



P16-0371 Panorama Project

**Panorama Investigation Management
User Manual**

PNS IOM 102 Investigation Management Part 1

Version 1.1

Dated: 2019- 05-31

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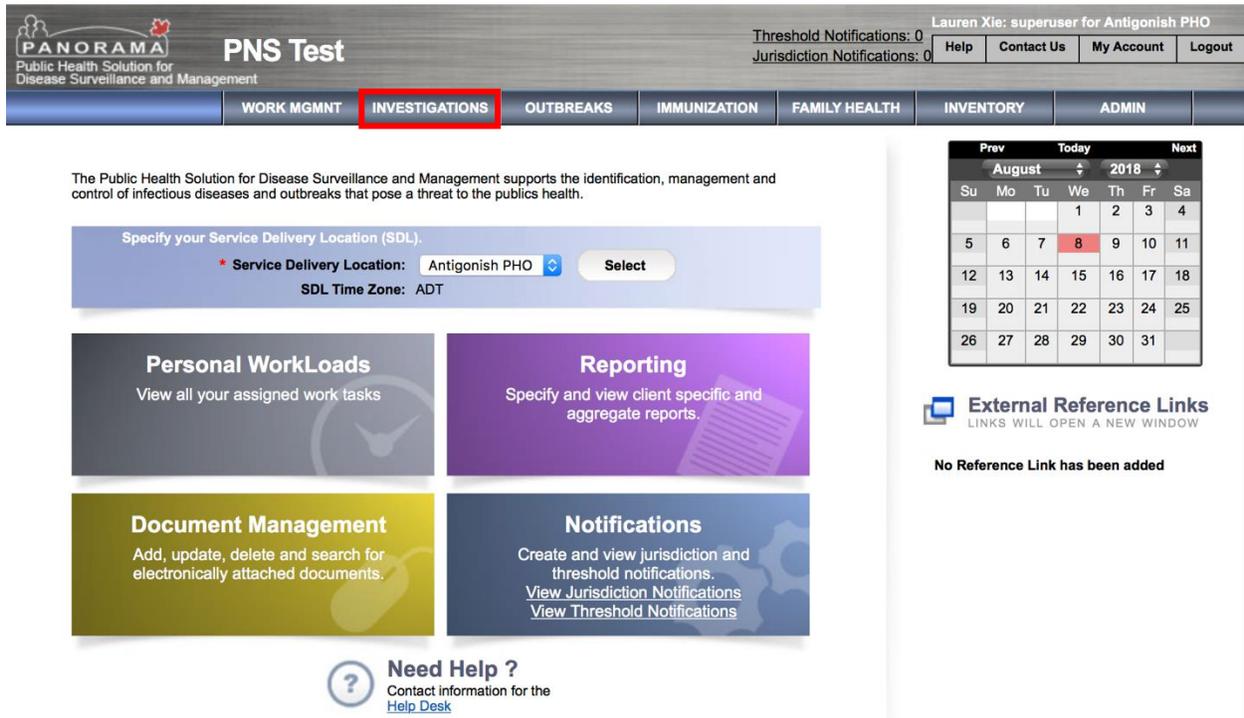
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1 INVESTIGATION MODULE OVERVIEW

The Panorama Investigation module provides tools to assist Public Health in identifying, investigating and managing cases and contacts of communicable diseases to contain a disease and reduce risk to the public.



PANORAMA PNS Test
Public Health Solution for Disease Surveillance and Management

Threshold Notifications: 0
Jurisdiction Notifications: 0

Lauren Xie: superuser for Antigonish PHO
Help Contact Us My Account Logout

WORK MGMT **INVESTIGATIONS** OUTBREAKS IMMUNIZATION FAMILY HEALTH INVENTORY ADMIN

The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health.

Specify your Service Delivery Location (SDL).
* Service Delivery Location: Antigonish PHO Select
SDL Time Zone: ADT

Personal WorkLoads
View all your assigned work tasks

Reporting
Specify and view client specific and aggregate reports.

Document Management
Add, update, delete and search for electronically attached documents.

Notifications
Create and view jurisdiction and threshold notifications.
[View Jurisdiction Notifications](#)
[View Threshold Notifications](#)

Need Help ?
Contact information for the [Help Desk](#)

Prev		Today		Next	
August 2018					
Su	Mo	Tu	We	Th	Fr
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22	23	24	25	26	27
28	29	30	31		

External Reference Links
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

The Panorama Investigation module contains the following functions:

- Longitudinal view of a Client's record
- Record the progress of a Client's signs and symptoms
- Record disease outcomes
- Create Exposures to represent potential sites of communicable disease
- Create links within an Investigation between contacts and cases to create Exposures
- Ability to record lab and diagnostic imaging test results
- Ability to calculate and review of incubation and communicability periods
- Ability to recommend and record interventions and follow-ups
- Ability to include Human subjects, Non-Human subjects or both

There are several Key Concepts related to Investigations:

- Encounter Model
- Encounter Groups
- Search Function

1.1 Context

One of the key concepts of Panorama is Context. Context has been covered during Immunization training but will be covered in more depth here for Investigation purposes.

Context in Panorama refers to having the right record(s) in place for viewing or documenting. Working through the training material, Users will see the term, “In Context”. This means a specific record or records need to be in place before viewing or documentation can be performed. An example of this is when the User is instructed, before starting the step-by-step flow, to have the Subject (Client) In Context. This means the Subject has been selected and is validated by seeing the Subject hyperlink and information displayed in the Client Context Header (Header) at the top of the screen.

A further example is when the User is instructed to have the Subject and an Investigation in context, which means the Subject has been selected and is validated by seeing the Client hyperlink and related information displayed in the Header and the User has then selected an Investigation within the Subject’s record and is validated by seeing the INV ID hyperlink and related information displayed in the Header below the Client banner in the Investigation Banner.

Another example of context related to Panorama is the “Context Document”. A context document is associated directly to where the document should be placed. An example is when a User needs to upload a lab result. The User first ensures they have the Subject in context the lab report belongs to, then the User ensures they have the right disease investigation In Context (can validate this by looking at the Context Header) before uploading the document. This is for both privacy/security reasons as well as the ability to rapidly find the document later.

Note that records that are not placed In Context will not be saved correctly even if the User clicks Save. Using In Context effectively is a foundational requirement for the correct use of Panorama.

1.2 Encounter Model

Manual Encounter functionality will not be used in Nova Scotia. This section is included in this document as Panorama will generate Encounters automatically in certain screens when using the application.

The building block of an investigation is the encounter – a point of service for a subject that is defined by date, location, and the organization that performed a service. Encounters are always associated with a Subject (person, animal, or object, such as body of water or inanimate object) for an encounter group (see below), but no other linkage is required. This allows the system to collect each interaction without predetermination of its significance to public health.

1.2.1 Key Points to Remember about Encounters

If an Encounter is created when an investigation is In Context, the encounter is automatically associated to that investigation.

Some encounters are automatically generated depending on the type of information being captured. When Users document any of the following, encounters are automatically recorded:

- Submission of diagnostic imaging (D.I.)
- Interventions recorded against a cohort for each member of the cohort
- Intervention follow-ups
- Interventions recorded against a client
- TB skin tests given and read
- Mass TB skin tests given and read for each client
- When a “Directly Observed Treatment” (DOT) for a tuberculosis case visit is recorded
- **IMPORTANT:** Auto-generated encounters should be disregarded by end users.

1.3 Encounter Groups

Encounter Groups are a key component of the security model that help determine who can view an Encounter or Investigation record. Encounters and Investigations are always assigned to one Encounter Group. Encounter groups are based on the following disease groupings:

- Communicable Disease Investigation: contains all diseases except Chlamydia, Gonorrhea, and Tuberculosis
- Sexually Transmitted Infections: contains Chlamydia and Gonorrhea only
- Tuberculosis: contains Tuberculosis

The Subject Summary screen displays all investigations sorted by Encounter Group for a given subject.

Subject Summary



ACTIVE			
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Report:

Communicable Disease Investigation Encounter Group	✓ Contains Data	⌵ Show
Sexually Transmitted Infections Investigation Encounter Group	✓ Contains Data	⌵ Show
Tuberculosis Disease Investigation Encounter Group	✓ Contains Data	⌵ Show

1.4 Search Function

The search screens in Panorama function as powerful query tools. Search functions specific to Investigations are:

- Investigations
- Exposures
- Interventions
- Lab
- Outbreak – within Outbreak module

Note: Best practice is to always search by the Client’s Health Card Number and review their subject summary screen for associated investigations.

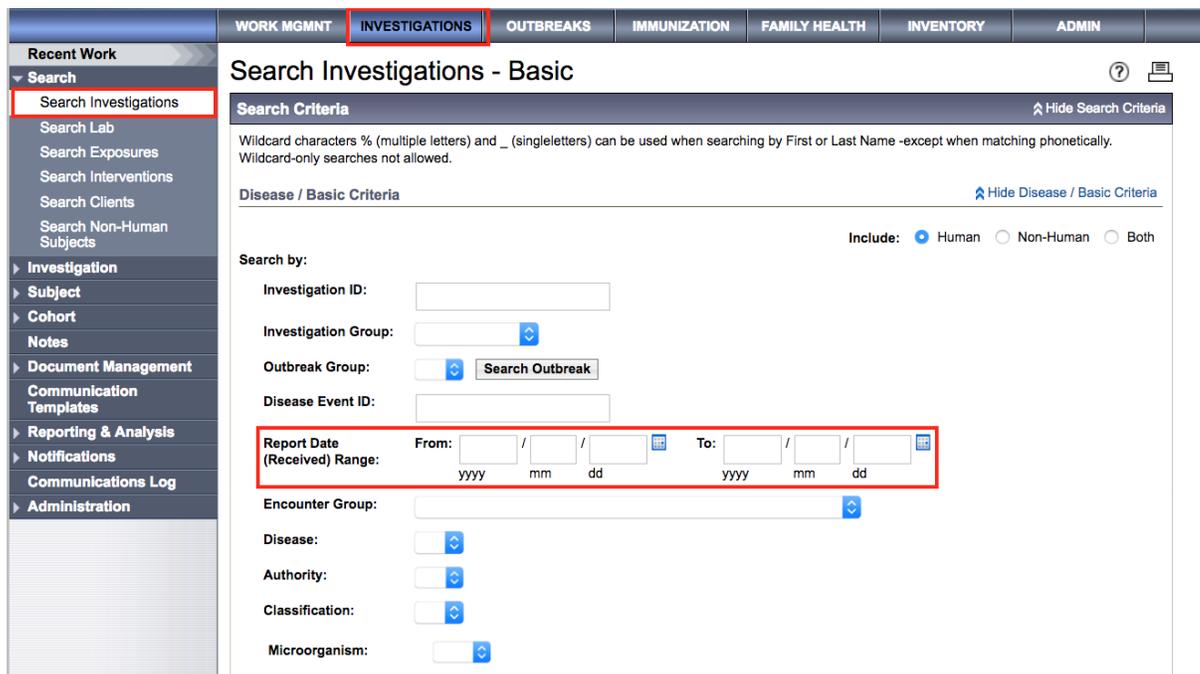
1.4.1 Search Investigations – Basic Search

Users can use the Search Investigations functionality to filter on diseases or time periods of interest and view all associated investigations that meet the specified parameters.

Users can also search for and retrieve Investigation records using search criteria that returns a broad selection of Investigations, or specific criteria that can locate a narrower range of results. Upon retrieving the Investigation records, the User can select, view or update the Investigation record of interest. Basic and Advanced search functionality are available.

Users seeking a specific investigation when they do not have a client in Context can use the following steps:

1. From the **Panorama Dashboard**, select the **Investigations** module tab to view the **Search Investigations – Basic** display.



Search Investigations - Basic

Search Criteria [Hide Search Criteria](#)

Wildcard characters % (multiple letters) and _ (singleletters) can be used when searching by First or Last Name -except when matching phonetically. Wildcard-only searches not allowed.

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

Include: Human Non-Human Both

Search by:

Investigation ID:

Investigation Group:

Outbreak Group: **Search Outbreak**

Disease Event ID:

Report Date (Received) Range: From: / / To: / /
yyyy mm dd yyyy mm dd

Encounter Group:

Disease:

Authority:

Classification:

Microorganism:

2. Enter **Report Date From** and **Report Date To**
3. Click **Search** button.

WORK MGMNT | **INVESTIGATIONS** | OUTBREAKS | IMMUNIZATION | FAMILY HEALTH | INVENTORY | ADMIN

Search Investigations - Basic ? [icon]

Search Criteria Hide Search Criteria

⚠ Too many results were found matching your criteria. Limit the scope of your search and try again.

Wildcard characters % (multiple letters) and _ (singleletters) can be used when searching by First or Last Name -except when matching phonetically. Wildcard-only searches not allowed.

Disease / Basic Criteria Hide Disease / Basic Criteria

Include: Human Non-Human Both

Search by:

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:

[Advanced Search](#)

Note: If a **warning message** appears at the top of the screen, “Too many results found matching your criteria. Limit the scope of your search and try again.” Users can refine their search criteria to reduce the number of search results. In this case, a variety of search criteria can be used, including disease, client name, etc.

4. Click **Encounter Group** and select the applicable Encounter Group.

5. Select desired **Disease**.
6. Click **Search** button.

WORK MGMNT
INVESTIGATIONS
OUTBREAKS
IMMUNIZATION
FAMILY HEALTH
INVENTORY
ADMIN

Search Investigations - Basic ?

Search Criteria
^ Hide Search Criteria

Wildcard characters % (multiple letters) and _ (singleletters) can be used when searching by First or Last Name -except when matching phonetically. Wildcard-only searches not allowed.

Disease / Basic Criteria
^ Hide Disease / Basic Criteria

Include: Human Non-Human Both

Search by:

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:

[Advanced Search](#)

The **Investigations Search Results** table displays all the Measles Investigations over the specified time period.

7. Click **Investigation ID** hyperlink to open the Subject's investigation.

Investigation Search Results

[New Search](#)

6 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
<input type="checkbox"/>	13 ✓	Laurel, Daphne	1994 May 11	Measles 15 / National / Case - Probable	2018 May 4
<input type="checkbox"/>	145 ✓	LMTEST1, LMTEST1	1981 Jan 1	Measles 148 / National / Case - Confirmed	2018 Jul 12
<input type="checkbox"/>	161 ✓	Melon, Water	1986 Jul 1	Measles 164 / National / Case - Person Under Investigation	2018 Jul 1
<input type="checkbox"/>	76	Sprint2, Measles	1960 Jan 1	Measles 79 / National / Case - Person Under Investigation	2018 Jun 1
<input type="checkbox"/>	2	Test001, Test001	1990 Sep 9	Measles 2 / Manual / Case - Person Under Investigation	2018 Mar 27
<input type="checkbox"/>	4	White, Snow	2010 Apr 1	Measles 4 / Manual / Case - Person Under Investigation	2018 Apr 16

Total: 6 Page 1 of 1 Jump to page:

✓ =potential duplicate
merged =secondary (merged) investigations

1.4.2 Search Investigations – Advanced Search

Users also have the option to use more advanced search tools for greater specificity.

1. Click **Advanced Search** hyperlink on the Basic Search screen to open the **Search Investigations - Advanced** search function.

WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH	INVENTORY	ADMIN
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Search Investigations - Basic

Search Criteria [Hide Search Criteria](#)

Wildcard characters % (multiple letters) and _ (singleletters) can be used when searching by First or Last Name -except when matching phonetically. Wildcard-only searches not allowed.

