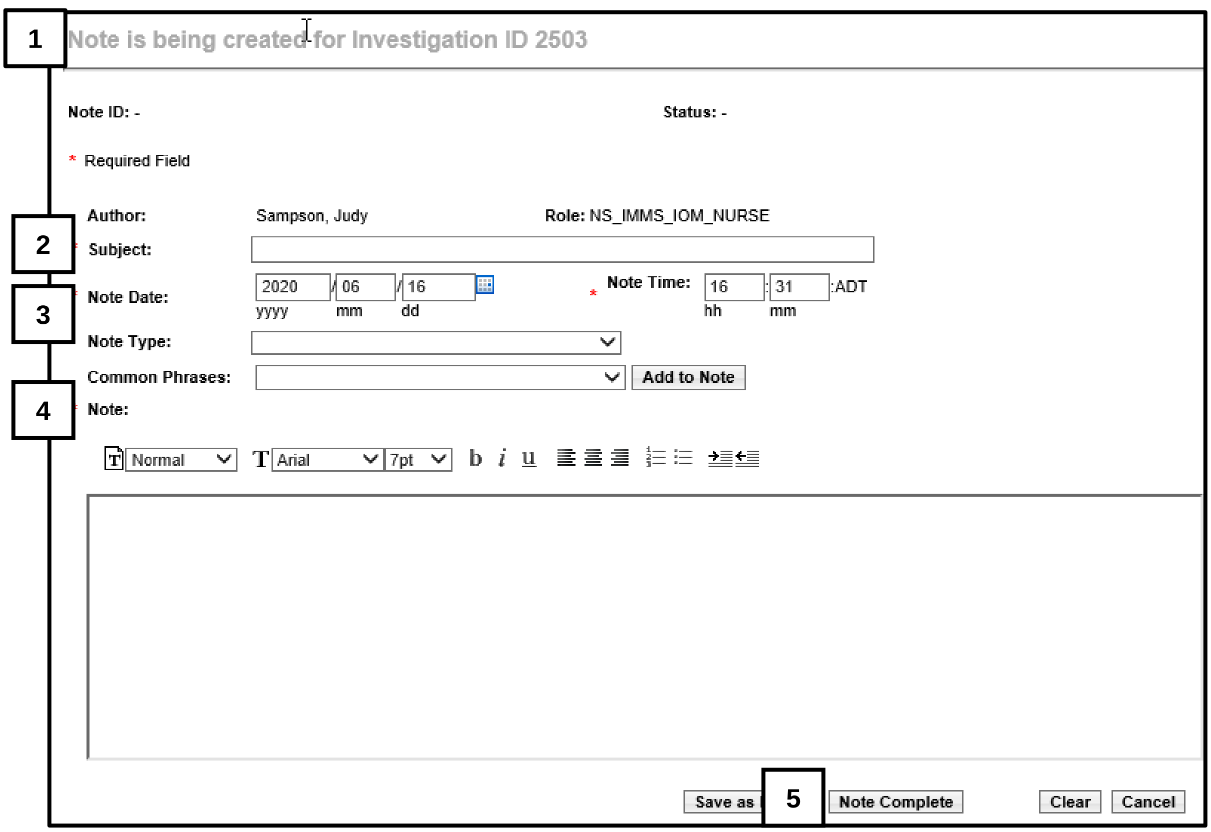
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



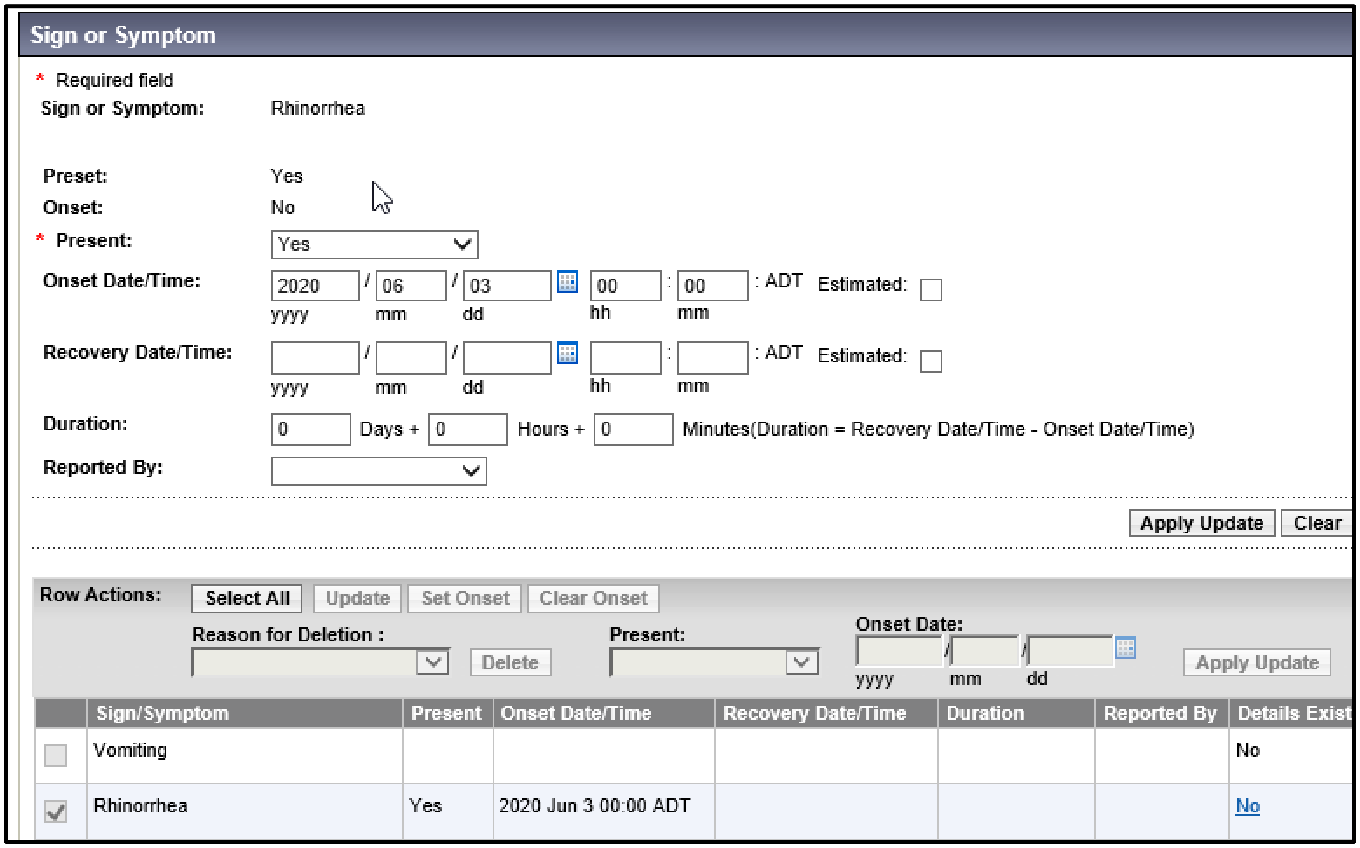
2. Click on **Author Note** button



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

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



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

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 Yes hyperlink

Observations Details

* Required field
Sign or Symptom: Fever

*Observation Date: 2020 / 06 / 17
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	Value	Unit	Observed By
○	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

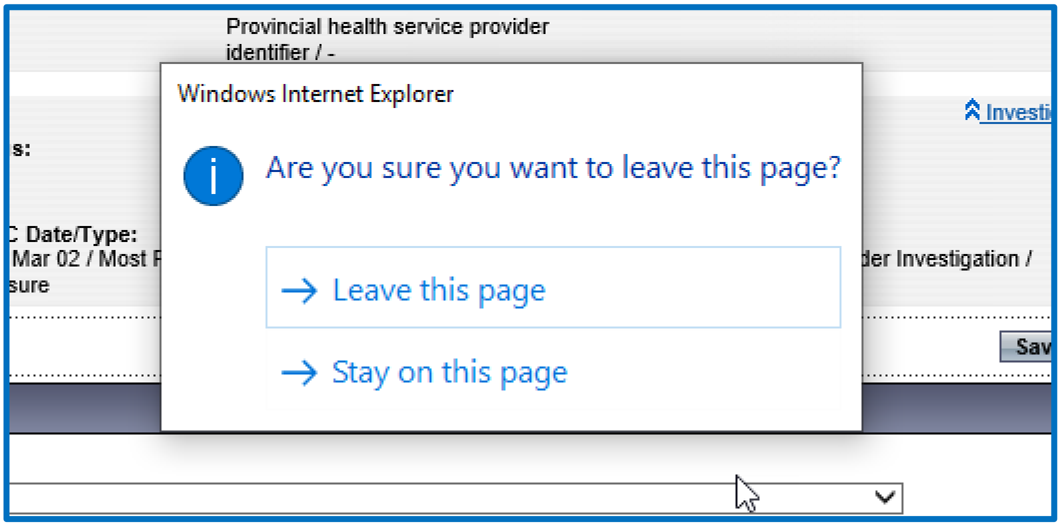
Sign and Symptom – reported by client and already present - Yes without a recovery date:

Cough	Yes	2020 Jun 15 00:00 ADT				No

- Do not update

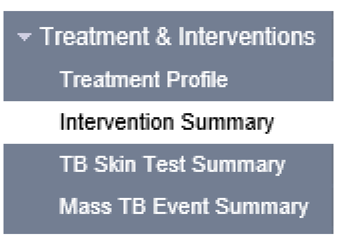
- Click the **Save** button (Top or Bottom right-hand area of screen)

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.

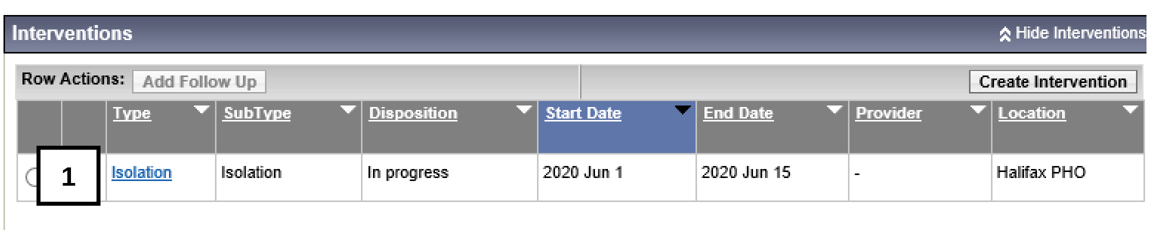


The following needs to be completed when closing a COVID-19 Contact investigation:

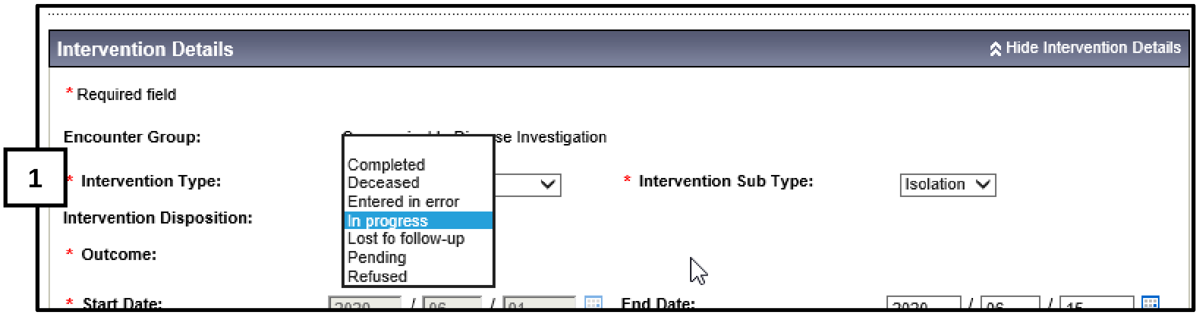
1. Complete the Intervention



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

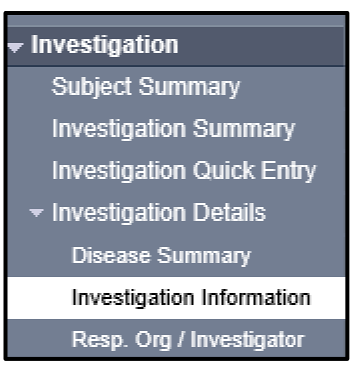


1. Click on the isolation intervention of the intervention that has a disposition of "In progress"

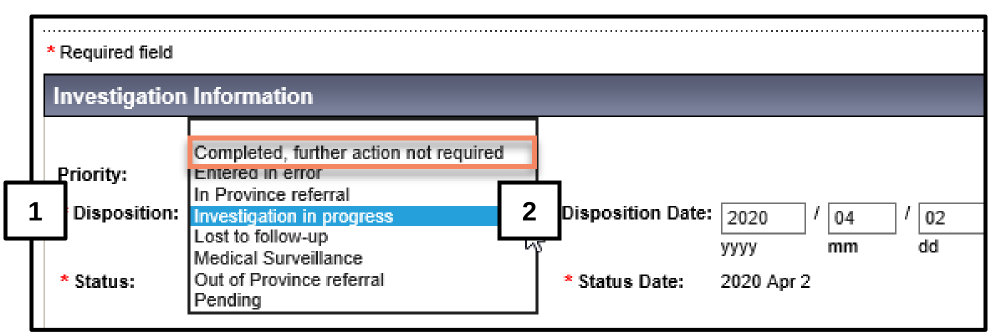


1. **Intervention Type** – select from the drop-down list
    a. **Completed** - if client finished required isolation
    b. **Deceased** - client died before completing isolation
    c. **Lost to follow up** - client is lost to follow up
2. Click the **Save** button (right hand portions of screen,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

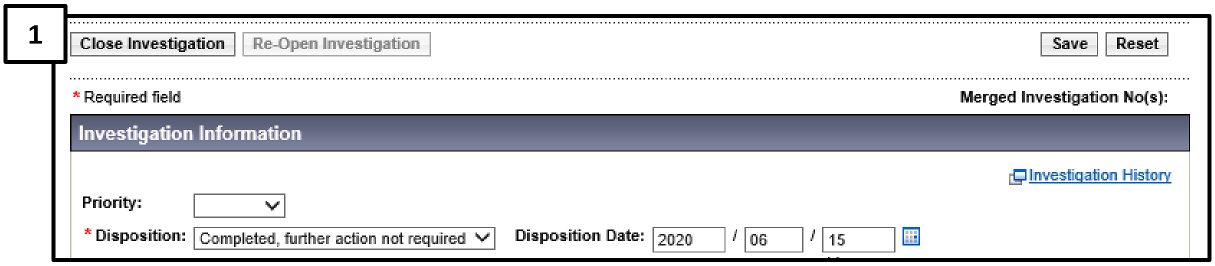
2. Update the investigation disposition and close the investigation



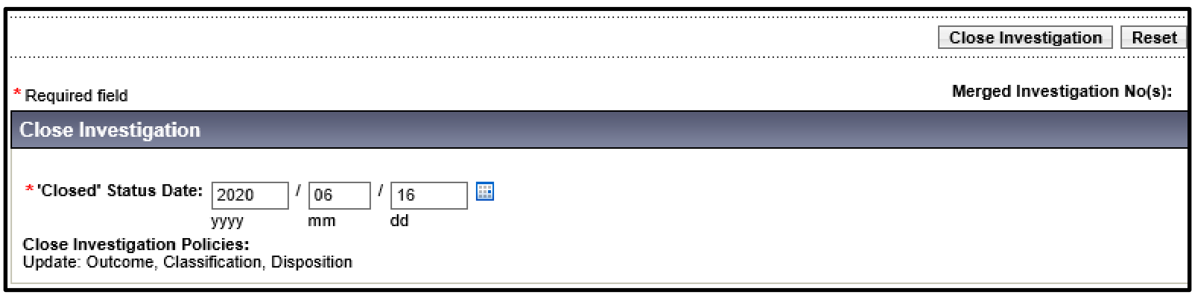
From the left-hand navigation, click on **Investigation Information.**



