

Client 1 - New Confirmed Case

1. [Search for a client](#)
2. [Verify Client's telephone number and address – create temporary address-add email address](#)
3. [Entering Ethnic Information](#)
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14. [Exposure Summary \(Upcoming training\)](#)
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Client 2 - Contact Case now Confirmed Case

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18. [Adding a Secondary Investigator](#)

Contact Low Risk because of COVID 19 Immunization Status.

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

Intermittent Monitoring

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

1. [Search for Investigation](#)
2. [Create Isolation Intervention](#)
3. [Update Signs and Symptoms](#)
4. [Update Nursing notes](#)

2. Client 1 - Case – Intermittent Monitoring June 10

1. [Update Signs and Symptoms](#)
2. [Update Nursing notes](#)

3. Client 2 - Case- Intermittent Monitoring June 10

1. [Update Signs and Symptoms](#)
2. [Update Nursing notes](#)

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

1. [Update Signs and Symptoms](#)
2. [Update Nursing notes](#)

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

1. [Update Signs and Symptoms](#)
2. [Close contact case](#)
3. [Update Nursing notes](#)

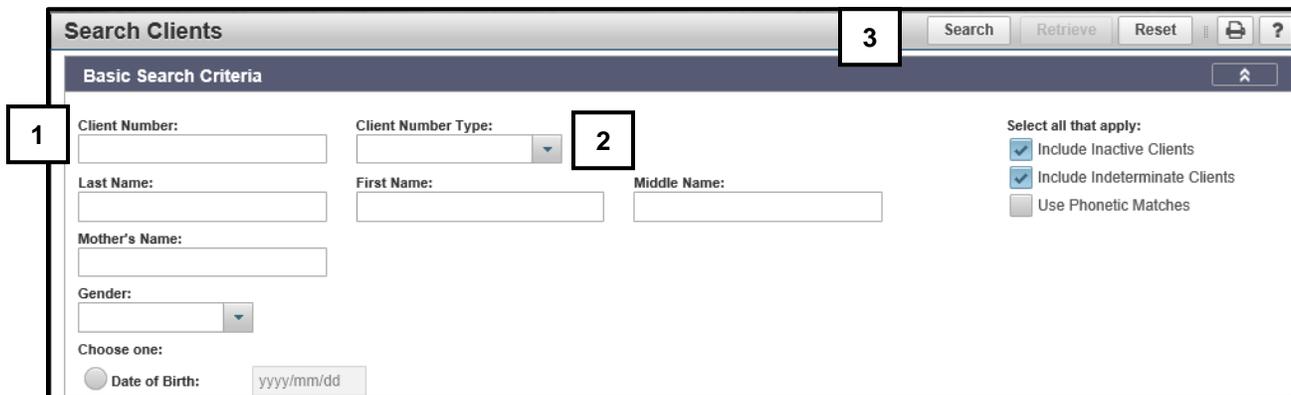
6. Client 1 – Case – Intermittent Monitoring – June 13

1. [Update Signs and Symptoms](#)
2. [Close Case](#)
3. [Update Nursing notes](#)

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.

Search Clients
5
Search Retrieve Reset

Basic Search Criteria ↑

Client Number:

Client Number Type:

Select all that apply:

Include Inactive Clients

Include Indeterminate Clients

Use Phonetic Matches

1 **Last Name:**

Mother's Name:

Gender:

2 **First Name:**

Middle Name:

Choose one:

Date of Birth:

4

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

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

Search Results
3
4
✓ ↑

Client Quick Entry
Create Client

Preview Update Set In Context Create Cohort Subject Summary

	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active	
2	<input type="checkbox"/>	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
1	<input checked="" type="checkbox"/>	5424	9333000002	Summer	Bertha	Female	2000 Jan 01	NSHA	Active
	<input type="checkbox"/>	5425	9333000003	Summer	Caitlin	Female	2000 Jan 01	NSHA	Active

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

If no search results are returned:

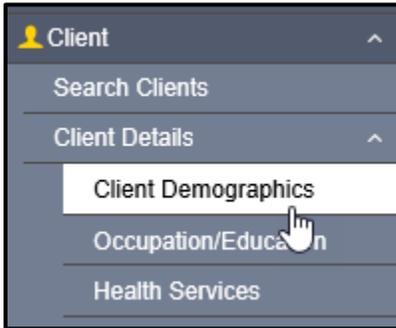
- Remove first name and complete search. The client may not have provided their legal name
- Remove DOB and complete search. The client's mm/dd may be reversed.

Panorama – COVID-19 Case Management and Monitoring
-Version 12 Last Updated: 2021-06-11

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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**

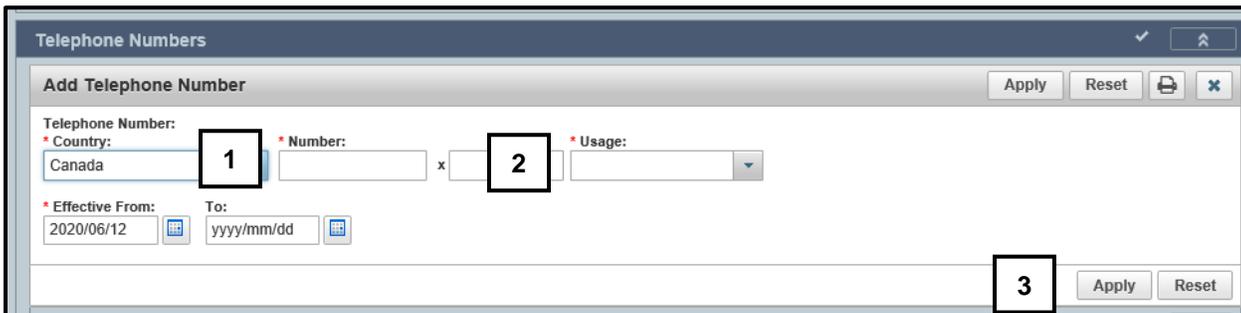
Telephone Number

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.

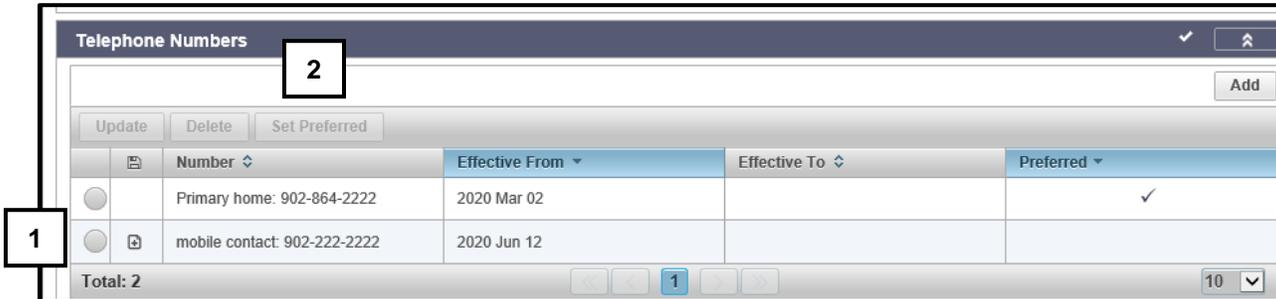
1. Click on the **Add** button



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.



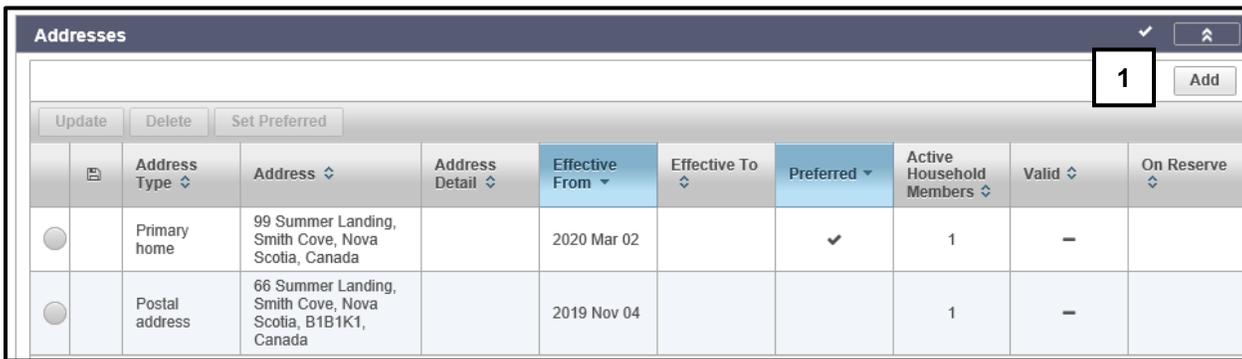
	Number	Effective From	Effective To	Preferred
<input type="radio"/>	Primary home: 902-864-2222	2020 Mar 02		<input checked="" type="checkbox"/>
<input type="radio"/>	mobile contact: 902-222-2222	2020 Jun 12		<input type="checkbox"/>

Total: 2

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)



	Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid	On Reserve
<input type="radio"/>	Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02		<input checked="" type="checkbox"/>	1	-	
<input type="radio"/>	Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04		<input type="checkbox"/>	1	-	

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

1. Click on the **Add** button

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.

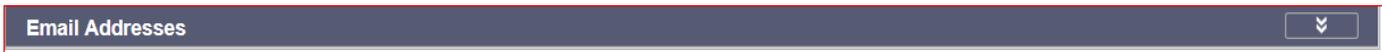
	Update	Delete	Set Preferred									
				Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid	On Reserve
<input type="radio"/>				Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02		✓	1	-	
<input checked="" type="radio"/>				Temporary address	33 Winter Avenue, Beaver Bank, Nova Scotia, B4G1E6, Canada		2020 Jun 12				-	
<input type="radio"/>				Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04			1	-	

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

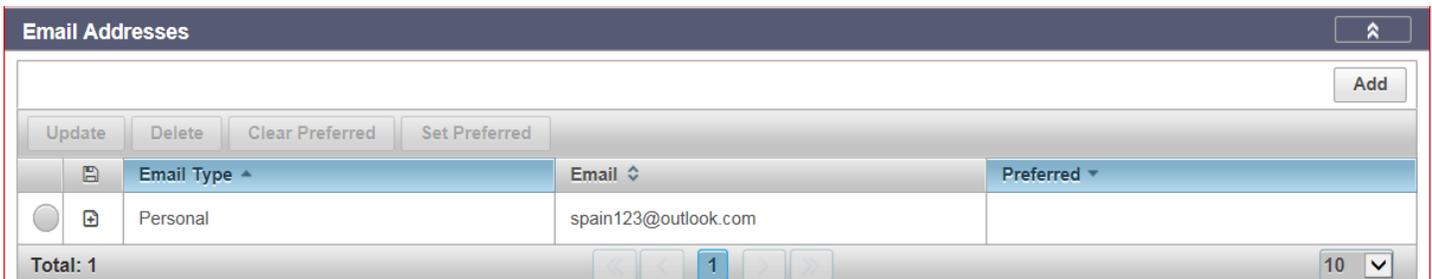
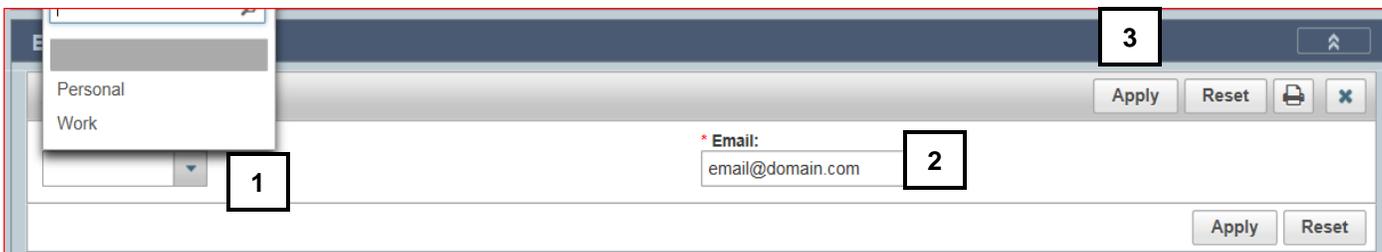
1. Expand the email tab by clicking on the down arrows



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.



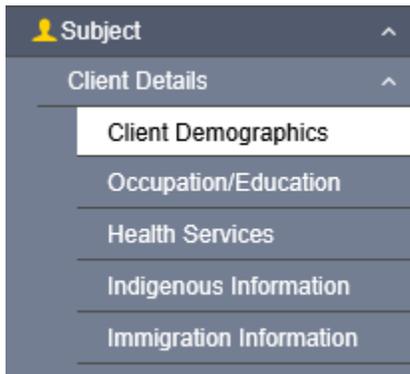
3. Email type : select personal or work. Email: Add the email address provided by the client. Click apply.



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

Entering Ethnicity Information

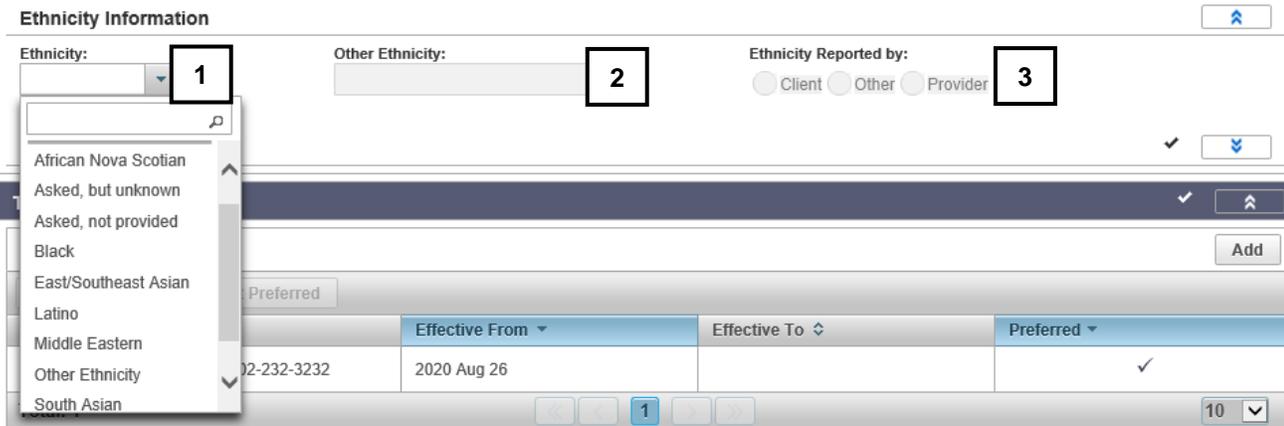
Note: If the client does not provide an answer to the question related to their ethnicity, this still needs to be documented in Panorama.



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**

Subject Summary

Client ID: [5521](#) Name (Last, First Middle) / Gender: Stone, Rolling / Male Health Card No: 2222333444 Date of Birth / Age: 1990 Jun 02 / 30 years

Phone Number: - Address: 97 Willow Street, Amherst, Nova Scotia, B4H3W6, Canada Additional ID Type / Additional ID: Provincial health service provider identifier / -

Report:

Communicable Disease Investigation Encounter Group Hide

Disease: Investigation Quick Entry Create Investigation

Unassociated Encounters (Non-Investigation) Hide

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

Move Selected Encounter(s) To: Move

Non-Episode Encounters Create Encounter Hide

Encounter Date	Encounter Type	Encounter Reasons	Organization	Location

Confirm that there is not another COVID-19 investigation.

Communicable Disease Investigation Encounter Group Hide

Disease: Investigation Quick Entry Create Investigation

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

Disease Summary ↑ Hide

* **Disease:** 1 Unusual/Emerging Disease ▾

* **Authority:** 2 National ▾ * **Classification:** Case - Confirmed ▾ 3

* **Classification Date:** 2020 / 06 / 02 4
yyyy mm dd

Microorganism: COVID-19 ▾ 5

Information Source: ▾

Investigation Information ↑ Hide

Priority: ▾

* **Disposition:** Investigation in progress ▾ 6

Enter the following information:

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

* **Responsible Organization :** Halifax Public Health Office ▾ 1
To specify an Organization first click on the 'Find' button. Then search, or type some of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

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

* **Responsible Organization Workgroup :** IOM-Halifax-Unmonitored ▾ 2

* **Responsible Organization Date :** 2020 / 07 / 08 3
yyyy mm dd

* **Investigator Organization :** Central Zone ▾ 3

* **Investigator Workgroup :** COVID-19 Unmonitored ▾ 4

Investigator Name : 5

* **Assigned Date :** 2020 / 07 / 08 5
yyyy mm dd

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

Enter the following information:

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

Reporting Notification Hide

*** Reporting Source:**

Provider:
Click Find to select a provider:
Provider: Find

Location: QEII-Victoria General (VG) Site-General
To specify a Service Delivery Location, first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Victoria General-General] Find

Other:

Type of Reporting Source: Lab v

Method of Notification: Lab v

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

Report Date (Sent): / / calendar
yyyy mm dd

Report Date (Received): 2020 / 06 / 02 calendar
yyyy mm dd

5 Submit Clear Cancel

Enter the following information:

- Reporting Source-** click **Location** radio button and search using the **Find** button for “Victoria General-General”, highlighted and click **Select**

Location: Yarmouth Public Health Office
To specify a Service Delivery Location, first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Western Zone > Yarmouth Public Health Office > [Yarmouth PHO] Find

Type Search Close

Start typing the name of the Service Delivery Location. Matches will begin to appear below. Select the match with the keyboard or mouse.