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

Include: Human Non-Human Both

Search by:

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. The User can then search by **Last Name**, **First Name**, or **Health Card Number**.

Subject [Hide Subject](#)

Client Number: **Client Number Type:**

(Health Card Number, Additional IDs, Client ID)

Last Name: **First Name:** Phonetic matching for Names

Gender:

Date of Birth: / / **Age Range:** **From:** **To:**

Country: **City:**

The **Investigation Search Results** section will display the Client and all associated Investigation IDs in the table.

Investigation Search Results				
New Search				
1 results found. Inactive investigation(s) are not shown Click Investigation ID to view Investigation Summary.				
Row Actions:				
<input type="button" value="Select All"/>	<input type="button" value="Deselect All"/>	<input type="button" value="Preview"/>	<input type="button" value="Update"/>	<input type="button" value="Generate Map"/> <input type="button" value="Update Selected"/>
Investigation ID	Last Name, First Name	Date of Birth	Disease / Disease Event ID / Primary Authority / Classification	Reporting Date Received
<input type="checkbox"/> 4	White, Snow	2010 Apr 1	Measles 4 / Manual / Case - Person Under Investigation	2018 Apr 16
Total: 1		Page 1 of 1		Jump to page: <input type="text"/>
<input checked="" type="checkbox"/> =potential duplicate merged =secondary (merged) investigations				

3. Click on **Investigation ID** hyperlink to go directly to the Subject's **Investigation Summary** screen.

Advanced searches can be completed using Investigation Information, Responsible Organization/Investigator, and Reporting Notification.

1.4.3 Search by Investigator

1. Navigate to the **Responsible Organization / Investigator** section of the Advanced Search screen.
2. Select Responsible Organization using the EFC.
3. Select Investigator Organization using the EFC – this should be the relevant zone.

4. Select Investigator Workgroup
5. Select Investigator
6. Click Search.

Results will appear in the search results table near the bottom of the page.

Responsible Organization / Investigator
[Hide Responsible Organization / Investigator](#)

Responsible Organization Unit: Nova Scotia Health Authority Exact Match

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] [Find](#)

[Close](#)

Type
Search

Start typing the name of the Organization. Matches will begin to appear below.

Select the match with the keyboard or mouse.

Organization Name:	Nova Scotia Health Authority, -	Show Info	
City, Province:	Hierarchy Type:	Status:	
-	Jurisdictional	Active	
			Select

Investigator Organization: Central Zone

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] [Find](#)

[Close](#)

Type
Search

Start typing the name of the Organization. Matches will begin to appear below.

Select the match with the keyboard or mouse.

Organization Name:	Central Zone, -	Show Info	
City, Province:	Hierarchy Type:	Status:	
-	Jurisdictional	Active	
			Select

Investigator Workgroup: IOM - Central-Zone

Investigator Type:

Investigator: Susan MacKirdy/NSHA

1.4.4 Preview Investigation

Once an investigation is located, Users can perform a variety of actions by selecting the specific investigation from the search results.

1. Users can **Preview** an investigation by clicking on the checkbox beside the hyperlink of the desired Investigation and clicking on **Preview**.

Investigation Preview Hide

Investigation ID:	4	Subject Name:	White, Snow
Gender:	Female	Disposition:	Became a case
Address at Time of Investigation:	-	Status:	CLOSED

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
<input checked="" type="checkbox"/>	4	White, Snow	2010 Apr 1	Measles 4 / Manual / Case - Person Under Investigation	2018 Apr 16

Total: 1 Page 1 of 1 Jump to page:

=potential duplicate
 merged =secondary (merged) investigations

1.4.5 Update Investigation (Group)

Users can also update one or more investigations at a time. **Note:** there is a limited number of fields which can be updated using the Group Update functionality. These are:

- Disposition & Disposition Date
- Close Investigation
- An Investigation Group Name can be applied to the investigations if desired.

1. Click on 1 or more **boxes** beside each Investigation ID hyperlink
2. Click **Update Selected** button.

Investigation Search Results					
					New Search
6 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	
<input checked="" type="checkbox"/> 13 ✓	Laurel, Daphne	1994 May 11	Measles 15 / National / Case - Probable	2018 May 4	
<input checked="" type="checkbox"/> 145 ✓	LMTEST1, LMTEST1	1981 Jan 1	Measles 148 / National / Case - Confirmed	2018 Jul 12	
<input type="checkbox"/> 161 ✓	Melon, Water	1986 Jul 1	Measles 164 / National / Case - Person Under Investigation	2018 Jul 1	
<input type="checkbox"/> 76	Sprint2, Measles	1960 Jan 1	Measles 79 / National / Case - Person Under Investigation	2018 Jun 1	
<input type="checkbox"/> 2	Test001, Test001	1990 Sep 9	Measles 2 / Manual / Case - Person Under Investigation	2018 Mar 27	
<input type="checkbox"/> 4	White, Snow	2010 Apr 1	Measles 4 / Manual / Case - Person Under Investigation	2018 Apr 16	

Total: 6 Page 1 of 1 Jump to page:

✓ =potential duplicate
merged =secondary (merged) investigations

Group Operation – Update Investigation screen displays.

WORK MGMNT
INVESTIGATIONS
OUTBREAKS
IMMUNIZATION
FAMILY HEALTH
INVENTORY
ADMIN

Group Operation - Update Investigations

? 📄

[Close Investigations](#)
[Save](#) [Cancel](#) [Return to Previous Page](#)

Investigations Selected for Group Update ✓ Contains Data [Hide](#)

Investigation Group: (for future reference)

Number of Investigations Selected: 2

Investigation Information ✓ Contains Data [Hide](#)

* Required only if updating disposition.

* Disposition: Disposition Date: 2017 / 06 / 08

yyyy mm dd

Investigator ✓ Contains Data [Hide](#)

[Close Investigations](#)
[Save](#) [Cancel](#) [Return to Previous Page](#)

3. Click **Close Investigation(s)** or update Investigation Disposition Information.
4. Click **Save**.
5. Click **Return to Previous Page** hyperlink.

2 SUBJECT SUMMARY

2.1 Overview

The **Subject Summary** screen is the starting point for recording and managing investigations. The **Subject Summary** screen displays:

- All investigations recorded for a Client.
- Investigations displayed by Encounter Group.
- Investigation details displayed that include Investigation ID, Status, Investigator, Disease and Classification.
- Encounters associated with an Investigation.
- 'Unassociated Encounters' not linked to a disease Investigation.

From the **Subject Summary** screen, a User can:

- Create an Investigation
- View the Investigation Summary for a specific investigation by selecting the Investigation ID number hyperlink.

Communicable Disease Investigation Encounter Group ↑ Hide

Create Investigation

Investigation 167 - Measles - OPEN ↑ Hide

Investigation ID: 167
 Status: OPEN
 Investigator: 
 Linked Outbreaks: -
 Report Date (Sent): -
 Report Date (Received): 08 August 2018

Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Measles	Measles virus	-	<input checked="" type="checkbox"/> National / Case - Person Under Investigation 2018 Aug 8	-	-

Investigation 167 Encounters ↓ Show

Unassociated Encounters (Non-Investigation) ↑ Hide

1 encounter(s) total

Click Encounter Date for encounter details.

Move Selected Encounter(s) To:

Unassociated Non-Episode Encounters ↓ Move

Create Episode

Episode: First Incidence

Update Title
 Delete Episode
 Create Encounter
 [Hide](#)

Encounter Date	Encounter Type	Encounter Reasons	Organization	Location
----------------	----------------	-------------------	--------------	----------

Non-Episode Encounters

Create Encounter
 [Hide](#)

Encounter Date	Encounter Type	Encounter Reasons	Organization	Location
<input type="checkbox"/> 2018 Aug 8	Admission, Discharge or Transfer	-	Antigonish PHO	Antigonish PHO

3 CREATE INVESTIGATION

Prior to creating an Investigation, the User should view the **Subject Summary** screen to avoid creating a duplicate Investigation. A Client (Subject) must be In Context before an Investigation can be created. Creating an Investigation involves the entry of Investigation details, including:

- o Disease and Classification
- o Disposition and Status
- o Responsible Organizational Unit and Investigator
- o Reporting Source

The Investigation record is the focal object with related entities such as Risk Factors, Treatment and Interventions, Exposures, Signs & Symptoms and Outcome information being captured as part of the Investigation. Once an Investigation is created, an Investigation header appears under the Client Header in the Investigation Summary.

Investigation Summary



ACTIVE

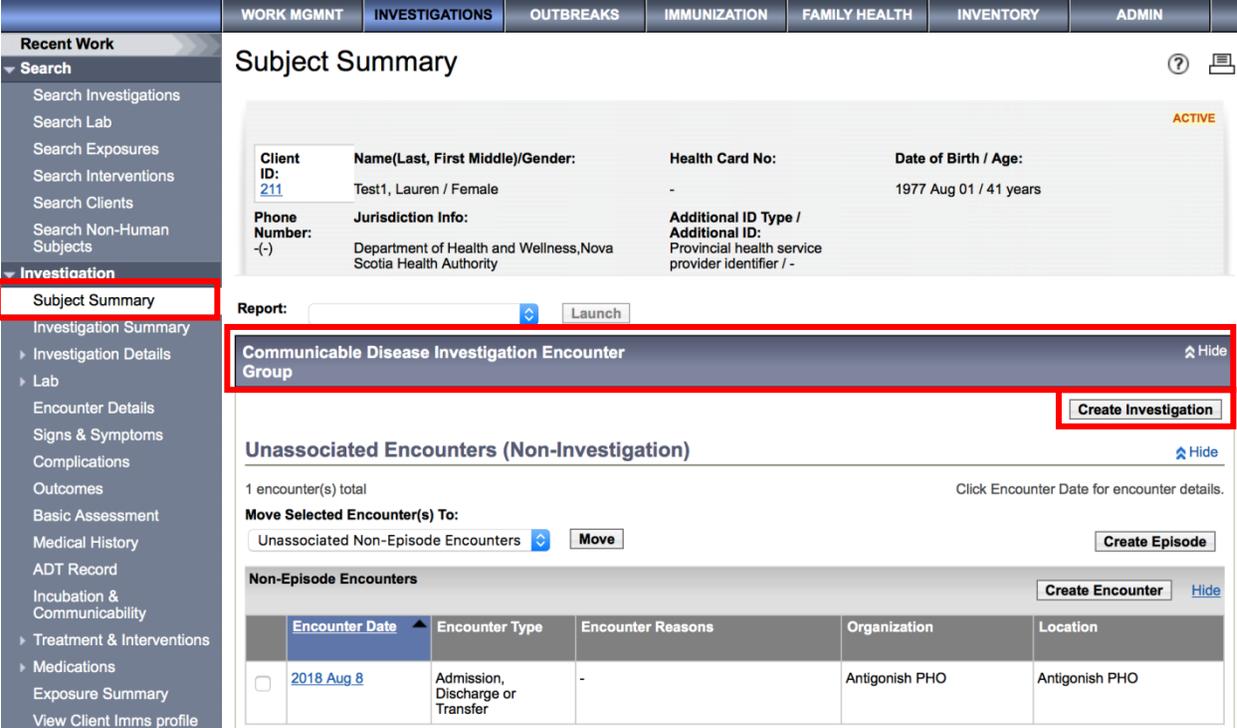
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

3.1 Create Investigation

Each Investigation is assigned an auto-generated, unique Panorama Investigation ID number. The User creates the Investigation in the Encounter Group section of the screen that applies to the Investigation.

1. After setting a client In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **Subject Summary**.
2. Confirm that the investigation has not already been created.
3. Under the relevant **Encounter Group** section, click **Create Investigation**.



Subject Summary ? 🖨️

ACTIVE

Client ID: 211	Name (Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Phone Number: (-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Report:

Communicable Disease Investigation Encounter Group ⬆️ Hide

Unassociated Encounters (Non-Investigation) ⬆️ Hide

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

Move Selected Encounter(s) To:

Non-Episode Encounters Hide

	Encounter Date	Encounter Type	Encounter Reasons	Organization	Location
<input type="checkbox"/>	2018 Aug 8	Admission, Discharge or Transfer	-	Antigonish PHO	Antigonish PHO

The **Create Investigation** screen displays

- Complete all Panorama mandatory and business mandatory fields within **Disease Summary, Investigation Information, Responsible Organization/Investigator**, and **Reporting Notification** sections to create an Investigation.
- Under the **Disease Summary** section, click **Disease** field and scroll to the disease required. Click on the disease to populate the field.

Note:

“Unknown Disease” only to be used temporarily until further information is obtained to update/specify the disease.

“Unusual/Emerging Disease” used for Zika, Babesiosis, HGA, Powassan

Create Investigation



ACTIVE

Client ID: 211	Name (Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Additional details (e.g., disease, diagnosis, attached documents) may be entered after the investigation has been created.

* Required field

Disease Summary Hide

* Disease:	<input checked="" type="checkbox"/> Acquired Immunodeficiency Syndrome (AIDS) <input type="checkbox"/> Acute Flaccid Paralysis <input type="checkbox"/> Anthrax <input type="checkbox"/> Botulism <input type="checkbox"/> Brucellosis <input type="checkbox"/> Campylobacteriosis <input type="checkbox"/> Cholera <input type="checkbox"/> Clostridium Difficile <input type="checkbox"/> Creutzfeldt-Jakob Disease <input type="checkbox"/> Cryptosporidiosis
* Authority:	<input type="text"/>
* Classification Date:	<input type="text"/>
Microorganism:	<input type="text"/>
Information Source:	<input type="text"/>

6. Select **Authority**.

Note: **Authority** is the authority who defines the case classification.

- National: Nova Scotia follows the National case definitions for the majority of diseases.
- Manual: Only used for Non-Human Subjects.

Disease Summary Hide

* Disease:	<input type="text" value="Measles"/>	* Classification:	<input type="text"/>
* Authority:	<input checked="" type="checkbox"/> Manual <input type="checkbox"/> National		
* Classification Date:	<input type="text" value="08"/> / <input type="text" value="08"/> <small>yyyy mm dd</small>		
Microorganism:	<input type="text"/>		
Information Source:	<input type="text"/>		

7. Select **Classification**.

Disease Summary Hide

* **Disease:** Classification

* **Authority:** Case - Confirmed

* **Classification Date:** / / Case - Not a Case

yyyy mm dd

Microorganism:

Information Source:

Case - Person Under Investigation

Case - Probable

Contact - Not a Contact

Contact - Person Under Investigation

8. The **Classification Date:** field defaults to today's date. The date can be updated by clicking on the calendar icon then clicking on the desired date.

Disease Summary Hide

* **Disease:** Classification:

* **Authority:**

* **Classification Date:** / / Prev Today Next

yyyy mm dd

August 2018						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Clear Done

Investigation Information Hide

Priority:

9. Select **Microorganism** if known.
10. Select **Information Source**.

Disease Summary Hide

* **Disease:** Classification:

* **Authority:**

* **Classification Date:** / / yyyy mm dd

Microorganism:

Information Source:

11. Select **Priority: Note:** the only option to select is Do Not use.
12. Select **Disposition**.

Investigation Information Hide

Priority:

* Disposition:

- Completed, further action not required
- Entered in error
- In Province referral
- Investigation in progress
- Lost to follow-up
- Out of Province referral
- Pending

Responsible Organization / Investigator Hide

* Responsible 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.