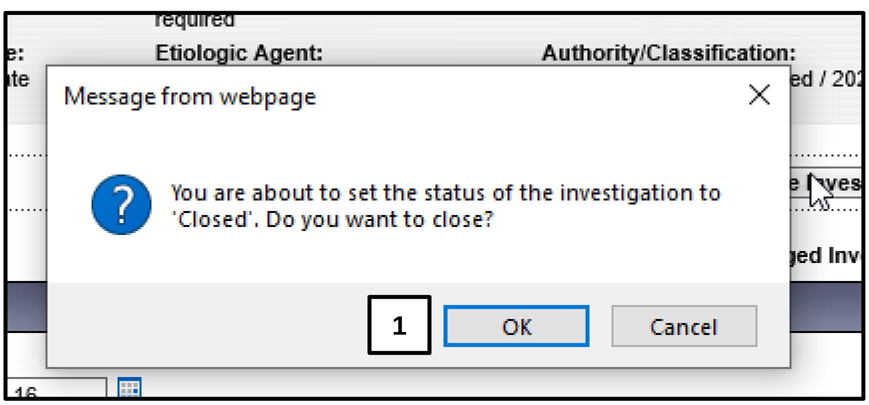
1. **Disposition** - Select “Completed, further action not required” from the drop down
2. **Disposition Date** – defaults to the date of the previous disposition. Enter the close date.
3. Click the **Save** button



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

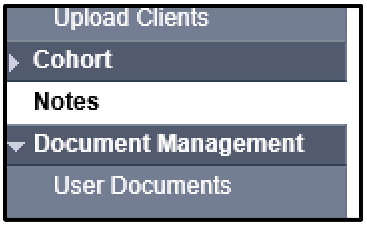


1. **Closed Status Date –** defaults to the current date. If the closed status date is different than the current date, enter the closed status date.
2. Click the **Close Investigation** button.

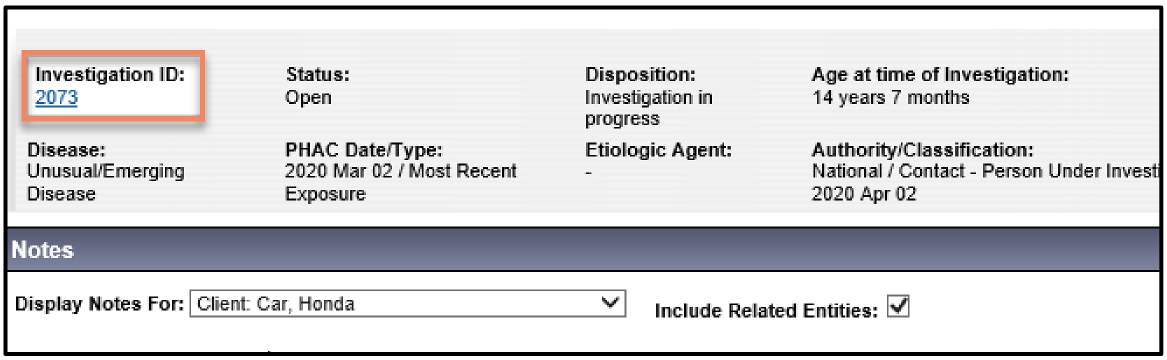


1. Click the **OK** button

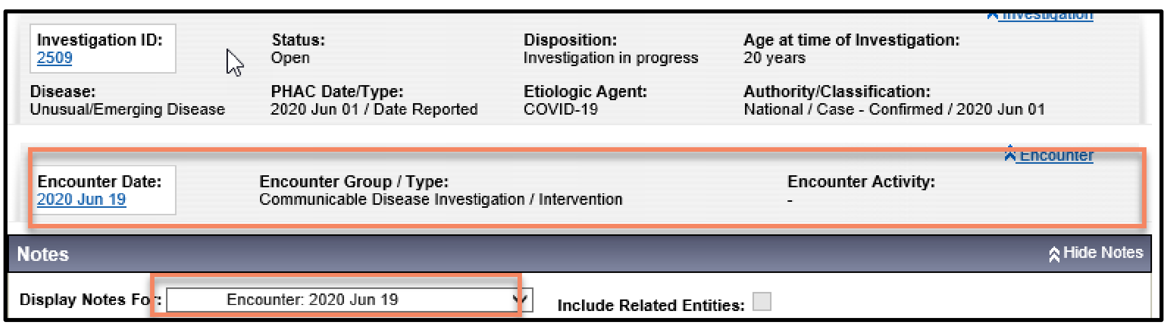
Adding a Clinical Note



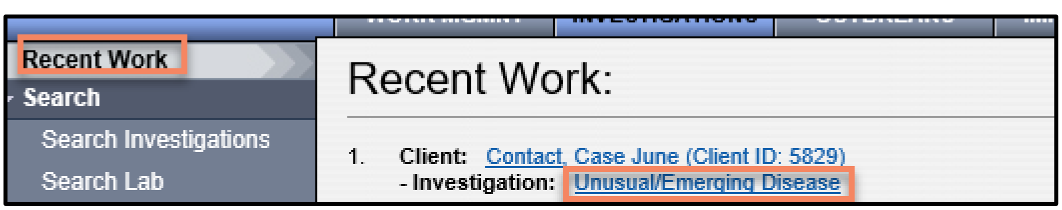
From the left-hand navigation, click on **Notes.**



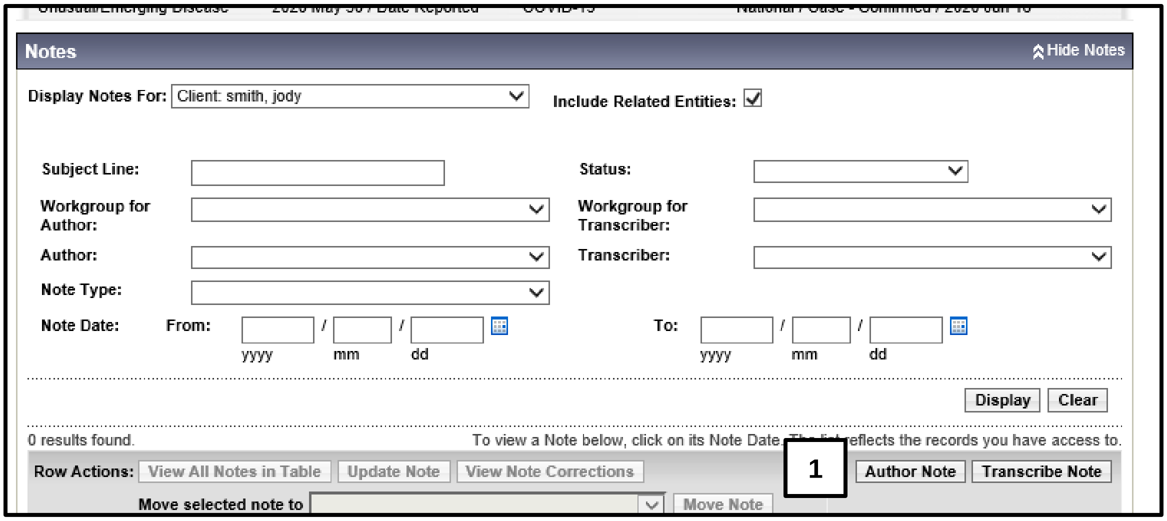
Ensure your investigation is in context. Do not add the note if only the client is in context.



