



## **P16-0371 Panorama Project**

# **Panorama Investigation Management User Manual**

## **PNS CLT 101 Client Records Management Addendum**

Version 1.0

Dated: 2018-10-16





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## 1 COURSE UPDATE

The Client Records Management course was originally designed for Immunization Training and this addendum has been created to include additional client screens used for Investigation & Outbreak Management. These new sections are:

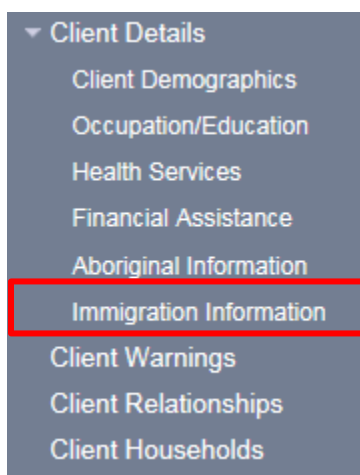
1. Immigration Information
2. Aboriginal Information
3. Health Services
4. Risk Factors

## 2 IMMIGRATION INFORMATION

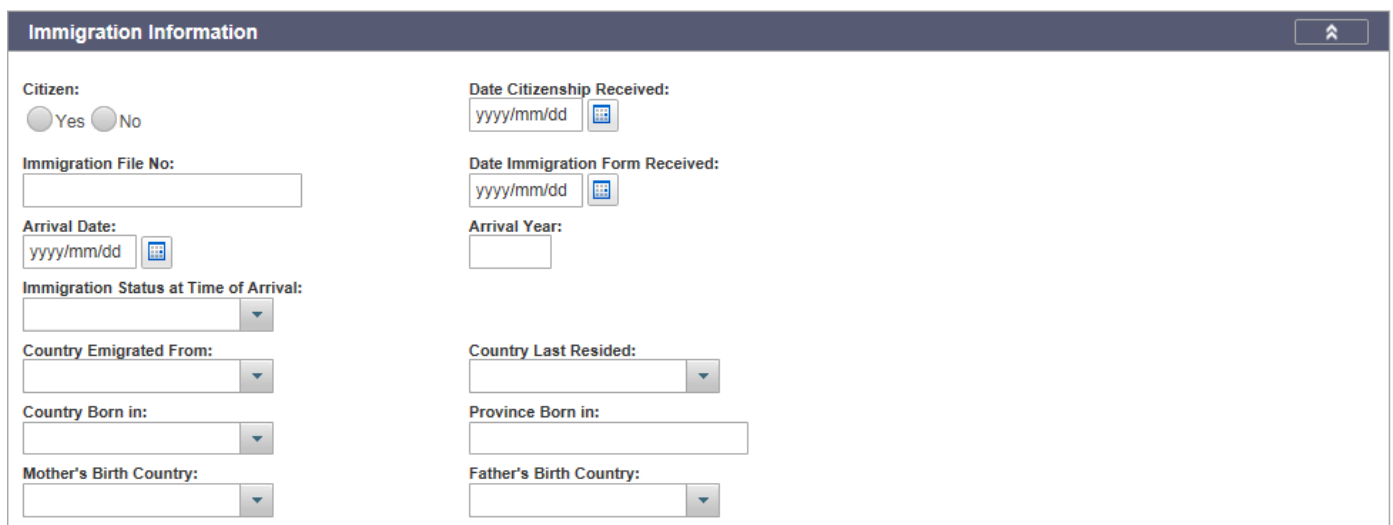
The Immigration Information screen allows users to create and update immigration information related to a client. There are no Panorama mandatory fields on this screen which must be completed in order to save the record.

### 2.1 Create Immigration Information Record

1. After setting a client In Context, go to the **Left-Hand Navigation** menu.
2. Under the Client/Subject/Client Details section, click **Immigration Information**.



The Immigration Information screen is displayed.



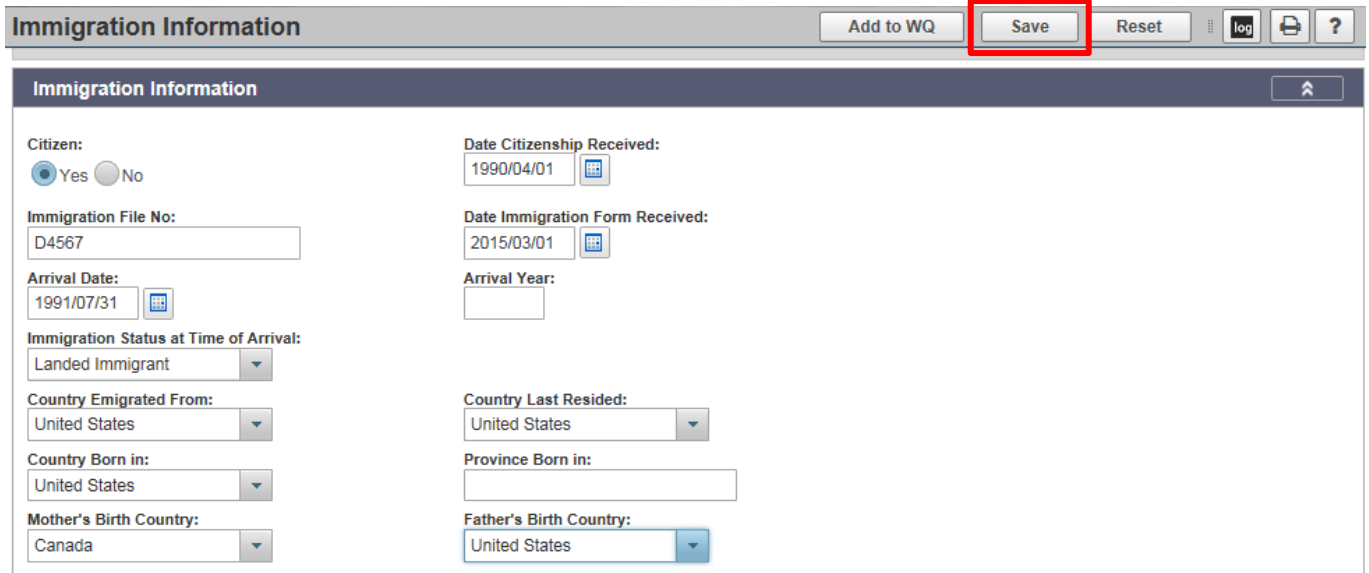
A screenshot of a web form titled "Immigration Information" with a dark header bar. The form contains the following fields and controls:

- Citizen:** Radio buttons for "Yes" and "No".
- Immigration File No:** A text input field.
- Arrival Date:** A date picker field showing "yyyy/mm/dd".
- Immigration Status at Time of Arrival:** A dropdown menu.
- Country Emigrated From:** A dropdown menu.
- Country Born in:** A dropdown menu.
- Mother's Birth Country:** A dropdown menu.
- Date Citizenship Received:** A date picker field showing "yyyy/mm/dd".
- Date Immigration Form Received:** A date picker field showing "yyyy/mm/dd".
- Arrival Year:** A text input field.
- Country Last Resided:** A dropdown menu.
- Province Born in:** A text input field.
- Father's Birth Country:** A dropdown menu.