TIP: Disposition refers to the disposition or stage of the Investigation and is updated as appropriate throughout the investigation.

13. Within the **Responsible Organization/Investigator** section, the **Responsible Organization defaults** to the User's organization. Using the EFC to search and select another organization if applicable.
14. Select **Responsible Organization Workgroup**.

Responsible Organization / Investigator Hide

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

* Responsible Organization Workgroup :

* Responsible Organization Date : / /

yyyy mm dd

* Investigator Organization :

* Investigator Workgroup :

Investigator Name :

* Assigned Date : / /

yyyy mm dd

15. Select **Investigator Workgroup**. This will initiate a work management task to the selected workgroup.
16. Leave the **Investigator Name** field blank unless the Investigator is known.

Responsible Organization / Investigator Hide

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

Close ✕

Type **Search**

*Start typing the name of the Organization. Matches will begin to appear below.
Select the match with the keyboard or mouse.*

Organization Name: Show Info

Select

* **Responsible Organization Workgroup :** ⌵

* **Responsible Organization Date :** / / 
 yyyy mm dd

* **Investigator Organization :** ⌵

* **Investigator Workgroup :** ⌵

Investigator Name : ⌵

* **Assigned Date :** / / 
 yyyy mm dd

17. **Under Reporting Source**, the **Provider** field should default to the User/Provider within the Reporting Notification section. The **Location** should default to the User/Provider. The **Other** field can be populated with a free-text if reported by source who is not a system User/Provider.

Note: Out of Province care providers should be recorded in the “Other” provider field.

18. Click **Submit** button.

Disease Summary



ACTIVE

Client ID: 211	Name (Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

Investigation details successfully saved.

The **Disease Summary** screen displays with a confirmation message, “Investigation details successfully saved”.

An additional Investigation banner appears at the top the screen displaying the system-generated Investigation ID, Status, Disposition, Disease, PHAC Date/, Authority/Classification, and Investigator information.

Disease Summary

Disease Event 170 - Measles [Hide](#)

PHAC Date / Date Type: 2018 Aug 8 / Date Reported **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
Measles	Measles virus	-		<input checked="" type="checkbox"/> National / Case - Person Under Investigation 2018 Aug 8	-	-

In the Disease Summary section, a system-generated **Disease Event ID** number displays, disease information is populated in the table, and the Investigation has now been created.

3.2 Investigation Details

When Investigations are created, the system populates the Investigation details with as much information as is available. The entry process has been defined to reduce the possibility of transcription or transformation errors and allows public health to quickly create records.

The Investigation and Work Management modules are linked. When an Investigation is created, Users can identify or assign a primary investigator to the specific Investigation or send a task to a workgroup to be assigned to an Investigator at a later time.

Responsible Organization / Investigator



ACTIVE			
Client ID: 211	Name (Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

[Investigation](#)

Save **Reset**

* Required field

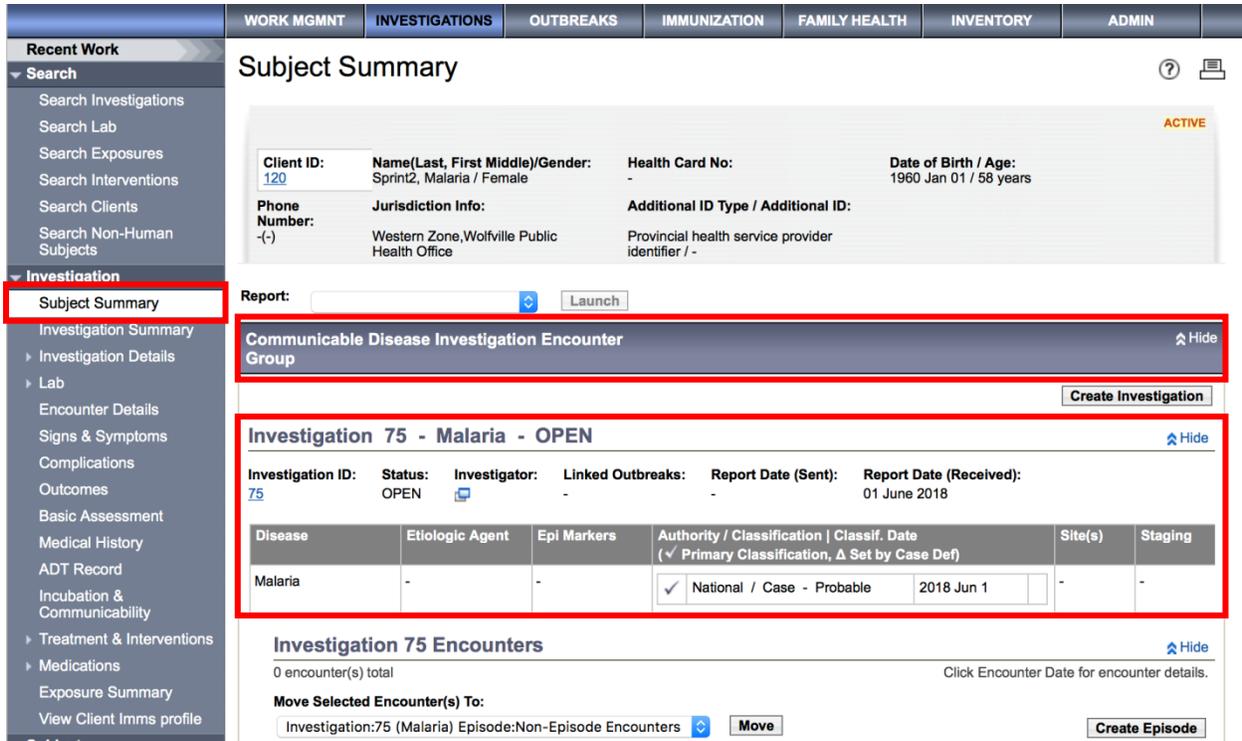
Merged Investigation No(s):

Responsible Organization	Show
Investigator	Hide
* Required only if adding or updating investigator information.	
Investigator Type :	<input type="text"/>
* Investigator Organization :	<input type="text"/>
* Investigator Workgroup :	<input type="text"/>
Investigator Name :	<input type="text"/>
* Assigned Date :	2018 / 08 / 08 <input type="text"/>
	yyyy mm dd
Assigned Time :	<input type="text"/> : <input type="text"/> : ADT
	hh mm
End Date :	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/>
	yyyy mm dd

When an investigator is added to an Investigation, a task is automatically generated and placed on the work queue of that individual.

3.3 Search Client Investigations

1. After setting a client In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **Subject Summary**.
2. Navigate to the pertinent **Encounter Group**, to which the reportable disease should be associated and review to ensure there is not an already existing **Investigation ID** with a disease that matches the disease that will be the focus of the Investigation to be created.



Subject Summary

Client ID: 120 **Name(Last, First Middle)/Gender:** Sprint2, Malaria / Female **Health Card No:** - **Date of Birth / Age:** 1960 Jan 01 / 58 years

Phone Number: (-) **Jurisdiction Info:** Western Zone, Wolfville Public Health Office **Additional ID Type / Additional ID:** Provincial health service provider identifier / -

Report: [Dropdown] [Launch]

Communicable Disease Investigation Encounter Group [Hide]

[Create Investigation]

Investigation 75 - Malaria - OPEN [Hide]

Investigation ID:	Status:	Investigator:	Linked Outbreaks:	Report Date (Sent):	Report Date (Received):
75	OPEN	[Icon]	-	-	01 June 2018

Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Malaria	-	-	✓ National / Case - Probable 2018 Jun 1	-	-

Investigation 75 Encounters [Hide]

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

Move Selected Encounter(s) To:

Investigation:75 (Malaria) Episode:Non-Episode Encounters [Dropdown] [Move] [Create Episode]

3. If there is no existing investigation continue on to **Create Investigation**.
4. Alternatively, if there is a matching Investigation, update the appropriate sections of the existing Investigation by clicking the **Investigation ID**.

4 SIGNS AND SYMPTOMS

The absence or onset of symptoms assists Panorama in determining the period of communicability. In the absence of lab results, symptoms enable the investigator to narrow down or identify the disease and other clients at risk.

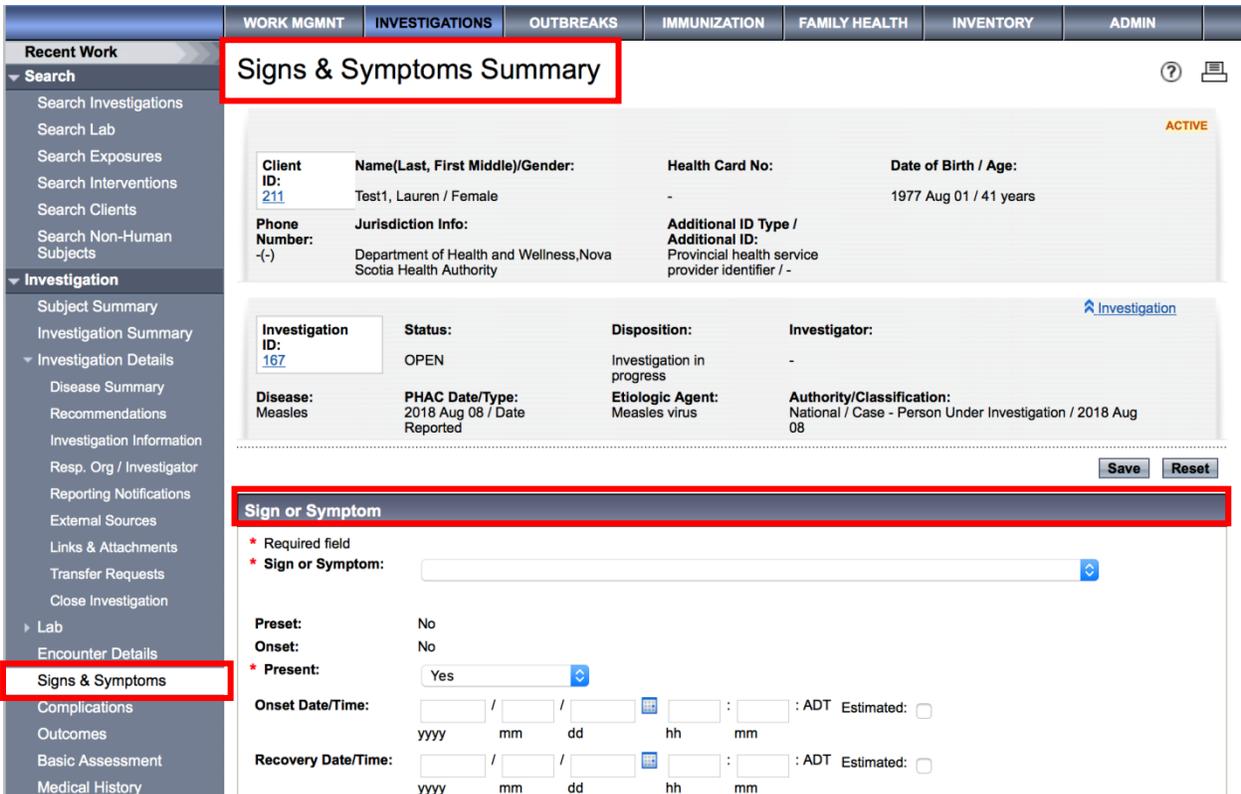
Signs and Symptoms are composed of two parts: the description of the initial attribute (symptom) and the value of the attribute at a point in time (observation). Each symptom includes a response, onset date and time, recovery date and time, duration, units and reported by. Each observation includes a description, value, units, and date.

Signs and Symptoms must be created with both a client and investigation in context.

Note: Complications experienced by the client will be recorded in the Signs & Symptoms section.

4.1 Create Signs and Symptoms from a List of Signs and Symptoms Presets

1. After setting a client and investigation In Context, go to the **Left-Hand Navigation** menu and select **Signs and Symptoms**.



Client ID:	Name (Last, First Middle)/Gender:	Health Card No:	Date of Birth / Age:
211	Test1, Lauren / Female	-	1977 Aug 01 / 41 years

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

Disease:	PHAC Date/Type:	Etiologic Agent:	Authority/Classification:
Measles	2018 Aug 08 / Date Reported	Measles virus	National / Case - Person Under Investigation / 2018 Aug 08

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present: Yes

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

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

The **Signs & Symptoms** Summary screen displays.

2. Select the **Sign or Symptom** from the list of preset values by selecting one or more of the relevant checkboxes. Once the checkbox is selected, the Row Actions are activated.

Sign or Symptom

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

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:**
yyyy mm dd

	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Asymptomatic						No
<input checked="" type="checkbox"/>	Conjunctivitis						No
<input type="checkbox"/>	Coryza						No
<input checked="" type="checkbox"/>	Cough						No
<input type="checkbox"/>	Diarrhoea						No

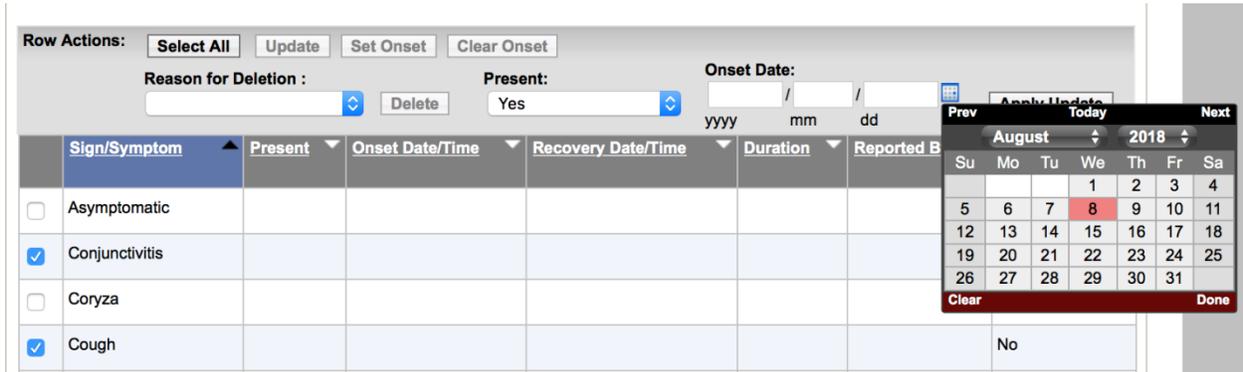
3. Select a value for **Present**.