SDL Name: Show Info

- Victoria General-Dialysis, Halifax, Nova Scotia
- Victoria General-General, Halifax, Nova Scotia Select
- Victoria General-ICU, Halifax, Nova Scotia
- Victoria General-Infectious Diseases, Halifax, Nova Scotia
- Victoria General-Pharmacy, Halifax, Nova Scotia

Other:

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

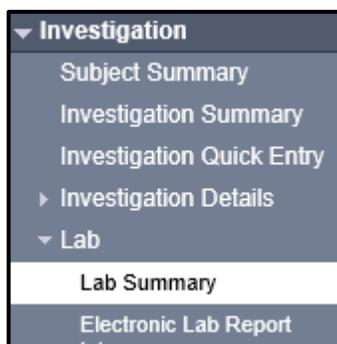
Making a Lab Pertinent to an investigation

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**

Row Actions: [View/Update Requisition](#) [View/Update Lab Report](#) **2**

* Flag indicates sensitivities present

	Specimen Collection / Imaging Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status
1	<input checked="" type="checkbox"/> <input type="checkbox"/>	2020 Mar 25	Swab / -	Presence or identity	Positive;	020-079-00246	COVID-19	-	Final

Total: 1 Page 1 of 1 Jump to page:

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

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

Selected Tests **1** [Hide Selected Tests](#)

Requisition Tests:

Row Actions: [Delete Test](#) [Set to Cannot Report](#)

3 Subject Investigations:

Pertinent Investigations:

Test Annotations: (4000 characters)

<input type="radio"/>	Test ID	Resulted	Test Name	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group
2	645	<input checked="" type="checkbox"/>	NAAT	Swab/ Nasopharyngeal swab	2020 Mar 25			Communicable Disease Investigation

On the Human Lab Report Screen

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

Row Actions: [Delete Test](#) [Set to Cannot Report](#) **1**

Subject Investigations: [2044, Unusual/Emerging Disease, 2020 Mar 25](#)

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

Test ID	Resulted	Test Name	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group
<input checked="" type="radio"/> 645	✓	NAAT	Swab/ Nasopharyngeal swab	2020 Mar 1	2044. Unusual/Emerging Disease, 2020 Mar 25		Communicable Disease Investigation

Reason for Deletion: **2**

- The lab is now pertinent to the investigation
- Click the **Save** button

Note:

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

To put the investigation into context:

▼ Investigation

Subject Summary

Investigation Summary

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

Subject Summary

? [Menu] **ACTIVE**

Client ID: 5014	Name (Last, First Middle) / Gender: Bunny, Mister / Male	Health Card No: 0123987654	Date of Birth / Age: 1975 Nov 30 / 44 years
Phone Number: Primary home: 902-749-6635	Address: 187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Report: [Dropdown] [Launch]

Communicable Disease Investigation Encounter Group ↑ Hide

Disease: [Dropdown] Investigation Quick Entry
Create Investigation

Investigation 2044 - Unusual/Emerging Disease - Open ↑ Hide

Investigation ID:	Status:	Investigator:	Linked Outbreaks:	Report Date (Sent):	Report Date (Received):
2044	Open	Krissy Rose-Muise	-	-	25 March 2020

Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Unusual/Emerging Disease	COVID-19	-	✓ National / Case - Confirmed 2020 Jun 2	-	-

1

1. Click the Hyperlink associated to the current investigation

Note: The Investigation is now back in Context:

Recent Work

Search

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

Investigation

- Subject Summary**
- Investigation Summary
- Investigation Quick Entry
- Investigation Details

Lab

- Lab Summary
- Electronic Lab Report

Investigation Summary

? [Menu] **ACTIVE**

Client ID: 5014	Name (Last, First Middle) / Gender: Bunny, Mister / Male	Health Card No: 0123987654	Date of Birth / Age: 1975 Nov 30 / 44 years
Phone Number: Primary home: 902-749-6635	Address: 187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation ID: 2044	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 44 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 25 / Specimen Collection	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 02

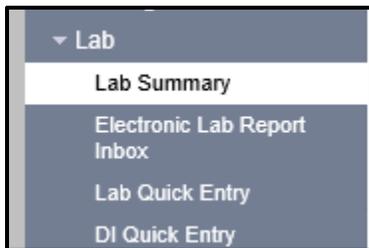
Investigation Details ✓ Contains Data ↑ Hide Investigation Details

[Investigation Details](#) Create Encounter

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

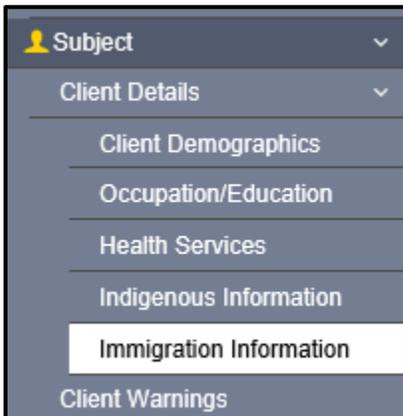
Lab Tests ↑ Hide Lab Tests									
Lab ↑ Hide Lab									
Lab Summary									
	Specimen Collection Date	Specimen Type / Description	Result Name	Interpreted Result; Result	Flag	Accession No.	Etiologic Agent	Epi Markers	Result Status
+	2020 Jun 1	Swab / -	Presence or identity	Positive;		jas-123654	COVID-19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

Immigration Information
3

Save Reset log ?

Active

Client ID: 5423	Name (Last, First Middle) / Gender: Summer, Alice / Female	Health Card No: 9333000001	Date of Birth / Age: 2000 Jan 01 / 20 years
Phone Number: -	Address:	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Immigration Information
↑

Citizen:
 Yes No

Immigration File No:

Arrival Date:

Immigration Status at Time of Arrival:

Country Emigrated From:

Country Born in:

Mother's Birth Country:

Date Citizenship Received:

Date Immigration Form Received:

Arrival Year:

Country Last Resided:

Province Born in:

Father's Birth Country:

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

Adding Indigenous Status

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

Subject
↑

Client Details
↑

Client Demographics

Occupation/Education

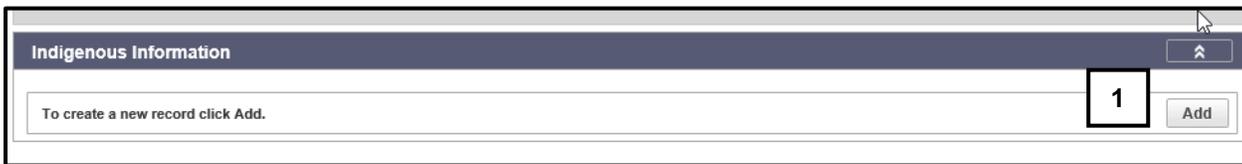
Health Services

Indigenous Information

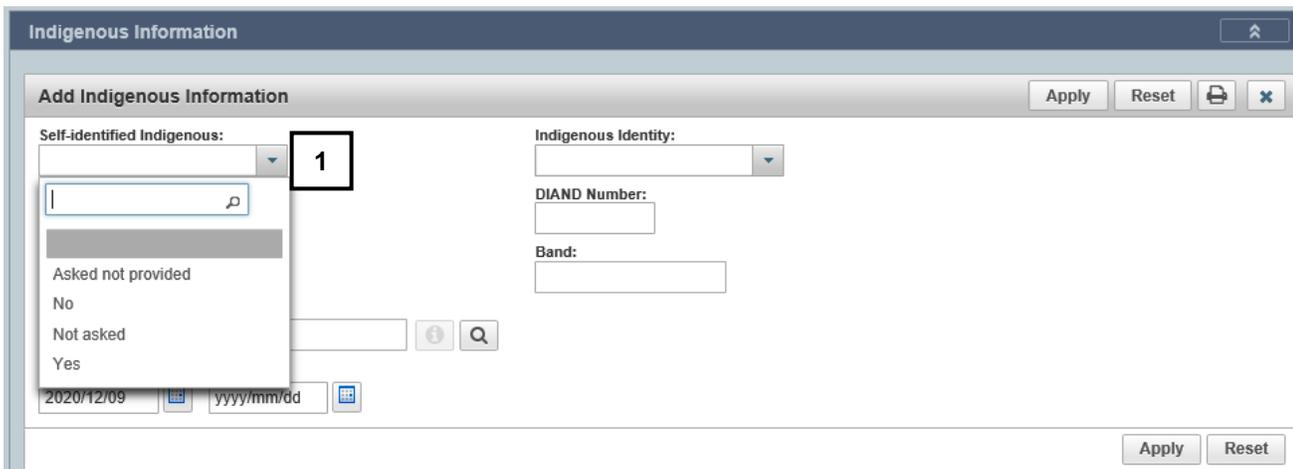
Immigration Information

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

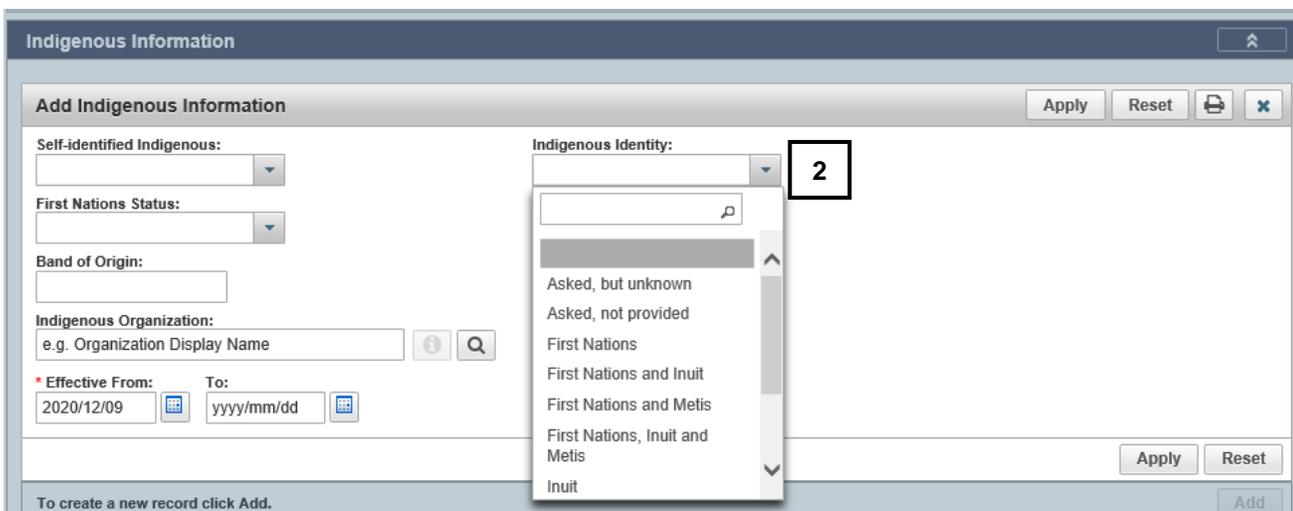
If the client does not have Indigenous Information in Panorama, you will need to add it.



2. 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.

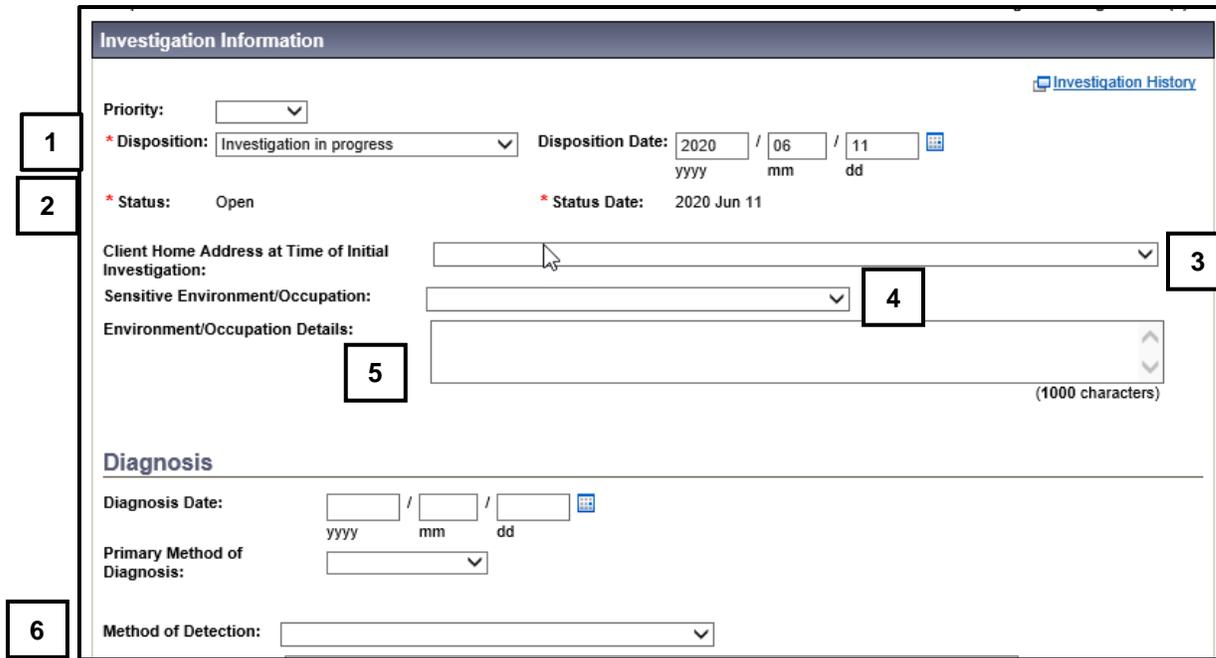
You do not need to enter information in the other fields

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

Completing Investigation Information

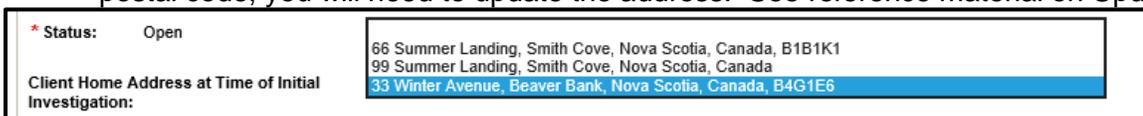
Additional information needs to be entered into Panorama once the investigation has been created and client interviewed.

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



The screenshot shows the 'Investigation Information' form. Callout 1 points to the 'Disposition' dropdown menu. Callout 2 points to the 'Status' dropdown menu. Callout 3 points to the 'Client Home Address at Time of Initial Investigation' dropdown menu. Callout 4 points to the 'Sensitive Environment/Occupation' dropdown menu. Callout 5 points to the 'Environment/Occupation Details' text area. Callout 6 points to the 'Method of Detection' dropdown menu. The form includes fields for 'Priority', 'Disposition Date', 'Status Date', 'Diagnosis Date', 'Primary Method of Diagnosis', and 'Method of Detection'. A link for 'Investigation History' is visible in the top right corner.

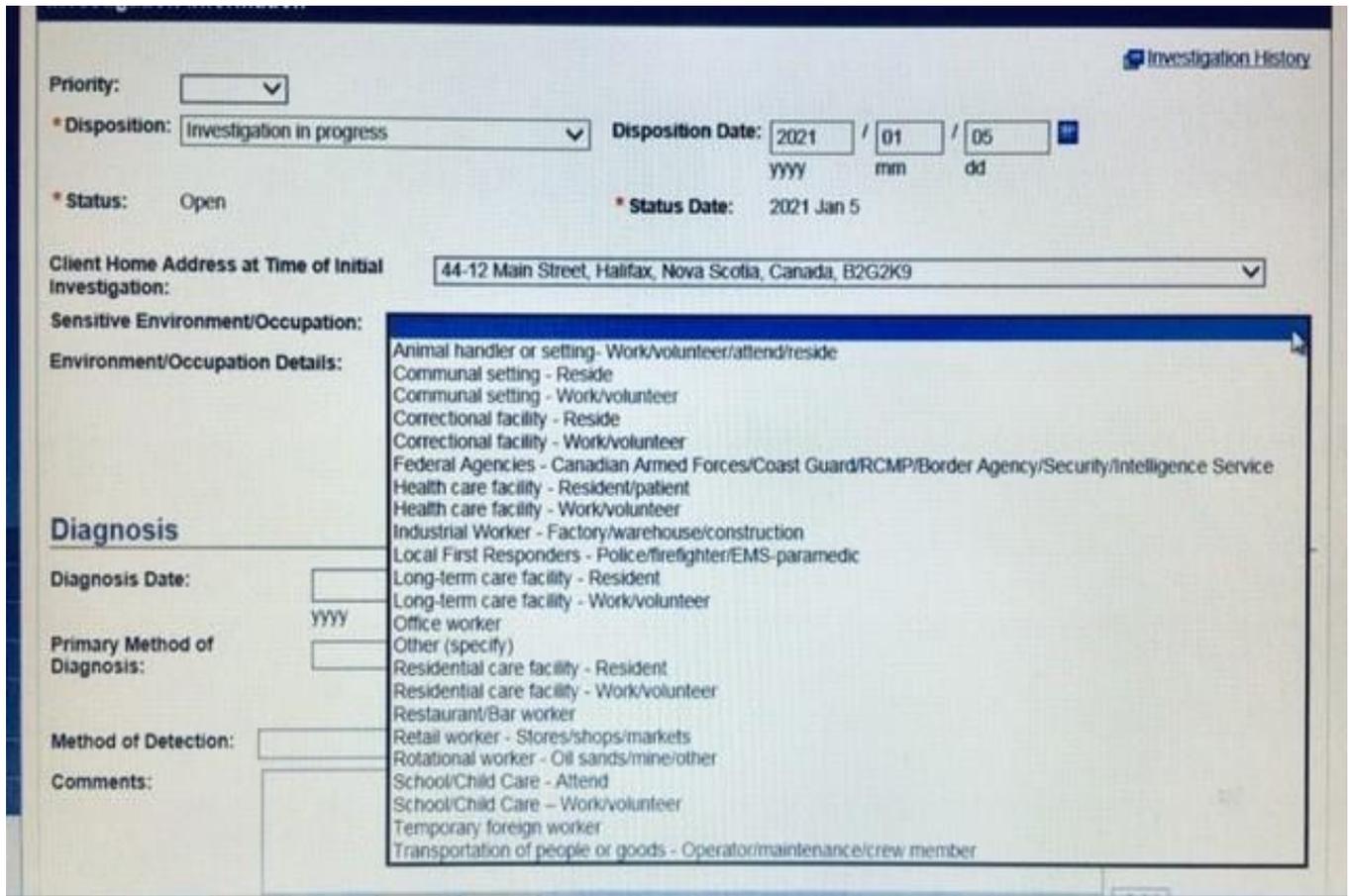
1. **Disposition and Disposition Date** – are auto-populated when the investigation was created
2. **Status and Status Date** – are auto-populated when the investigation was created
3. **Client Home Address at Time of Initial Investigation** – select the client’s address which includes the **Postal Code**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



This close-up shows the 'Client Home Address at Time of Initial Investigation' dropdown menu. The status is 'Open'. The dropdown list contains three address options: '66 Summer Landing, Smith Cove, Nova Scotia, Canada, B1B1K1', '99 Summer Landing, Smith Cove, Nova Scotia, Canada', and '33 Winter Avenue, Beaver Bank, Nova Scotia, Canada, B4G1E6'. The third option is highlighted in blue.