3. Select the appropriate radial button for **Citizen**.
4. Complete fields with available information.

**Note:** there are no Panorama mandatory fields on this screen.

5. Click **Save** button.



The screenshot shows a web application interface for "Immigration Information". At the top, there is a header bar with the title "Immigration Information" and several buttons: "Add to WQ", "Save" (highlighted with a red box), "Reset", "log", a printer icon, and a help icon. Below the header is a form with the following fields:

- Citizen:** Radio buttons for "Yes" (selected) and "No".
- Immigration File No:** Text input field containing "D4567".
- Arrival Date:** Date picker showing "1991/07/31".
- Immigration Status at Time of Arrival:** Dropdown menu showing "Landed Immigrant".
- Country Emigrated From:** Dropdown menu showing "United States".
- Country Born in:** Dropdown menu showing "United States".
- Mother's Birth Country:** Dropdown menu showing "Canada".
- Date Citizenship Received:** Date picker showing "1990/04/01".
- Date Immigration Form Received:** Date picker showing "2015/03/01".
- Arrival Year:** Empty text input field.
- Country Last Resided:** Dropdown menu showing "United States".
- Province Born in:** Empty text input field.
- Father's Birth Country:** Dropdown menu showing "United States".

A message will display indicating the record was successfully saved..

## 2.2 Update Immigration Information Record

---

1. With the client in context, navigate to the **Immigration Information** screen.
2. Update the relevant fields.
3. Click **Save** button.

**Immigration Information** Add to WQ Save Reset log Print ?

**Immigration Information** ↑

**Citizen:**  
 Yes  No

**Immigration File No:**  
D4567

**Arrival Date:**  
1991/07/31 Calendar

**Immigration Status at Time of Arrival:**  
Landed Immigrant ▼

**Country Emigrated From:**  
United States ▼

**Country Born in:**  
United States ▼

**Mother's Birth Country:**  
Canada ▼

**Date Citizenship Received:**  
1990/04/01 Calendar

**Date Immigration Form Received:**  
2015/03/01 Calendar

**Arrival Year:**

**Country Last Resided:**  
Virgin Islands, U.S. ▼

**Province Born in:**

**Father's Birth Country:**  
United States ▼

**Message:** i Immigration information was successfully updated.

A message will display indicating the record was successfully updated.

**Note:** There is no history table to track changes made to Immigration Information.

**Note:** Immigration Information records cannot be deleted.

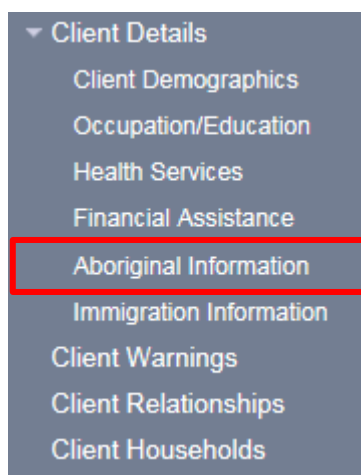


### 3 ABORIGINAL INFORMATION

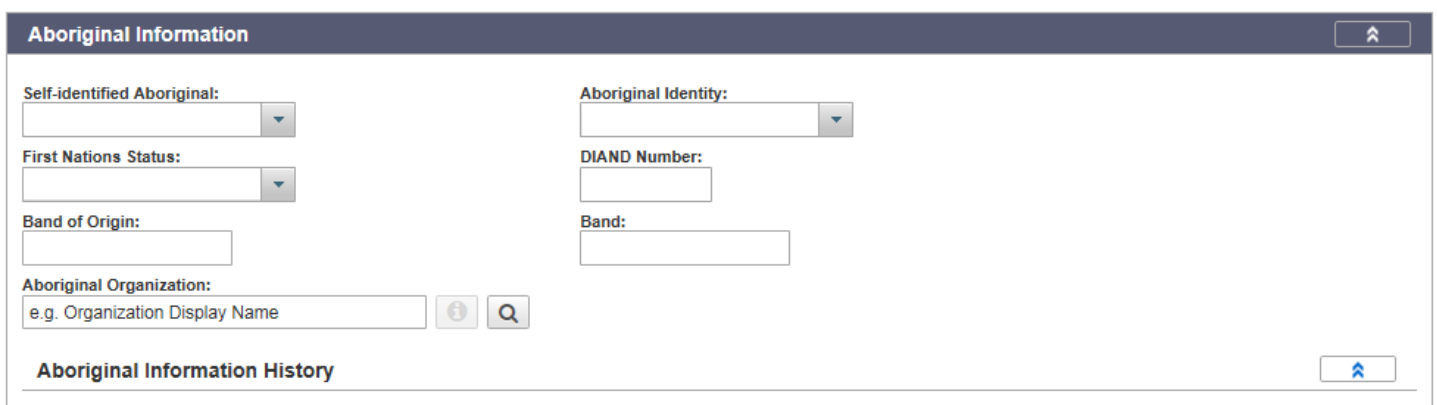
The Aboriginal Information screen allows a user to create or update information related to a client's aboriginal status. There are no Panorama mandatory fields on this screen which must be completed in order to save the record.

#### 3.1 Create Aboriginal Information Record

1. After setting a client In Context, go to the **Left-Hand Navigation** menu.
2. Under the **Client/Subject/Client Details** section, click **Aboriginal Information**.



The **Aboriginal Information** screen is displayed.



A screenshot of the 'Aboriginal Information' form. The form has a dark blue header with the title 'Aboriginal Information' and an upward arrow icon. The form contains several fields:
 

- 'Self-identified Aboriginal:' with a dropdown menu.
- 'Aboriginal Identity:' with a dropdown menu.
- 'First Nations Status:' with a dropdown menu.
- 'DIAND Number:' with a text input field.
- 'Band of Origin:' with a text input field.
- 'Band:' with a text input field.
- 'Aboriginal Organization:' with a text input field containing 'e.g. Organization Display Name', an information icon (i), and a search icon (Q).

 At the bottom of the form, there is a section titled 'Aboriginal Information History' with an upward arrow icon.

3. Complete the fields with the available information.

**Note:** there are no Panorama mandatory fields on this screen.



**Tip:** Band of Origin and Band are auto-complete fields. A selection of options will appear when typing the response – select the appropriate value from the list.