Row Actions:

Reason for Deletion : **Present:**
yyyy mm dd

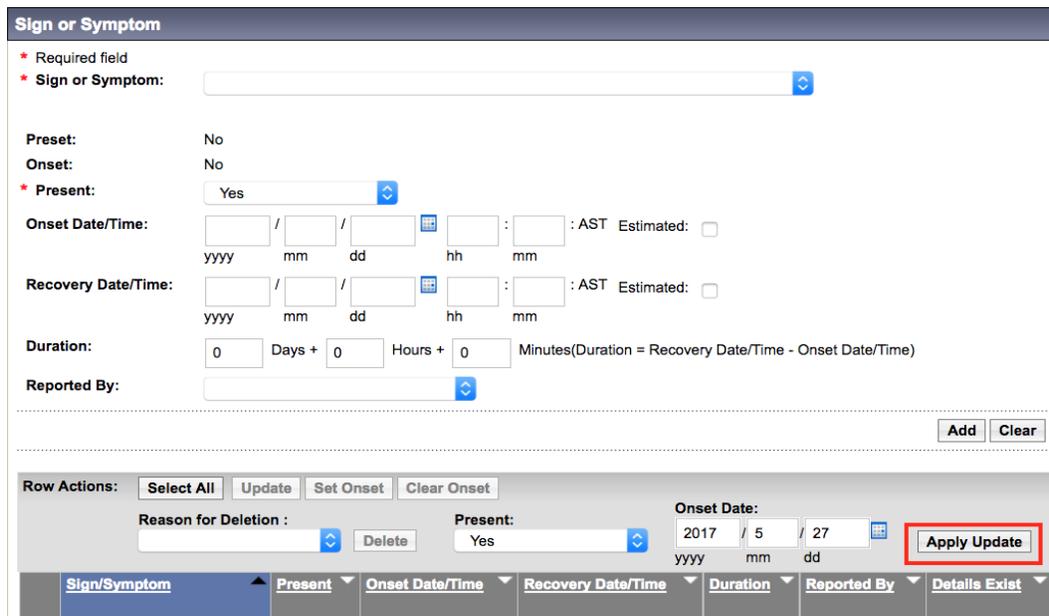
	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
<input type="checkbox"/>	Asymptomatic						No
<input checked="" type="checkbox"/>	Conjunctivitis						No
<input type="checkbox"/>	Coryza						No

4. If applicable, enter **Onset Date** for each selected sign/symptom.



Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By
<input type="checkbox"/> Asymptomatic					
<input checked="" type="checkbox"/> Conjunctivitis					
<input type="checkbox"/> Coryza					
<input checked="" type="checkbox"/> Cough					No

5. Click **Apply Update** button.



Sign or Symptom

* Required field
 * Sign or Symptom:

Preset: No
 Onset: No
 * Present: Yes

Onset Date/Time: / / : : : AST Estimated:
 yyyy mm dd hh mm

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

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

Reported By:

Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist

The **Sign or Symptom** table displays the recorded information for those newly added **Signs or Symptoms**.

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"/>	Asymptomatic						No
<input type="checkbox"/>	Conjunctivitis	Yes	2018 Aug 8 00:00 ADT				No
<input type="checkbox"/>	Coryza						No
<input type="checkbox"/>	Cough	Yes	2018 Aug 8 00:00 ADT				No
<input type="checkbox"/>	Diarrhea						No

6. Repeat steps 3 to 6 above to record the **Present Value** for all other Signs and Symptoms.

Note: To record a value for Reported By, follow the steps in, “View and Update Signs & Symptoms” below.

Note: For IGAS, only use Streptococcal Toxic Shock-Like Syndrome value if case meets criteria outlined in surveillance guidelines/CD chapter.

4.2 Manually add Signs and Symptoms

1. Under the Sign or Symptom section, select a **Sign or Symptom**.

Sign or Symptom

* Required field

* Sign or Symptom:

Preset: No

Onset: No

* Present:

Onset Date/Time: / / : : AST Estimated:

yyyy mm dd hh mm

Recovery Date/Time: / / : : AST Estimated:

yyyy mm dd hh mm

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

Reported By:

Note: The value of **Present** defaults to **Yes**.

2. If applicable, select **Onset Date/Time, Recovery Onset Date/Time**.

Sign or Symptom

* Required field
 * Sign or Symptom: Chills

Preset: No
 Onset: No
 * Present: Yes

Onset Date/Time: / / : : : AST Estimated:

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

Duration: 0 Days + 0 Hours

Reported By:

Calendar overlay showing May 2017 with date 27 highlighted.

Buttons: Add, Clear

3. Select **Reported By**.

Sign or Symptom

* Required field
 * Sign or Symptom: Chills

Preset: No
 Onset: No
 * Present: Yes

Onset Date/Time: 2018 / 8 / 8 00 : 00 : ADT Estimated:

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

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

Reported By:

- ✓ Caregiver/Guardian
- Client
- Health care provider

Buttons: Add, Clear

4. Click **Add** button.

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"/>	
		yyyy		mm		dd	
Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist	
<input type="checkbox"/> Asymptomatic						No	
<input type="checkbox"/> Chills	Yes	2018 Aug 8 00:00 ADT			Client	No	
<input type="checkbox"/> Conjunctivitis	Yes	2018 Aug 8 00:00 ADT				No	
<input type="checkbox"/> Coryza						No	
<input type="checkbox"/> Cough	Yes	2018 Aug 8 00:00 ADT				No	
<input type="checkbox"/> Diarrhea						No	

The sign/symptom will be added to the table.

- Repeat steps 1 to 5 to add additional signs/symptoms.
- Click **Save** button.

Signs & Symptoms Summary



ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

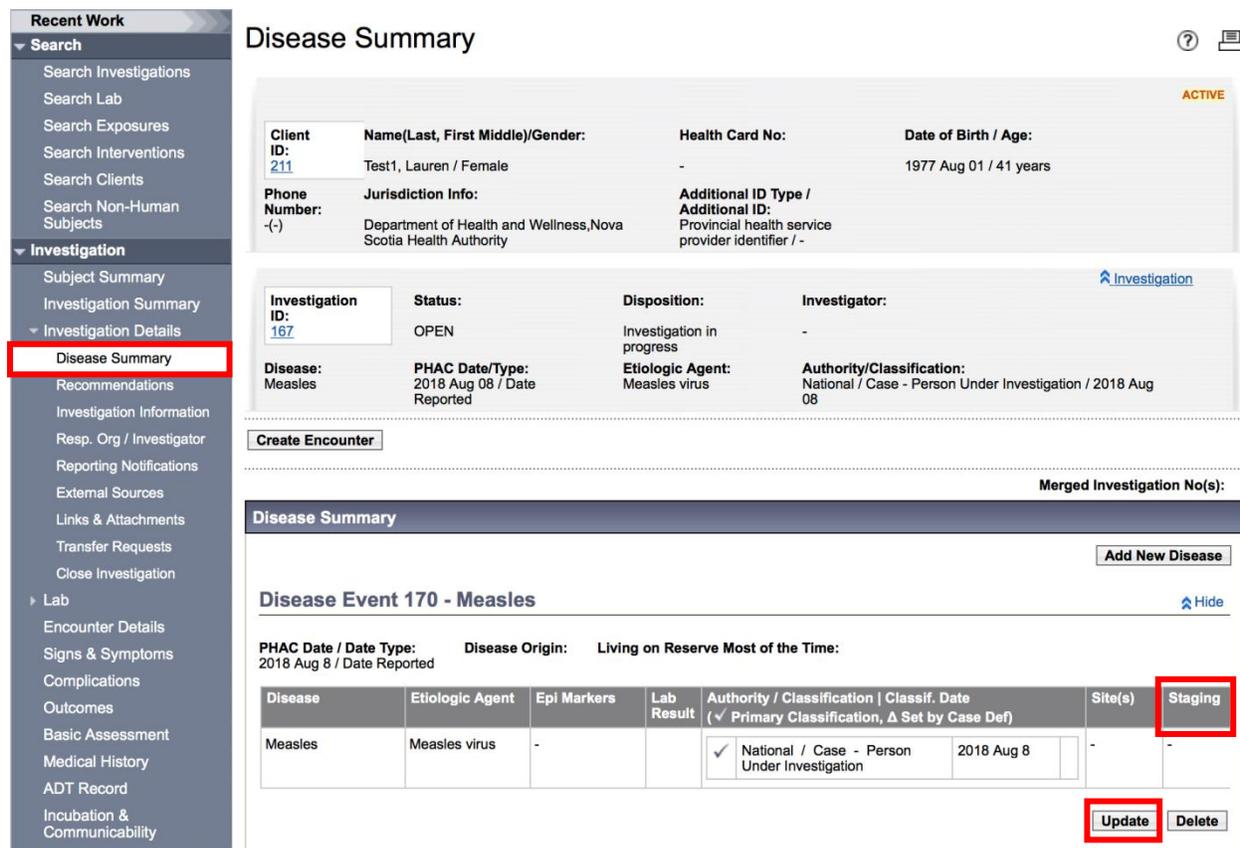
Signs and Symptoms and Observations saved successfully.

Screen refreshes and “Signs and Symptoms and Observations saved successfully.” message displays.

5 DISEASE SUMMARY

The Disease Summary screen displays information about each disease event on an investigation such as the etiologic agent, classification, authority, and if the disease is regionally or nationally reportable. From the Disease Summary screen, a User can add a new disease and update an existing disease event.

1. After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **Disease Summary** under **Investigation Details**.



Recent Work

- Search
 - Search Investigations
 - Search Lab
 - Search Exposures
 - Search Interventions
 - Search Clients
 - Search Non-Human Subjects
- Investigation
 - Subject Summary
 - Investigation Summary
 - Investigation Details
 - Disease Summary**
 - Recommendations
 - Investigation Information
 - Resp. Org / Investigator
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Transfer Requests
 - Close Investigation
 - Lab
 - Encounter Details
 - Signs & Symptoms
 - Complications
 - Outcomes
 - Basic Assessment
 - Medical History
 - ADT Record
 - Incubation & Communicability

Disease Summary ? 🖨️

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

[Investigation](#)

[Create Encounter](#)

Merged Investigation No(s):

Disease Summary [Add New Disease](#)

Disease Event 170 - Measles [Hide](#)

Disease	Etiologic Agent	Epi Markers	Lab Result	Authority / Classification Classif. Date (✓ Primary Classification, Δ Set by Case Def)	Site(s)	Staging
Measles	Measles virus	-		✓ National / Case - Person Under Investigation 2018 Aug 8	-	-

[Update](#) [Delete](#)

Disease Summary screen displays.

Note: The Disease Summary screen will be the landing page if an Investigation has just been created. A Disease Event entry would have been automatically created from the creation of an investigation, and displays as the first table row, without data, in the Staging column.

For any given Disease Event, only the most recent row (Recent = most recent record based on the last updated date) can be selected for **Update**.

- Under **Disease Summary** section, click **Update** under the desired **Disease Event**.

Disease Event History

* **Disease:**

Microorganism:

Genotype:

Genotype (specify):

NML No.:

Sequence designation:

Sequence designation comment:

Information Source:

Site(s): Hold Ctrl and then click to select multiple items.

Available Sites:	Add >	Selected Sites(s):
<input style="width: 95%;" type="text"/>	< Remove	<input style="width: 95%;" type="text"/>

Staging:

*** Investigation Classification**

* **Authority:**

* **Classification:**

* **Classification Date:** / /

yyyy mm dd

The **Disease Event Details** screen displays.

- Enter data on this screen as applicable. Note that Panorama mandatory fields are indicated with a red asterisk (*).
- Click **Save** button.

Note: For General GI and Respiratory diseases, select the disease depending on specimen type. E.g. If stool, select GI, if NP swab, select Respiratory.

Disease Event Details



ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

No updates have been made to the Disease Event History.
Investigation details successfully saved.

Screen refreshes. Confirmation message displays.

6 INVESTIGATION INFORMATION

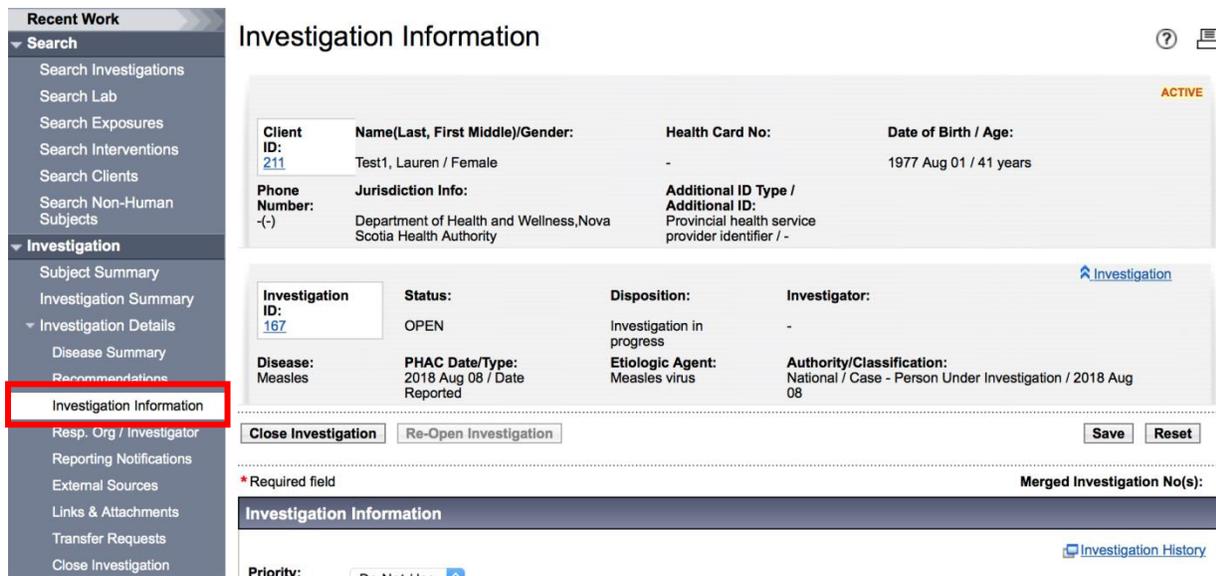
Investigation Information centers around information related to the status of an Investigation. Initially, many of the fields are auto-populated with information from when the investigation was created, such as: Disposition is set to “Notification Issued”, Status is set to “Open”, and Client Home Address at Time of Initial Investigation (auto-filled from Client demographics).

This information can be updated creating a historical view of the updates. There are also additional fields that can be completed to enter investigation information, including: Sensitive Environment/Occupation, Primary Diagnosis and Method of Detection.

Note: **Sensitive Environment/Occupation** lists environments/occupations that might increase the probability that the Client could transmit the disease. From this list, the nurse could create an exposure with the specifics (e.g. hospital name, address, nature of exposure, link contacts).

6.1 Update Investigation Information

1. After setting a client and investigation In Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Investigation Information** under **Investigation Details**.



Recent Work

- Search
 - Search Investigations
 - Search Lab
 - Search Exposures
 - Search Interventions
 - Search Clients
 - Search Non-Human Subjects
- Investigation
 - Subject Summary
 - Investigation Summary
 - Investigation Details
 - Disease Summary
 - Recommendations
 - Investigation Information**
 - Resp. Org / Investigator
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Transfer Requests
 - Close Investigation

Investigation Information ? 🖨️

ACTIVE

Client ID: 211	Name (Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No.: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Date Reported	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

Close Investigation **Re-Open Investigation** **Save** **Reset**

* Required field **Merged Investigation No(s):**

Investigation Information [Investigation History](#)

Priority:

Investigation Information Screen displays.

2. Select **Disposition**.

3. Accept or modify **Disposition Date**.
4. Enter data on this screen as applicable. Note that Panorama mandatory fields are indicated with a red asterisk (*).
5. Select **Client Home Address at Time of Initial Investigation**, if recorded.

Note: The drop-down list contains all addresses of the Client. If the client record has no address, there is no address to select from.

6. Select **Sensitive Environment/Occupation**.
7. Enter **Environment/Occupation** Details in the comments box.

Investigation Information

[Investigation History](#)

Priority: Do Not Use

* Disposition: Investigation in progress

Disposition Date: 2018 / 08 / 08

yyyy mm dd

* Status: OPEN * Status Date: 2018 Aug 8

Client Home Address at Time of Initial Investigation:

Sensitive Environment/Occupation: Health care facility - Work/volunteer

Environment/Occupation Details:

Volunteer as care provider

(974 characters)

8. Under **Diagnosis** sub-section, enter **Diagnosis Date**, select **Primary Method of Diagnosis**, **Method of Detection** and enter **Comments** if desired.