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)

Row Actions: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion :		Present:	Onset Date:				
<input type="text" value=""/>		<input type="text" value="Yes"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Apply Update"/>	
		yyyy	mm	dd			
<u>Sign/Symptom</u>	<u>Present</u>	<u>Onset Date/Time</u>	<u>Recovery Date/Time</u>	<u>Duration</u>	<u>Reported By</u>	<u>Details Exist</u>	
<input type="checkbox"/> Abdominal pain/discomfort/cramps						No	
<input type="checkbox"/> Arthralgia						No	
<input type="checkbox"/> Asymptomatic						No	
<input type="checkbox"/> Chest pain						No	
<input type="checkbox"/> Chills						No	
<input type="checkbox"/> Confusion						No	
<input checked="" type="checkbox"/> Cough						No	
<input type="checkbox"/> Diarrhea						No	
<input type="checkbox"/> Dyspnea						No	
<input checked="" type="checkbox"/> Fever						No	
<input checked="" type="checkbox"/> Headache						No	

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

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

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

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

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present:

Onset Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion:

Present:

Onset Date: / / : : ADT

yyyy mm dd

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

Sign or Symptom

* Required field

* **Sign or Symptom:**

* **Other Sign or Symptom:**

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

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

U

When client indicates there is no Fever:

<input checked="" type="checkbox"/>	Fever						No
-------------------------------------	-------	--	--	--	--	--	----

Row Actions:

Reason for Deletion :

Present:

Onset Date: / /

yyyy mm dd

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

<input type="checkbox"/>	Fever	No				No	1
--------------------------	-------	----	--	--	--	--------------------	---

1. Click on the [No](#) hyperlink

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: / / 1

Observation: 2

Observation Value: 3 Unit: 4

* Observed By: 5

6

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

	Observation Date	Observation	Value	Unit	Observed By
<input type="radio"/>	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

When the client indicates there is a fever:

Fever	Yes	2020 Jun 15 00:00 ADT			No	1
-------	-----	-----------------------	--	--	--------------------	---

1. Click on the [No](#) hyperlink

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: / / 1

yyyy mm dd

Observation: 2

Observation Value: 3 Unit: 4

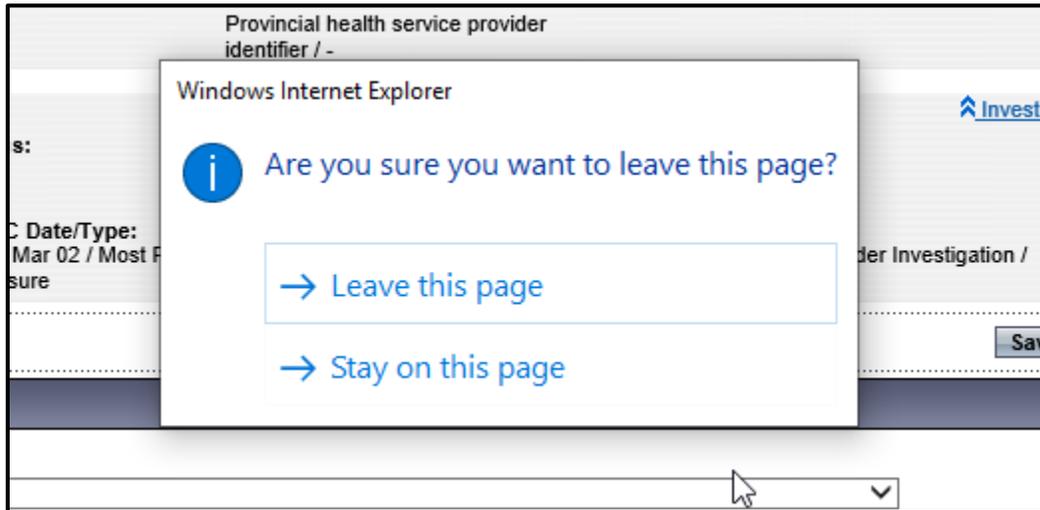
* Observed By: 5 6

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

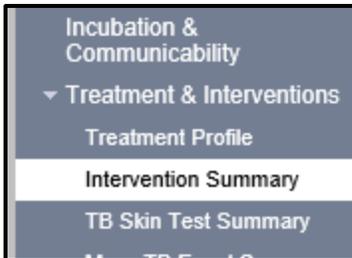
Reason for Deletion: ▼ Delete Present: ▼ Onset Date: yyyy mm dd 📅 Apply Update

	Sign/Symptom ▲	Present ▼	Onset Date/Time ▼	Recovery Date/Time ▼	Duration ▼	Reported By ▼	Details Exist
<input type="checkbox"/>	Abdominal pain/discomfort/cramps						No
<input type="checkbox"/>	Arthralgia						No
<input type="checkbox"/>	Asymptomatic	Yes	2020 Jun 1 00:00 ADT	2020 Jun 7 00:00 ADT	6 d 0 h 0 m		No
<input type="checkbox"/>	Chest pain						No
<input type="checkbox"/>	Chills						No
<input type="checkbox"/>	Confusion						No
1 <input checked="" type="checkbox"/>	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	
---------------	-----	----------------------	--

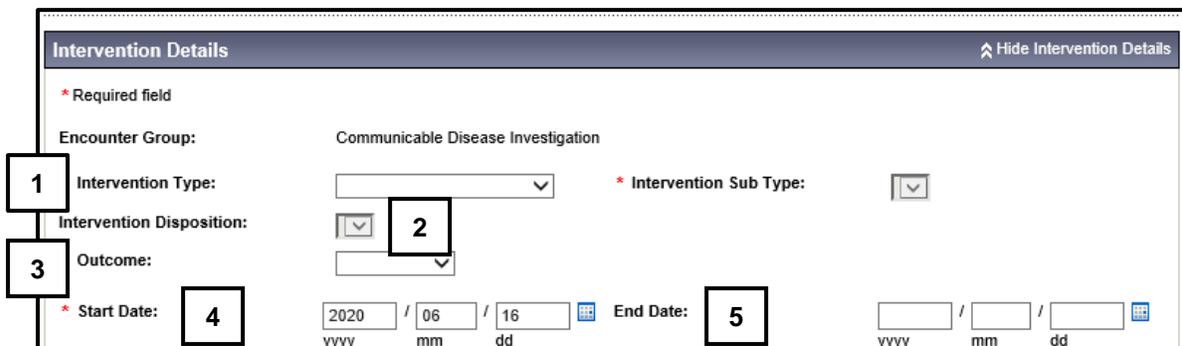
Adding an Isolation Intervention



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

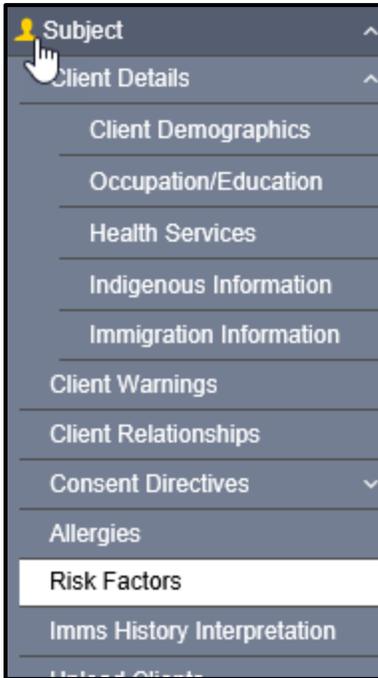
1. **Comment** – enter the rationale for how the isolation start and end dates were determined. Include the isolation end date in the comment with 2359 hours.
2. Click the **Add** button. The comment has now been added to the comment table (see below)
3. Click the **Save** button (bottom and top right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

Investigations
Risk Factors
Save Reset Log ?

Investigation

Investigation ID: 2460	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 30 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 02 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 02

Risk Factor

Update View Delete Set Response Set Pertinent Add

		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input checked="" type="checkbox"/>	✓	Chronic liver disease							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	✓	Exposure - Contact - contact with a case (confirmed, probable or suspect)							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	✓	Medical - Cancers							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	✓	Medical - Cardiac disorder							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	✓	Medical - Chronic renal disease/dialysis							



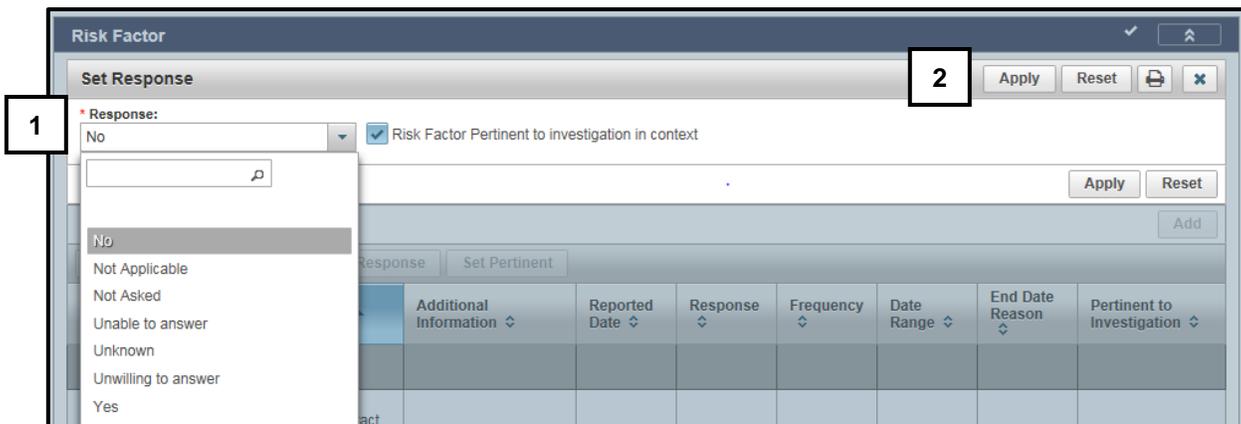
1. The risk factor table is populated with all presets defined for Unusual/Emerging disease for COVID-19. Ensure all preset risk factors are showing by clicking the **Drop-down** in the right-hand corner and changing from 10 to “all”:

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:

Risk Factor										
Add										
Update View Delete Set Response Set Pertinent										
<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Travel - Outside of province, but within Canada		2018 Apr 01	Yes				2495 (Hepatitis C)

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.

Add Risk Factor
Apply Reset

1

Category:

2

* Risk Factor:

Risk Factor Pertinent to investigation in context

Additional Information:

* Response:

Frequency:

Reported By:

Effective From:

Effective To:

End Date Reason:

* Reported Date:

Reported by Details:

4

 Apply Reset

Add

Update View Delete Set Response Set Pertinent										
<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation

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)

Risk Factors
1
Save Reset

Active

Client ID: 5521	Name (Last, First Middle) / Gender: Stone, Rolling / Male	Health Card No: 2222333444	Date of Birth / Age: 1990 Jun 02 / 30 years
Phone Number: -	Address: 97 Willow Street, Amherst, Nova Scotia, B4H3W6, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation

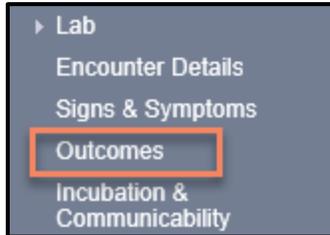
Investigation ID: 2460	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 30 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 02 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 02

Risk Factor ✓

<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Chronic liver disease		2020 Jun 02	No				2460 (Unusual/Emerging Disease)

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

Adding an Outcome



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

Outcome History

1 *Outcome:

Other Outcome:

2 Outcome Date: / /

yyyy mm dd

3

Row Actions:

Outcome	Outcome Date

Note: there can be multiple outcomes.

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

Outcome	Outcome Date
Recovered	2020 Jun 11

Comments

(4000 characters)

Date	Comments	Recorded By

4

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:

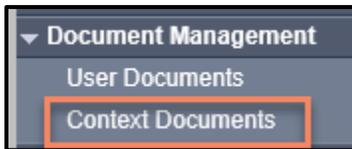
Outcome	Outcome Date
Recovered	2021 May 13
Alive-Not Hospitalized	2021 May 11
Alive-Hospitalized	2021 May 10
Alive-Hospitalized-ICU	2021 May 7
Alive-Hospitalized	2021 May 5
Alive-Not Hospitalized	2021 May 2

OR

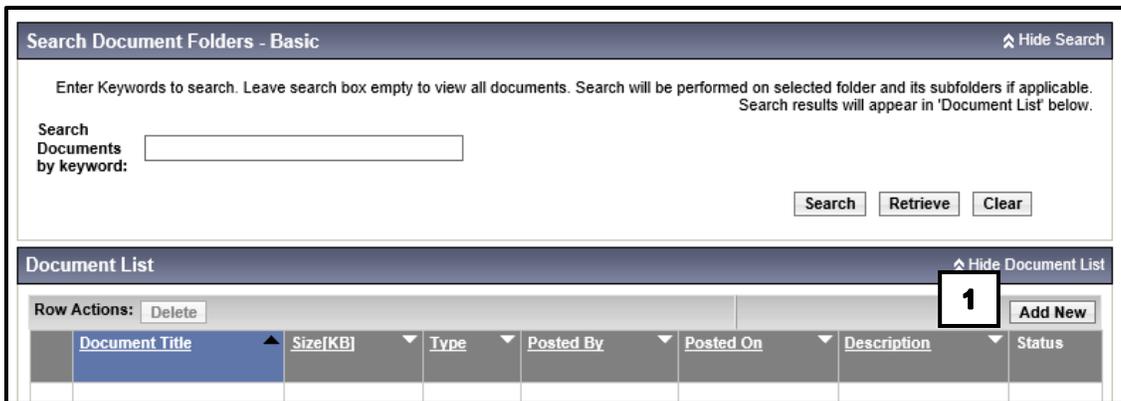
Outcome	Outcome Date
Recovered	2021 May 13
Alive-Not Hospitalized	2021 May 2

Uploading a Document to an Investigation

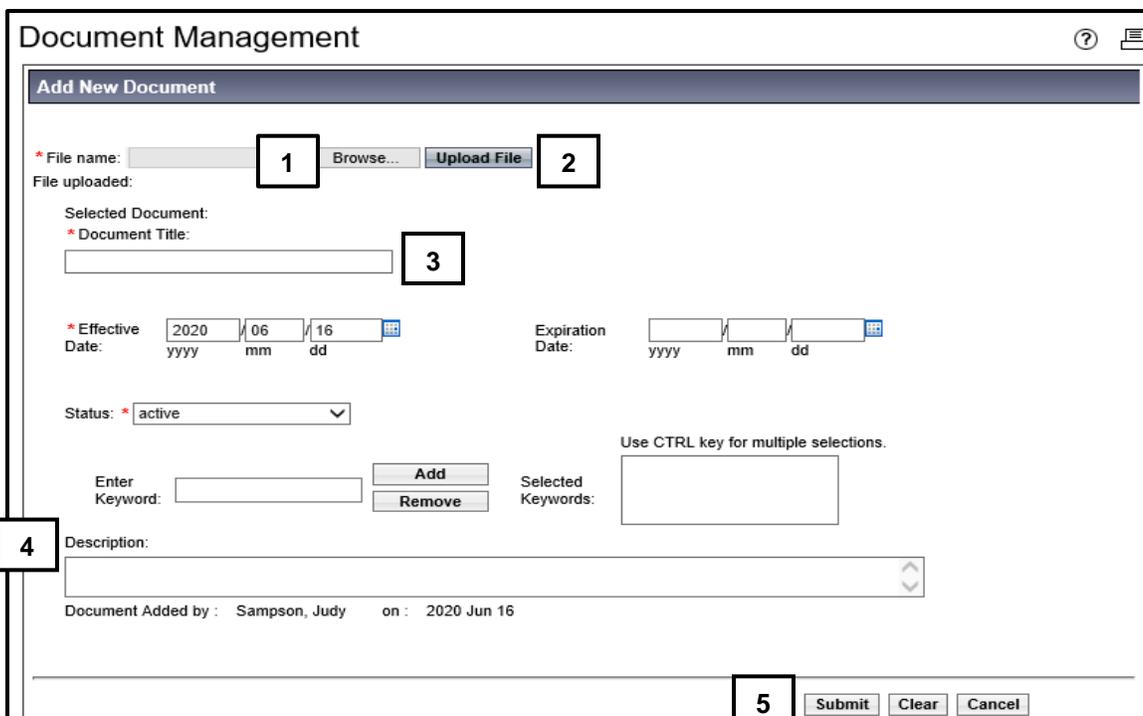
Note: Before you upload a document, ensure that the Encounter is not in the context banner. To take the encounter out of context, go to recent work and click on the investigation.



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.

* File name:

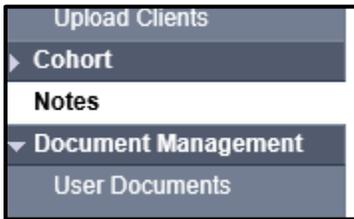
File uploaded: Recovery Letter_11111111_20200416.docx

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

Document List								↑ Hide Document List
Row Actions: <input type="button" value="Delete"/>						<input type="button" value="Add New"/>		
	Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status	
<input type="checkbox"/>	Recovery Letter 20020416	46.46	1 PDF	Sampson, Judy	2020 Apr 24	Recovery letter	active	

1. You can view the document by clicking on the hyperlinked [PDF](#) in the **Type** column

Adding a Clinical Note to an Investigation



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

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: <input type="text" value="Client: Car, Honda"/>		Include Related Entities: <input checked="" type="checkbox"/>	

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01
Encounter Date: 2020 Jun 19	Encounter Group / Type: Communicable Disease Investigation / Intervention	Encounter Activity: -	
Notes			
Display Notes For: <input type="text" value="Encounter: 2020 Jun 19"/>		Include Related Entities: <input type="checkbox"/>	

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

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

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 **One-time key code (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_IMMMS_JOM_NURSE

* Subject: One-time key code (OKC) **1**

* Note Date: 2020 / 10 / 14 **2** * Note Time: 09 : 41 ADT

Note Type: Investigation

Common Phrases: Investigation Add to Note

* Note:

Normal Arial 7pt b i u

OKC provided to client for use. **3**

4

Save as Draft Note Complete Clear Cancel

1. **Subject** –One-Time key Code (OKC) this must be fully typed out and the acronym after it as this is not an approved acronym.
2. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
3. **Note** – One Time Key Code provided for client use
4. Click the **Note Complete** button

1 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

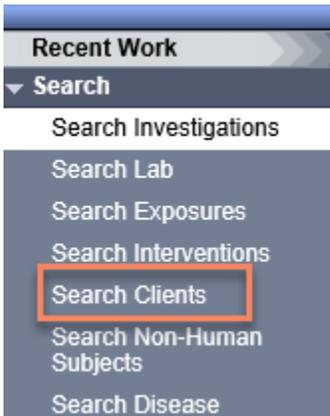
Move selected note to Move Note

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	

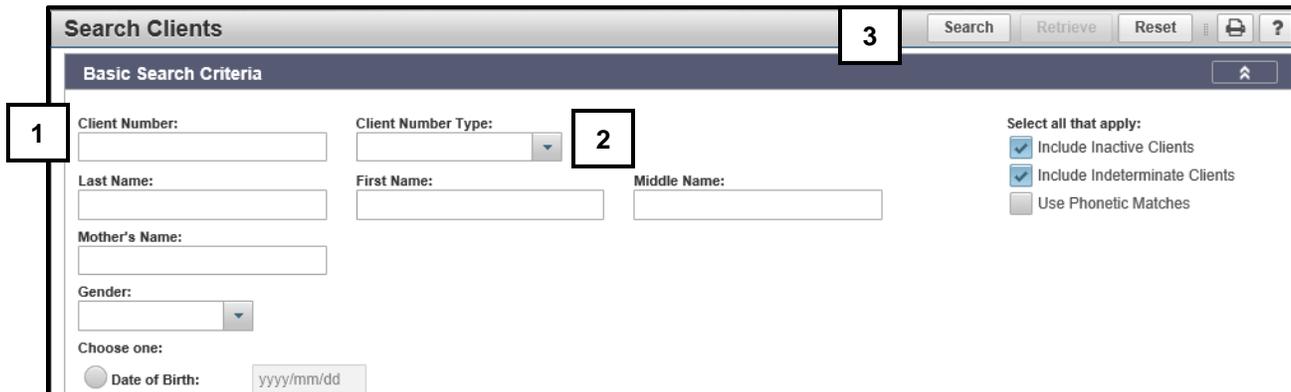
Total: 1 Page 1 of 1 Jump to page:

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.