4. Click **Save** button.

**Aboriginal Information**
Add to WQ
Save
Reset
log
?

Client ID: 205

Phone Number: (-)

Name(Last, First Middle)/Gender: Grape, Red / Male

Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority

Health Card No: -

Additional ID Type / Additional ID: Provincial health service provider identifier / -

Active

Date of Birth / Age: 1982 Jul 01 / 36 years

**Aboriginal Information**
↑

Self-identified Aboriginal: Yes

First Nations Status: Off reserve

Band of Origin: Millbrook - We'kopekwtik

Aboriginal Organization: e.g. Organization Display Name

Aboriginal Identity: First Nations

DIAND Number: 1234567891

Band: Millbrook - We'kopekwtik

**Aboriginal Information History**
↑

A message will display indicating the record was successfully saved.

The record now appears in the **Aboriginal Information History** table, the **Effective From** date of the record defaults to the current date.

**Aboriginal Information**
✓
↑

Self-identified Aboriginal: Yes

First Nations Status: Off reserve

Band of Origin: Millbrook - We'kopekwtik

Aboriginal Organization: e.g. Organization Display Name

Aboriginal Identity: First Nations

DIAND Number: 1234567891

Band: Millbrook - We'kopekwtik

**Aboriginal Information History**
✓
↑

	Self-identified Aboriginal	Aboriginal Identity	FN Status	DIAND #	Aboriginal Organization	Effective From	Effective To
1	Yes	First Nations	Off reserve	1234567891		2018 Jul 19	
Total: 1							

## 3.2 Update Aboriginal Information Record

1. With the client in context, navigate to the **Aboriginal Information** screen.
2. Update the relevant fields.
3. Click **Save** button.

A message will display indicating the record was successfully updated.

The new record is added to the history table, the **Effective From** date defaults to the current date. The previous record's **Effective To** date defaults to the current date.

**Aboriginal Information**
✓ [↑](#)

**Self-identified Aboriginal:**  
Yes ▼

**First Nations Status:**  
On reserve ▼

**Band of Origin:**  
Millbrook - We'kopekwith

**Aboriginal Organization:**  
e.g. Organization Display Name [i] [Q]

**Aboriginal Identity:**  
First Nations ▼

**DIAND Number:**  
1234567891

**Band:**  
Millbrook - We'kopekwith

**Aboriginal Information History**
✓ [↑](#)

☑	Self-identified Aboriginal	Aboriginal Identity	FN Status	DIAND #	Aboriginal Organization	Effective From	Effective To
▶	Yes	First Nations	On reserve	1234567891		2018 Jul 19	
▶	Yes	First Nations	Off reserve	1234567891		2018 Jul 19	2018 Jul 19
<b>Total: 2</b>							

◀ ▶
1
▶ ▶
10 ▼

**Note:** Aboriginal Information records **cannot** be deleted.

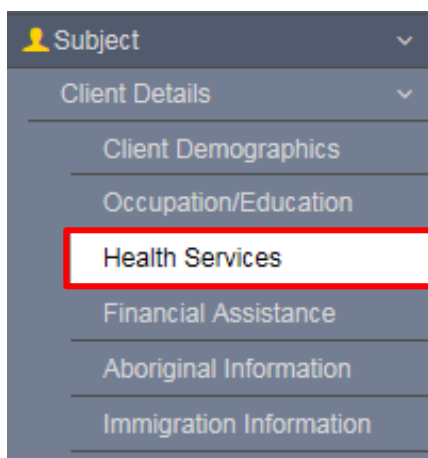
## 4 HEALTH SERVICES

This page allows users to create and update the health services information related to a client. This includes the providers associated to the client and the service delivery locations associated to the client.


A client **must** be in context to access this screen.

**Note:** the Service Delivery Location modal will not be used in Nova Scotia.

1. After setting a client In Context, go to the **Left-Hand Navigation** menu.
2. Under the **Client/Subject** section, click **Health Services**.

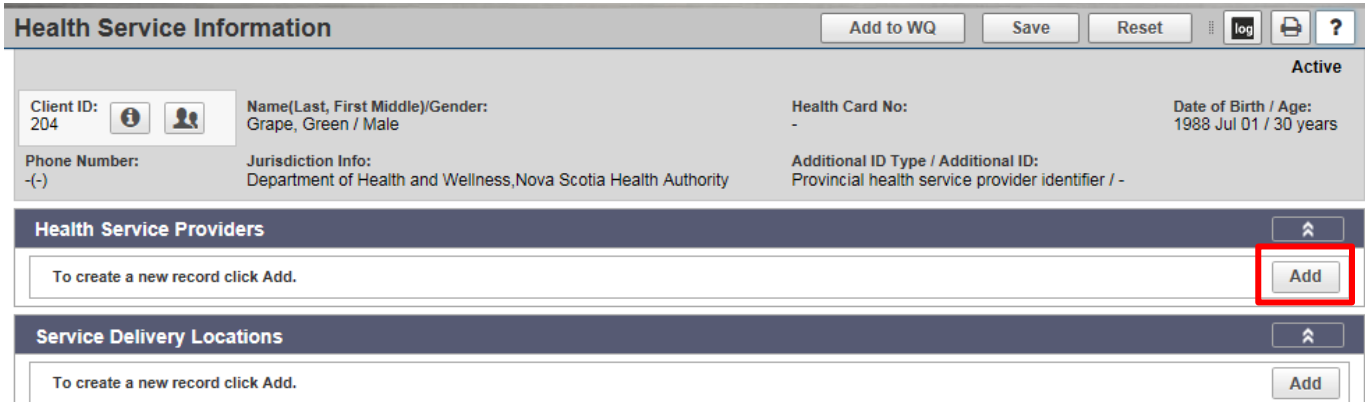


The **Health Service Information** screen is displayed.

Health Service Information				Add to WQ	Save	Reset	log	Print	?
<b>Active</b>									
Client ID: 204	 	Name (Last, First Middle)/Gender: Grape, Green / Male	Health Card No: -	Date of Birth / Age: 1988 Jul 01 / 30 years					
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority		Additional ID Type / Additional ID: Provincial health service provider identifier / -						
Health Service Providers									
To create a new record click Add.									
<b>Add</b>									
Service Delivery Locations									
To create a new record click Add.									
<b>Add</b>									



## 4.1 Add a Health Service Provider

1. Click **Add** button.



**Health Service Information** Add to WQ Save Reset log Print ?

**Active**

Client ID: 204   Name (Last, First Middle)/Gender: Grape, Green / Male Health Card No: - Date of Birth / Age: 1988 Jul 01 / 30 years

Phone Number: (-) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Health Service Providers** ^

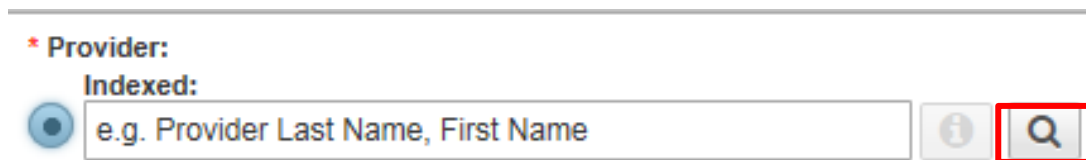
To create a new record click Add. **Add**

**Service Delivery Locations** ^

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




The **Add Provider Modal** is displayed.