Note: **Method of Detection** field should only be used for TB cases. For other diseases, use **Reason for Testing** on the lab screen.

9. Click **Add** button.

Diagnosis

Diagnosis Date:	2018 / 8 / 8
	yyyy mm dd
Primary Method of Diagnosis:	Clinical diagnosis
Method of Detection:	Occupational screening
Comments:	Free text comments
	(3982 characters) Add

10. Click **Save** button.

Investigation Information

? 🖨

ACTIVE			
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

Investigation details successfully saved.

* Required field Merged Investigation No(s):

Investigation Information	
Priority:	Do Not Use
Investigation History	

Screen refreshes, and a confirmation message, 'Investigation details successfully saved' displays.



Tip: There is a Investigation history hperlink available on this screen as a pop-up window. Click the Investigation History hyperlink at the top right of the screen to view.

6.2 Indicative Disease

When AIDS has been selected as the disease, the Primary Method of Diagnosis is set as Indicative Disease and the Indicative Disease Section displays.

1. Select **Indicative Disease**, enter **Year of Diagnosis** and **Select Diagnosis Type**.
2. Click **Add Indicative Disease** button.

Diagnosis

Diagnosis Date: / / 
yyyy mm dd

Primary Method of Diagnosis:

Indicative disease ▾

Indicative Disease

* At least one required if Method of Diagnosis is Indicative Disease.

* Indicative Disease:

* Year of Diagnosis:

Diagnosis Type:

Add Indicative Disease

Clear

7 RESPONSIBLE ORGANIZATION/INVESTIGATOR

A Responsible Organization and Responsible Organization Workgroup must be assigned to each Investigation. Multiple Responsible Organizations can be added to an Investigation and the Responsible Organization(s) can be updated. A hyperlink to **Responsible Organization History** is available in the top right corner of the screen.



Recent Work

- Search
 - Search Investigations
 - Search Lab
 - Search Exposures
 - Search Interventions
 - Search Clients
 - Search Non-Human Subjects
- Investigation
 - Subject Summary
 - Investigation Summary
 - Investigation Details
 - Disease Summary
 - Recommendations
 - Investigation Information
 - Resp. Org / Investigator**
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Transfer Requests
 - Close Investigation
 - Lab

Responsible Organization / Investigator ? 🖨️

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

[Investigation](#) **Save** **Reset**

*** Required field** **Merged Investigation No(s):**

Responsible Organization 🔍 Hide

*** Responsible Organization :** [Responsible Organization History](#)

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.

The history of updates to Responsible Organization is displayed in a pop-up window.

An Investigator Organization and Workgroup must be assigned to each Investigation. The Investigator Name field is not mandatory. This allows for an Investigation to be assigned to a general "intake" workgroup and can be assigned to a specific Investigator through the work management module.

If no Investigator has been assigned, a Work Management task is created and assigned to the Workgroup selected. Multiple Investigators can be added to an Investigation. Only one Primary Investigator can be assigned to an Investigation at a time. If the case is transferred to another Primary Investigator, an end date must be applied to the first Investigator before adding a new Investigator.

7.1 Add Responsible Organization / Investigator

1. After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **Resp. Org / Investigator** under **Investigation Details**.



Responsible Organization / Investigator ? 🖨️

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

[Investigation](#) **Save** **Reset**

*** Required field** **Merged Investigation No(s):**

Responsible Organization 🔍 Hide

*** Responsible Organization :** [Responsible Organization History](#)

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.

Responsible Organization / Investigator screen displays.

2. Select **Responsible Organization** or click **Find** to use the Embedded Find Component to select a value.
3. Select **Responsible Organization Workgroup**.
4. Enter **Responsible Organization Date**.

Responsible Organization ^ Hide

[Responsible Organization History](#)

* **Responsible Organization** : Nova Scotia Health Authority v

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

Close

Type
Search

*Start typing the name of the Organization. Matches will begin to appear below.
Select the match with the keyboard or mouse.*

Organization Name:

Nova Scotia Health Authority, -

Show Info

Select

* **Responsible Organization Workgroup** : TestSEM v

* **Responsible Organization Date** : 2018 / 8 / 8
yyyy mm dd

Add Organization

Clear

5. Click **Add Organization** button.

	Responsible Organization	Responsible Organization Workgroup	Responsible Organization Date
○	Nova Scotia Health Authority	Test workgroup 2	2018 Aug 8

The organization is added to the Responsible Organization table.

6. In the **Investigator** section, select **Investigator Type**.
7. Select **Investigator Organization**.
8. Select **Investigator Workgroup**, and optionally an **Investigator Name**.
9. Accept or modify an **Assigned Date**, and an **End Date** as applicable.

Investigator ⤴ Hide

* Required only if adding or updating investigator information.

Investigator Type :

*** Investigator Organization :**

*** Investigator Workgroup :**

Investigator Name :

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

End Date : / /
yyyy mm dd

10. Click **Add** button.

Row Actions:

	Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input type="radio"/>	Primary		Test workgroup 2	Nova Scotia Health Authority	2018 Aug 8	

The Investigator is added to the table.

11. Click **Save** button.

Responsible Organization / Investigator



ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

Investigation details successfully saved.

*Required field

Merged Investigation No(s):

Responsible Organization	Hide
---------------------------------	----------------------

[Responsible Organization History](#)

Screen refreshes, and a confirmation message is displayed.



Tip: There is a Responsible Organization history available on this screen as a pop-up window. Click **Responsible Organization History** hyperlink at the top right of the screen to view.

7.2 Update Responsible Organization / Investigator

1. Under the **Responsible Organization** or **Investigator** tables, select the radio button next to the **Responsible Org** or **Investigator** respectively to be updated.

Reason for Deletion :

Row Actions: **Update**

Responsible Organization	Responsible Organization Workgroup	Responsible Organization Date
<input checked="" type="radio"/> Nova Scotia Health Authority	Test workgroup 2	2018 Aug 8

Investigator ^ Hide

* Required only if adding or updating investigator information.

Investigator Type :

* Investigator Organization :

* Investigator Workgroup :

Investigator Name :

* Assigned Date : 2018 / 08 / 09 Assigned Time : : : ADT
yyyy mm dd hh mm

End Date : / /
yyyy mm dd

Row Actions: **Update**

Investigator Type	Investigator Name	Investigator Workgroup	Investigator Organization	Assigned Date/Time	End Date
<input checked="" type="radio"/> Primary		Test workgroup 2	Nova Scotia Health Authority	2018 Aug 8	

2. Click **Update** button. The fields above the table auto populate with associated information.
3. Make the necessary changes.
4. Click **Apply Update** button.

Responsible Organization ^ Hide

[Responsible Organization History](#)

* Responsible 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: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

* Responsible Organization Workgroup :

* Responsible Organization Date : 2018 / 08 / 08
yyyy mm dd

5. Click **Save** button.

ACTIVE			
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

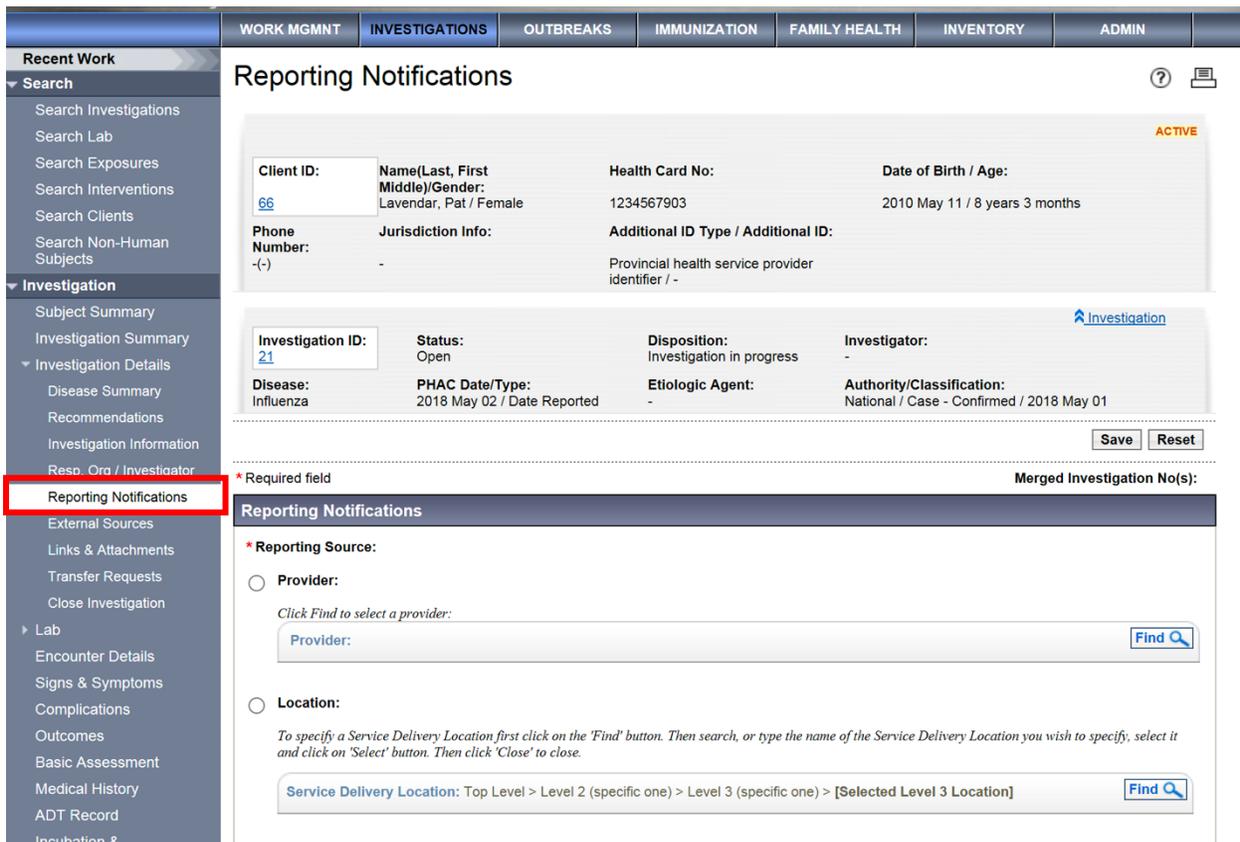
Investigation details successfully saved.

Screen refreshes, and a confirmation message 'Investigation details successfully saved' displays.

8 REPORTING NOTIFICATIONS

The Reporting Notifications screen allows a user to add or update reporting notification details including reporting source and report date or delete a reporting notification for an investigation in context.

1. After setting a client and investigation in Context, navigate to the **Left-Hand Navigation** menu and select **Reporting Notifications** under **Investigation Details**.



The screenshot shows the 'Reporting Notifications' screen. The left-hand navigation menu is on the left, with 'Reporting Notifications' highlighted in red. The main content area is titled 'Reporting Notifications' and contains the following information:

Client Information:

Client ID: 66	Name (Last, First Middle) / Gender: Lavendar, Pat / Female	Health Card No: 1234567903	Date of Birth / Age: 2010 May 11 / 8 years 3 months
Phone Number: -(-)	Jurisdiction Info: -	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Investigation Information:

Investigation ID: 21	Status: Open	Disposition: Investigation in progress	Investigator: -
Disease: Influenza	PHAC Date/Type: 2018 May 02 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Confirmed / 2018 May 01

Buttons: **Save** **Reset**

* Required field

Merged Investigation No(s):

Reporting Notifications

* **Reporting Source:**

Provider:

Click Find to select a provider:

Find 

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.

Find 

8.1 Adding a Reporting Notification

Important: At least one reporting notification per investigation must be specified.

To add a reporting notification

1. Select **Reporting Source**.

If other is selected, enter the name of the reporting source.

2. Optionally select a **Type of Reporting Source** and **Method of Notification**.
3. Enter at least one of **Report Date (Sent)** or **Report Date (Received)**.
4. Click **Add Notification** button.

The system adds the reporting notification to the table.

5. Click **Save** button.

The system saves the reporting notification and displays a message indicating that the investigation details were successfully saved.

Reporting Notifications

*** Reporting Source:**

Provider:
Click Find to select a provider:
 Find

Location: Halifax 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 > Central Zone > Halifax Public Health Office > [Halifax PHO]
 Find

Other:

Type of Reporting Source: ▼

Method of Notification: ▼

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

Report Date (Sent): / / [calendar icon]
yyyy mm dd

Report Date (Received): / / [calendar icon]
yyyy mm dd

Add Notification
Clear

Row Actions: View/Update Details Delete

	Reporting Source	Type of Reporting Source	Report Date (Sent)	Report Date (Received)	Method of Notification
<input type="radio"/>	Halifax Public Health Office			2018 May 2	

Save
Reset

8.2 Updating a Reporting Notification

1. Select the radio button next to the notification to be modified.

2. Click **View/Update Details** button.

Row Actions: View/Update Details Delete					
	Reporting Source	Type of Reporting Source	Report Date (Sent)	Report Date (Received)	Method of Notification
<input type="radio"/>	Halifax Public Health Office	Client		2018 Sep 5	In Person
<input checked="" type="radio"/>	Halifax Public Health Office			2018 May 2	

Save Reset

The system displays the details of the selected notification.

3. Modify the reporting notification information as required.
4. Click **Apply Update** button.

Type of Reporting Source:

Method of Notification:

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

Report Date (Sent): / / 
yyyy mm dd

Report Date (Received): / / 
yyyy mm dd

Apply Update Clear

The system updates the reporting notification in the table.

5. Click **Save** button.

The system saves the reporting notification that was updated and displays a message indicating that the investigation details were successfully saved.

8.3 Deleting a Reporting Notification

1. Select the radio button next to the reporting notification to be deleted.
2. Click **Delete** button.

Row Actions:

	Reporting Source	Type of Reporting Source	Report Date (Sent)	Report Date (Received)	Method of Notification
<input type="radio"/>	Halifax Public Health Office	Client		2018 Sep 5	In Person
<input checked="" type="radio"/>	Halifax Public Health Office			2018 May 2	

The system deletes the reporting notification from the table.

3. Click **Save** button.

The system deletes the selected notification and displays a message indicating that the investigation details were successfully saved.

