



## Covid-19 – Panorama - Case Management - Checklist



This resource is a checklist and reminders for the Public Health Nurses supporting COVID-19 Case Management. [Please refer to the detailed document provided in training for step-by-step how to instructions.](#)

Click on the hyperlink to go directly to the topic:

### Case Investigation

[Creating a new confirmed case investigation](#) pg 2, 3 & 4

[Daily Monitoring – confirmed case](#) pg 5

[Closing a case investigation](#) pg 6

### Contact Investigation

[Changing a contact case to a confirmed case](#) pg 7, 8 & 9

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Each topic starts on a new page so you can print the applicable checklist.

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## Creating a New Case Investigation

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 **Address**

- Verify the client's address
- If the address provided by the client is different than the address in Panorama, add a temporary address to the client.

**Reminders:**

- Do not update the existing address unless it is the temporary address
- Set the temporary address you added to "Preferred" so that it will show in the client context header

 **Telephone Number**

- Verify the client's phone number
- If the phone number provided by the client is different than the phone number in Panorama, add a Mobile telephone number to the client.

**Reminders:**

- Do not update the Primary Home or Workplace phone number
- You can update the Mobile phone number if one already exists
- Set the Mobile phone number to "Preferred" so that it will show in the client context header
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 **Ethnicity****Reminders:**

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

 **Immigration information** **Indigenous information** **Create Investigation****Reminders:**

- Set responsible organization to Halifax PHO
- Set responsible organization workgroup to IOM-Halifax PHO-Unmonitored
- Set investigation organization to Central Zone
- Set investigator workgroup to COVID-19 Unmonitored
- Set reporting source location to Victoria General-General

 **Investigation Information**

- Verify the Address at Time of Investigation selection matches address provided by client. Address must also include postal code.
- If a different address was provided or no postal code recorded, select the appropriate and/or complete address from the drop down menu.

**Reminders:**

- If the drop down options do not include the correct address with postal code, you will need to update the address in client demographics first.

- Sensitive Environment/occupation section should be updated with the most appropriate option that matches the response on the PHAC from.

**Reminders:**

- There will be investigations that do not have sensitive environment/occupation. Example-retired individuals.

**Link the lab to the investigation**

**Add the Signs and Symptoms (S&S)**

- Client reports no S&S
  - Select Asymptomatic – set Present to Yes and onset date
  - Select Fever – set Present to No
  - Add the temperature observation to Fever – No (details)
- Client reports S&S that are in the S&S table
  - Select the S&S and set Present to Yes and onset date
- Client reports S&S that is not in the S&S table
  - Use the “Add” functionality

**Symptom Onset**

Reminders:

- If a symptom is the first indication of disease (ie, is prior to specimen collection date), you need to set the symptom as the onset. This will update the PHAC date.

**Isolation Intervention**

Reminders:

- Once an isolation intervention is added, you can not change the start date
- Add a comment which includes how the isolation dates were determined. Include the end date in the comment.
- Set organization to Central Zone
- Set service delivery location to Halifax PHO (do not select CDC or Early Years)
- After you Save the isolation intervention, exit the screen using the Cancel button. This will take your isolation out of context.

**Risk Factors**

Reminders:

- All risk factors require a response (Yes or No)
- If a risk factor is already pertinent to another investigation, do not update that risk factor. “Add” the risk factor through the Add functionality and record response against the one you added.

**Outcome**

Reminders:

- An initial outcome needs to be added



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### Exposures

#### Reminders:

- Complete Contact Form and upload to context documents.
- If you have not completed the additional Exposure Summary training, notify a member of your team who has been trained in Exposure Summary entry that the exposure information is ready to be entered.
- If you have been trained in Exposure Summary entry, ensure all exposure data has been entered from the contact form. Notify the investigating PHN if any new contact investigations created via the exposure summary.
- Do not enter into Panorama until training for exposures is provided

### Upload PHAC form and SBAR communication

#### Reminders:

- Ensure that an intervention is not in the context header. If it is, go to Recent Work and click on the investigation and then go back into the Context Document function.

### Nursing Note

#### Reminders:

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context.

### Covid Alert App

#### Reminders:

- Ensure there is a standalone note to reflect IF a One-time key code was provided to client

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## Daily Monitoring – Confirmed Case

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### Add the Signs and Symptoms (S&S)