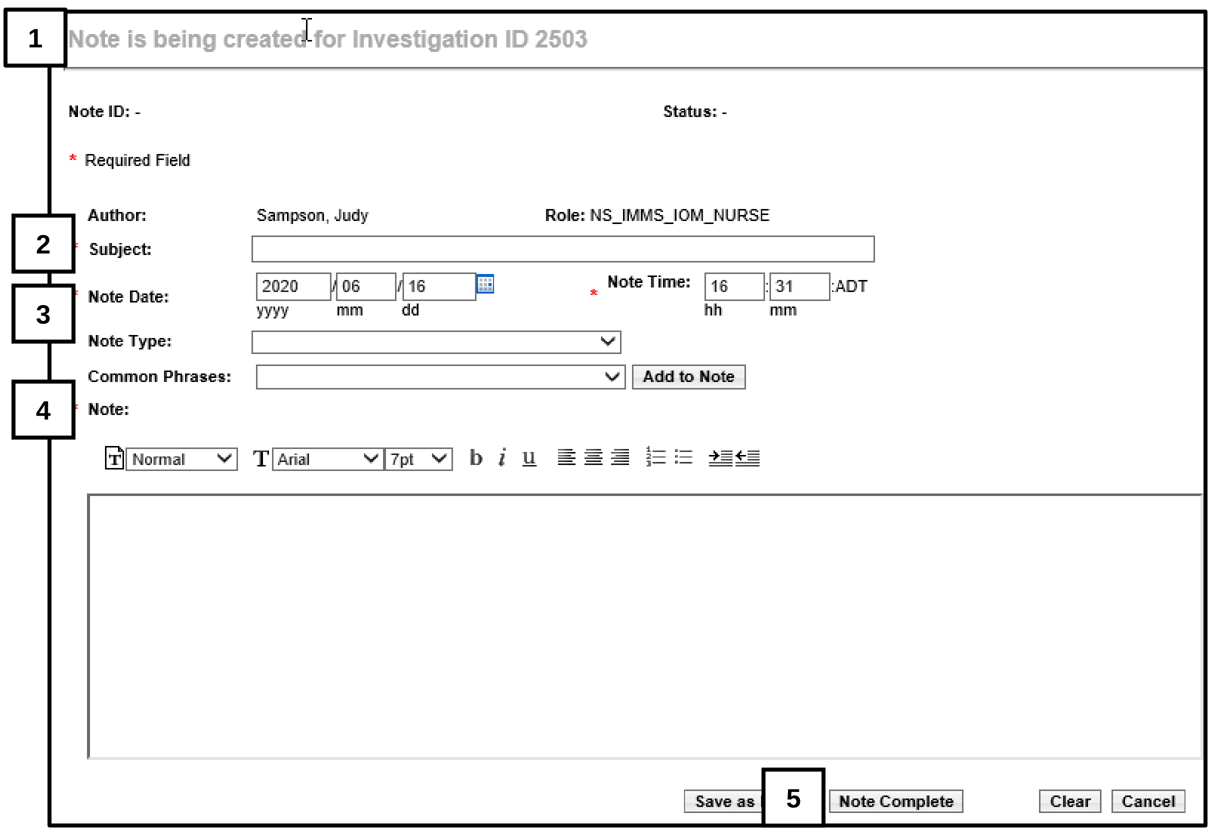
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



2. Click on **Author Note** button

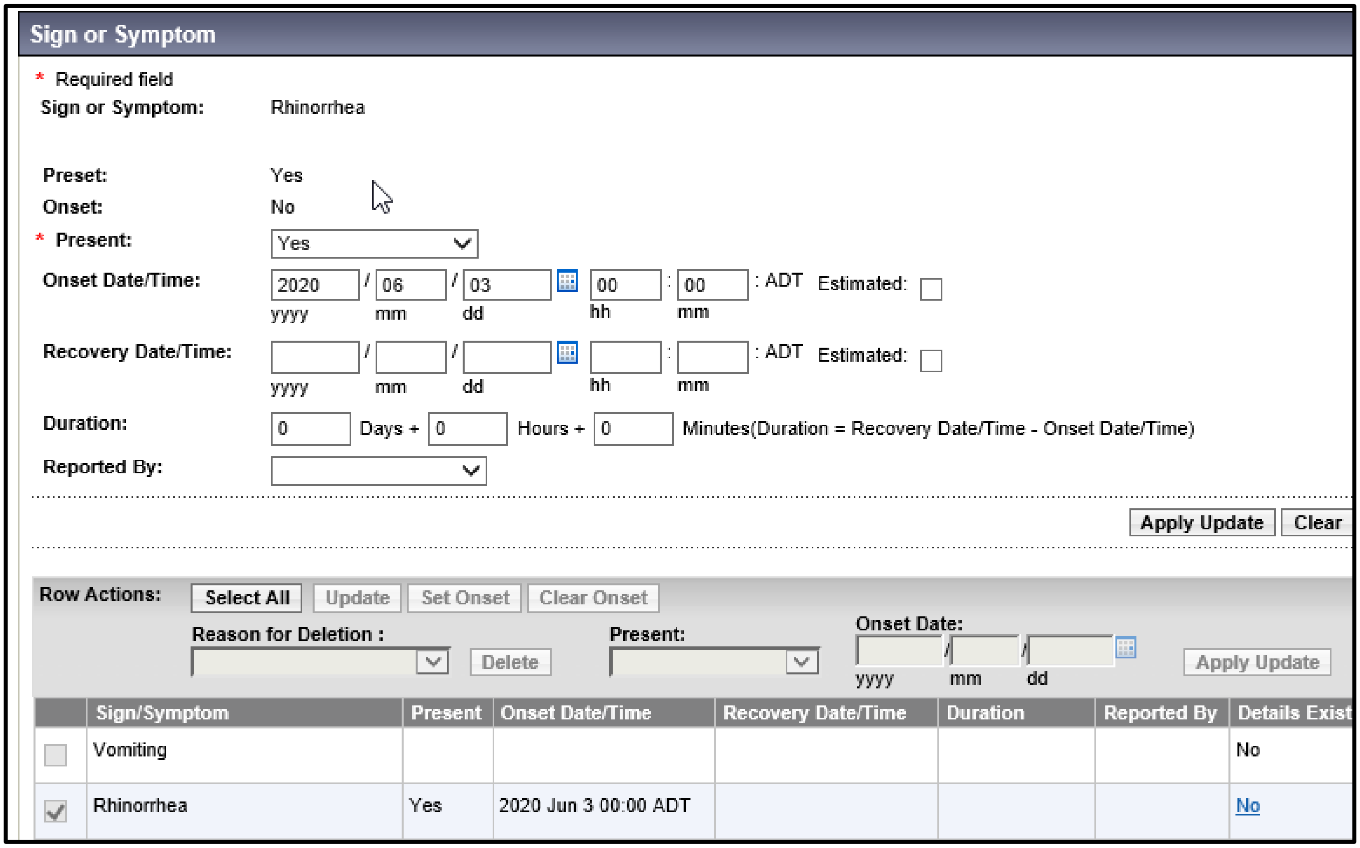


1. Ensure the note is being added for an investigation
2. **Subject** – enter the subject of the note
3. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
4. **Note** – enter the note details
5. Click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

Client 1 - Intermittent Monitoring – June 13

Investigation has recorded Signs and Symptoms & Daily Monitoring indicates no 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 the S&S is no longer reported by the client, you need to end date the S&S by entering the Recovery Date



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

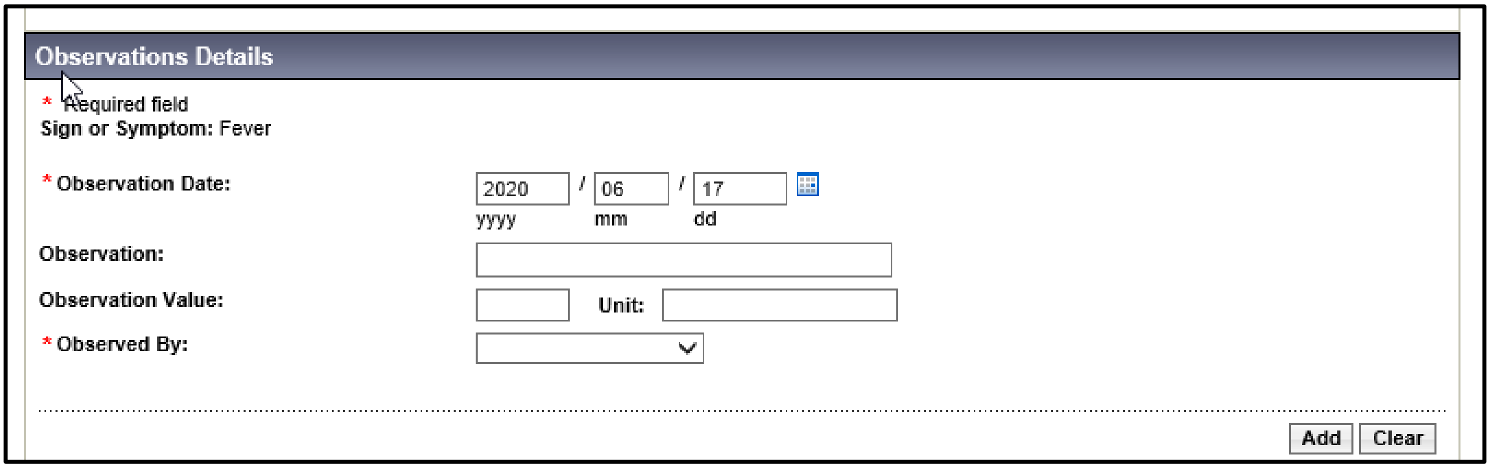
Rhinorrhea	Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12 d 0 h 0 m		No