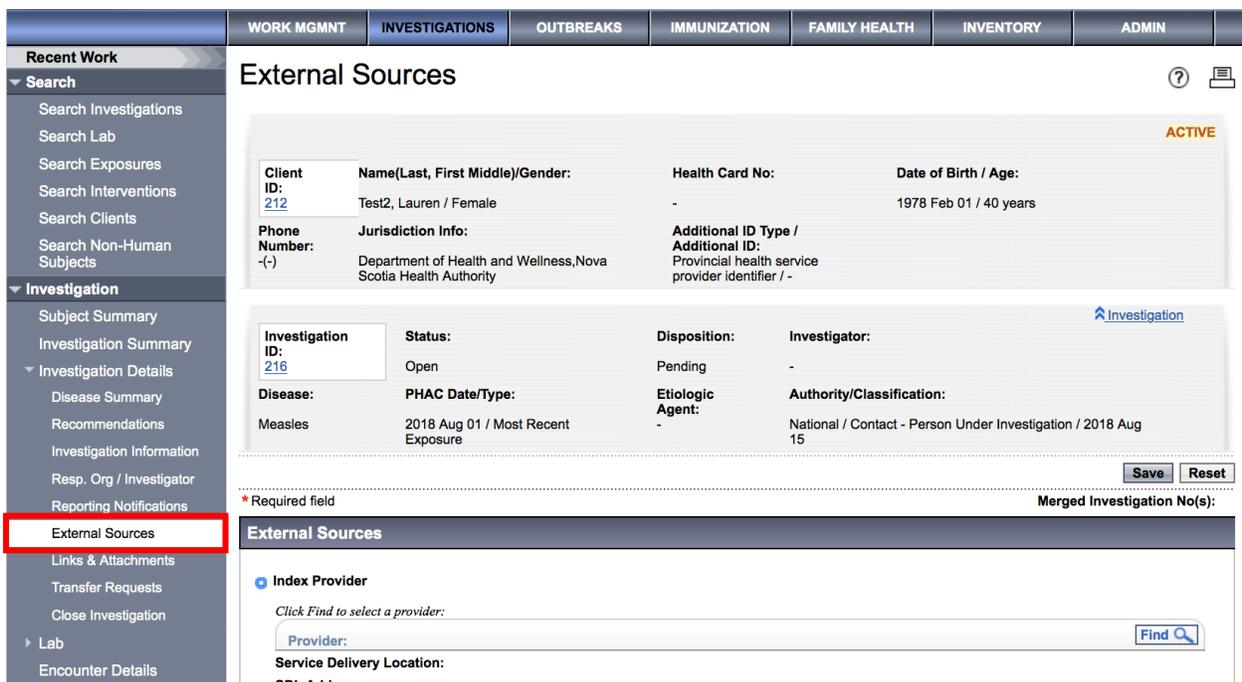
9 EXTERNAL SOURCES

Choosing External Sources from the left-hand navigation provides the ability to record contact information for people or agencies that need to be contacted about an Investigation. These External Sources can be one of three types: Index Providers, Service Delivery Locations, or Other External Sources. For each type, an address, phone number and fax number can be recorded.

Note: Only use “Other External Source”. Do not use “Index Provider or Service Delivery Location. Index Providers cannot be selected as an SDL must be associated with them.

9.1 Adding an External Source

1. After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **External Sources** under **Investigation Details**.



WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH	INVENTORY	ADMIN																
<div style="display: flex; justify-content: space-between;"> <div style="width: 20%;"> <p>Recent Work</p> <p>Search</p> <ul style="list-style-type: none"> Search Investigations Search Lab Search Exposures Search Interventions Search Clients Search Non-Human Subjects <p>Investigation</p> <ul style="list-style-type: none"> Subject Summary Investigation Summary Investigation Details Disease Summary Recommendations Investigation Information Resp. Org / Investigator Reporting Notifications External Sources Links & Attachments Transfer Requests Close Investigation <p>Lab</p> <ul style="list-style-type: none"> Encounter Details </div> <div style="width: 80%;"> <h3>External Sources</h3> <p style="text-align: right;">ACTIVE</p> <table border="1"> <tr> <td>Client ID: 212</td> <td>Name (Last, First Middle) / Gender: Test2, Lauren / Female</td> <td>Health Card No.: -</td> <td>Date of Birth / Age: 1978 Feb 01 / 40 years</td> </tr> <tr> <td>Phone Number: -(-)</td> <td>Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority</td> <td colspan="2">Additional ID Type / Additional ID: Provincial health service provider identifier / -</td> </tr> </table> <table border="1"> <tr> <td>Investigation ID: 216</td> <td>Status: Open</td> <td>Disposition: Pending</td> <td>Investigator: -</td> </tr> <tr> <td>Disease: Measles</td> <td>PHAC Date/Type: 2018 Aug 01 / Most Recent Exposure</td> <td>Etiologic Agent: -</td> <td>Authority/Classification: National / Contact - Person Under Investigation / 2018 Aug 15</td> </tr> </table> <p style="text-align: right;">Save Reset</p> <p>* Required field Merged Investigation No(s):</p> <h4>External Sources</h4> <p><input checked="" type="radio"/> Index Provider</p> <p>Click Find to select a provider:</p> <p>Provider: <input type="text"/> Find</p> <p>Service Delivery Location: SN: Address:</p> </div> </div>							Client ID: 212	Name (Last, First Middle) / Gender: Test2, Lauren / Female	Health Card No.: -	Date of Birth / Age: 1978 Feb 01 / 40 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 ID: 216	Status: Open	Disposition: Pending	Investigator: -	Disease: Measles	PHAC Date/Type: 2018 Aug 01 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Aug 15
Client ID: 212	Name (Last, First Middle) / Gender: Test2, Lauren / Female	Health Card No.: -	Date of Birth / Age: 1978 Feb 01 / 40 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 ID: 216	Status: Open	Disposition: Pending	Investigator: -																			
Disease: Measles	PHAC Date/Type: 2018 Aug 01 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Aug 15																			

External Sources screen displays.

2. Select **Other External Source**.
3. Complete the information. **Note:** although not indicated with an asterisk, once the Other External Source checkbox is activated, a piece of demographic information is required – i.e. telephone number.

External Sources

Index Provider

Click Find to select a provider:

Provider: Find 

Service Delivery Location:

SDL Address:

Phone Number:

Fax Number:

Service Delivery 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: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 Location] Find 

SDL Address:

SDL Contact Phone Number:

SDL Contact Fax Number:

Other External Source

Name:

Role/Organization:

Country:

Address Line 1:

Address Line 2:

Province/Territory:

City:

Postal Code:

Phone Number: () - ext. International

Fax Number: () - International

* Effective Date From: / / 

yyyy mm dd

Effective Date To: / / 

yyyy mm dd

Row Actions:

External Source Type	Name	Role/Organization	Address	Phone/Fax Numbers	Effective From	Effective To
----------------------	------	-------------------	---------	-------------------	----------------	--------------

4. Click **Add**.

The External Source is added to the External Sources table.

- Click **Save**.

Row Actions: <input type="button" value="Update"/> <input type="button" value="Delete"/>							
	External Source Type	Name	Role/Organization	Address	Phone/Fax Numbers	Effective From	Effective To
<input type="radio"/>	Other	Dr. P. Williams	Physician (NFLD)	-	(450) 450-4545 (Phone)	2018 Oct 18	-

Created By	Created Date/Time	Last Updated By	Last Updated Date/Time
------------	-------------------	-----------------	------------------------

External Sources



ACTIVE

Client ID: 212	Name (Last, First Middle)/Gender: Test2, Lauren / Female	Health Card No: -	Date of Birth / Age: 1978 Feb 01 / 40 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 ID: 216	Status: Open	Disposition: Pending	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 01 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Aug 15

External Sources successfully saved.

Page refreshes and confirmation message “external sources successfully saved” displays.

9.2 Updating an External Source

- After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **External Sources** under **Investigation Details**.

External Sources screen displays.

2. Scroll to the bottom of the page and select an existing External Source from the table to activate Row Actions.

Row Actions: Update Delete							
	External Source Type	Name	Role/Organization	Address	Phone/Fax Numbers	Effective From	Effective To
<input checked="" type="radio"/>	Other	Dr. P. Williams	Physician (NFLD)	-	(450) 450-4545 (Phone)	2018 Oct 18	-

Save Reset

Click **Update**.

3. In the populated fields, update the information as required.
4. Click **Apply Update**.

External Source table updates and displays the updated information.

5. Click **Save**.

External Sources



ACTIVE

Client ID: 212	Name(Last, First Middle)/Gender: Test2, Lauren / Female	Health Card No: -	Date of Birth / Age: 1978 Feb 01 / 40 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 ID: 216	Status: Open	Disposition: Pending	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 01 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Aug 15

External Sources successfully saved.

Save Reset

Page refreshes and confirmation message “external sources successfully saved” displays.

9.3 Deleting an External Source

1. After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **External Sources** under **Investigation Details**.

External Sources screen displays.

2. Scroll to the bottom of the page and select an existing External Source from the table to activate Row Actions.



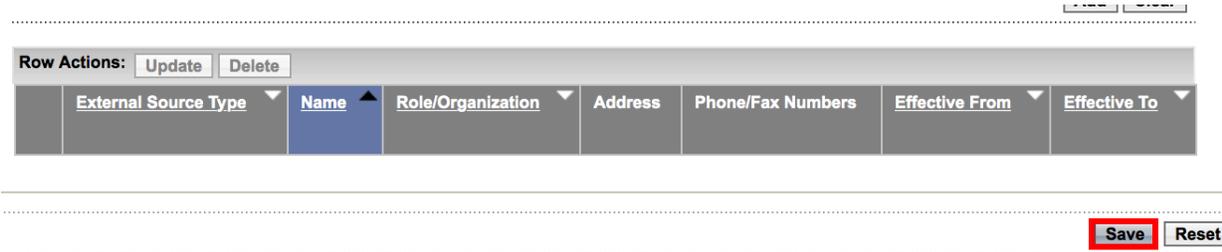
The screenshot shows a table with the following data:

External Source Type	Name	Role/Organization	Address	Phone/Fax Numbers	Effective From	Effective To
Other	Dr. P. Williams	Physician (NFLD)	-	(450) 450-4545 (Phone)	2018 Oct 18	-

Row Actions: Update **Delete**

Buttons: Save Reset

3. Click **Delete**.



The screenshot shows the same table as above, but the 'Delete' button in the Row Actions bar is highlighted in red.

Row Actions: Update **Delete**

Buttons: **Save** Reset

External Source table updates and the External Source to be deleted is removed.

4. Click **Save**.

External Sources



ACTIVE

Client ID: 212	Name(Last, First Middle)/Gender: Test2, Lauren / Female	Health Card No: -	Date of Birth / Age: 1978 Feb 01 / 40 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 ID: 216	Status: Open	Disposition: Pending	Investigator: -	Investigation
Disease: Measles	PHAC Date/Type: 2018 Aug 01 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Aug 15	

External Sources successfully saved.

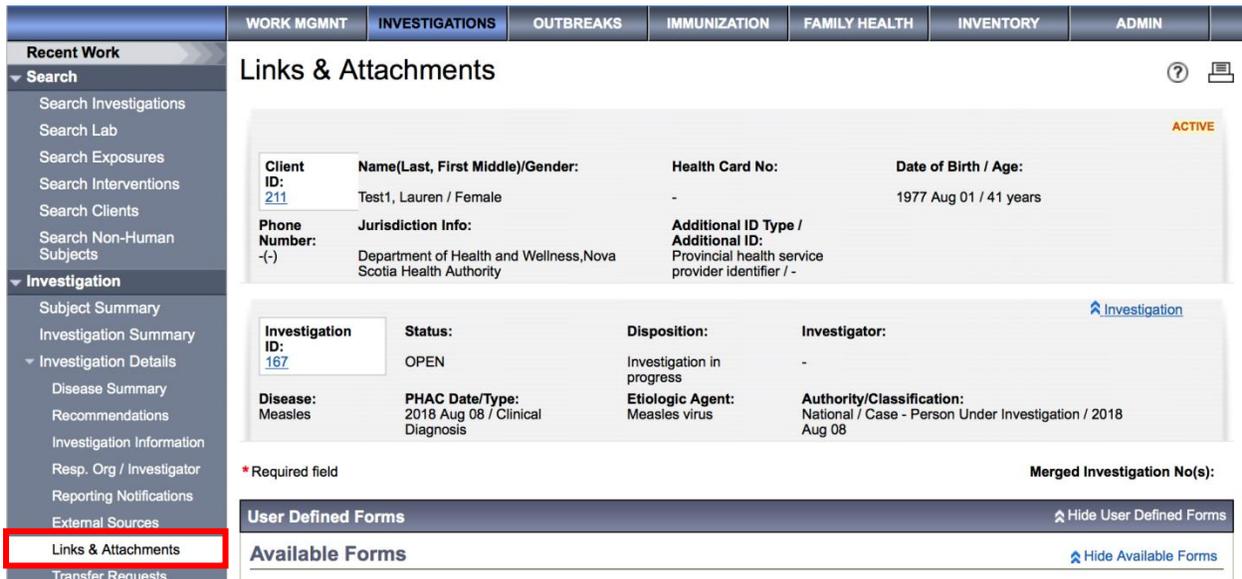
Page refreshes and confirmation message “external sources successfully saved” displays.

10 LINKS AND ATTACHMENTS

Choosing Links & Attachments from the left-hand navigation provides access to Document Management from within an Investigation. Document Management allows Users to upload documents pertinent to an investigation. Documents can include Lab Results, Hospital Discharge Summaries, and external Consults. From **Links and Attachments** Users are also able to view and fill out UDFs pertinent to an investigation.

10.1 Complete a User Defined Form

1. After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **Links & Attachments** under **Investigation Details**.



WORK MGMT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH	INVENTORY	ADMIN																
<div style="display: flex; justify-content: space-between;"> <div style="width: 20%;"> <p>Recent Work</p> <p>Search</p> <ul style="list-style-type: none"> Search Investigations Search Lab Search Exposures Search Interventions Search Clients Search Non-Human Subjects <p>Investigation</p> <ul style="list-style-type: none"> Subject Summary Investigation Summary Investigation Details Disease Summary Recommendations Investigation Information Resp. Org / Investigator Reporting Notifications External Sources Links & Attachments Transfer Requests </div> <div style="width: 80%;"> <h3>Links & Attachments</h3> <div style="text-align: right;">ACTIVE</div> <table border="1"> <tr> <td>Client ID: 211</td> <td>Name(Last, First Middle)/Gender: Test1, Lauren / Female</td> <td>Health Card No: -</td> <td>Date of Birth / Age: 1977 Aug 01 / 41 years</td> </tr> <tr> <td>Phone Number: -(-)</td> <td>Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority</td> <td colspan="2">Additional ID Type / Additional ID: Provincial health service provider identifier / -</td> </tr> </table> <table border="1"> <tr> <td>Investigation ID: 167</td> <td>Status: OPEN</td> <td>Disposition: Investigation in progress</td> <td>Investigator: -</td> </tr> <tr> <td>Disease: Measles</td> <td>PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis</td> <td>Etiologic Agent: Measles virus</td> <td>Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08</td> </tr> </table> <p>* Required field</p> <p style="text-align: right;">Merged Investigation No(s):</p> <div style="display: flex; justify-content: space-between;"> <div> <p>User Defined Forms</p> <p>Available Forms</p> </div> <div> <p>Hide User Defined Forms</p> <p>Hide Available Forms</p> </div> </div> </div> </div>							Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -	Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08
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Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -																				
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Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08																			

Links & Attachments screen displays.

Links & Attachments



ACTIVE

Client ID: 205	Name(Last, First Middle)/Gender: Grape, Red / Male	Health Card No: -	Date of Birth / Age: 1982 Jul 01 / 36 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: 252	Status: Open	Disposition: Out of Province referral	Investigator: -
Disease: Salmonellosis	PHAC Date/Type: 2018 Aug 30 / Date Reported	Etiologic Agent: Salmonella / species	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 30

* Required field

Merged Investigation No(s):

User Defined Forms [Hide User Defined Forms](#)

Available Forms [Hide Available Forms](#)

1 forms found. Click on radio button to select.