2. Search and select **Indexed Provider** using the **Advanced Search** button.



**\* Provider:**

**Indexed:**

 e.g. Provider Last Name, First Name  

The **Provider Advanced Search** screen is displayed.

**Note: Do not use** the type-ahead search function – Panorama will not save the record when that type of search is completed.

3. Enter search criteria and click **Search** button.

The search results are displayed in the table below.

**Provider Advanced Search** x

Include Inactive

Last Name:  First Name:  Role:

SDL Name:  Identifier Type:  Identifier Value:

Province / Territory:  City / Town:

**Search**

Last Name	First Name	Role	Professional Status	Identifier	Telephone	Service Delivery Location
DRAKE	MARY	Registered Nurse	Active	CRNNS RN ID:22197	902-270-4700 x2	
DRAKE	Wendy	Medical Doctor	Active	CPSNS ID:11416	902-869-6101	

Total: 2 10

To create a new record click Add.

4. Select Provider to be added to the record.
5. Enter **Effective Date**.
6. Click **Apply** button.

**Health Service Providers** ^

**Add Provider**

\* Provider:

Indexed:

Non-Indexed:

\* Effective From:   To:

**Apply**

The Provider is added to the factory table.

7. Click **Save** button.

The system responds with a message that the record was saved.

**Health Service Information** Add to WQ **Save** Reset log ?

**Client ID:** 204 **Name(Last, First Middle)/Gender:** Grape, Green / Male **Health Card No:** - **Date of Birth / Age:** 1988 Jul 01 / 30 years

**Phone Number:** (-) **Jurisdiction Info:** Department of Health and Wellness, Nova Scotia Health Authority **Additional ID Type / Additional ID:** Provincial health service provider identifier / -

---

**Health Service Providers** Add

Update Delete Clear Preferred Set Preferred

	Provider	Phone Number	Effective From	Effective To	Preferred
<input type="radio"/>	DRAKE, Wendy Tamara ,Medical Doctor,	workplace: 902-869-6101	2018 Aug 20		

Total: 1 10

## 4.2 Set Preferred Provider

If more than one provider is listed, a preferred provider can be set.

1. Select **Provider**.
2. Click **Set Preferred** button.

**Health Service Providers** Add

Update Delete Clear Preferred **Set Preferred**

	Provider	Phone Number	Effective From	Effective To	Preferred
<input checked="" type="radio"/>	DRAKE, Wendy Tamara ,Medical Doctor,	workplace: 902-869-6101	2018 Aug 20		
<input type="radio"/>	WILLIAMS, Alicia Gail Howe ,Medical Doctor,	workplace: 902-473-1234	2018 Jun 01		

Total: 2 10

A checkbox appears in the Preferred Column.

3. Click **Save** button

**Health Service Providers** Add

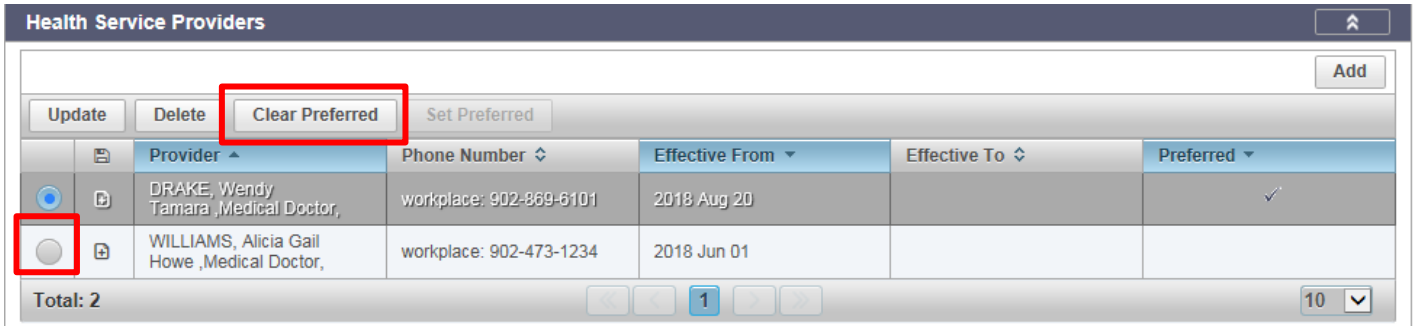
Update Delete Clear Preferred Set Preferred

	Provider	Phone Number	Effective From	Effective To	Preferred
<input type="radio"/>	DRAKE, Wendy Tamara ,Medical Doctor,	workplace: 902-869-6101	2018 Aug 20		<input checked="" type="checkbox"/>
<input type="radio"/>	WILLIAMS, Alicia Gail Howe ,Medical Doctor,	workplace: 902-473-1234	2018 Jun 01		

Total: 2 10

### 4.3 Clear Preferred Provider

1. Select **Provider**.
2. Click **Clear Preferred** button.
3. Click **Save** button



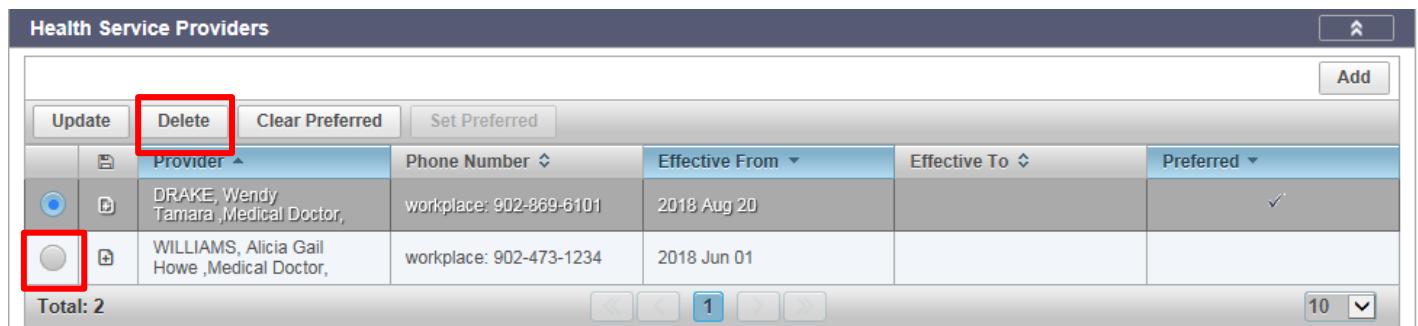
The screenshot shows a table with the following data:

Update	Delete	Clear Preferred	Set Preferred	Provider	Phone Number	Effective From	Effective To	Preferred
<input checked="" type="radio"/>		<input type="checkbox"/>	<input type="checkbox"/>	DRAKE, Wendy Tamara, Medical Doctor,	workplace: 902-869-6101	2018 Aug 20		✓
<input type="radio"/>		<input type="checkbox"/>	<input type="checkbox"/>	WILLIAMS, Alicia Gail Howe, Medical Doctor,	workplace: 902-473-1234	2018 Jun 01		

Total: 2

### 4.4 Delete Provider


1. Select **Provider**.
2. Click **Delete** button.
3. Click **Save** button.



The screenshot shows a table with the following data:

Update	Delete	Clear Preferred	Set Preferred	Provider	Phone Number	Effective From	Effective To	Preferred
<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DRAKE, Wendy Tamara, Medical Doctor,	workplace: 902-869-6101	2018 Aug 20		✓
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WILLIAMS, Alicia Gail Howe, Medical Doctor,	workplace: 902-473-1234	2018 Jun 01		

Total: 2

 **Tip:** Instead of deleting a provider, an Effective To date can be added to the provider [Select **Provider** > Click **Update** button >Add **Effective To** date]. This will maintain a complete list of providers associated with the client over time.



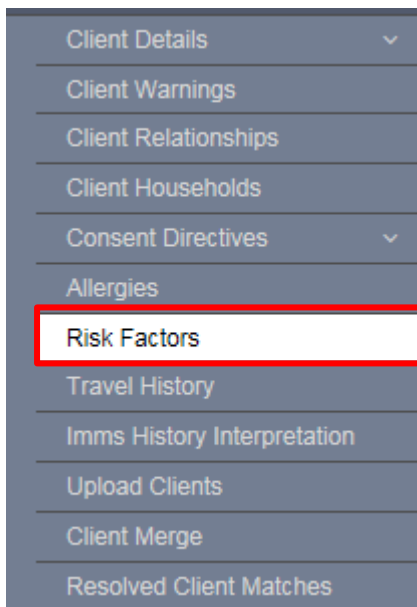
## 5 RISK FACTORS

Risk factors are any state that increases the probability of transmitting or acquiring a communicable disease, or affecting its course or management. Risk factors usually represent a state that has a span of time, as opposed to exposures that are characterized by subject, place, and/or time. Risk factors are associated directly with the client, however, a user may designate them as pertinent to an investigation.

A user may only record risk factors that are available based on the Encounter Group(s) they have access to. When recorded under an investigation, the system will present a list of pre-set risk factors determined by the Encounter Group and Disease(s) associated with the investigation. These pre-set risk factors should be used to guide the client interview. Additional risk factors can be added as applicable.

### 5.1 Pre-set Risk Factors

1. After setting a client **and** investigation In Context, go to the **Left-Hand Navigation** menu.
2. Under the **Client/Subject** section, click **Risk Factors**.



The system displays the Risk Factors screen.

**Risk Factors** Add to WQ Save Reset log print ?

**Active**

Client ID: 204 Name(Last, First Middle)/Gender: Grape, Green / Male Health Card No: - Date of Birth / Age: 1988 Jul 01 / 30 years

Phone Number: (-) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Risk Factor** Add

To create a new record click Add. Add

With an investigation is in context, the pre-set risk factors for the disease associated with the investigation are displayed. The pre-set risk factors are intended as a guide for the investigator to use to confirm whether or not the risk factor is applicable to the investigation.

Each pre-set risk factor should be updated indicating if the risk factor is pertinent to the investigation, the client's response to the risk factor and other fields as required.

**Risk Factors** Add to WQ Save Reset log print ?

**Active**

Client ID: 88 Name(Last, First Middle)/Gender: TESTSEM, Susan / Female Health Card No: - Date of Birth / Age: 1990 May 11 / 28 years

Phone Number: (-) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Investigation** Add


Investigation ID: 32 Status: OPEN Disposition: Investigation in progress Investigator: -

Disease: Hepatitis C PHAC Data/Type: 2018 May 08 / Date Reported Etiologic Agent: - Authority/Classification: Provincial / Case - Person Under Investigation / 2018 May 01

**Risk Factor** Add

Update View Delete Set Response

<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input type="checkbox"/>	✓	Acupuncture		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Alcoholism		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-branding		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-implanting		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-Other (specify)		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-scarification		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Casual sex while travelling (specify)		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Chronic renal disease/dialysis		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Co-infection with another STBBI (specify)		2018 Jun 01					

 **Tip:** At any time click the **Reset** button to clear any unsaved values entered on the screen. The **X** button will close the screen.

## 5.2 Update/View a Risk Factor

1. Select Risk Factor to be updated.
2. Click **Update** button.

Risk Factor										
Add										
Update View Delete Set Response										
<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Acupuncture		2018 Jun 01					
<input checked="" type="checkbox"/>		✓	Alcoholism		2018 Jun 01					
<input type="checkbox"/>		✓	Body modification-branding		2018 Jun 01					
<input type="checkbox"/>		✓	Body modification-implanting		2018 Jun 01					
<input type="checkbox"/>		✓	Body modification-Other (specify)		2018 Jun 01					

The **Update Risk Factor** screen will be displayed.

The **Risk Factor** field will be pre-populated with the selected Risk Factor.



**Tip:** for **pre-set risk factors**, the category field will be blank in the update risk factor screen. **Do not select a value from this field – leave blank.**

**Update Risk Factor** Apply Reset

\* Risk Factor: Alcoholism
 Risk Factor Pertinent to investigation in context

Additional Information:

\* Response:  Frequency:  Reported By:

Effective From:  Effective To:  End Date Reason:  \* Reported Date: 2018/06/01

Reported by Details:

Apply Reset

3. Indicate if **Risk Factor is Pertinent to investigation in context**.

**Note:** If there is no investigation in context, this field will not be displayed.

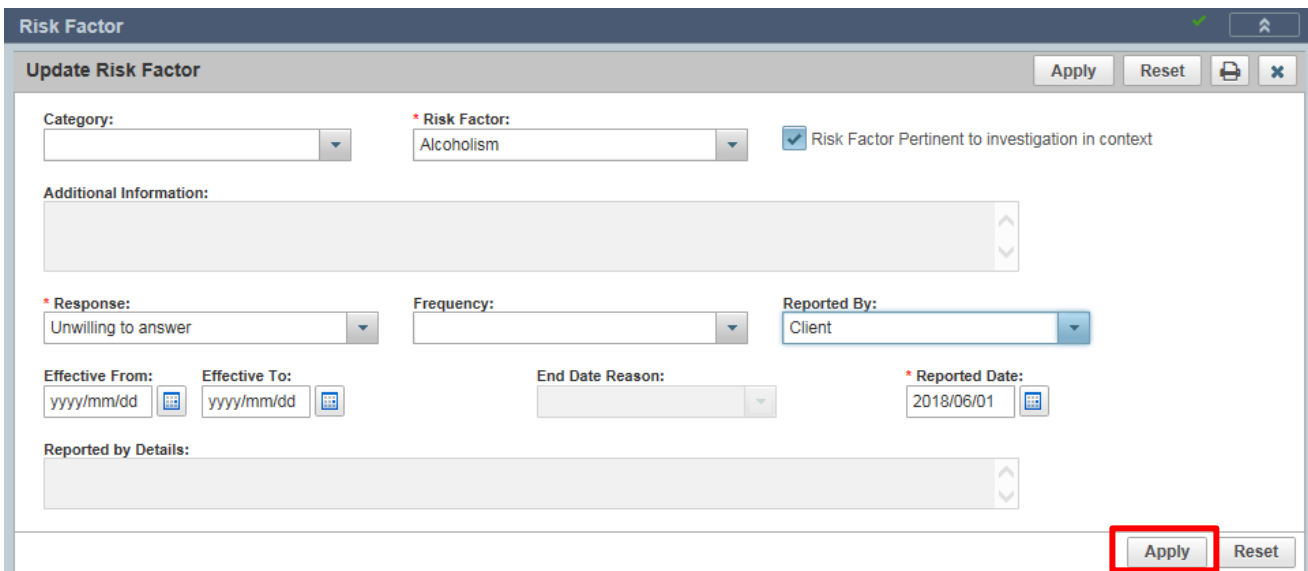
4. Select **Response, Frequency and Reported By**.

5. Select **Effective From** date.

6. Select **Reported Date** or leave the default date (current date).

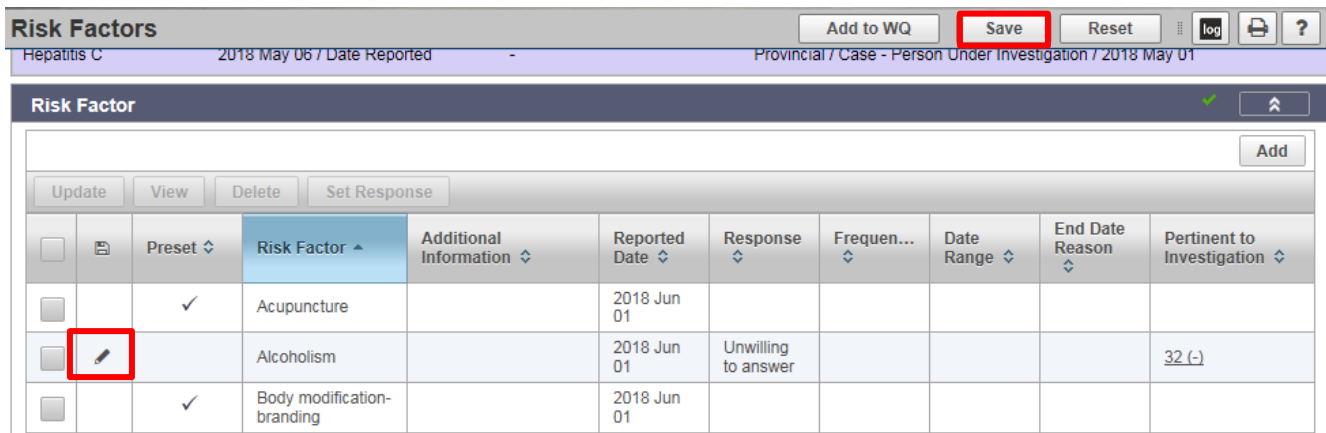
7. Enter **Reported By Details** if field is enabled.

8. Click **Apply** button.



The changes to the Risk Factor are saved in draft form.

9. Click **Save** button



Update	View	Delete	Set Response	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Acupuncture		2018 Jun 01					
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Alcoholism		2018 Jun 01	Unwilling to answer				32 (-)
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Body modification-branding		2018 Jun 01					

The system displays a message the risk factor was successfully updated.

**Note:** Click the View button to review a read-only version of the risk factor.



**Tip:** To display all pre-set risk factors on one page, change the records per page view located at the bottom of the screen to **All**.

<input type="checkbox"/>	✓	Co-infection with another STBBI (specify)	2018 Jun 01						
<input type="checkbox"/>	✓	Current or history of incarceration	2018 Jun 01						

Total: 60

1 2 3 4 5 6 10

### 5.3 End Date a Risk Factor

Pre-set risk factors cannot be deleted. If the pre-set risk factor previously made effective is no longer applicable, an **Effective To** date can be used to indicate the risk factor is no longer relevant in respect to the client/investigation.

1. Select risk factor.
2. Click **Update** button.
3. Select **Effective To** date.
4. Select **End Date Reason**.
5. Click **Apply** button.

**Note:** the **Effective From** date field must be completed in order to save the **Effective To** date.

**Risk Factor**

**Update Risk Factor** Apply Reset

\* Risk Factor: Alcoholism  Risk Factor Pertinent to investigation in context

Additional Information:

\* Response: Unwilling to answer Frequency: Reported By: Client

Effective From: 2012/07/01 Effective To: 2018/07/11 End Date Reason: No longer applicable

\* Reported Date: 2018/06/01

Reported by Details:

Apply Reset

The record will be saved in draft form.

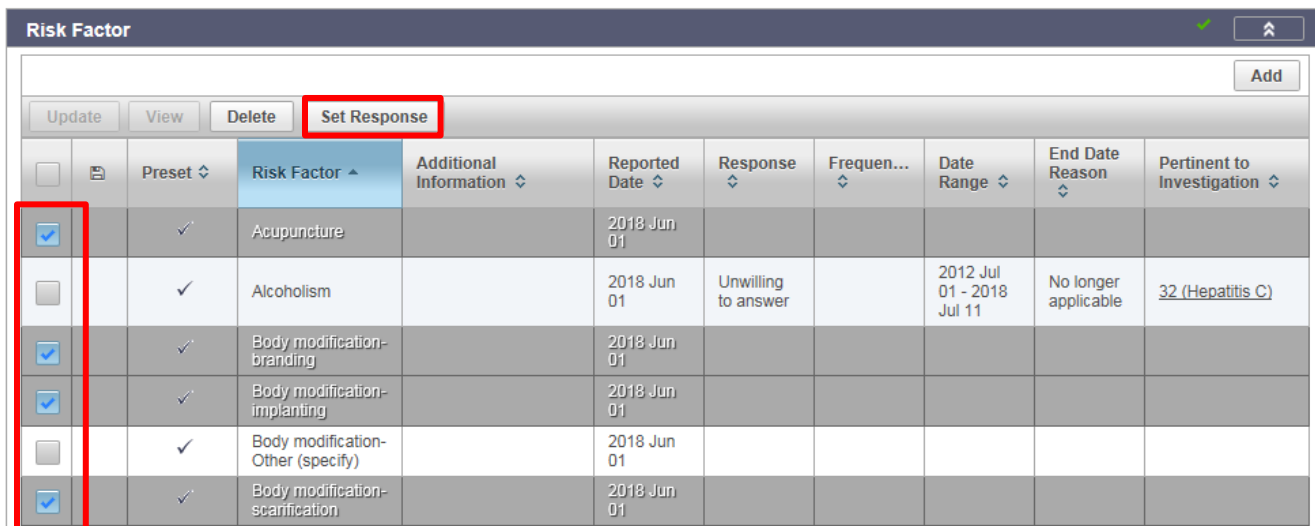
6. Click **Save** button.