Add temperature observation:

On Fever No:

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

2. Click on the Yes hyperlink

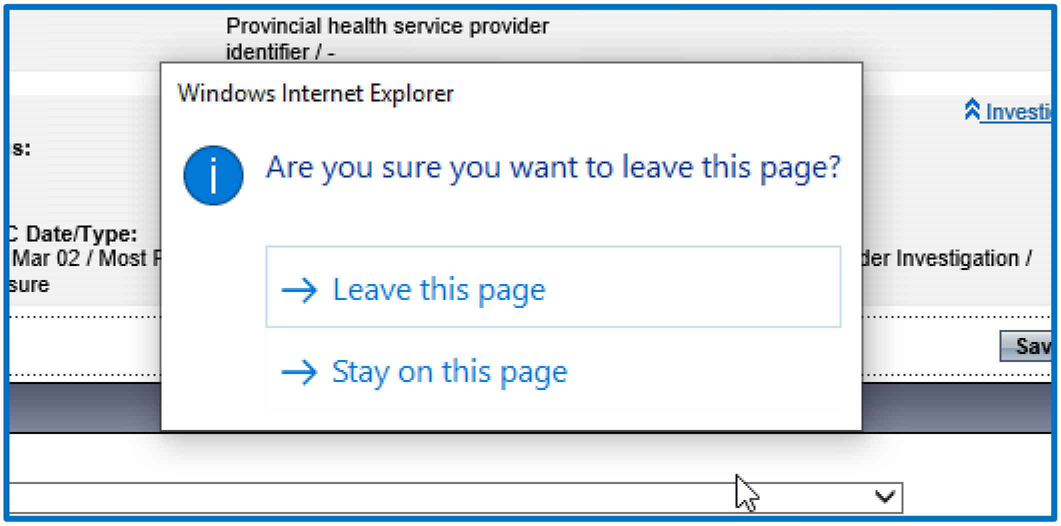


1. **Observation Date** - Enter date of the observation
2. **Observation field** - Enter word Temperature If the client as unable to provide temperature, add Unable to provide temperature.
3. **Observation Value** - Enter temperature value.
4. **Unit** - Enter Celsius
5. **Observed by** – select from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

	Observation Date	Observation	Value	Unit	Observed By
○	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

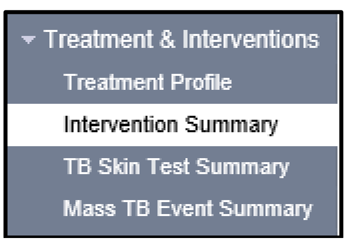
- Click the **Save** button (Top or Bottom right-hand area of screen)

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.

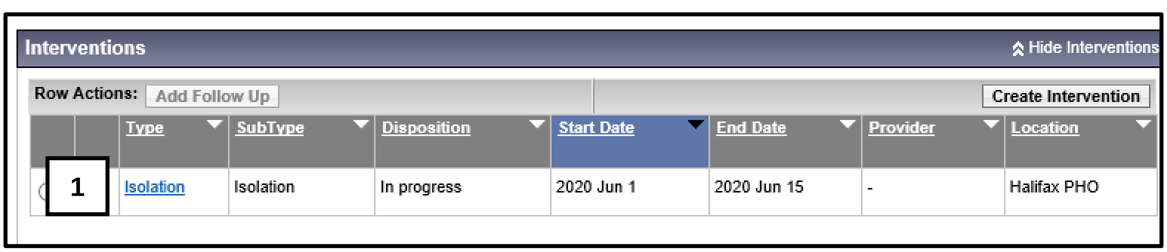


The following needs to be completed when closing a COVID-19 Case investigation:

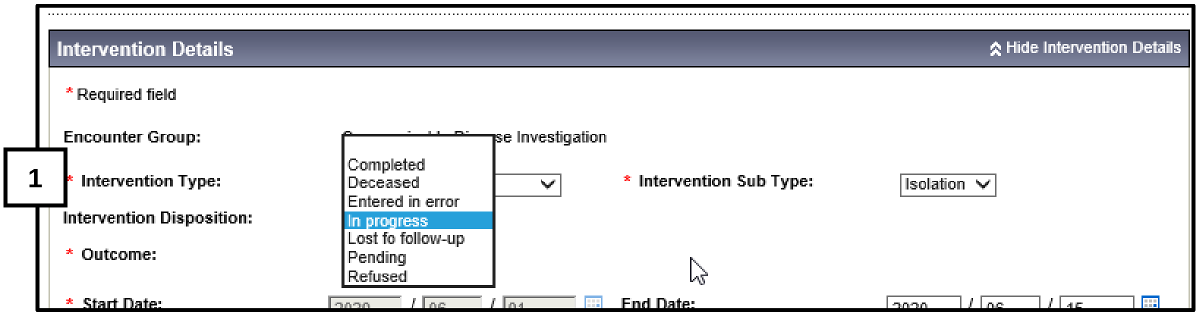
1. Complete the Intervention



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

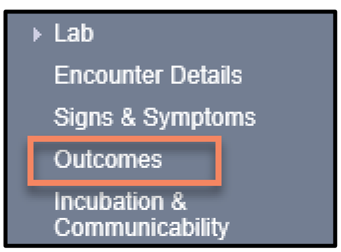


1. Click on the isolation intervention of the intervention that has a disposition of "In progress"



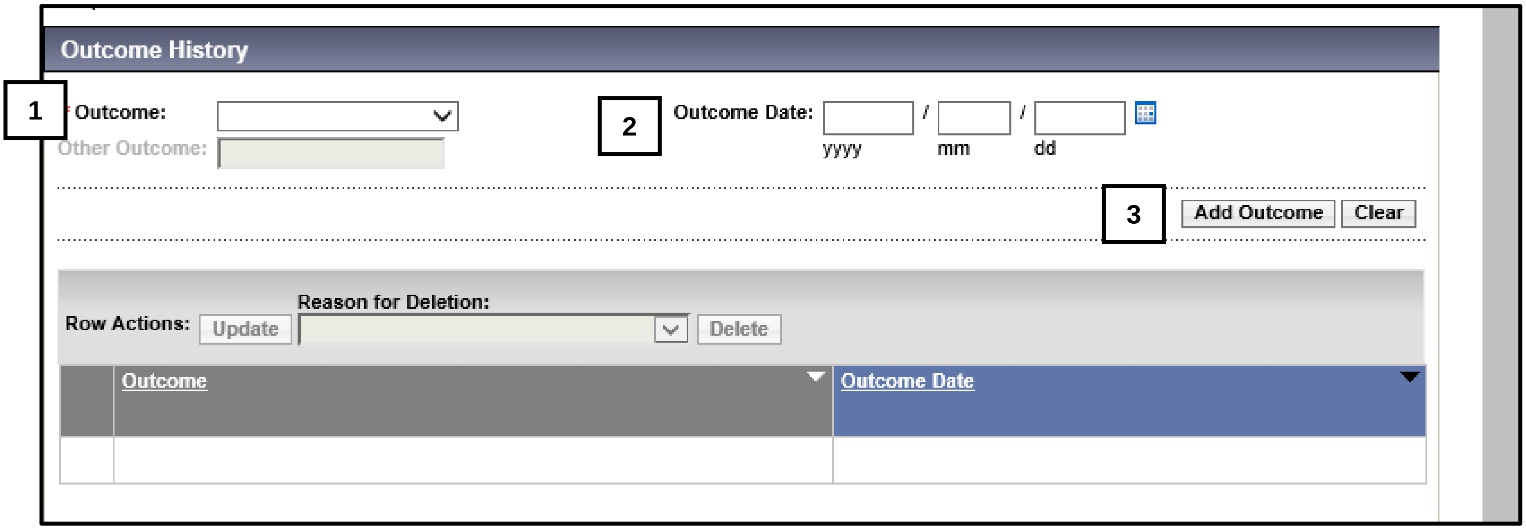
2. **Intervention Type** – select from the drop-down list
    a. Completed if finished required isolation
    b. Deceased client died before completing isolation
    c. Lost to follow up -client is lost to follow up
3. Click the **Save** button (right hand portions of screen, top or bottom)