Row actions: [Fill Out Form](#)

	Form ID	Form Name	Form Description	Version	Required	Date Published	Associated Files (Version)
<input checked="" type="radio"/>	2	Food Questionnaire	Generic Food Questionnaire	5		2018 Sep 20	-

- From the User Defined Forms (UDF) section, click the radio button next to the form to be completed.
- Click **Fill Out Form**.

The selected UDF displays in a new window.

Foods Exposures Questionnaire -- Webpage Dialog



Foods Exposures Questionnaire

Record type: Investigation
 Record ID: 252
 Record Name: UDF Investigation

Applicable risk factor and exposure details must be captured in the appropriate section of Panorama.

Food Exposures Questionnaire [Show/Hide](#)

Day:

Date:

Breakfast Place

Breakfast Food

Breakfast companions

Additional Food Exposures [Show/Hide](#)

4. Enter data in the UDF as applicable.
5. To add additional sections, click **Add** button located at the bottom of the form.
6. Click **Submit** upon completion. Confirmation messages, 'Your data has been successfully saved' and 'You may now close this window' displays.

- Close the window by clicking “X” at the top right corner of the window. The Links & Attachments screen refreshes, and the saved form can be found in the **Filled Out Forms** table.

Filled Out Forms

[Hide Filled Out Forms](#)

1 forms found.

Click on Instance ID to view Form. Click on radio button to select.

Row actions: Update Migrate Answers to Newest Version									
	Instance ID	Form Name	Form Description	Version	Needs Migration	Updates Allowed By	Status	Created By/On	Last Updated By/On
<input type="radio"/>	11	Food Questionnaire	Generic Food Questionnaire	5		All users	Published	MacKirdy, Susan 2018 Oct 16	-

10.2 Attached Documents

User can store and view documents that have been attached to system records. Documents can be attached directly to system records such as client, non-human subject, investigations, cohorts, mass immunization events, outbreaks, etc.

Note: Documents associated to an investigation **should always** be added with the investigation in context. This will restrict access to the document to those users with the appropriate permissions.

- After setting a client and investigation In Context in the Investigations Module, go to the **Left-Hand Navigation** menu and select **Links & Attachments** under **Investigation Details**.

WORK MGMT

INVESTIGATIONS

OUTBREAKS

IMMUNIZATION

FAMILY HEALTH

INVENTORY

ADMIN

Recent Work

Search

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

Investigation

- Subject Summary
- Investigation Summary
- Investigation Details
- Disease Summary
- Recommendations
- Investigation Information
- Resp. Org / Investigator
- Reporting Notifications
- External Sources
- Links & Attachments
- Transfer Requests

Links & Attachments

ACTIVE

Client ID: 211	Name (Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

*Required field

Merged Investigation No(s):

User Defined Forms [Hide User Defined Forms](#)

Available Forms [Hide Available Forms](#)

Links & Attachments screen displays.

1. Navigate to the Attached Documents section.
2. Click **Manage Documents**

Attached Documents ↑ Hide Attached Documents

0 Attached Documents Click on Document Title to open or save attachment.

Manage Documents

Document Title	Size (KB)	Type	Posted By	Posted On

The **Context Documents** screen is displayed.

Context Documents



ACTIVE

Client ID: 205	Name(Last, First Middle)/Gender: Grape, Red / Male	Health Card No: -	Date of Birth / Age: 1982 Jul 01 / 36 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: 252	Status: Open	Disposition: Out of Province referral	Investigator: -
Disease: Salmonellosis	PHAC Date/Type: 2018 Aug 30 / Date Reported	Etiologic Agent: Salmonella / species	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 30

Search Document Folders - Basic ↑ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

Document List ↑ Hide Document List

Row Actions:

Document Title	Size[KB]	Type	Posted By	Posted On	Description	Status

Total: 0 Page 1 of 1 Jump to page:

1.1 Search Context Documents

1. Complete a **Client or Subject Search**. If the document was added with an investigation in context, the investigation must be in context to search for the document.

The Context Documents screen is displayed.

In this example, the client and investigation are in context and the documents attached to this investigation record are displayed in the Document List.

Context Documents ? 🖨️

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 / -	

Investigation ID: 151	Status: OPEN	Disposition: Investigation in progress	Investigator: -	Investigation
Disease: Mumps	PHAC Date/Type: 2018 Jun 25 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Jul 16	

Search Document Folders - Basic ⤴ Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

Document List ⤴ Hide Document List

Row Actions:

Document	Title	Size [KB]	Type	Posted By	Posted On	Description	Status
<input type="checkbox"/>	Test File 2	11.61	VND.OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 20		active

1.2 Add Context Document

With the client and/or investigation in context

1. Click **Add New** 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"/>	Test File 2	11.61	VND_OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 20		active
Total: 1				Page 1 of 1		Jump to page: <input type="text"/>	

The Document Management screen is displayed.

1. Click **Browse** button to search for the applicable document.
2. Click **Upload File** button.
3. Enter **Document Title**.
4. Update **Effective Date** if required. Default is current date.
5. Add **Expiration Date** if required.
6. Change **Status** if necessary. Default is "active".
7. If desired, enter **Keyword(s)** to assist with searches. Click **Add** button.
8. Add **Description** and enter **Comments** if required.
9. Click **Submit** button.

Document Management



Add New Document

Add New Document to Folder: MacKirdy, Susan Use tree view above to select a different folder.

* File name: Browse... Upload File

File uploaded: Test Document 2.docx

Selected Document:

* Document Title:

* Effective Date: / /

Expiration Date: / /

Status: * active

Lock Document

Use CTRL key for multiple selections.

Enter Keyword: Add Remove Selected Keywords:

Description:

Document Added by: MacKirdy, Susan on: 2018 Aug 17

Comments: ^ Hide Comments

Comments:

Submit

The document is added to the **Document List**.

1.2.1 Open Context Document

10. Click **Document Title** hyperlink.

Document List ^ Hide Document List							
Document Title	Size [KB]	Type	Posted By	Posted On	Description	Status	
<input checked="" type="checkbox"/>	Test File 2	11.61	VND_OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGMML.DOCUMENT	MacKirdy, Susan	2018 Aug 20		active

Total: 1 Page 1 of 1 Jump to page:

1.3 Delete Context Document

With the client and investigation in context

1. Select document to be deleted.
2. Click **Delete** button.

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 / -	

Investigation ID: 151	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Mumps	PHAC Date/Type: 2018 Jun 25 / Most Recent Exposure	Etiologic Agent: -	Authority/Classification: National / Contact - Person Under Investigation / 2018 Jul 16

Investigation

Search Document Folders - Basic Hide Search

Enter Keywords to search. Leave search box empty to view all documents. Search will be performed on selected folder and its subfolders if applicable. Search results will appear in 'Document List' below.

Search Documents by keyword:

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 checked="" type="checkbox"/> Test File 2	11.61	VND_OPENXMLFORMATS-OFFICEDOCUMENT.WORDPROCESSINGML.DOCUMENT	MacKirdy, Susan	2018 Aug 20		active

[tia.ca/DocumentManagement/pages/](#) Jump to page:

The system will prompt the user to confirm.

3. Click **OK** to continue.

11 OUTCOMES

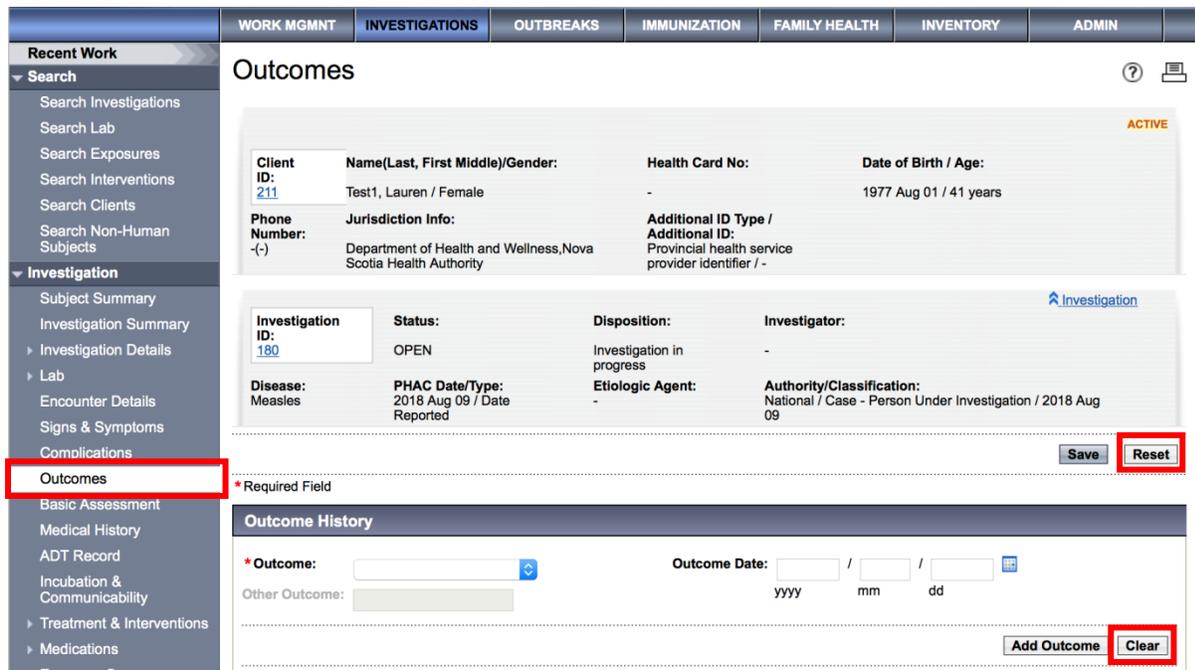
An Outcome is an attribute of the client and describes the result at a point in time during the investigation and the final result in relation to the notifiable disease that is being investigated. e.g. hospitalization, recovered, death.

An Outcome of 'Death' has additional steps for creating and updating and therefore will be discussed in separate sections below.

What the user records in Outcomes rolls up to Outbreaks, i.e. if the Client and Investigation In Context are linked to an Outbreak, the recorded outcome for that Client displays in the table on the Outcome Counts screen. Reference Outbreak User Guide for more detail.

11.1 Create an Outcome

1. After setting a Client and Investigation in Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Outcomes**.



The screenshot shows the 'Outcomes' screen in a web application. The top navigation bar includes 'WORK MGMNT', 'INVESTIGATIONS', 'OUTBREAKS', 'IMMUNIZATION', 'FAMILY HEALTH', 'INVENTORY', and 'ADMIN'. The left-hand navigation menu is expanded, showing 'Outcomes' selected. The main content area displays the following information:

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Phone Number: (-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

Below this, investigation details are shown:

Investigation ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

Buttons for 'Save' and 'Reset' are visible. The 'Outcome History' section includes a dropdown for 'Outcome' and a date field for 'Outcome Date' (format: yyyy / mm / dd). Buttons for 'Add Outcome' and 'Clear' are also present.

The Outcomes screen displays.

2. Under **Outcome History** section, select **Outcome**.

Note: If the Outcome is Other, enter the Outcome Details in the **Other Outcome** field.

Note: "Recovered" to be used for circumstances such as a patient with e-coli where stool samples come back clear.

3. Enter **Outcome Date**.

Outcome History

*** Outcome:** Alive-Hospitalized

Other Outcome:

Outcome Date: 2018 / 8 / 14

yyyy mm dd

Add Outcome Clear

4. Click **Add Outcome** button.

Row Actions: Update Delete

Reason for Deletion: Reason for Deletion

	Outcome	Outcome Date
<input type="radio"/>	Alive-Hospitalized	2018 Aug 14

Comments

Patient alive and has been hospitalized as of this morning.

(3941 characters)

Add

The screen refreshes and the Outcome displays in the table.

5. If desired, enter comments in the **Comments** field.
6. Click **Add** button.

Date	Comments	Recorded By
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

Save Reset

The added comment displays in the Comments table.

7. Click **Save** button.

Outcomes



ACTIVE			
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -	Investigation
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09	

Outcome saved successfully

The screen refreshes and a confirmation message 'Outcome saved successfully' displays.

11.2 Create Outcome of 'Deceased'

1. After setting a Client and Investigation in Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Outcomes**.

The screenshot shows the 'Outcomes' page within the application. The left-hand navigation menu is visible, with 'Outcomes' highlighted in a red box. The main content area displays the 'Outcomes' form, which includes client and investigation details. Below the form, there is an 'Outcome History' section with a dropdown menu for 'Outcome' and a date field for 'Outcome Date'. The 'Outcomes' page also features a 'Save' and 'Reset' button.

The Outcomes screen displays.

2. Under **Outcome History** section, select “Deceased” from the **Outcome** drop-down list.
3. Enter **Outcome Date**.

Note: The Outcome Date equals the Date of Death. Enter Date of Death as the true date of death, if known; or else, enter the date on which the user was informed of the death.

Outcome History

*** Outcome:** ⌵

Other Outcome:

Outcome Date: / / 📅

yyyy mm dd

4. Click **Add Outcome** button.

Row Actions:

	Outcome	Outcome Date
<input type="radio"/>	Alive-Hospitalized	2018 Aug 14
<input type="radio"/>	Deceased	2018 Aug 14

Comments

(4000 characters)

Date	Comments	Recorded By
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

Cause Of Death Details ⬆ Hide Cause of Death Details

*** Cause Of Death:** ⌵

Other Cause of Death:

Contributing Level:

The **Deceased Outcome** displays in the table below, and the **Cause of Death Details** section becomes available.

5. Enter any comments in the Comments field, and click **Add** button.

Comments

(4000 characters)

Add

Date	Comments	Recorded By
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

Cause Of Death Details ↑ Hide Cause of Death Details

*** Cause Of Death:**

Other Cause of Death:

Contributing Level:

Add

6. In the **Cause of Death Details** section, select **Cause of Death**.
7. Enter **Other Cause of Death**, if applicable, and **Contributing Level**.
8. Click **Add** button.

Date	Comments	Recorded By
2018 Aug 14	Patient passed away in hospital.	Xie, Lauren
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

Cause Of Death Details ⤴ Hide Cause of Death Details

* Cause Of Death:

Other Cause of Death:

Contributing Level:

Row Actions

Cause Of Death	Contributing Level
<input type="radio"/> Other: Heart attack	Immediate

The added comment displays in the **Comments table** after adding the comment. After adding cause of death details, the screen refreshes and the Cause of Death Details displays in the **Cause Of Death table**.

- Complete **Autopsy Performed?**
- In the **Comments** field, record any updates to the fields on the current screen. Also use this text box to enter any additional information pertinent to the Death being recorded. Click **Add** button.

Information Source:

Autopsy Performed?

Comments

Patient passed away in the hospital. No autopsy planned.

(3944 characters)

Date	Comments	Recorded By
2018 Aug 14	Patient passed away in the hospital. No autopsy planned.	Xie, Lauren

The added comment displays in the Comments table.

11. Click **Save** button.

Outcomes

? ☰

DECEASED INACTIVE			
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Date of Death / Age: 2018 Aug 14 / 41 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: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

Outcome saved successfully

The screen refreshes and a message 'Outcome saved successfully' displays. Client record displays 'Deceased Inactive'.

Note: When an outcome of 'Deceased' is saved:

- The Client record is automatically inactivated with a reason of 'Deceased'.
- The Date of Death is populated with the Outcome Date, with
- Date of death and age are displayed in the Header under the Client ID Field.
- 'Deceased Inactive' is displayed in the top right-hand corner of the Header.
- Any active Relationships of the Client In Context are automatically expired when the Death is recorded as the Outcome, with the Effective To Date being set to the Date of Death.