Search Clients [5] Search Retrieve Reset [Print] [Help]

Basic Search Criteria

Client Number: Client Number Type:

Last Name: [1] First Name: [2] Middle Name:

Mother's Name:

Gender: [3]

Choose one:

Date of Birth: yyyy/mm/dd [4]

Select all that apply:

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

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

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

Search Results [3] [4] Client Quick Entry Create Client

Preview Update Set In Context Create Cohort Subject Summary

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5424	9333000002	Summer	Bertha	Female	2000 Jan 01	NSHA	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	5425	9333000003	Summer	Caitlin	Female	2000 Jan 01	NSHA	Active

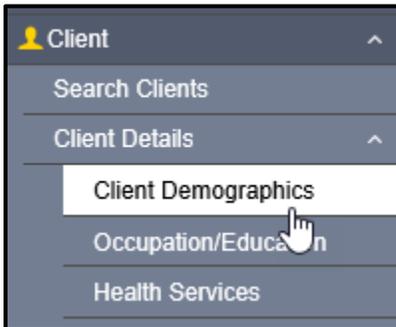
1. Click the **checkbox** for the client that you want to work with.
2. The **Action** buttons are now activated for that client.
3. If you want to review/update the address and telephone information for the client, click the **Update** button.
4. If you want to go directly to the client's investigations,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

If no search results are returned:

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

Update Client Telephone Number, Create a Temporary Address 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.

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

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)

	Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid	On Reserve
<input type="radio"/>	Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02		✓	1	-	
<input type="radio"/>	Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04			1	-	

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

1. Click on the **Add** button

1 Address Type:

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

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

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

Other Address Details:

(100 characters remaining.)

* Effective From: To:

3

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

	Address Type	Address	Address Detail	Effective From	Effective To	Preferred	Active Household Members	Valid	On Reserve
<input type="radio"/>	Primary home	99 Summer Landing, Smith Cove, Nova Scotia, Canada		2020 Mar 02		<input checked="" type="checkbox"/>	1	-	
<input checked="" type="radio"/>	Temporary address	33 Winter Avenue, Beaver Bank, Nova Scotia, B4G1E6, Canada		2020 Jun 12		<input type="checkbox"/>		-	
<input type="radio"/>	Postal address	66 Summer Landing, Smith Cove, Nova Scotia, B1B1K1, Canada		2019 Nov 04		<input type="checkbox"/>	1	-	

Total: 3

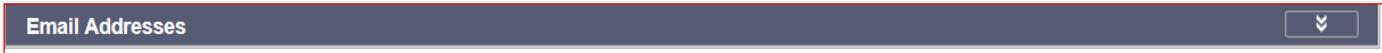
1

2

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

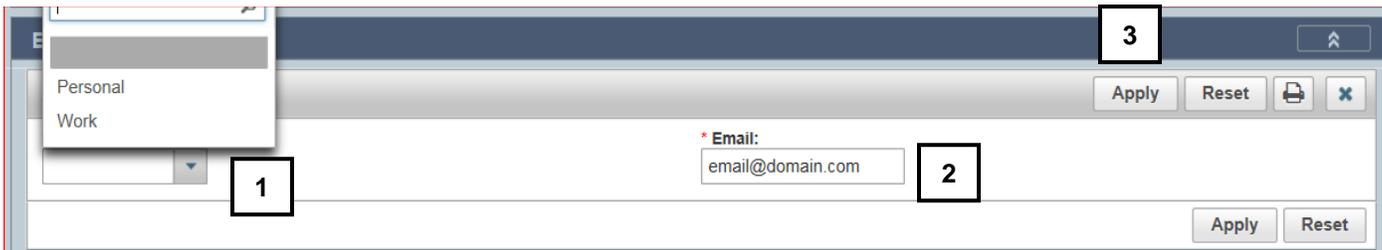
1. Expand the email tab by clicking on the arrows



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.



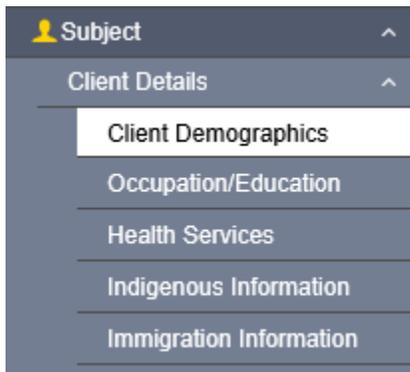
3. Email type : select personal or work. Email: Add the email address provided by the client. Click apply.



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

Entering Ethnicity Information

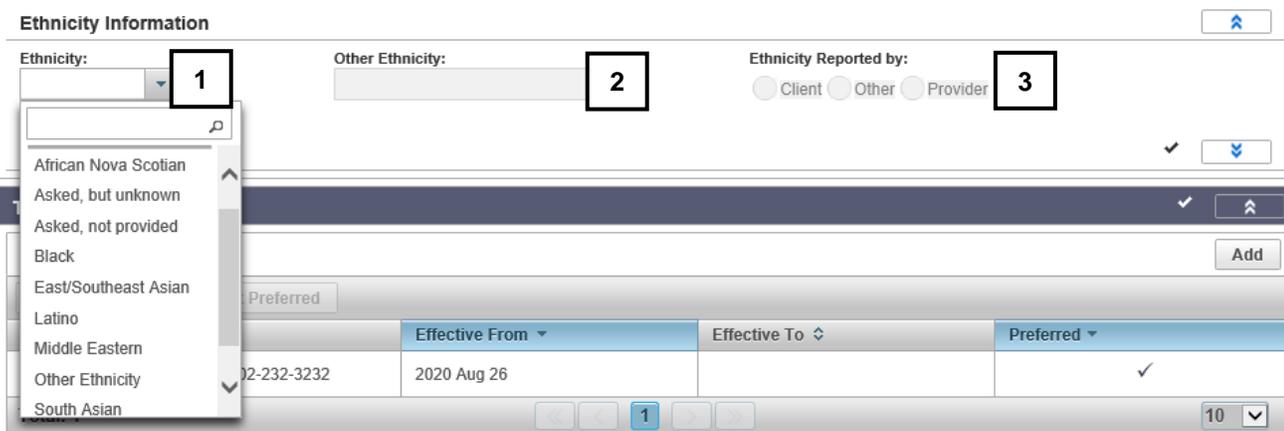
Note: If the client does not provide an answer to the question related to their ethnicity, this still needs to be documented in Panorama.



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



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

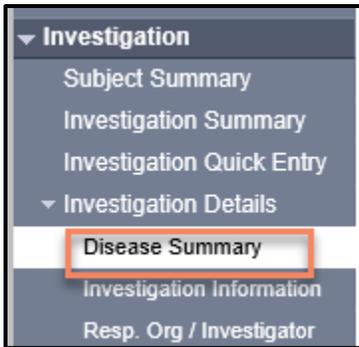


1. Select the Ethnicity value from the drop-down list. If the client identifies with an Ethnicity that is not in the list, choose “Other Ethnicity” and go to step 2.
2. If “Other Ethnicity” is chosen in step 1, type in the Ethnicity the client identifies with.
3. Select who provided the Ethnicity information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

Disease Summary

Disease Event 2612 - Unusual/Emerging Disease ↕ Hide

PHAC Date / Date Type: 2020 Jun 1 / Report Received Disease Origin: Living on Reserve Most of the Time:

Disease	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Unusual/Emerging Disease	COVID-19	-		<input checked="" type="checkbox"/> National / Contact - Person Under Investigation 2020 Jun 1	-	-

1

1. Click on the Update Button

Disease Event Details

PHAC Date / Date Type: 2020 Jun 1 / Specimen Collection
 Disease Origin:
 Living on Reserve Most of the Time: (during initial investigation)

Disease Event History

* Disease: Unusual/Emerging Disease
 Microorganism: COVID-19
 Information Source:
 Site(s): Hold Ctrl and then click to select multiple items.

Available Sites: Selected Sites(s):

Staging:

* Investigation Classification

* Authority: * Classification:
 * Classification Date: 2020 / 06 / 12
yyyy mm dd

Row Actions:

	Primary	Authority	Classification	Classification Date
1	<input checked="" type="radio"/>	National	Contact - Person Under Investigation	2020 Jun 1

Note:

- Do not add any information in the Disease Event Detail or the Disease Event History sections.
- Do not Add Classification in the Investigation Classification area.

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

Staging:

* Investigation Classification

* Authority:

* Classification:

* Classification Date: / /

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

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

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

Disease Summary						
						<input type="button" value="Add New Disease"/>
Disease Event 2612 - Unusual/Emerging Disease Hide						
PHAC Date / Date Type:		Disease Origin:	Living on Reserve Most of the Time:			
2020 Jun ¹ / Date Reported						
Disease	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification Classif. Date	Site(s)	Staging
<input checked="" type="checkbox"/> Primary Classification, Δ Set by Case Def						
Unusual/Emerging Disease	COVID-19	-		<input checked="" type="checkbox"/> National / Case - Confirmed 2020 Jun 11	-	-
Unusual/Emerging Disease	COVID-19	-		<input checked="" type="checkbox"/> National / Contact - Person Under Investigation 2020 Jun 1	-	-

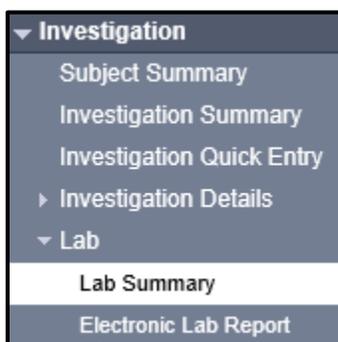
Making a Lab Pertinent to an investigation

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

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



1. 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**

Row Actions: **2**

* Flag indicates sensitivities present

	<input type="checkbox"/>	<input type="checkbox"/>	<u>Specimen Collection / Imaging Date</u>	<u>Specimen Type / Description</u>	<u>Result Name</u>	<u>Interpreted Result; Result</u>	<u>Flag</u>	<u>Accession No.</u>	<u>Etiologic Agent</u>	<u>Epi Markers</u>	<u>Result Status</u>
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2020 Mar 25	Swab / -	Presence or identity	Positive;		020-079-00246	COVID-19	-	Final

Total: 1 Page 1 of 1 Jump to page:

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

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

Selected Tests **1**

Requisition Tests:

Row Actions:

3 Subject Investigations:

Pertinent Investigations:

Test Annotations: (4000 characters)

<input type="radio"/>	<u>Test ID</u>	<u>Resulted</u>	<u>Test Name</u>	<u>Specimen</u>	<u>Collection Date</u>	<u>Pertinent Investigations</u>	<u>Test Annotations</u>	<u>Encounter Group</u>
2	645	<input checked="" type="checkbox"/>	NAAT	Swab/ Nasopharyngeal swab	2020 Mar 25			Communicable Disease Investigation

On the Human Lab Report Screen

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

Row Actions:

Subject Investigations: 1 2044, Unusual/Emerging Disease, 2020 Mar 25

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

Test ID	Resulted	Test Name	Specimen	Collection Date	Pertinent Investigations	Test Annotations	Encounter Group
<input checked="" type="radio"/> 645	✓	NAAT	Swab/ Nasopharyngeal swab	2020 Mar 1	2044, Unusual/Emerging Disease, 2020 Mar 25		Communicable Disease Investigation

Reason for Deletion:

2

- The lab is now pertinent to the investigation
- Click the **Save** button

Note:

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

To put the investigation into context:

▼ Investigation

Subject Summary

Investigation Summary

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

Subject Summary

? [Menu] **ACTIVE**

Client ID: 5014	Name(Last, First Middle) / Gender: Bunny, Mister / Male	Health Card No: 0123987654	Date of Birth / Age: 1975 Nov 30 / 44 years
Phone Number: Primary home: 902-749-6635	Address: 187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Report: [v] [Launch]

Communicable Disease Investigation Encounter Group ^ Hide

Disease: [v] [Investigation Quick Entry](#)
[Create Investigation]

Investigation 2044 - Unusual/Emerging Disease - Open ^ Hide

Investigation ID: 2044	Status: Open	Investigator: Krissy Rose-Muise	Linked Outbreaks: -	Report Date (Sent): -	Report Date (Received): 25 March 2020
--	------------------------	---	-------------------------------	---------------------------------	---

Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Unusual/Emerging Disease	COVID-19	-	✓ National / Case - Confirmed 2020 Jun 2	-	-

1

2. Click the Hyperlink associated to the current investigation

Note: The Investigation is now back in Context:

Recent Work

- Search
 - Search Investigations
 - Search Lab
 - Search Exposures
 - Search Interventions
 - Search Clients
 - Search Non-Human Subjects
 - Search Disease Notifications
- Investigation
 - Subject Summary**
 - Investigation Summary
 - Investigation Quick Entry
 - Investigation Details
- Lab
 - Lab Summary
 - Electronic Lab Report

Investigation Summary

? [Menu] **ACTIVE**

Client ID: 5014	Name(Last, First Middle) / Gender: Bunny, Mister / Male	Health Card No: 0123987654	Date of Birth / Age: 1975 Nov 30 / 44 years
Phone Number: Primary home: 902-749-6635	Address: 187 Rabbit Hole Lane, Tusket, Nova Scotia, B0W3M0, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation ID: 2044	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 44 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 25 / Specimen Collection	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 02

[Investigation](#)

Investigation Details ✓ Contains Data ^ Hide Investigation Details

[Investigation Details](#) [Create Encounter]

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

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

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

<ul style="list-style-type: none"> ▾ Lab Lab Summary Electronic Lab Report Inbox Lab Quick Entry DI Quick Entry
--

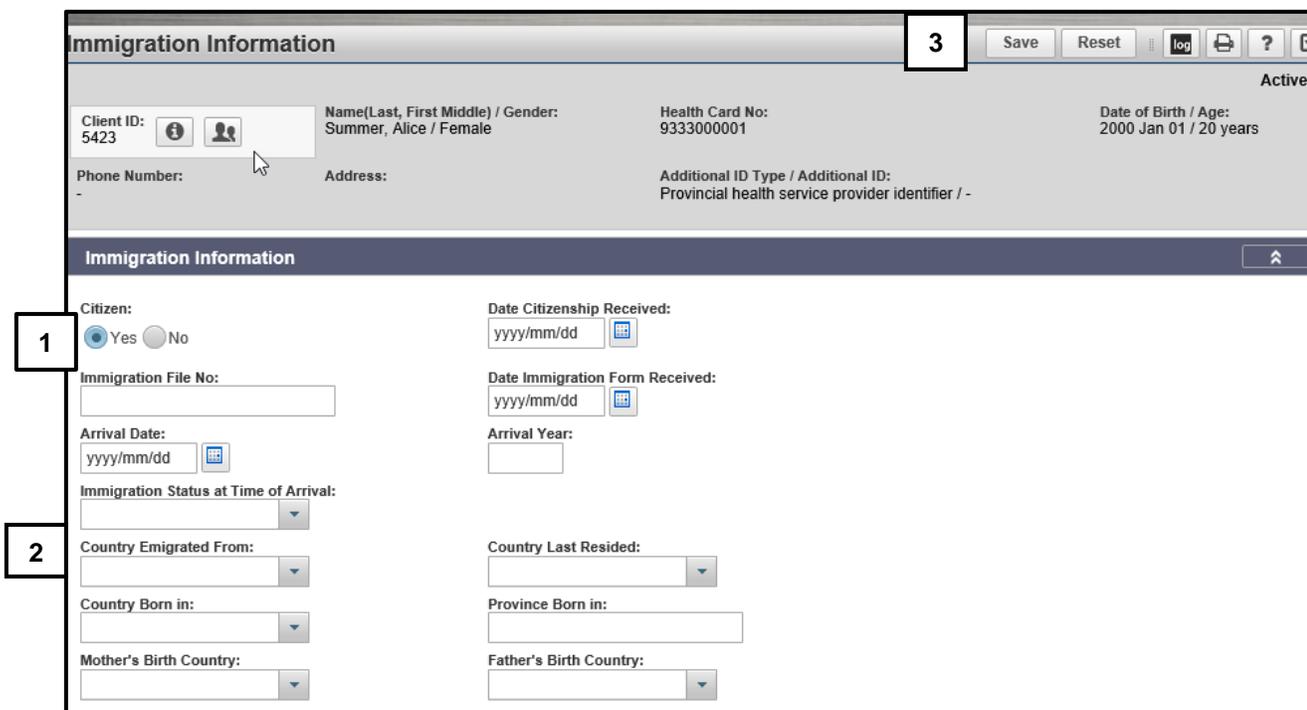
From the left-hand navigation, click on **Lab Summary**

Updating Immigration Information



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

From the left-hand navigation, click on Immigration Information



The screenshot shows the 'Immigration Information' form. At the top right, there is a 'Save' button (callout 3) and a 'Reset' button. The form contains the following fields:

- Client ID:** 5423
- Name (Last, First Middle) / Gender:** Summer, Alice / Female
- Health Card No:** 9333000001
- Date of Birth / Age:** 2000 Jan 01 / 20 years
- Phone Number:** -
- Address:** -
- Additional ID Type / Additional ID:** Provincial health service provider identifier / -

The main form area is titled 'Immigration Information' and contains the following sections:

- Citizen:** Radio buttons for 'Yes' (callout 1) and 'No'.
- Date Citizenship Received:** yyyy/mm/dd
- Immigration File No:** Text input field.
- Date Immigration Form Received:** yyyy/mm/dd
- Arrival Date:** yyyy/mm/dd
- Arrival Year:** Text input field.
- Immigration Status at Time of Arrival:** Drop-down menu.
- Country Emigrated From:** Drop-down menu (callout 2).
- Country Last Resided:** Drop-down menu.
- Country Born in:** Drop-down menu.
- Province Born in:** Text input field.
- Mother's Birth Country:** Drop-down menu.
- Father's Birth Country:** Drop-down menu.

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

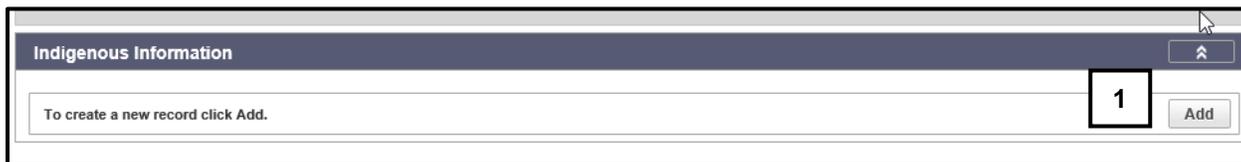
Adding Indigenous Status

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.

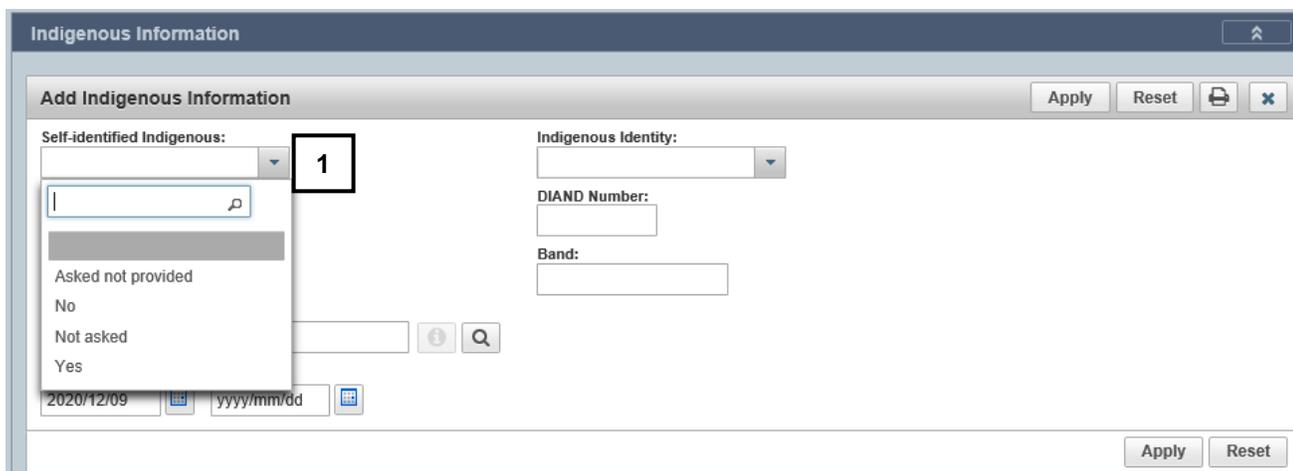


From the left-hand navigation, click on **Indigenous Information**.