2. Add the final Outcome

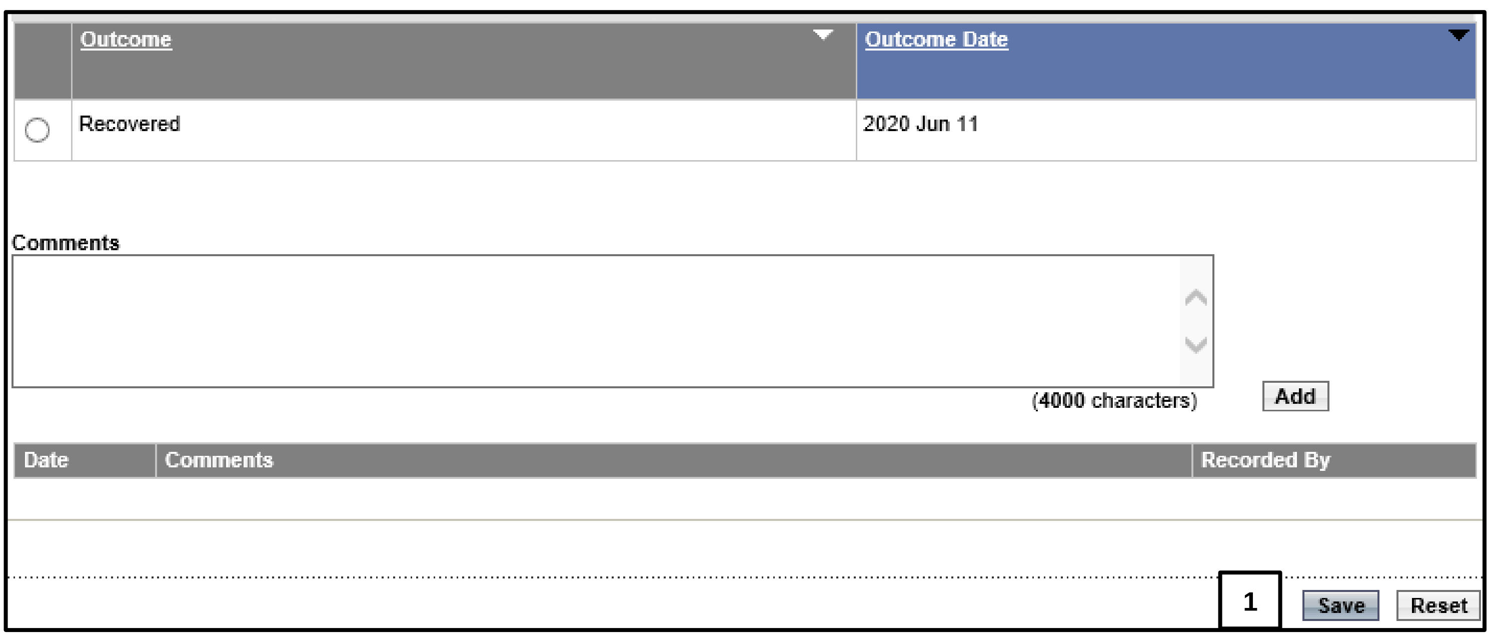


From the left-hand navigation bar, click on **Outcome**

Note: there can be multiple outcomes.



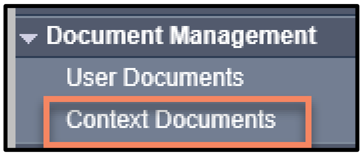
1. **Outcome** - Select the outcome from the drop-down list
2. **Outcome Date** - Enter the outcome date. For daily monitoring entry – enter the call date
3. Click the **Add Outcome** button to add the outcome to the outcome table



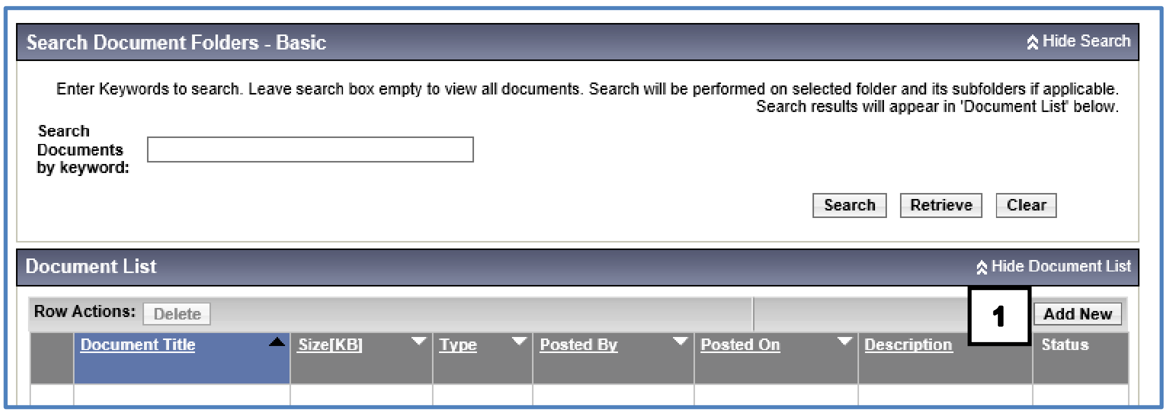
1. Click the **Save** button

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

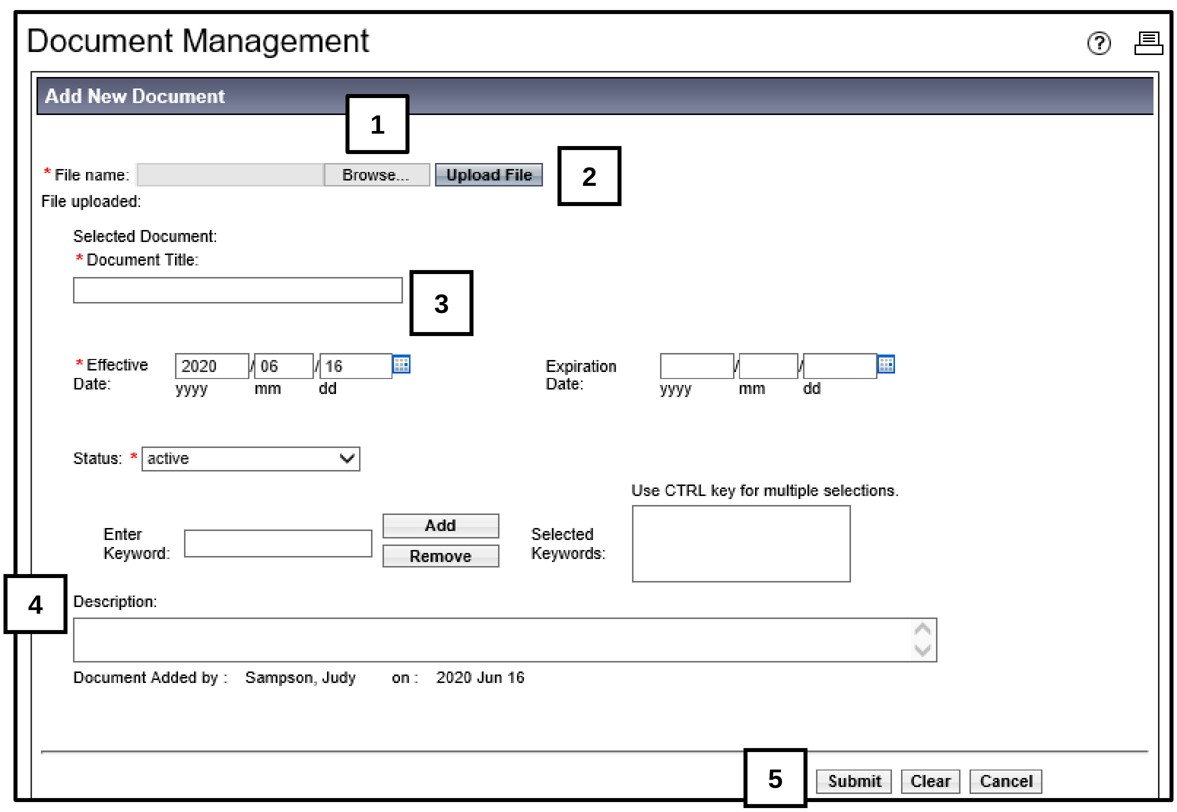
3. Upload letter – Recovery or Lost to Follow Up (if the investigation was a case. Not applicable for a contact investigation)