#### Reminders:

- A fever observation needs to be recorded for every day the client is called, including if the client is not able to provide a temperature reading. Febrile temperature readings are to be recorded within the appropriate Fever “Yes” details, and Afebrile readings (and client unable to provide temperature reading) are to be recorded with the Fever “No” details.
- Investigation has S&S and Daily Monitoring indicates S&S
  - If the S&S reported is already documented without a recovery date, do nothing (means it’s still present)
  - Add a recovery date to any S&S already documented that are not being reported by the client the day of the call, including the Fever “Yes” S&S.
  - If the client is reporting S&S that aren’t already documented, select the S&S, set to Present-Yes and Onset Date equal to the call date, however,
  - If the S&S is already documented with a recovery date, do not update this S&S, instead add a new S&S (with Present- “Yes” and Onset Date)
  - Add the fever observation to the appropriate Fever-Yes details (for febrile readings) or Fever-No details (for afebrile readings or no temp reading provided)
    - If a Fever “No” is not in the S&S on the investigation and client is reporting afebrile, add a Fever “No” and then add the fever observation temperature under Fever-No details.
- Investigation has S&S and Daily Monitoring does not have S&S
  - Add a recovery date to S&S that do not have a recovery date
  - Add the Fever observation to Fever “No”

### Outcome

- If the client’s outcome has changed, add a new outcome

### Nursing Note

#### Reminders:

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context.
- Ensure the subject is Daily Monitoring

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## Closing a Case Investigation

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 **Isolation Intervention**

- Update the disposition to Complete

Reminders:

- After you Save the isolation intervention, exit the screen using the Cancel button. This will take your isolation out of context.

 **Outcome**

- Add the final outcome. Most time this will be Recovered.

 **Investigation Disposition**

- Change the investigation disposition to Completed, further action is not required.

Reminders:

- Ensure to change the disposition date as it defaults to the last disposition date recorded.

 **Close Investigation (Status)** **Nursing Note**

Reminders:

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context.
- Ensure the subject is Closing Case

 **Upload Recovery Letter**

Reminders:

- Ensure the Encounter is not in context. If it is, go to recent work and click on the investigation hyperlink. Go back to Context Documents.

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## Changing a Contact Case to a Confirmed Case

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 **Address**

- Verify the client's address
- If the address provided by the client is different than the address in Panorama, add a temporary address to the client.

Reminders:

- Do not update the existing address unless it is the temporary address
- Set the temporary address you added to "Preferred" so that it will show in the client context header

 **Telephone Number**

- Verify the client's phone number
- If the phone number provided by the client is different than the phone number in Panorama, add a Mobile telephone number to the client.

Reminders:

- Do not update the Primary Home or Workplace phone number
- You can update the Mobile phone number if one already exists
- Set the Mobile phone number to "Preferred" so that it will show in the client context header

 **Ethnicity**

Reminders:

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

 **Immigration information** **Indigenous information** **Update Disease Classification**

Reminders:

- Ensure you change the classification date to the date case was confirmed. (Defaults to last classification date).

 **Investigation Information**

- Verify the client's address at time of investigation matches address provided by client. Address must also include postal code.
- If a different address was provided or no postal code recorded, select the appropriate and/or complete address from the drop down menu.

Reminders:

- If the drop down options do not include the correct address with postal code, you will need to update the address in client demographics first.

- Sensitive Environment/occupation section should be updated with the most appropriate option that matches the response on the PHAC from.

Reminders:

- There will be investigations that do not have sensitive environment/occupation. Example-retired individuals.

**Link the lab to the investigation**

**Update the Signs and Symptoms (S&S)**

**Reminders:**

- Do not change the Present (Yes or No) or the Onset Date on a S&S that is already documented
- If a S&S has a recovery date documented and client re-presents with S&S, add a new S&S.
- A Fever observation needs to be recorded for every day the client is called, including if the client is not able to provide a temperature reading. Febrile temperature readings are to be recorded with the appropriate Fever -“Yes” details, and Afebrile readings (and client unable to provide temperature reading) with the Fever “No” details.
- Investigation has Asymptomatic “Yes’ & Fever “No” and Daily Monitoring Report indicates no S&S
  - Add the temperature observation to Fever – No
- Investigation has Asymptomatic “Yes’ & Fever “No” and Daily Monitoring Report indicates S&S
  - Asymptomatic – update, add the recovery date
  - If the client indicated a Fever, add a Fever with Present- “Yes” and Onset Date (do not change the Fever No to Fever Yes).
    - Add the temperature observation reading to the Fever “Yes” details.
  - Select any other S&Ss with Present- “Yes” and Onset Date
  - If a S&S is not in the pre-set list, add through the “Add” functionality at the top of the screen.
- Investigation has S&S and Daily Monitoring indicates S&S
  - If the S&S reported is already documented without a recovery date, do nothing (means it’s still present)
  - Add a recovery date to any S&S already documented that are not being reported by the client the day of the call, including the Fever “Yes” S&S if client is afebrile.
  - If the client is reporting S&S that aren’t already documented, select S&S with Present- Yes and Onset Date equal to the call date, however,
  - If the S&S is already documented with a recovery date, do not update this S&S, instead, add a new S&S (with Present- “Yes” and Onset Date)
  - Add the fever observation to the appropriate Fever-Yes details (for febrile readings) or Fever-No details (for afebrile readings or no temp reading provided)
    - If a Fever “No” is not in the S&S on the investigation and client is afebrile, add a Fever “No” and then add the fever observation.
- Investigation has S&S and Daily Monitoring does not have S&S
  - Add a recovery date to S&S that do not have a recovery date
  - Add the Fever observation to Fever “No”

**Symptom Onset**

**Reminders:**

- If a symptom is the first indication of disease (ie, is prior to specimen collection date), you need to set the symptom as the onset. This will update the PHAC date.