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.

▼ Investigation

- Subject Summary
- Investigation Summary
- Investigation Quick Entry
- ▼ Investigation Details
 - Disease Summary
 - Investigation Information**
 - Resp. Org / Investigator
 - Reporting Notifications

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

Investigation Information [Investigation History](#)

Priority:

1 * Disposition: Disposition Date: / / yyyy mm dd

2 * Status: * Status Date:

Client Home Address at Time of Initial Investigation: **3**

4 Sensitive Environment/Occupation:

5 Environment/Occupation Details: (1000 characters)

Diagnosis

Diagnosis Date: / / yyyy mm dd

Primary Method of Diagnosis:

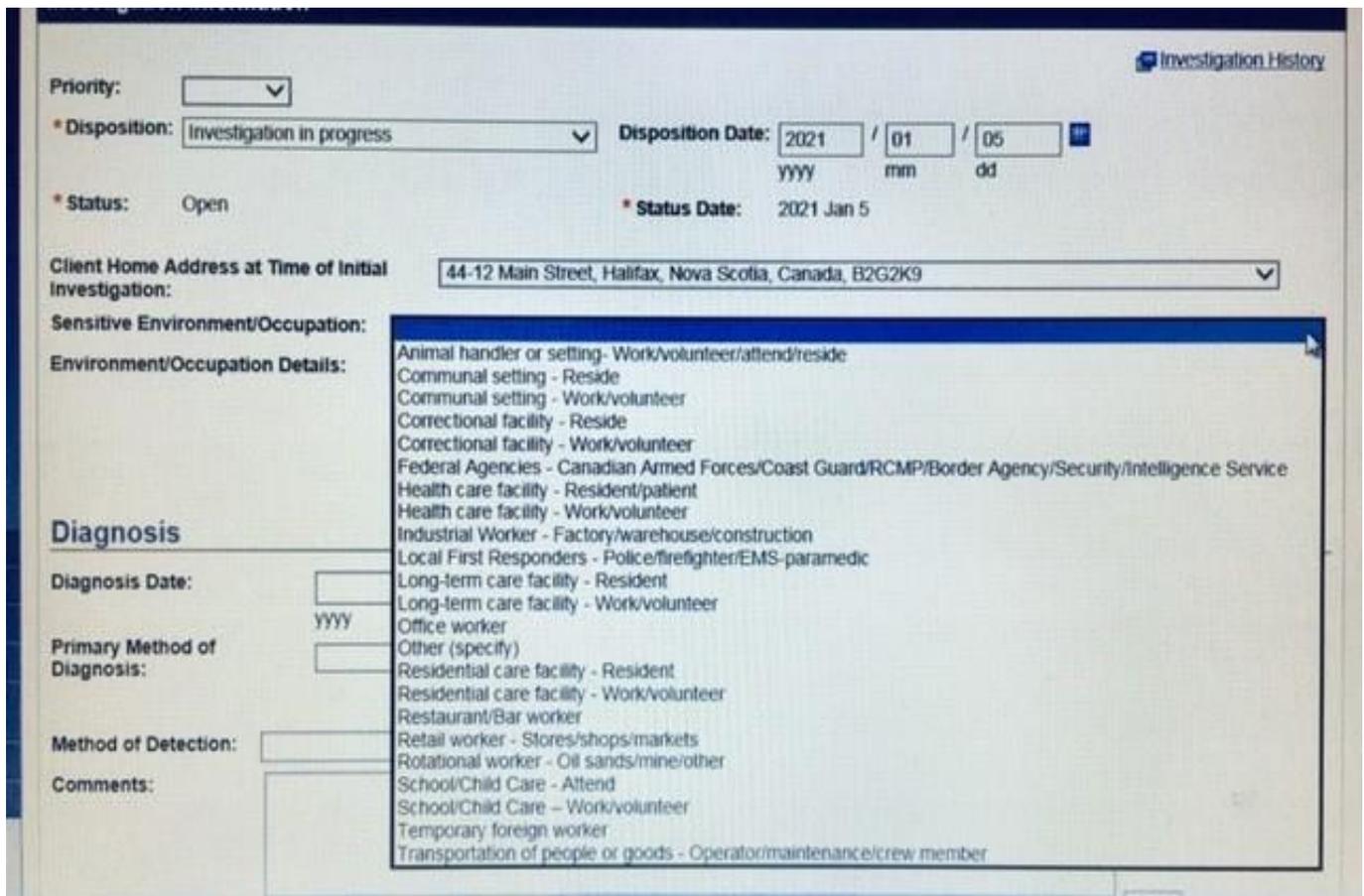
6 Method of Detection:

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

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

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 – (these options are changing)



The screenshot shows a web-based form for COVID-19 case management. The 'Disposition' is set to 'Investigation in progress' and the 'Status' is 'Open'. The 'Client Home Address at Time of Initial Investigation' is '44-12 Main Street, Halifax, Nova Scotia, Canada, B2G2K9'. A dropdown menu for 'Sensitive Environment/Occupation' is open, displaying a list of options including 'Animal handler or setting - Work/volunteer/attend/reside', 'Communal setting - Reside', 'Health care facility - Resident/patient', 'Industrial Worker - Factory/warehouse/construction', 'Office worker', 'Residential care facility - Resident', 'Retail worker - Stores/shops/markets', 'School/Child Care - Attend', and 'Transportation of people or goods - Operator/maintenance/crew member'.

- **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 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 & 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

Sign or Symptom

* Required field
Sign or Symptom: Rhinorrhea

Preset: Yes
Onset: No

* **Present:** Yes

Onset Date/Time: 2020 / 06 / 03 00 : 00 : ADT Estimated:
yyyy mm dd hh mm

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

Duration: 0 Days + 0 Hours + 0 Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: **Present:** **Onset Date:** / / : : ADT
yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input checked="" type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No

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

Rhinorrhea	Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	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

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

Add temperature observation

On the appropriate Fever S&S:

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

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

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

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: / /
yyyy mm dd

Observation:

Observation Value: Unit:

* Observed By:

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
<input type="radio"/>	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:

Reason for Deletion:

Present:

Onset Date: / /
yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
<input checked="" type="checkbox"/>	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 not in the displayed Signs and Symptoms list, you will manually add this symptom:

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

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present:

Onset Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion : **Present:** **Onset Date:** / /

yyyy mm dd

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

Sign or Symptom

* Required field

* Sign or Symptom:

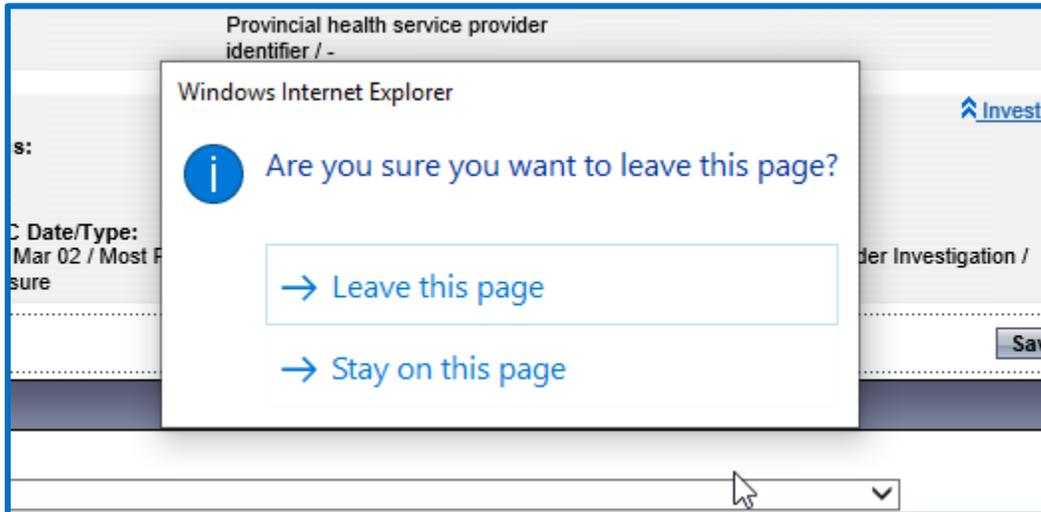
* Other Sign or Symptom:

- Onset Date** - Enter the date the client reported the S&S. Do not enter a time
- Click **Add** button
- 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: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="2 Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion:		Present:		Onset Date:		<input type="button" value="Apply Update"/>	
<input type="text"/>		<input type="text"/>		<input type="text"/> <input type="text"/> <input type="text"/>			
yyyy		mm		dd			
<input type="checkbox"/>	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Abdominal pain/discomfort/cramps						No
<input type="checkbox"/>	Arthralgia						No
<input type="checkbox"/>	Asymptomatic	Yes	2020 Jun 1 00:00 ADT	2020 Jun 7 00:00 ADT	6 d 0 h 0 m		No
<input type="checkbox"/>	Chest pain						No
<input type="checkbox"/>	Chills						No
<input type="checkbox"/>	Confusion						No
<input checked="" type="checkbox"/>	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	
---------------	-----	----------------------	--

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**

Risk Factors [Save] [Reset] [log] [Print] [Help] [Close]

Investigation

Investigation ID: 2460 Status: Open Disposition: Investigation in progress Age at time of Investigation: 30 years

Disease: Unusual/Emerging Disease PHAC Date/Type: 2020 Jun 02 / Date Reported Etiologic Agent: COVID-19 Authority/Classification: National / Case - Confirmed / 2020 Jun 02

Risk Factor [Add]

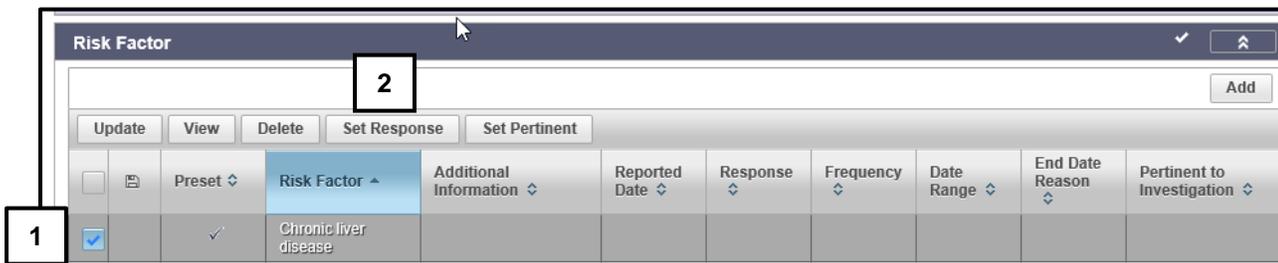
Update	View	Delete	Set Response	Set Pertinent									
<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation				
<input type="checkbox"/>	✓	Chronic liver disease											
<input type="checkbox"/>	✓	Exposure - Contact - contact with a case (confirmed, probable or suspect)											
<input type="checkbox"/>	✓	Medical - Cancers											
<input type="checkbox"/>	✓	Medical - Cardiac disorder											
<input type="checkbox"/>	✓	Medical - Chronic renal disease/dialysis											



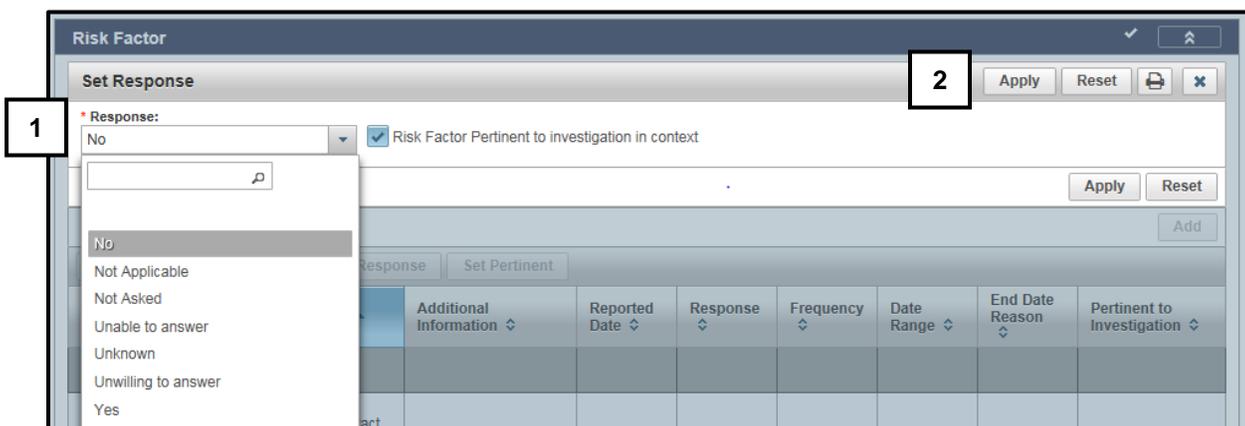
1. The risk factor table is populated with all presets defined for Unusual/Emerging disease for COVID-19. Ensure all preset risk factors are showing by clicking the **Drop-down** in the right-hand corner and changing from 10 to “all”:

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.

	Update	View	Delete	Set Response	Set Pertinent						
		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation	
<input type="checkbox"/>		✓	Travel - Outside of province, but within Canada		2018 Apr 01	Yes				2495 (Hepatitis C)	

1. Click the **Add** button

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

Add Risk Factor [Apply] [Reset] [Print] [Close]

1. **Category:** [Dropdown] 2. *** Risk Factor:** [Dropdown] Risk Factor Pertinent to investigation in context

Additional Information: [Text Area]

3. *** Response:** [Dropdown] **Frequency:** [Dropdown] **Reported By:** [Dropdown]

Effective From: [Date Picker] **Effective To:** [Date Picker] **End Date Reason:** [Dropdown] *** Reported Date:** [Date Picker]

Reported by Details: [Text Area]

4. [Apply] [Reset] [Add]

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)

Risk Factors

1

Save Reset log

Active

Client ID: 5521 Name (Last, First Middle) / Gender: Stone, Rolling / Male Health Card No: 2222333444 Date of Birth / Age: 1990 Jun 02 / 30 years

Phone Number: - Address: 97 Willow Street, Amherst, Nova Scotia, B4H3W6, Canada Additional ID Type / Additional ID: Provincial health service provider identifier / -

Investigation

Investigation ID: 2460 Status: Open Disposition: Investigation in progress Age at time of Investigation: 30 years

Disease: Unusual/Emerging Disease PHAC Date/Type: 2020 Jun 02 / Date Reported Etiologic Agent: COVID-19 Authority/Classification: National / Case - Confirmed / 2020 Jun 02

Risk Factor ✓

Add

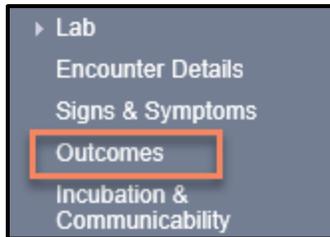
Update View Delete Set Response Set Pertinent

<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequency	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Chronic liver disease		2020 Jun 02	No				2460 (Unusual/Emerging Disease)

Ensure **ALL risk factors** have a response

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

Adding an Outcome



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

Outcome History

1 * Outcome:

Other Outcome:

2 Outcome Date: / /

yyyy mm dd

3

Row Actions: Reason for Deletion:

Outcome	Outcome Date

Note: there can be multiple outcomes.

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

Outcome		Outcome Date
<input type="radio"/>	Recovered	2020 Jun 11

Comments

(4000 characters)

Date	Comments	Recorded By
<div style="border: 1px solid black; display: inline-block; padding: 2px 5px;">4</div> <input type="button" value="Save"/> <input type="button" value="Reset"/>		

4. Click the **Save** button

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

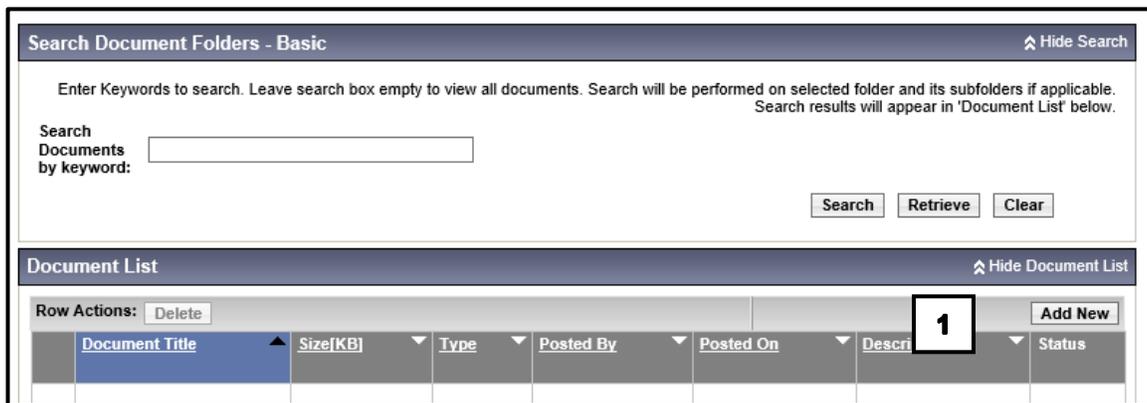
Outcomes are only changed if the status of the case's outcome changes during our investigation

Uploading a Document to an Investigation

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



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



1. Click the **Add New** button

Document Management

Add New Document

* File name: 1

File uploaded:

Selected Document: 2

* Document Title:

3 * Effective Date: / / Expiration Date: / /

Status: *

Enter Keyword: Selected Keywords:

Use CTRL key for multiple selections.