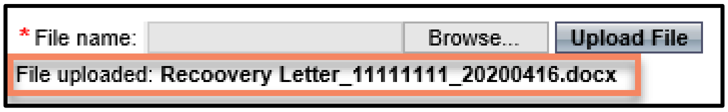
From the left-hand navigation, click on **Context Documents. Do not use User Documents.**



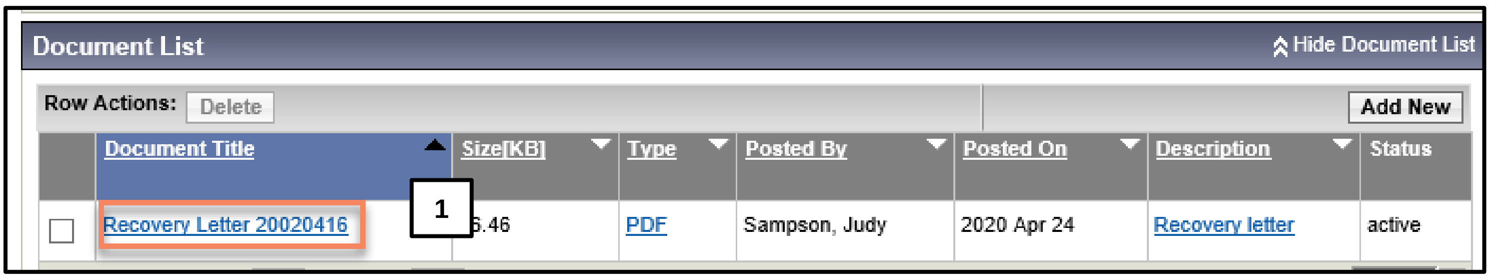
1. Click the **Add New** button



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



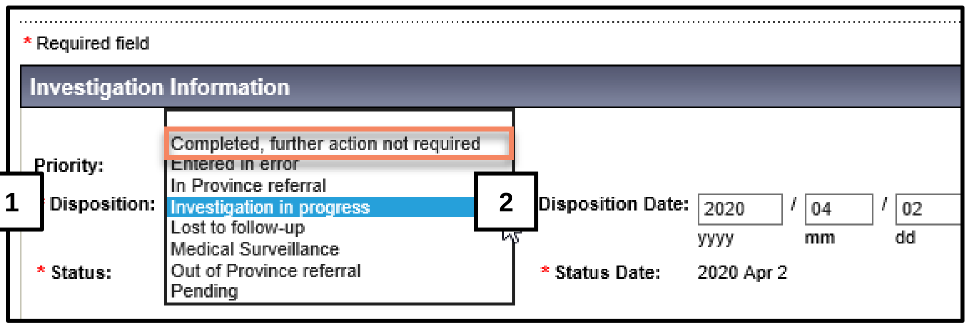
2. Click the **Upload File** button. You will see that the file is uploaded
3. **Document Title** – enter the document title
4. **Description** – enter the document description
5. Click the **Submit** button



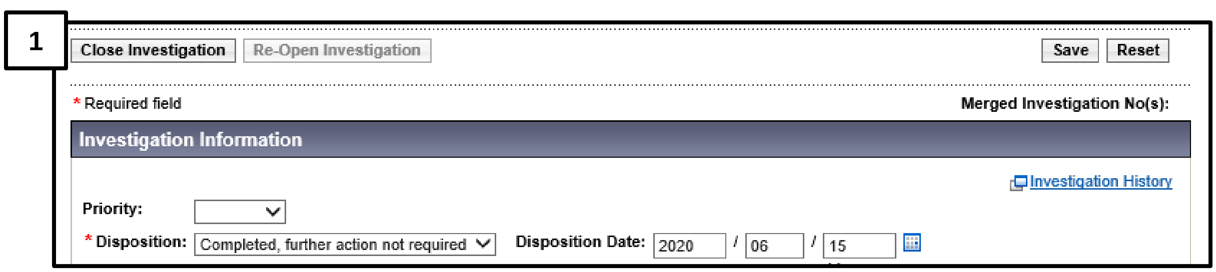
1. You can view the letter by clicking on the hyperlinked name in the **Type** column

4. Update the investigation disposition and close the investigation

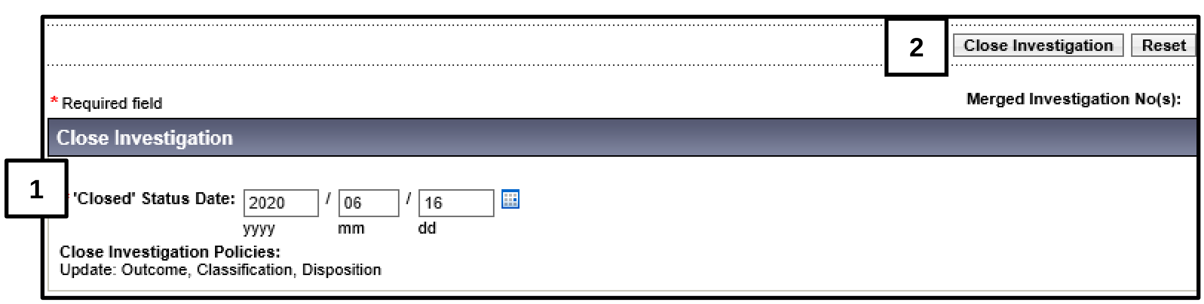
From the left-hand navigation, click on **Investigation Information.**



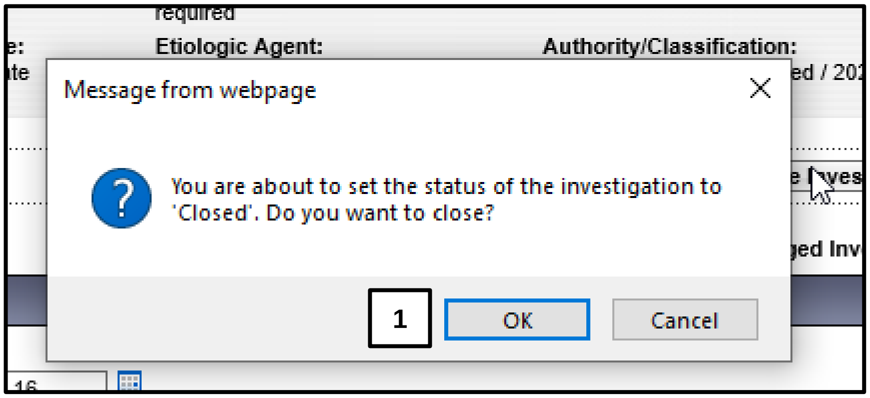
1. **Disposition** - Select "Completed, further action not required" from the drop down
2. **Disposition Date** – defaults to the date of the previous disposition. Enter the close date.
3. Click the **Save** button



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

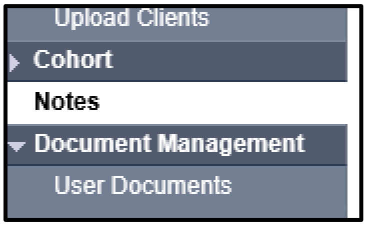


1. **Closed Status Date** – defaults to the current date. If the closed status date is different than the current date, enter the closed status date.
2. Click the **Close Investigation** button.