The system will display a message that the risk factor has been successfully updated.

## 5.4 Set Response for Multiple Risk Factors

The **Set Response** button can be used to select a response for multiple risk factors simultaneously. The response for the risk factors must be the same.

1. Select risk factors to which a single response will be selected.
2. Click **Set Response** button.



Risk Factor										
Add										
Update View Delete <b>Set Response</b>										
<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input checked="" type="checkbox"/>		✓	Acupuncture		2018 Jun 01					
<input type="checkbox"/>		✓	Alcoholism		2018 Jun 01	Unwilling to answer		2012 Jul 01 - 2018 Jul 11	No longer applicable	32 (Hepatitis C)
<input checked="" type="checkbox"/>		✓	Body modification-branding		2018 Jun 01					
<input checked="" type="checkbox"/>		✓	Body modification-implanting		2018 Jun 01					
<input type="checkbox"/>		✓	Body modification-Other (specify)		2018 Jun 01					
<input checked="" type="checkbox"/>		✓	Body modification-scarification		2018 Jun 01					

The **Set Response** screen will be displayed.

3. Select **Response**.
4. Click **Apply** button.

**Risk Factor**

**Set Response** Apply Reset Print Close

\* Response:

Apply Reset Add

Update View Delete Set Response

<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input checked="" type="checkbox"/>		✓	Acupuncture		2018 Jun 01					
<input type="checkbox"/>		✓	Alcoholism		2018 Jun 01	Unwilling to answer		2012 Jul 01 - 2018 Jul 11	No longer applicable	32 (Hepatitis C)
<input checked="" type="checkbox"/>		✓	Body modification-branding		2018 Jun 01					
<input checked="" type="checkbox"/>		✓	Body modification-implanting		2018 Jun 01					

The response is added to each of the selected risk factors.  
The records are in draft status.

**Risk Factor** Add

Update View Delete Set Response

<input type="checkbox"/>		Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Acupuncture		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Alcoholism		2018 Jun 01	Unwilling to answer		2012 Jul 01 - 2018 Jul 11	No longer applicable	32 (Hepatitis C)
<input type="checkbox"/>		✓	Body modification-branding		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Body modification-implanting		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Body modification-Other (specify)		2018 Jun 01					
<input type="checkbox"/>		✓	Body modification-scarification		2018 Jun 01	Not Applicable				

5. Click **Save** button.

The system will display a message that the risk factors have been successfully updated.

Risk Factors										
<span>Add to WQ</span> <span><b>Save</b></span> <span>Reset</span> <span>log</span> <span>Print</span> <span>?</span>										
<span>Update</span> <span>View</span> <span>Delete</span> <span>Set Response</span>										
<input type="checkbox"/>		Preset $\updownarrow$	Risk Factor $\wedge$	Additional Information $\updownarrow$	Reported Date $\updownarrow$	Response $\updownarrow$	Frequen... $\updownarrow$	Date Range $\updownarrow$	End Date Reason $\updownarrow$	Pertinent to Investigation $\updownarrow$
<input type="checkbox"/>		✓	Acupuncture		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Alcoholism		2018 Jun 01	Unwilling to answer		2012 Jul 01 - 2018 Jul 11	No longer applicable	<a href="#">32 (Hepatitis C)</a>
<input type="checkbox"/>		✓	Body modification-branding		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Body modification-implanting		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Body modification-Other (specify)		2018 Jun 01					
<input type="checkbox"/>		✓	Body modification-scarification		2018 Jun 01	Not Applicable				

Risk Factors was successfully updated.



## 5.5 Add Single Risk Factor

1. With a client, and investigation if applicable, in context, navigate to **the Risk Factors** screen.
2. Click **Add** button to add a risk factor not included in the pre-set list.



**Risk Factors** Add to WQ Save Reset log

**Active**

Client ID: 88   Name (Last, First Middle)/Gender: TESTSEM, Susan / Female Health Card No: - Date of Birth / Age: 1990 May 11 / 28 years

Phone Number: (-) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Investigation** ↑

Investigation ID: 32 Status: OPEN Disposition: Investigation in progress Investigator: -

Disease: Hepatitis C PHAC Data/Type: 2018 May 08 / Date Reported Etiologic Agent: - Authority/Classification: Provincial / Case - Person Under Investigation / 2018 May 01

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**Risk Factor** ↑

**Add**

Update View Delete Set Response

<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input type="checkbox"/>	✓	Acupuncture		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Alcoholism		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-branding		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-implanting		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-Other (specify)		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-scarification		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Casual sex while travelling (specify)		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Chronic renal disease/dialysis		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Co-infection with another STBBI (specify)		2018 Jun 01					

The **Add Risk Factor** screen is displayed.

**Risk Factor** ↑

**Add Risk Factor** Apply Reset

Category:  \* Risk Factor:   Risk Factor Pertinent to investigation in context

Additional Information:

\* Response:  Frequency:  Reported By:

Effective From:  Effective To:  End Date Reason:  \* Reported Date: 2018/07/19

Reported by Details:

Apply Reset

3. Select **Category** and **Risk Factor**.

4. Indicate if **Risk Factor is Pertinent to investigation in context**.

**Note:** If there is no investigation in context, this field will not be displayed.

5. Enter **Additional Information** if the field is enabled.

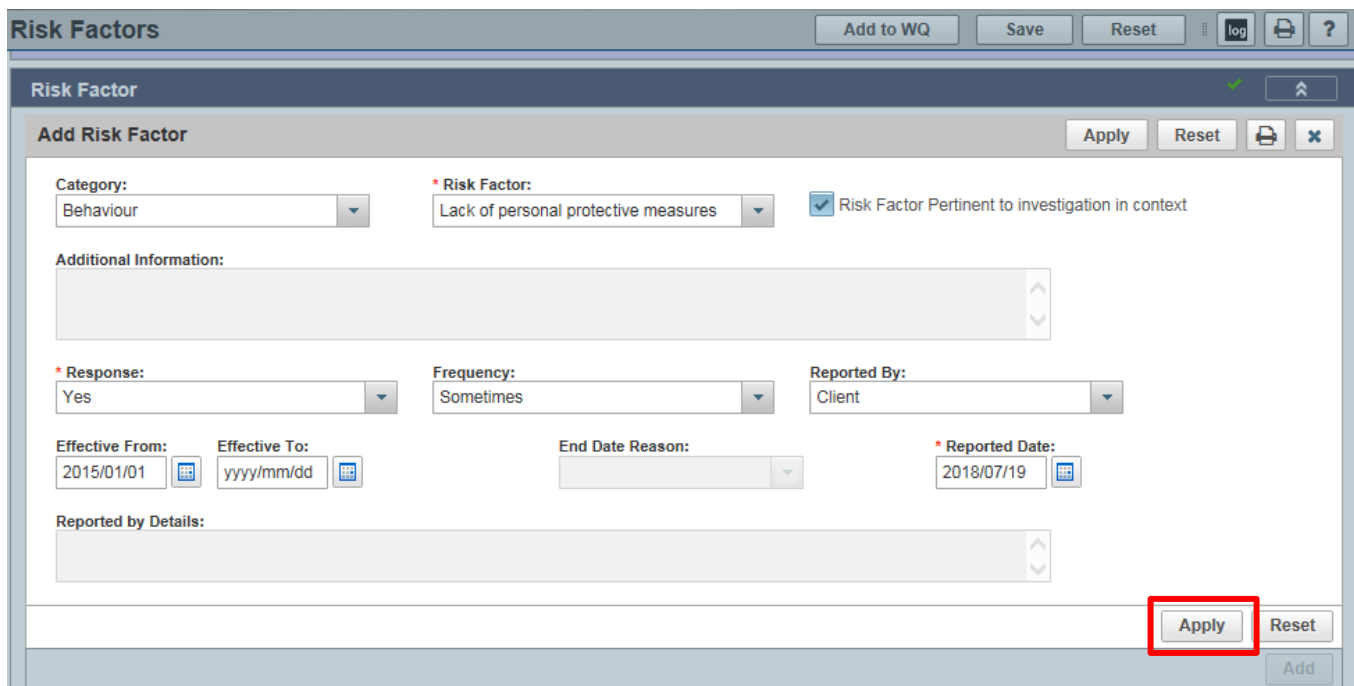
6. Select **Response, Frequency, and Reported By**.

7. Select **Effective From** date.

8. Select **Reported Date** or leave the default (current date).

9. Enter **Reported By Details** if field is enabled.

10. Click **Apply** button.



The risk factor will appear in the risk factor table in draft status.

11. Click **Save** button

The system will display a message that the risk factors were successfully updated.

## 5.6 Delete Risk Factor(s)

If a risk factor is **not included** as part of the pre-set list, it can be deleted.

1. Select **Risk Factor(s)** to be deleted.

2. Click **Delete** button.

Risk Factors										
<span>Add to WQ</span> <span>Save</span> <span>Reset</span> <span>log</span> <span>Print</span> <span>?</span>										
<span>Update</span> <span>View</span> <span>Delete</span> <span>Set Response</span>										
<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Acupuncture		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Alcoholism		2018 Jun 01	Unwilling to answer		2012 Jul 01 - 2018 Jul 11	No longer applicable	<a href="#">32 (Hepatitis C)</a>
<input type="checkbox"/>		✓	Body modification-branding		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Body modification-implanting		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Body modification-Other (specify)	Test	2018 Jun 01	Unable to answer				
<input type="checkbox"/>		✓	Body modification-scarification		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Casual sex while travelling (specify)		2018 Jun 01					
<input type="checkbox"/>		✓	Chronic renal disease/dialysis		2018 Jun 01	Unable to answer				
<input type="checkbox"/>		✓	Co-infection with another STBBI (specify)		2018 Jun 01					
<input checked="" type="checkbox"/>			Consumed eggs (specify)	Food truck	2018 Jul 23	Yes	Sometim...	2018 Jul 01		<a href="#">32 (Hepatitis C)</a>

The system displays the confirmation screen.

3. Select Reason for Deletion.

Risk Factors										
<span>Add to WQ</span> <span>Save</span> <span>Reset</span> <span>log</span> <span>Print</span> <span>?</span>										
<span>Update</span> <span>View</span> <span>Delete</span> <span>Set Response</span>										
<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>		✓	Acupuncture		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Alcoholism					2012 Jul 01 - 2018 Jul 11	No longer applicable	<a href="#">32 (Hepatitis C)</a>
<input type="checkbox"/>		✓	Body modifi branding							
<input type="checkbox"/>		✓	Body modifi implanting							
<input type="checkbox"/>		✓	Body modifi Other (specify)		01	answer				
<input type="checkbox"/>		✓	Body modification-scarification		2018 Jun 01	Not Applicable				
<input type="checkbox"/>		✓	Casual sex while travelling (specify)		2018 Jun 01					
<input type="checkbox"/>		✓	Chronic renal disease/dialysis		2018 Jun 01	Unable to answer				
<input type="checkbox"/>		✓	Co-infection with another STBBI (specify)		2018 Jun 01					
<input checked="" type="checkbox"/>			Consumed eggs (specify)	Food truck	2018 Jul 23	Yes	Sometim...	2018 Jul 01		<a href="#">32 (Hepatitis C)</a>

**Confirmation** ✕

Select the reason for deletion of: Consumed eggs (specify)

Reason for Deletion:

4. Click **Confirm** button.

**Risk Factors** Add to WQ Save Reset log Print ?

Update View Delete Set Response

<input type="checkbox"/>	<input type="checkbox"/>	Preset	Risk Factor	Additional Information	Reported Date	Response	Frequen...	Date Range	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	<input type="checkbox"/>	✓	Acupuncture		2018 Jun 01	Not Applicable				
<input type="checkbox"/>	<input type="checkbox"/>	✓	Alcoholism					2012 Jul 01 - 2018 Jul 11	No longer applicable	<a href="#">32 (Hepatitis C)</a>
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification branding							
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification implanting							
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification Other (specify)		01	answer				
<input type="checkbox"/>	<input type="checkbox"/>	✓	Body modification-scarification		2018 Jun 01	Not Applicable				
<input type="checkbox"/>	<input type="checkbox"/>	✓	Casual sex while travelling (specify)		2018 Jun 01					
<input type="checkbox"/>	<input type="checkbox"/>	✓	Chronic renal disease/dialysis		2018 Jun 01	Unable to answer				
<input type="checkbox"/>	<input type="checkbox"/>	✓	Co-infection with another STBBI (specify)		2018 Jun 01					
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Consumed eggs (specify)	Food truck	2018 Jul 23	Yes	Sometim...	2018 Jul 01		<a href="#">32 (Hepatitis C)</a>

**Confirmation** ✕

Select the reason for deletion of: Consumed eggs (specify)

Reason for Deletion:

Entered in Error ▼

**Confirm**

The record is saved in draft status.

5. Click **Save** button.

A message is displayed that Risk Factors were successfully updated.