4 Description:

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

5

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

* File name:

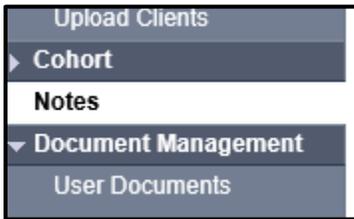
File uploaded: Recovery Letter_11111111_20200416.docx

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

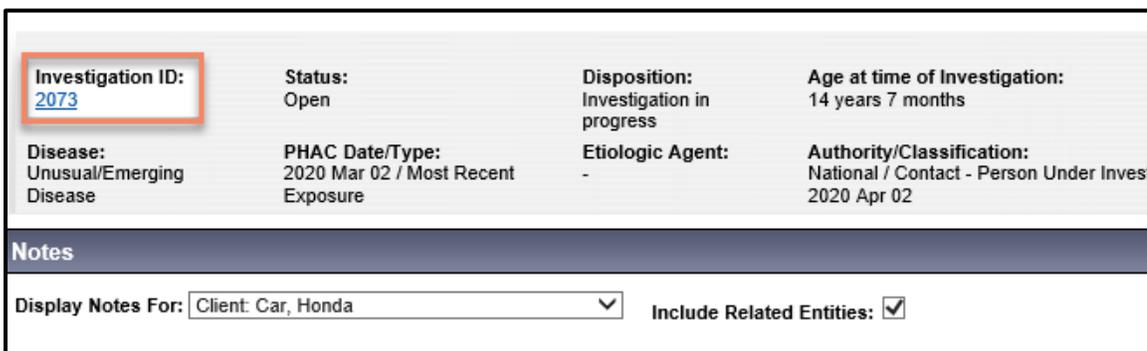
Document List ↑ Hide Document List								
Row Actions: <input type="button" value="Delete"/>								<input type="button" value="Add New"/>
	Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status	
<input type="checkbox"/>	Recovery Letter 20020416	46.46	1	PDF	Sampson, Judy	2020 Apr 24	Recovery letter	active

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

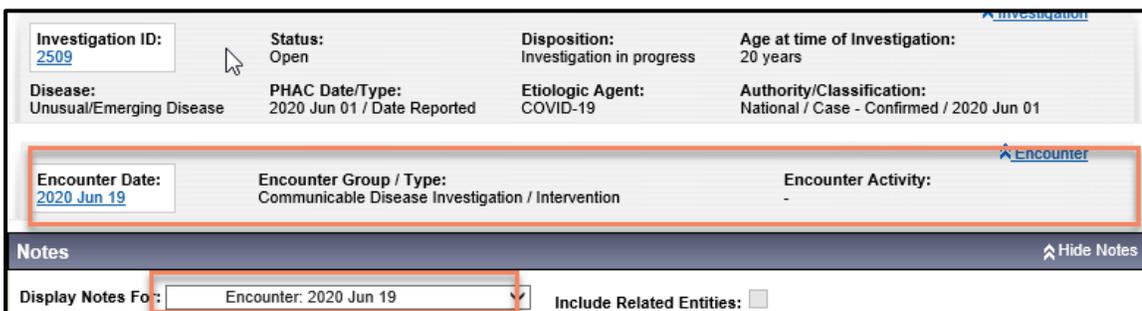
Adding a Clinical Note to an Investigation



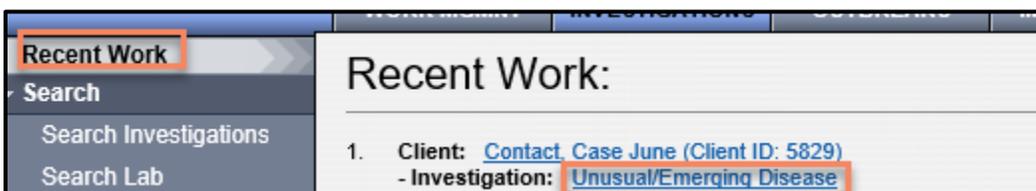
From the left-hand navigation, click on **Notes**.



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 **One-time key code (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_IMMMS_IOM_NURSE

* Subject:

* Note Date: / / * Note Time: : :ADT
yyyy mm dd hh mm

Note Type:

Common Phrases:

* Note:

OKC provided to client for use.

1. **Subject** –One-Time key Code (OKC) this must be fully typed out and the acronym after it as this is not an approved acronym.
2. **Note Date and Time** – defaults to the current date and time. Ensure that you enter the date and time that you gathered the information for the note.
3. **Note** – OKC provided for client use
4. Click the **Note Complete** button

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

Row Actions:

Move selected note to

Created Date/Time	Note Date/Time	Note Type	Subject Line	Author	Attached To	Status	Corrected
<input type="radio"/> 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:

- ▼ Investigation Details
 - Disease Summary
 - Investigation Information
 - Resp. Org / Investigator
- Reporting Notifications
- External Sources
- Links & Attachments
- Close Investigation

Scroll to bottom of page:

Investigator
⤴ Hide

* Required only if adding or updating investigator information.

Investigator Type : **1**

* Investigator Organization : **2**

* Investigator Workgroup : **3**

Investigator Name : **4**

5 * Assigned Date : / / **5** Assigned Time : : : AST

End Date : / / **6**

Row Actions:

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input type="radio"/>	Primary	Samantha McClellan	COVID-19 Unmonitored	Central Zone	2020 Sep 14	

otia.ca/CaseMgmtWeb/investigation/

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:

Row Actions:

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input type="radio"/>	Secondary	Krissy Rose-Muise	COVID-19 Unmonitored	Central Zone	2021 Jan 15	
<input type="radio"/>	Primary	Samantha McClellan	COVID-19 Unmonitored	Central Zone	2020 Sep 14	

7

7. Click the Save Button

Contacts Considered Low Risk due to Immunization Status

Recent Work

▼ Search

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

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

Search Clients
3
Search Retrieve Reset ... ?

Basic Search Criteria
⌵

Client Number:

Client Number Type:

2

Last Name:

First Name:

Middle Name:

Mother's Name:

Gender:

▼

Choose one:

Date of Birth:

Select all that apply:

Include Inactive Clients

Include Indeterminate Clients

Use Phonetic Matches

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

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-Version 12 Last Updated: 2021-06-11

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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.

The screenshot shows the 'Search Clients' form. Callout 1 points to the 'Last Name' field. Callout 2 points to the 'First Name' field. Callout 3 points to the 'Gender' dropdown menu. Callout 4 points to the 'Date of Birth' field. Callout 5 points to the 'Search' button.

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

The screenshot shows the 'Search Results' table. Callout 1 points to the checkbox in the first column of the first row. Callout 2 points to the 'Subject Summary' button above the table.

	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input type="checkbox"/>	5423	9333000001	Summer	Alice	Female	2000 Jan 01	NSHA	Active
<input checked="" type="checkbox"/>	5424	9333000002	Summer	Bertha	Female	2000 Jan 01	NSHA	Active
<input type="checkbox"/>	5425	9333000003	Summer	Caitlin	Female	2000 Jan 01	NSHA	Active

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

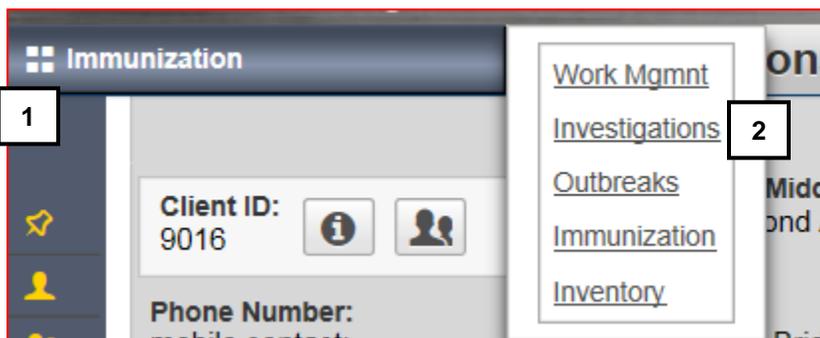
Agent ^	Date Administered ^	Date Administered				
COVID-19 mRNA	2021 Apr 13	2021 May 18				

Immunization History - Detailed Data Table									
Immunization History - Detailed Data Table									
Update Copy/Replace View Delete Add Single Immunization Add One or More Immunizations									
	Agent ^	Date Administered ^	Age at Administration ^	Status ^	Revised Dose ^	Trade Name ^	Body Site ^	Volume ^	
<input type="radio"/>	COVID-19 mRNA	2021 Apr 13	41y	Valid		COVID-19 Pfizer-BioNTech mRNA BTM	Deltoid: left	0.3 Dose	
<input type="radio"/>	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.

	WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	INVENTORY
Recent Work	Subject Summary				
Search					

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

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

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

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

Save the note. Do not add any other information to this contact investigation

Make sure the Status of the investigation is closed and the Disposition is Completed further action not required.

Intermittent Monitoring

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

Search for an Investigation



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

Disease / Basic Criteria [Hide Disease / Basic C](#)

Include: Human Non-Human

Search by:

1 Investigation ID:

Investigation Group:

Outbreak Group:

Disease Event ID:

Report Date (Received) Range: From: / / To: / /

yyyy mm dd yyyy mm dd

Encounter Group:

Disease:

Authority:

Classification:

Microorganism:

Site(s):
CTRL + click to select multiples

Staging:

PHAC Notification Status: Provincial Notification Status:

Co-managed Disease:

Outstanding Recommendations

Exclude Outbreak ID:

2 [Advanced](#)

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

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

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

Investigation Summary

?
📄

ACTIVE

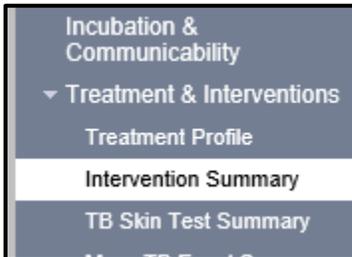
Client ID: 5423	Name (Last, First Middle) / Gender: Summer, Alice / Female	Health Card No: 9333000001	Date of Birth / Age: 2000 Jan 01 / 20 years
Phone Number: -	Address:	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation ID: 2492	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 11

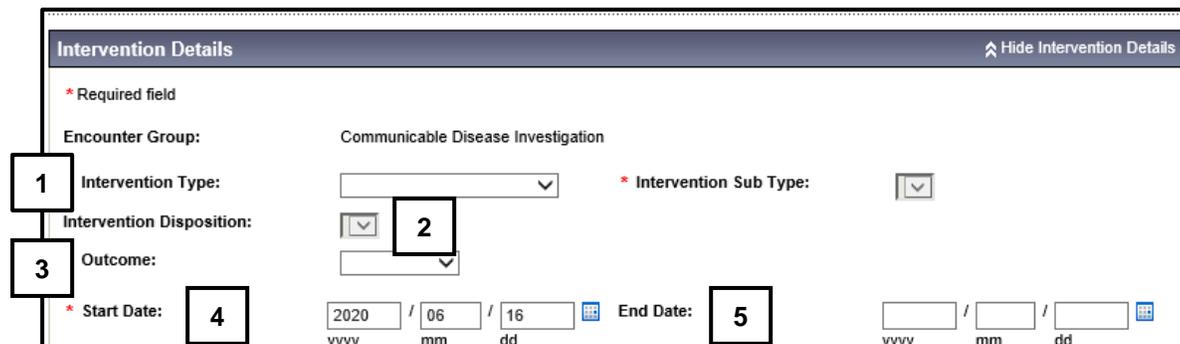
[Investigation](#)

The investigation is now in context.

Adding an Isolation Intervention



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



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

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

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Western Zone > [Yarmouth Public Health Office]

Workgroup: User:

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

Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > [Central Zone]

2 Location: *To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.*

Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Halifax PHO]

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

1 Comments

Comment:

(4000 characters remaining) **2**

- 1. Comment** – enter the rationale 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

Row Actions: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion :		Present:	Onset Date:			<input type="button" value="Apply Update"/>	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
	yyyy	mm	dd				
<input type="checkbox"/>	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Abdominal pain/discomfort/cramps						No
<input type="checkbox"/>	Arthralgia						No
<input checked="" type="checkbox"/>	Asymptomatic						No

Client is Asymptomatic (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)

<input type="checkbox"/>	Asymptomatic	Yes	2020 Apr 13 00:00 ADT				No
--------------------------	--------------	-----	-----------------------	--	--	--	--------------------

Client indicates no fever:

<input checked="" type="checkbox"/>	Fever						No
-------------------------------------	-------	--	--	--	--	--	----

Row Actions: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion :		Present:	Onset Date:			<input type="button" value="Apply Update"/>	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
	yyyy	mm	dd				
		No					

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:

<input type="checkbox"/>	Fever	No					No	1
--------------------------	-------	----	--	--	--	--	--------------------	---

1. Click on the [No](#) hyperlink

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: / / 
yyyy mm dd

Observation:

Observation Value: Unit:

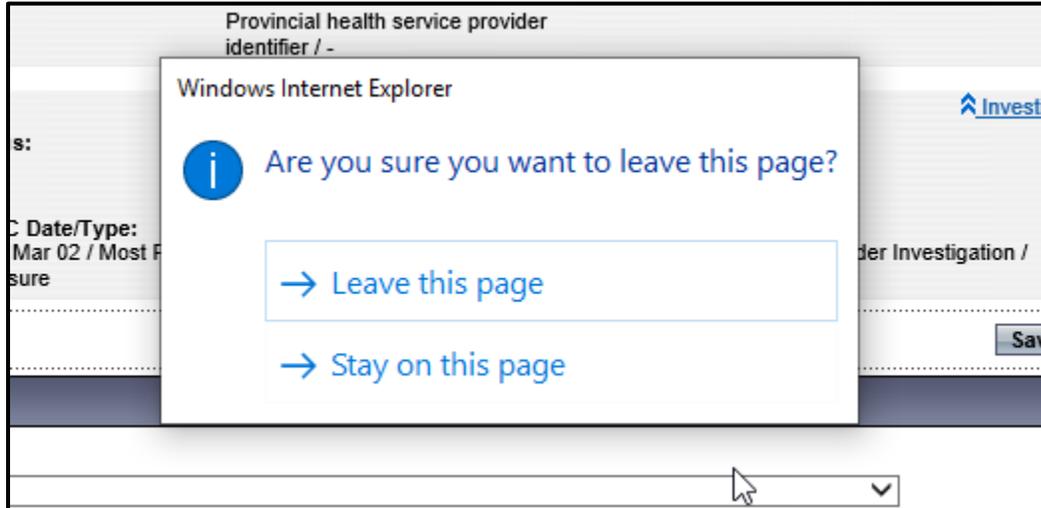
* Observed By:

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)

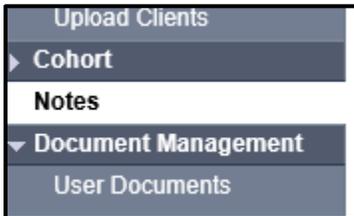
	Observation Date	Observation	Value	Unit	Observed By
<input type="radio"/>	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

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

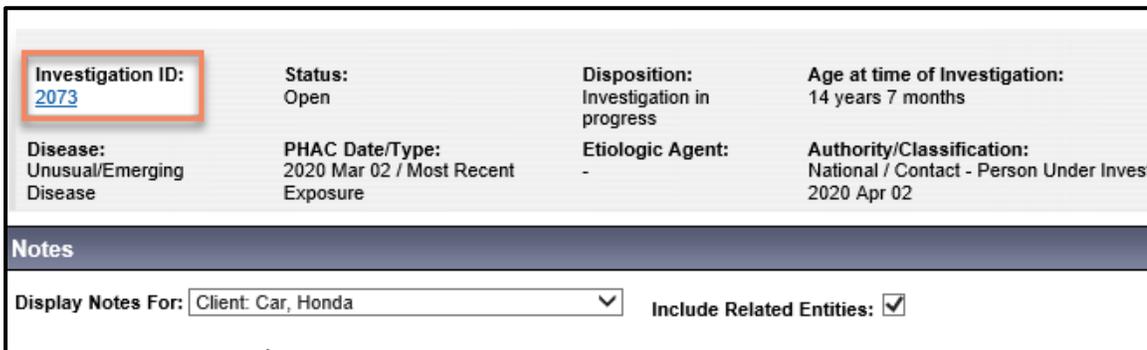
Note: If you see this message it indicates that you are leaving without saving your changes... Click “→ **Stay on this page**” and click the **Save** button.



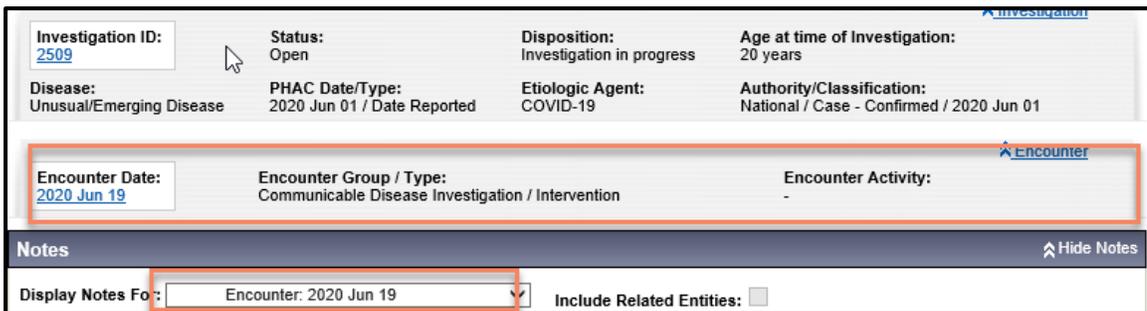
Adding a Clinical Note



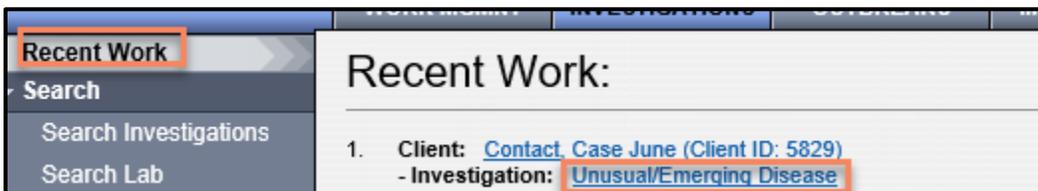
From the left-hand navigation, click on **Notes**.



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.

Sign or Symptom

* Required field
Sign or Symptom: Rhinorrhea

Preset: Yes
Onset: No

* **Present:** Yes

Onset Date/Time: 2020 / 06 / 03 00 : 00 : ADT Estimated:
yyyy mm dd hh mm

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

Duration: 0 Days + 0 Hours + 0 Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion : **Present:** **Onset Date:** / /
yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input checked="" type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No

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

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

- Present** – defaults to Yes. If you are adding a Fever No, select “NO” from the drop-down list
- Onset Date/Time if a yes. Date/Time will be grade out if “No” as not a symptom
- 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: / / 
yyyy mm dd

Observation:

Observation Value: Unit:

* Observed By:

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
<input type="radio"/>	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
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The Sign or Symptom needs to be re-added (**do not change a sign or symptom that has a recovered date**)

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

Sign or Symptom

* Required field
* Sign or Symptom:

Preset: No
Onset: No
* Present:

Onset Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: Present: Onset Date: / /

yyyy mm dd

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

Row Actions: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion :		Present:		Onset Date:		<input type="button" value="Apply Update"/>	
<input type="text"/>		<input type="text" value="Yes"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	
				yyyy	mm	dd	
<input type="checkbox"/>	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
<input checked="" type="checkbox"/>	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
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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.