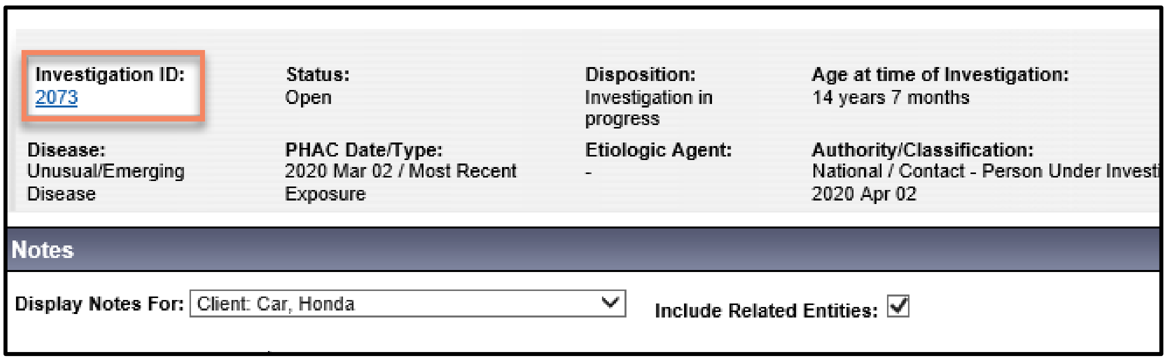


1. Click the **OK** button

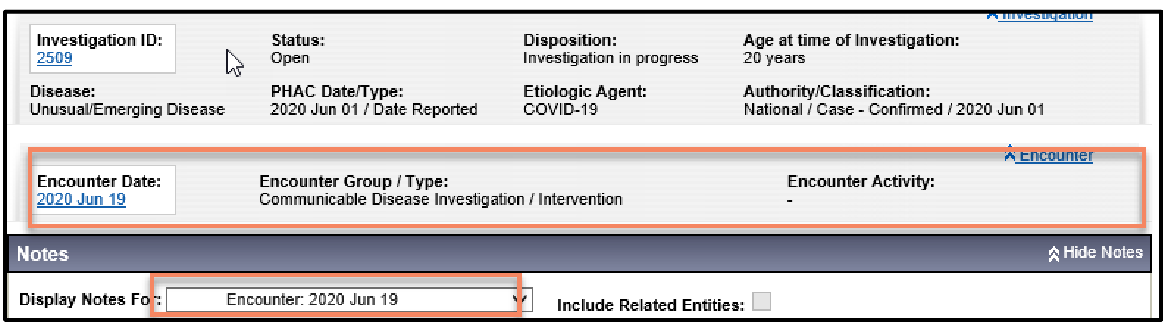
Adding a Clinical Note



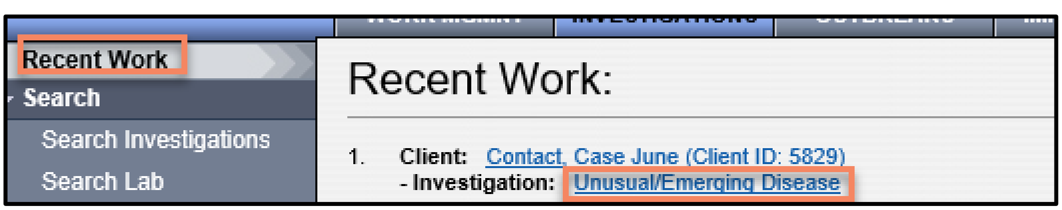
From the left-hand navigation, click on **Notes.**



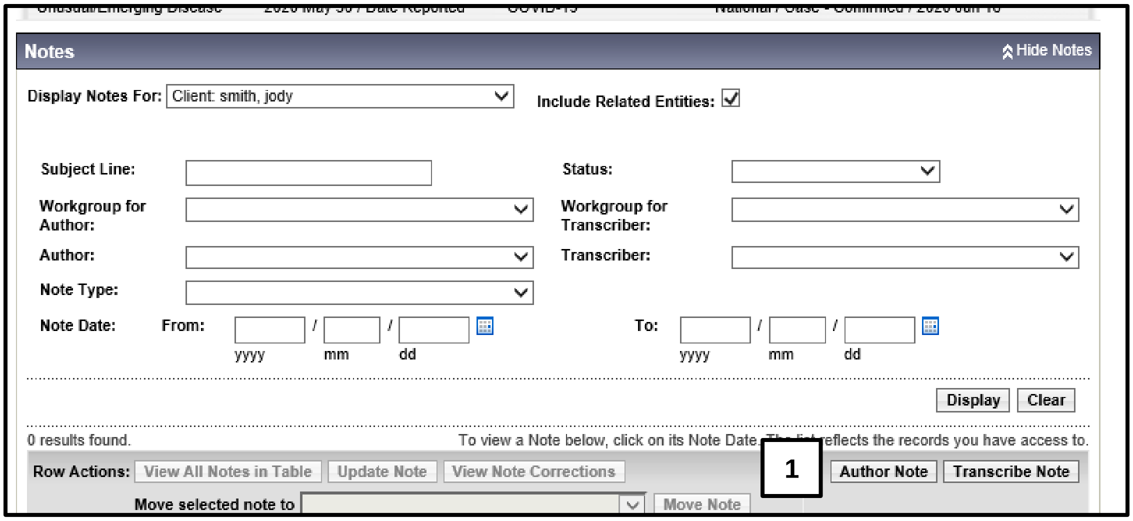
Ensure your investigation is in context. Do not add the note if only the client is in context.



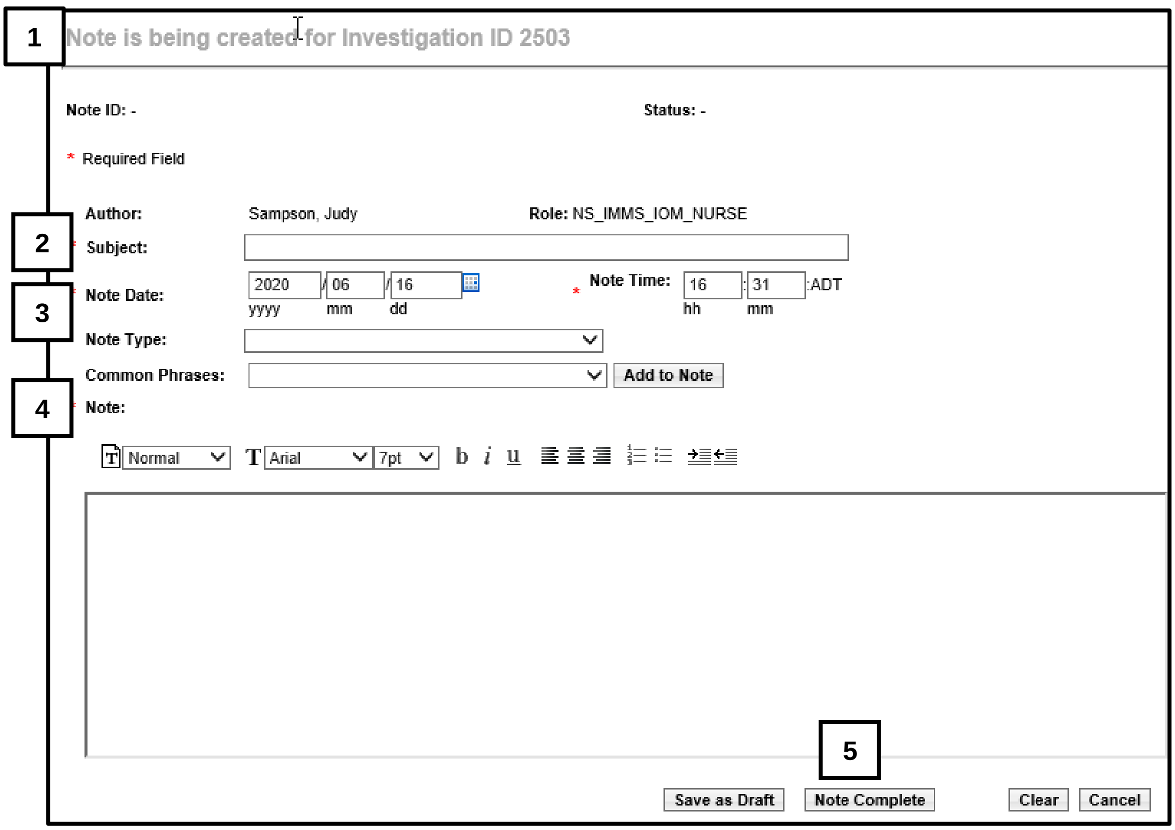
If an Encounter is in context, you will need to take it out of context so the note is added at the investigation level.



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



1. Click on **Author Note** button



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