**Isolation Intervention**

**Reminders:**

- Recalculate the isolation end date and update in Panorama. Add comment including new date.
- After you update isolation intervention, exit the screen using the Cancel button. This will take your isolation out of context





## Covid-19 – Panorama - Case Management - Checklist



### Risk Factors

#### Reminders:

- All risk factors require a response (Yes or No)
- If a risk factor is already pertinent to another investigation, do not update that risk factor. “Add” the risk factor through the add functionality and record response on the one you added.

### Outcome

### Exposures

#### Reminders:

- Complete Contact Form and upload to context documents.
- If you have not completed the additional Exposure Summary training, notify a member of your team who has been trained in Exposure Summary entry that the exposure information is ready to be entered.
- If you have been trained in Exposure Summary entry, ensure all exposure data has been entered from the contact form. Notify the investigating PHN if any new contact investigations created via the exposure summary.
- Do not enter into Panorama until training for exposures is provided

### Upload PHAC form and SBAR communication

#### Reminders:

- Ensure that an intervention is not in the context header. If it is, go to Recent Work and click on the investigation and then go back to the Context Document function.

### Nursing Note

#### Reminders:

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context

### Covid Alert App

#### Reminders:

- Ensure there is a standalone note to reflect IF a One-time key code was provided to client

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## First Contact with a Contact Case

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### Add Isolation Intervention

Reminders:

- Once an isolation intervention is added, you can not change the start date
- Add a comment which includes how the isolation dates were determined. Include the end date in the comment
- Set organization to Central Zone
- Set service delivery location to Halifax PHO (do not select CDC or Early Years)
- After you add the isolation intervention, exit the screen using the Cancel button. This will take your isolation out of context.

### Add the Signs and Symptoms (S&S)

- Client reports no S&S
  - Select Asymptomatic – set Present to Yes and onset date
  - Select Fever – set Present to No
  - Add the temperature observation to Fever – No details
- Client reports S&S that are in the S&S table
  - Select the S&S and set Present to Yes and onset date
- Client reports S&S that is not in the S&S table
  - Use the “Add” functionality

Reminders:

- A fever observation needs to be recorded for every day the client is called, including if the client is not able to provide a temperature reading. Febrile temperature readings are to be recorded within the appropriate Fever “Yes” details, and Afebrile readings (and client unable to provide temperature reading) are to be recorded with the Fever “No” details.

### Nursing Note

Reminders:

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context.
- Ensure the subject is Daily Monitoring

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## Daily Monitoring – Contact Case

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### Add the Signs and Symptoms (S&S)

#### Reminders:

- A fever observation needs to be recorded for every day the client is called, including if the client is not able to provide a temperature reading. Febrile temperature readings are to be recorded within the appropriate Fever “Yes” details, and Afebrile readings (and client unable to provide temperature reading) are to be recorded with the Fever “No” details.
- Investigation has S&S and Daily Monitoring indicates S&S
  - If the S&S reported is already documented without a recovery date, do nothing (means it’s still present)
  - Add a recovery date to any S&S already documented that are not being reported by the client the day of the call, including Fever “Yes” S&S.
  - If the client is reporting S&S that aren’t already documented, select Present- Yes and Onset Date equal to the call date, however,
  - If the S&S is already documented with a recovery date, do not update this S&S, instead add a new S&S (with Present- “Yes” and Onset Date)
  - Add the fever observation to the appropriate Fever-Yes details (for febrile readings) or Fever-No details (for afebrile readings)  
If a Fever “No” is not in the S&S on the investigation, add a Fever “No” and then add the fever observation
- Investigation has S&S and Daily Monitoring does not have S&S
  - Add a recovery date to S&S that do not have a recovery date
  - Add the Fever observation to Fever “No”

### Nursing Note

#### Reminders:

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context.
- Ensure the subject is Daily Monitoring

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## Closing a Contact Case

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**Isolation Intervention**

- Update the disposition to Complete

**Reminders:**

- After you save the isolation intervention, exit the screen using the Cancel button. This will take your isolation out of context.

**Investigation Disposition**

- Change the investigation disposition to Completed, further action is not required.

**Reminders:**

- Ensure to change the disposition date as it defaults to the last disposition date recorded.

**Close Investigation (Status)**

**Nursing Note**

**Reminders:**

- Ensure the note date and time reflect the correct date/time that the information was gathered and that note is made with the investigation in context .
- Ensure the subject is Closing Contact Case