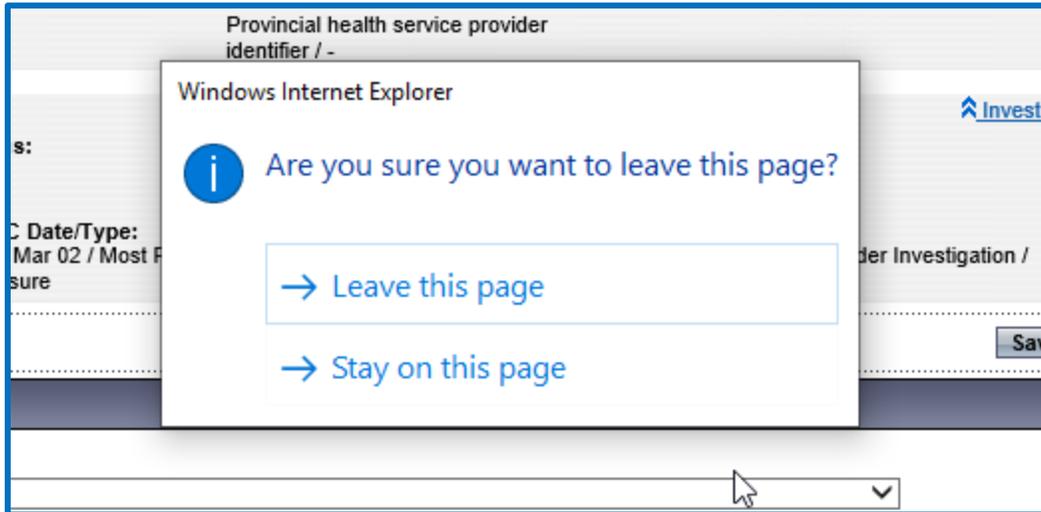
1. **Sign or Symptom** – Select the sign or symptom from the drop-down list. If the Sign or Symptom is not in the list select Other and also enter the sign/symptom in the **Other Sign or Symptom** field

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)

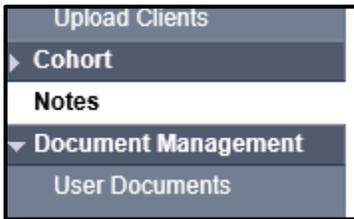
Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				No
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- Click the **Save** button (Top or Bottom right-hand area of screen)

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**.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: <input type="text" value="Client: Car, Honda"/>		Include Related Entities: <input checked="" type="checkbox"/>	

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01
Encounter			
Encounter Date: 2020 Jun 19	Encounter Group / Type: Communicable Disease Investigation / Intervention	Encounter Activity: -	
Notes			
Display Notes For: <input type="text" value="Encounter: 2020 Jun 19"/>		Include Related Entities: <input type="checkbox"/>	

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

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

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 the S&S is no longer reported by the client, you need to end date the S&S by entering the Recovery Date

Sign or Symptom

* Required field
Sign or Symptom: Rhinorrhea

Preset: Yes
Onset: No

* **Present:** Yes

Onset Date/Time: 2020 / 06 / 03 00 : 00 : ADT Estimated:
yyyy mm dd hh mm

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

Duration: 0 Days + 0 Hours + 0 Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion : **Present:**

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input checked="" type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No

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

Rhinorrhea	Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12 d 0 h 0 m		No
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Sign and Symptom – reported by client and already present - Yes without a recovery date:

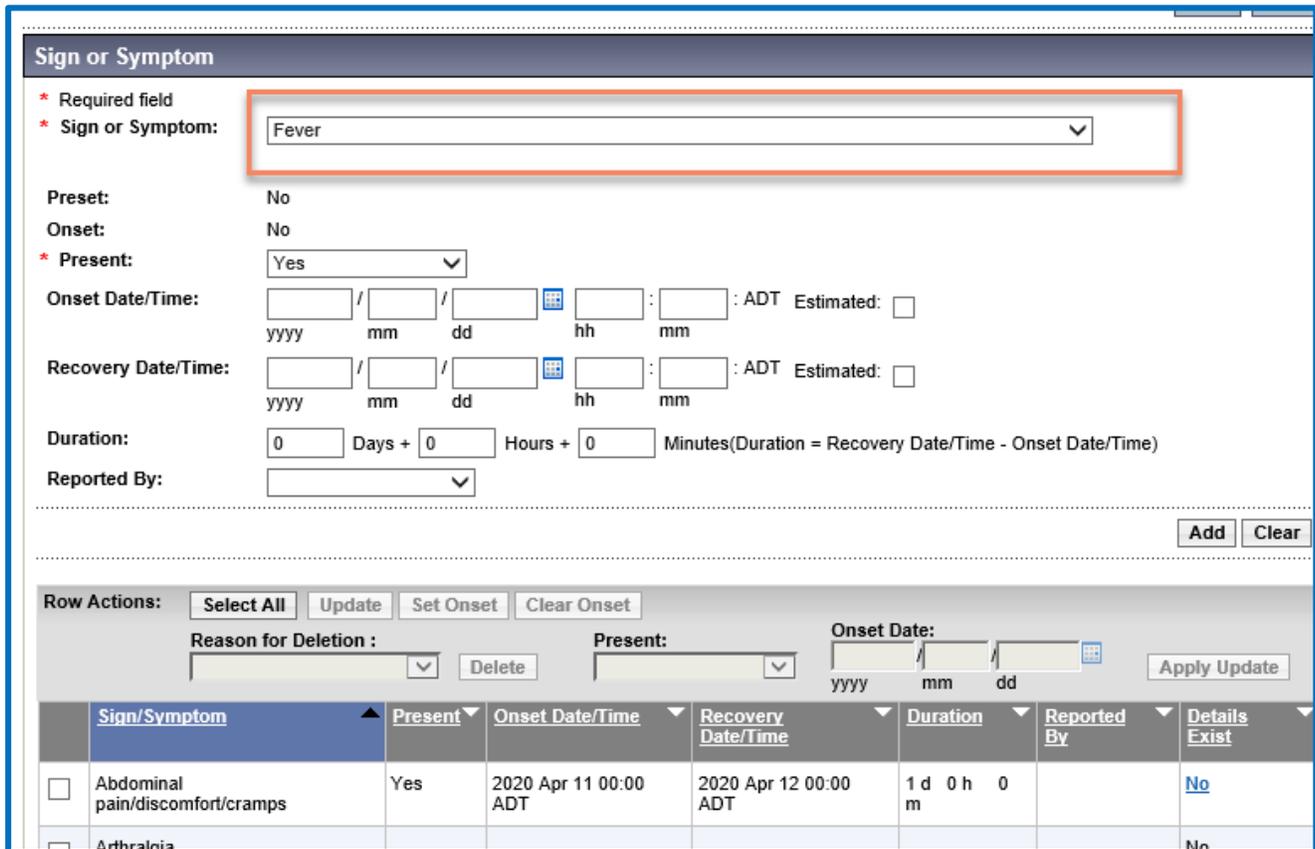
Cough	Yes	2020 Jun 15 00:00 ADT				No
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- Do not update

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



Sign or Symptom

* Required field
* Sign or Symptom: Fever

Preset: No
Onset: No
* Present: Yes

Onset Date/Time: / / : : : ADT Estimated:

Recovery Date/Time: / / : : : ADT Estimated:

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: Present: Onset Date: / /

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

- Present** – defaults to Yes. If you are adding a Fever No, select from the drop-down list
- Onset Date/Time - Enter the date of the call with the client
- 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:** / / 
yyyy mm dd

Observation:

Observation Value: **Unit:**

* **Observed By:**

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 ▼
<input type="radio"/>	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
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The Sign or Symptom needs to be added (**do not change a sign or symptom that has a recovered date**)

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

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present:

Onset Date/Time: / / : : : ADT Estimated:

Recovery Date/Time: / / : : : ADT Estimated:

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: Present: Onset Date: / /

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

Row Actions: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion : <input type="text"/>		Present: <input type="text" value="Yes"/>		Onset Date: <input type="text" value=""/> yyyy mm dd		<input type="button" value="Apply Update"/>	
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
<input checked="" type="checkbox"/>	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
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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.

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present:

Onset Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion:

Present: Onset Date: / /

yyyy mm dd

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

Sign or Symptom

* Required field

* Sign or Symptom:

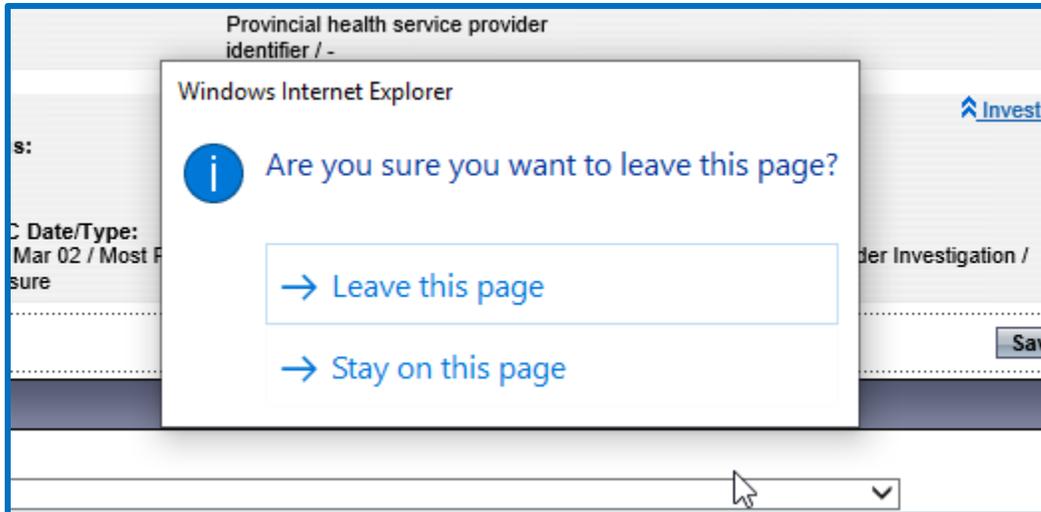
* Other Sign or Symptom:

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

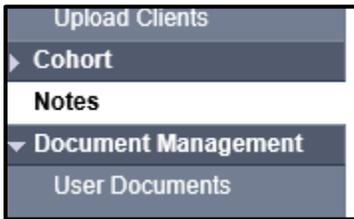
Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				No
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- Click the **Save** button (Top or Bottom right-hand area of screen)

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**.

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: <input type="text" value="Client: Car, Honda"/>		Include Related Entities: <input checked="" type="checkbox"/>	

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01
Encounter			
Encounter Date: 2020 Jun 19	Encounter Group / Type: Communicable Disease Investigation / Intervention	Encounter Activity: -	
Notes			
Display Notes For: <input type="text" value="Encounter: 2020 Jun 19"/>		Include Related Entities: <input type="checkbox"/>	

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

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

From the left-hand navigation, click on **Recent Work** and click on the [Investigation](#) hyperlink.

Onset/ Emerging Disease: 2020 May 30 / Date Reported: COVID-19 / National Case: Confirmed: 2020 Jun 10

Notes Hide Notes

Display Notes For: Client: smith, jody Include Related Entities:

Subject Line: Status:

Workgroup for Author: Workgroup for Transcriber:

Author: Transcriber:

Note Type:

Note Date: From: / / To: / /
yyyy mm dd

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

Row Actions:

Move selected note to

1. Click on **Author Note** button

1 Note is being created for Investigation ID 2503

Note ID: - Status: -

* Required Field

Author: Sampson, Judy Role: NS_IMMS_IOM_NURSE

2 Subject:

3 Note Date: / / **Note Time:** : :ADT
yyyy mm dd hh mm

Note Type:

Common Phrases:

4 Note:

5

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

Client 3 – Contact Case – Intermittent Monitoring – June 12

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

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

Row Actions: <input type="button" value="Select All"/> <input type="button" value="Update"/> <input type="button" value="Set Onset"/> <input type="button" value="Clear Onset"/>							
Reason for Deletion :		Present:		Onset Date:			
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Apply Update"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	yyyy	mm	dd				
<input type="checkbox"/>	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Abdominal pain/discomfort/cramps						No
<input type="checkbox"/>	Arthralgia						No
<input checked="" type="checkbox"/>	Asymptomatic	Yes	2020 Apr 9 00:00 ADT				No

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

Sign or Symptom

* Required field

Sign or Symptom: Asymptomatic

Preset: Yes

Onset: No

* Present:

Onset Date/Time: / / : : ADT Estimated:

Recovery Date/Time: / / : : ADT Estimated:

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

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
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If Fever is Y on the daily monitoring report:

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

Sign or Symptom

* Required field

* Sign or Symptom: Fever

Preset: No

Onset: No

* Present: Yes

Onset Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Duration: 0 Days + 0 Hours + 0 Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: Present: Onset Date: / /

yyyy mm dd

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

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

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: / /

yyyy mm dd

Observation:

Observation Value: Unit:

* Observed By:

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 ▼
<input type="radio"/>	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:

Reason for Deletion: Present:

Onset Date: / /

yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No
<input checked="" type="checkbox"/>	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
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Client reports a symptom that is not in the displayed Signs and Symptoms list, you will need to document

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

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present:

Onset Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion:

Present:

Onset Date: / /

yyyy mm dd

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

Sign or Symptom

* Required field

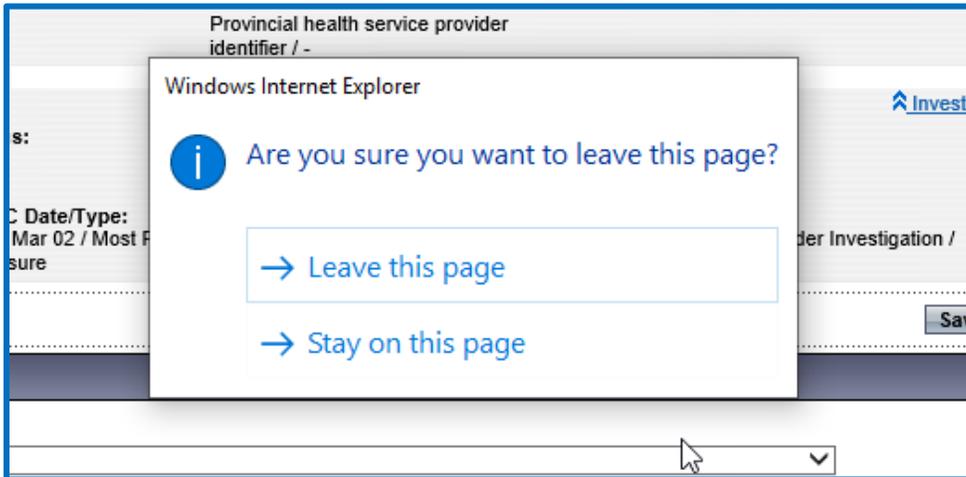
* Sign or Symptom:

* Other Sign or Symptom:

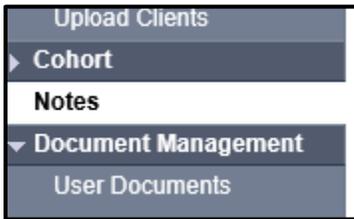
- Onset Date** - Enter the date the client reported the S&S. Do not enter a time
- Click **Add** button
- The S&S will now be updated in the table (see below)

Other: loss of smell	Yes	2020 Jun 15 00:00 ADT				No
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Note: If you see this message it indicates that you are leaving without saving your changes.. Click “→ Stay on this page” and click the **Save** button.



Adding a Clinical Note



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

Investigation ID: 2073	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 14 years 7 months
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Mar 02 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Invest 2020 Apr 02
Notes			
Display Notes For: <input type="text" value="Client: Car, Honda"/>		Include Related Entities: <input checked="" type="checkbox"/>	

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

Investigation ID: 2509	Status: Open	Disposition: Investigation in progress	Age at time of Investigation: 20 years
Disease: Unusual/Emerging Disease	PHAC Date/Type: 2020 Jun 01 / Date Reported	Etiologic Agent: COVID-19	Authority/Classification: National / Case - Confirmed / 2020 Jun 01
Encounter Date: 2020 Jun 19	Encounter Group / Type: Communicable Disease Investigation / Intervention	Encounter Activity: -	
Notes			
Display Notes For: <input type="text" value="Encounter: 2020 Jun 19"/>		Include Related Entities: <input type="checkbox"/>	

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

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

From the left-hand navigation, click on **Recent Work** and click on the [Investigation](#) hyperlink.

Notes Hide Notes

Display Notes For: Client: smith, jody Include Related Entities:

Subject Line: Status:

Workgroup for Author: Workgroup for Transcriber:

Author: Transcriber:

Note Type:

Note Date: From: / / To: / /

Display Clear

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

Row Actions: [View All Notes in Table](#) [Update Note](#) [View Note Corrections](#) **1** [Author Note](#) [Transcribe Note](#)

Move selected note to [Move Note](#)

2. Click on **Author Note** button

1 Note is being created for Investigation ID 2503

Note ID: - Status: -

* Required Field

Author: Sampson, Judy Role: NS_IMMS_IOM_NURSE

2 Subject:

3 Note Date: 2020 / 06 / 16 * Note Time: 16 : 31 :ADT

yy yy mm dd hh mm

Note Type:

Common Phrases: [Add to Note](#)

4 Note:

Normal Arial 7pt **i u**

5 [Save as](#) [Note Complete](#) [Clear](#) [Cancel](#)

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

Client 3 - Contact Case – Intermittent Monitoring – June 21

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

Sign or Symptom

*** Required field**
Sign or Symptom: Rhinorrhea

Preset: Yes
Onset: No

*** Present:** Yes

Onset Date/Time: 2020 / 06 / 03 00 : 00 : ADT Estimated:
yyyy mm dd hh mm

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

Duration: 0 Days + 0 Hours + 0 Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: **Present:** **Onset Date:** / /
yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input checked="" type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No

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

Rhinorrhea	Yes	2020 Jun 3 00:00 ADT	2020 Jun 15 00:00 ADT	12 d 0 h 0 m		No
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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:** / /
yyyy mm dd

Observation:

Observation Value: **Unit:**

*** Observed By:**

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
<input type="radio"/>	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

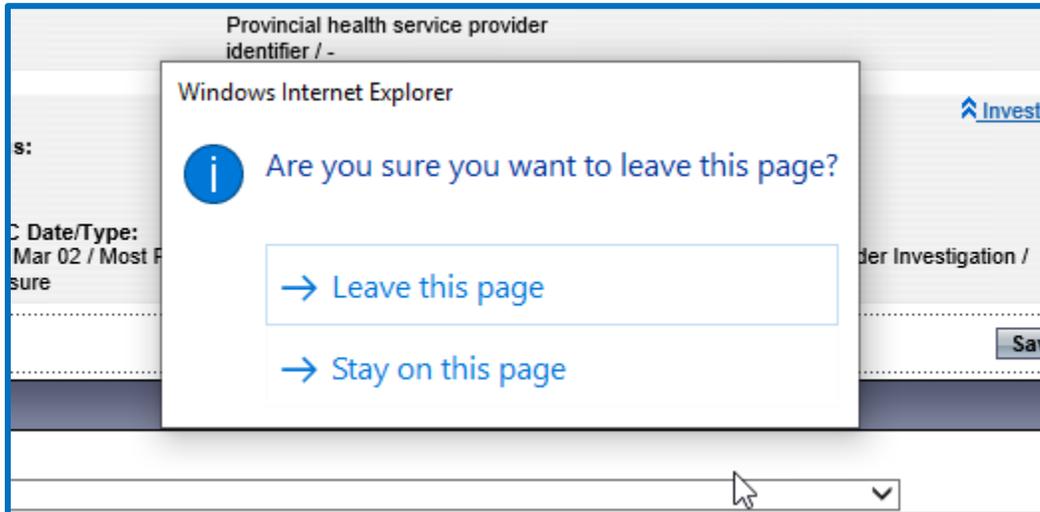
Sign and Symptom – reported by client and already present - [Yes](#) without a recovery date:

Cough	Yes	2020 Jun 15 00:00 ADT			No
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- 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**

Interventions ↑ Hide Interventions							
Row Actions: Add Follow Up				Create Intervention			
	Type	SubType	Disposition	Start Date	End Date	Provider	Location
1	Isolation	Isolation	In progress	2020 Jun 1	2020 Jun 15	-	Halifax PHO

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

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

Close Investigation
Re-Open Investigation

Save Reset

* Required field Merged Investigation No(s):

Investigation Information

Priority:

* Disposition:

Disposition Date: / /

[Investigation History](#)

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

Close Investigation Reset

* Required field Merged Investigation No(s):

Close Investigation

* 'Closed' Status Date: / /

yyyy mm dd

Close Investigation Policies:
Update: Outcome, Classification, Disposition

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

required

Etiologic Agent:

Authority/Classification:

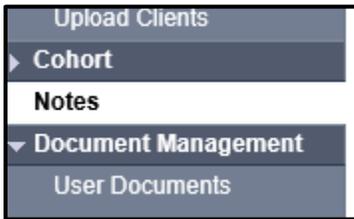
Message from webpage

You are about to set the status of the investigation to 'Closed'. Do you want to close?

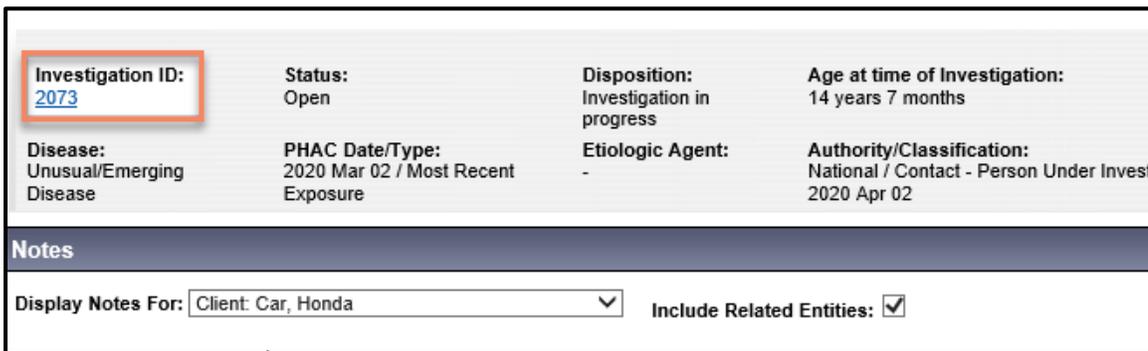
1
OK
Cancel

1. Click the **OK** button

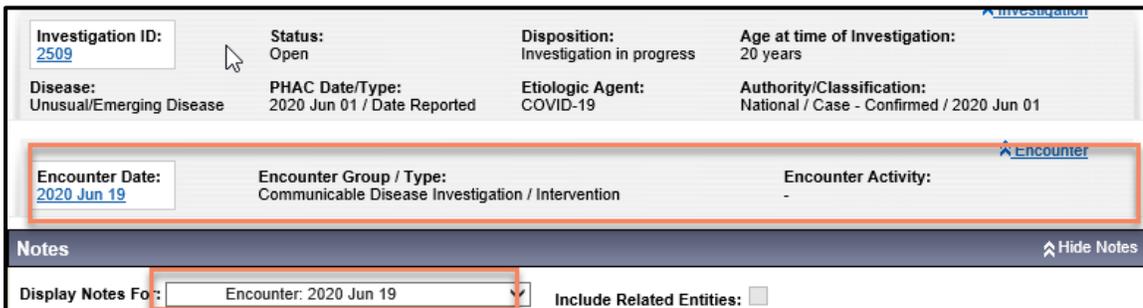
Adding a Clinical Note



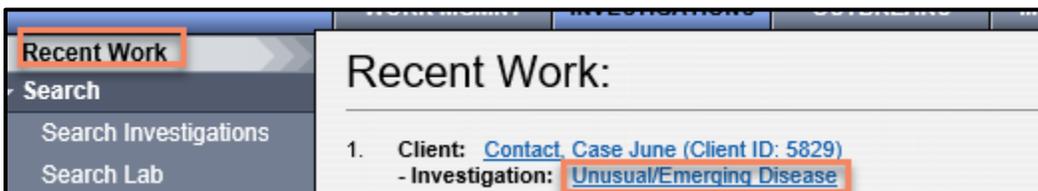
From the left-hand navigation, click on **Notes**.



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.

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

Sign or Symptom

* Required field
Sign or Symptom: Rhinorrhea

Preset: Yes
Onset: No

* **Present:**

Onset Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : ADT Estimated:

yyyy mm dd hh mm

Duration: Days + Hours + Minutes (Duration = Recovery Date/Time - Onset Date/Time)

Reported By:

Row Actions:

Reason for Deletion: **Present:** **Onset Date:** / /

yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Vomiting						No
<input checked="" type="checkbox"/>	Rhinorrhea	Yes	2020 Jun 3 00:00 ADT				No

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

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

Observations Details

* Required field
Sign or Symptom: Fever

* Observation Date: / / 
yyyy mm dd

Observation:

Observation Value: Unit:

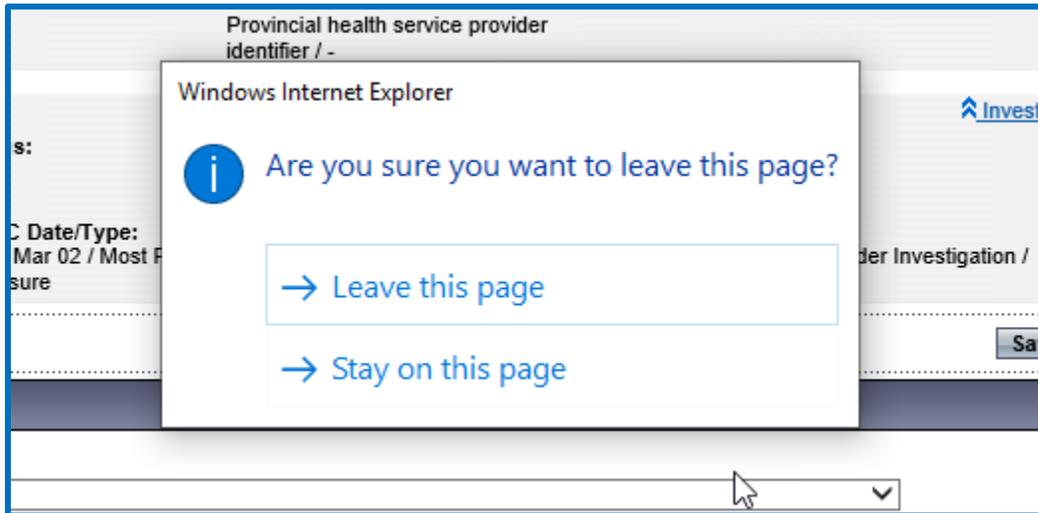
* Observed By:

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
<input type="radio"/>	2020 Apr 14	Temperature	37.4	celsius	Car, Mazda

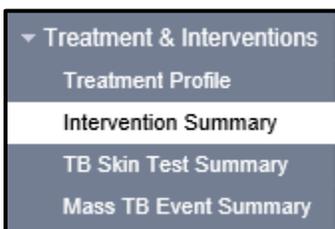
- Click the **Save** button (Top or Bottom right-hand area of screen)

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:

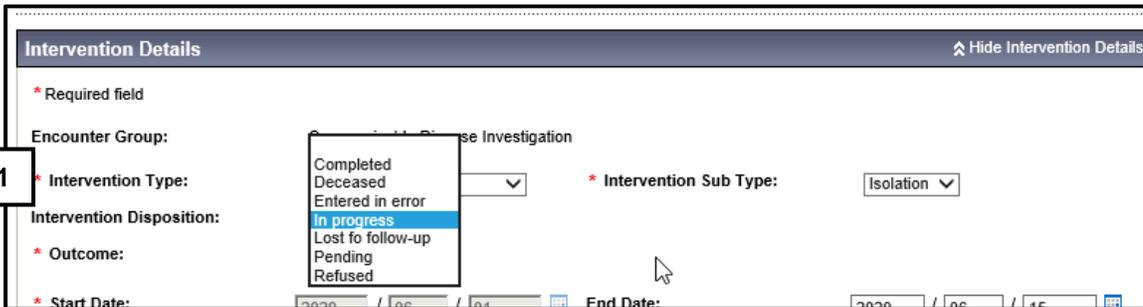
1. Complete the Intervention



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

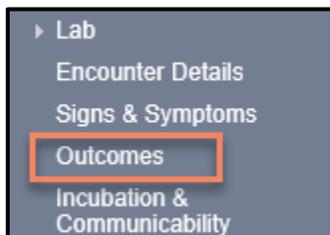
Interventions							
Type	SubType	Disposition	Start Date	End Date	Provider	Location	
1	Isolation	In progress	2020 Jun 1	2020 Jun 15	-	Halifax PHO	

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




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

2. Add the final Outcome



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

Note: there can be multiple outcomes.

Outcome History

1

Outcome:

2

Outcome Date: / /

Other Outcome:

3

Row Actions:
 Reason for Deletion:

Outcome	Outcome Date

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

Outcome	Outcome Date
<input type="radio"/> Recovered	2020 Jun 11

Comments

(4000 characters)

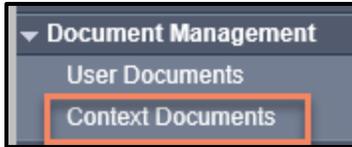
Date	Comments	Recorded By

1

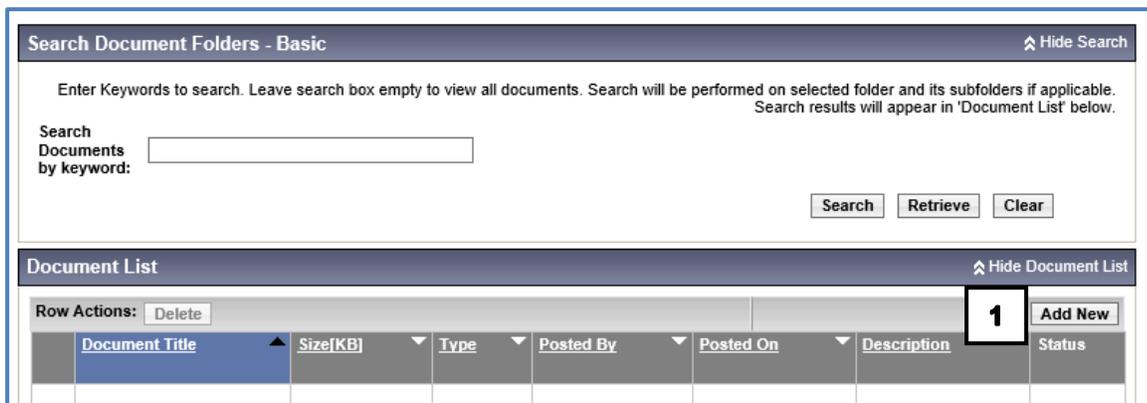
1. Click the **Save** button

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

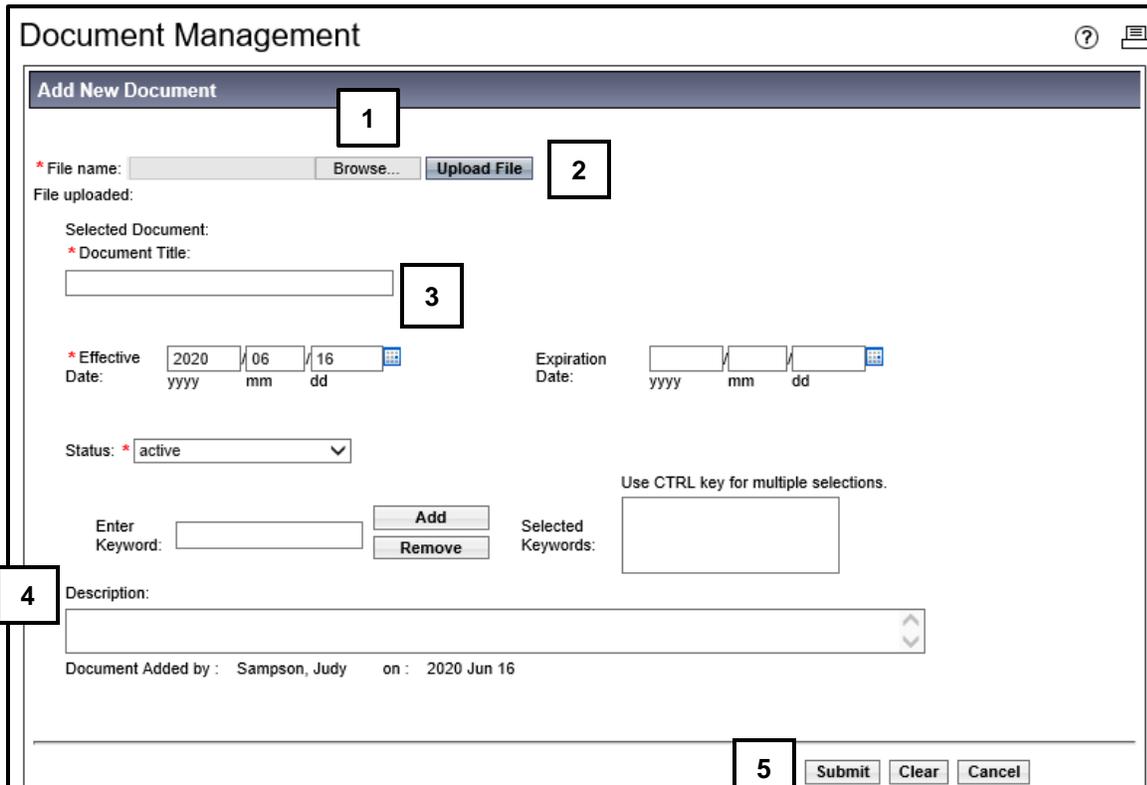
3. Upload letter – Recovery or Lost to Follow Up (if the investigation was a case. Not applicable for a contact investigation)



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.

* File name:

File uploaded: Recovery Letter_11111111_20200416.docx

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

Document List								↑ Hide Document List
Row Actions: <input type="button" value="Delete"/>								<input type="button" value="Add New"/>
	Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status	
<input type="checkbox"/>	Recovery Letter 20020416	5.46	PDF	Sampson, Judy	2020 Apr 24	Recovery letter	active	

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

4. Update the investigation disposition and close the investigation



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

* Required field

Investigation Information

Priority:

Disposition: 2

Disposition Date: 2020 / 04 / 02
yyyy mm dd

* Status:

* Status Date: 2020 Apr 2

1

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

* Required field Merged Investigation No(s):

Investigation Information

Priority:

* Disposition: / /

[Investigation History](#)

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

2

* Required field Merged Investigation No(s):

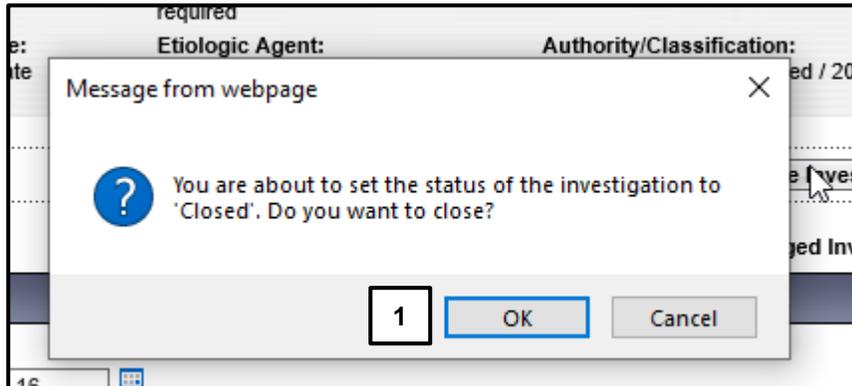
Close Investigation

'Closed' Status Date: / /
yyyy mm dd

Close Investigation Policies:
Update: Outcome, Classification, Disposition

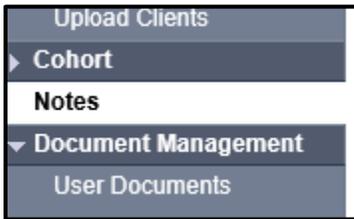
1

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.

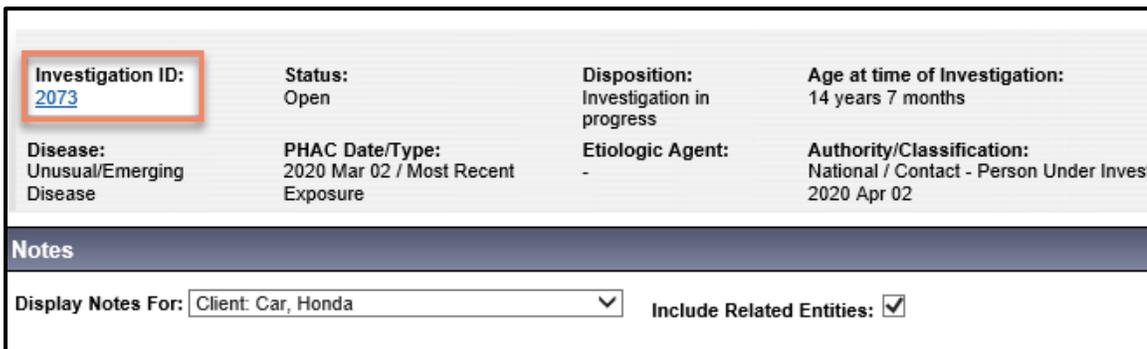


1. Click the **OK** button

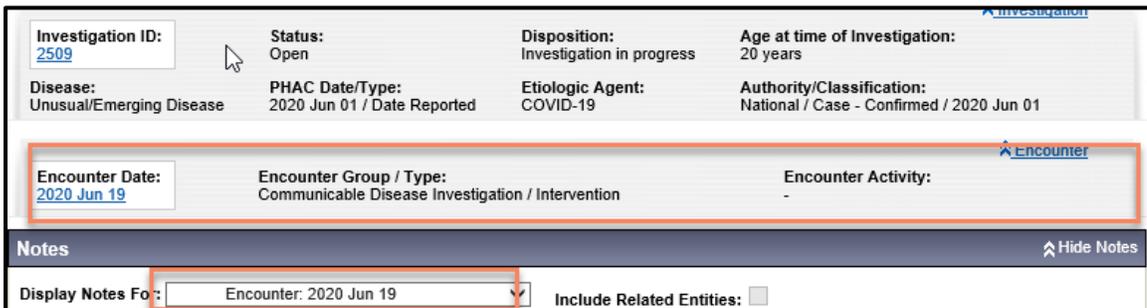
Adding a Clinical Note



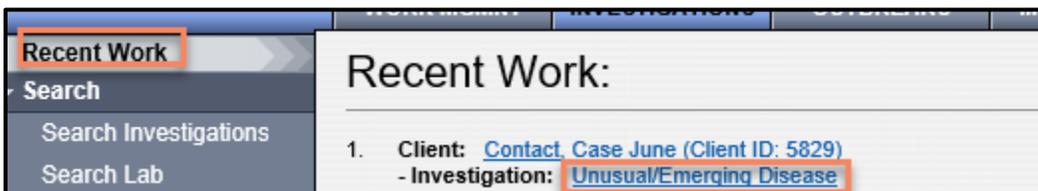
From the left-hand navigation, click on **Notes**.



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