11.3 View Outcomes

1. After setting a Client and Investigation In Context (an Encounter does not have to be In Context in order to view Outcomes), navigate to the **Left-Hand Navigation** menu and select **Outcomes**.

Outcomes screen displays. Outcomes are displayed in the **Outcomes Summary Table**.

OR

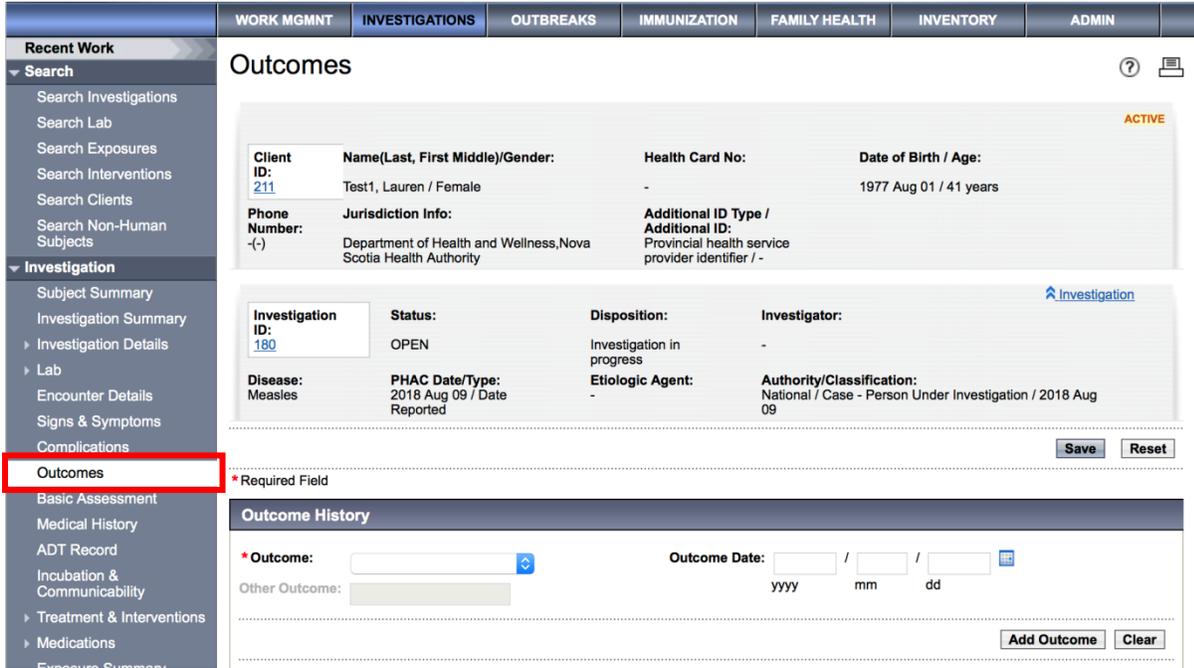
2. Navigate to the **Left-Hand Navigation** menu and select **Investigation Summary**.
3. Scroll down to **Outcomes** section.

Outcomes are displayed in the Outcomes Table.

4. To view the details, click the **Outcomes** hyperlink.

11.4 Update Outcome

- After setting a Client and Investigation in Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Outcomes**.

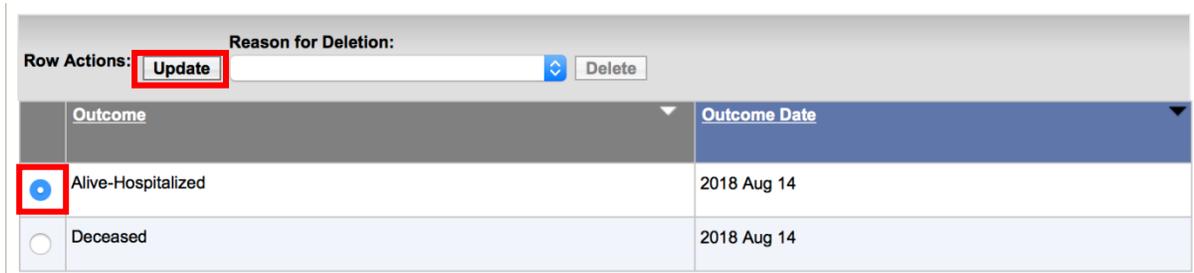


The screenshot shows the 'Outcomes' screen. The left-hand navigation menu is on the left, with 'Outcomes' highlighted in a red box. The main content area is titled 'Outcomes' and contains several sections:

- Client Information:** Client ID: 211, Name: Test1, Lauren / Female, Health Card No: -, Date of Birth / Age: 1977 Aug 01 / 41 years.
- Investigation Information:** Investigation ID: 180, Status: OPEN, Disposition: Investigation in progress, Investigator: -.
- Disease Information:** Disease: Measles, PHAC Date/Type: 2018 Aug 09 / Date Reported, Etiologic Agent: -, Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09.
- Outcome History:** A table with columns 'Outcome' and 'Outcome Date'. The first row is 'Alive-Hospitalized' with a date of '2018 Aug 14'. The second row is 'Deceased' with a date of '2018 Aug 14'. The 'Update' button in the 'Row Actions' column is highlighted in a red box.

The Outcomes screen displays.

- Select the **radio button** beside the Outcome to be updated.



The close-up screenshot shows the 'Outcome History' table. The 'Update' button in the 'Row Actions' column is highlighted in a red box. The table has two rows:

Outcome	Outcome Date
Alive-Hospitalized	2018 Aug 14
Deceased	2018 Aug 14

- Click **Update** button.

Outcome History

* Outcome: Outcome Date: / / 

Other Outcome:

yyyy mm dd

Row Actions: Reason for Deletion:

	Outcome	Outcome Date
<input checked="" type="radio"/>	Alive-Hospitalized	2018 Aug 14
<input type="radio"/>	Deceased	2018 Aug 14

The screen refreshes and the Outcome displays in the Outcome History section.

8. Update **Date** as required.
9. Click **Apply Update** button.

Row Actions: Reason for Deletion:

	Outcome	Outcome Date
<input type="radio"/>	Deceased	2018 Aug 14
<input type="radio"/>	Alive-Hospitalized	2018 Aug 13

Comments

Hospitalization date entered in error. Corrected to Aug 13

(3942 characters)

The date is updated.

10. Add comments to the **Comments** box to note the updates and click **Add** button.

Date	Comments	Recorded By
2018 Aug 14	Hospitalization date entered in error. Corrected to Aug 13	Xie, Lauren
2018 Aug 14	Patient passed away in hospital.	Xie, Lauren
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

Comment is added to the Comments table.

11. Click **Save** button.

Outcomes



DECEASED INACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Date of Death / Age: 2018 Aug 14 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

Outcome saved successfully

The screen refreshes and a confirmation message 'Outcome saved successfully' displays.

11.5 Delete Outcome

1. After setting a Client and Investigation in Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Outcomes**.

Recent Work

▼ Search

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

▼ Investigation

- Subject Summary
- Investigation Summary
- ▼ Investigation Details
 - Disease Summary
 - Recommendations
 - Investigation Information
 - Resp. Org / Investigator
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Transfer Requests
 - Close Investigation
- ▶ Lab
 - Encounter Details
 - Signs & Symptoms
 - Complications
 - Outcomes
 - Basic Assessment
 - Medical History

Outcomes ? 📄

ACTIVE

Client ID:	Name(Last, First Middle)/Gender:	Health Card No:	Date of Birth / Age:
211	Test1, Lauren / Female	-	1977 Aug 01 / 41 years
Phone Number:	Jurisdiction Info:	Additional ID Type / Additional ID:	
-(-)	Department of Health and Wellness, Nova Scotia Health Authority	Provincial health service provider identifier / -	

Investigation ID:	Status:	Disposition:	Investigator:
180	Open	Investigation in progress	-
Disease:	PHAC Date/Type:	Etiologic Agent:	Authority/Classification:
Measles	2018 Aug 09 / Date Reported	-	National / Case - Person Under Investigation / 2018 Aug 09

[Investigation](#) Save Reset

*** Required Field**

Outcome History

* Outcome: Outcome Date: / / yyyy mm dd

Other Outcome:

Add Outcome Clear

	Outcome	Outcome Date
Row Actions: Update Reason for Deletion: <input type="text"/> Delete	<input type="radio"/> Alive-Hospitalized	2018 Aug 13

The Outcomes screen displays.

- Enter a comment on the reason for deleting the outcome. Click **Add**.

Comments

Alive-Hospitalized entered in error. The Outcome will be deleted.

(3935 characters)

Add

- Click **Add**.

	Outcome	Outcome Date
Row Actions: Update Reason for Deletion: <input style="border: 2px solid red;" type="text" value="Entered in Error"/> Delete	<input style="border: 2px solid red;" type="radio"/> Alive-Hospitalized	2018 Aug 13

- After the comment has been added, click the radio button next to the Outcome to be deleted, select **Reason for Deletion**, and then click **Delete**.

Row Actions: Reason for Deletion:

Outcome	Outcome Date

Comments

(4000 characters)

Date	Comments	Recorded By
2018 Sep 4	Alive-Hospitalized entered in error. The Outcome will be deleted.	Xie, Lauren
2018 Aug 14	Outcome of deceased entered in error	Xie, Lauren
2018 Aug 14	Hospitalization date entered in error. Corrected to Aug 13	Xie, Lauren
2018 Aug 14	Patient passed away in hospital.	Xie, Lauren
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

- After the Observation is deleted from the observation table, click **Save**.

Outcomes



DECEASED INACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Date of Death / Age: 2018 Aug 14 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

Outcome saved successfully

The screen refreshes and a confirmation message 'Outcome saved successfully' displays.

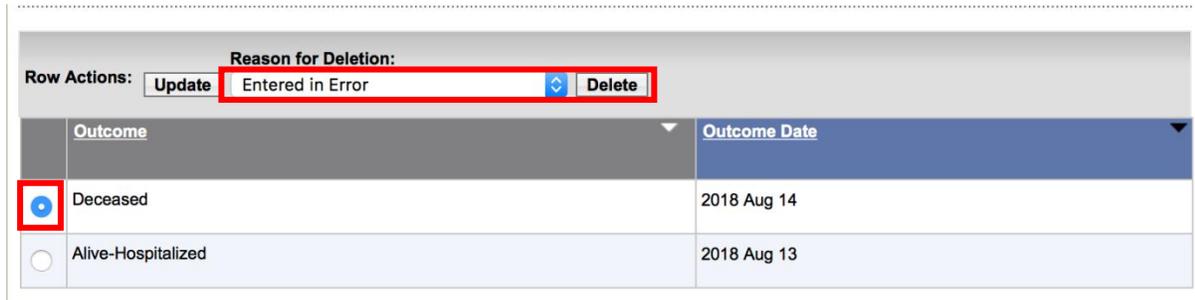
11.6 Delete Outcome of Deceased

- After setting a Client and Investigation in Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Outcomes**.

The Outcomes screen displays. Client record displays 'Deceased Inactive'.

- Under **Outcome History** section, select the radio button next to **Deceased**.

3. Select **Reason for Deletion**.



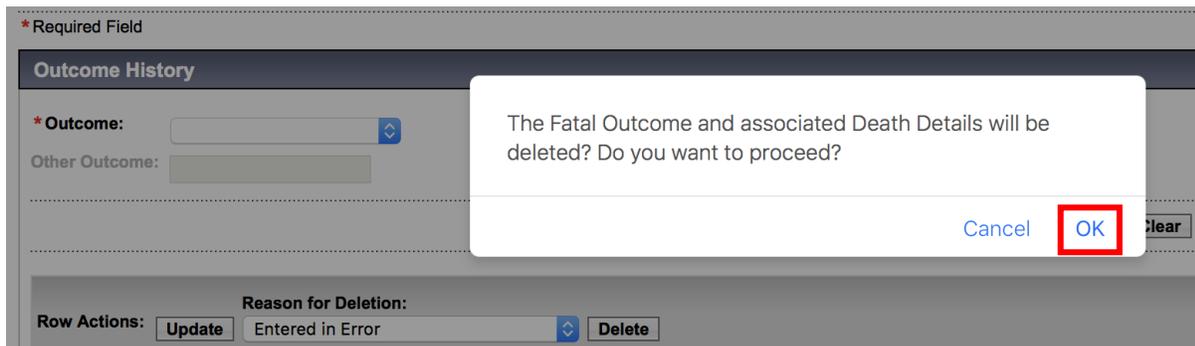
The screenshot shows a table with two columns: 'Outcome' and 'Outcome Date'. The 'Reason for Deletion' dropdown is set to 'Entered in Error'. The 'Deceased' option is selected in the 'Outcome' column, and the 'Delete' button is active.

Outcome	Outcome Date
<input checked="" type="radio"/> Deceased	2018 Aug 14
<input type="radio"/> Alive-Hospitalized	2018 Aug 13

The **Delete** button becomes active after selecting the Reason for Deletion.

Note: If the reason for deletion is **Other**, a reason must be entered in the **Enter Reason if Other** text box.

4. Click **Delete** button.



The screenshot shows a confirmation dialog box with the text: 'The Fatal Outcome and associated Death Details will be deleted? Do you want to proceed?'. The 'OK' button is highlighted with a red box. The background shows the 'Outcome History' form with the 'Reason for Deletion' dropdown set to 'Entered in Error'.

A caution message 'The Fatal Outcome and associated Death Details will be deleted? Do you want to proceed?' displays.

5. Click **OK**.

Row Actions:

Reason for Deletion:

Outcome	Outcome Date
<input type="radio"/> Alive-Hospitalized	2018 Aug 13

Comments

Outcome of deceased entered in error. |

(3300 characters)

The screen refreshes and the **Outcome of Deceased** no longer displays.

- Enter any **Comments** in the Comments field and click **Add** button.

Date	Comments	Recorded By
2018 Aug 14	Outcome of deceased entered in error	Xie, Lauren
2018 Aug 14	Patient passed away in hospital.	Xie, Lauren
2018 Aug 14	Patient alive and has been hospitalized as of this morning.	Xie, Lauren

- Click **Save** button.

Outcomes



DECEASED INACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Date of Death / Age: 2018 Aug 14 / 41 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](#)

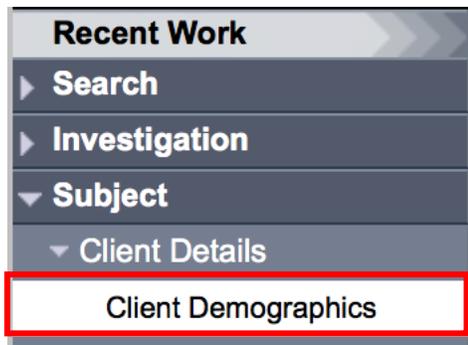
Investigation ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

A Fatal Outcome has been deleted. Please consider clearing the Date of Death in Client Demographics.
Outcome saved successfully

The screen refreshes and a message 'A Fatal Outcome has been deleted. Please consider clearing the Date of Death in Client Demographics. Outcome successfully saved' displays.

IMPORTANT: After deleting the Outcome of Death, Users should reactivate the client record by following the steps below.

- Navigate to the **Left-Hand Navigation** menu and select **Client Details** under **Subject**. Then select **Client Demographics**.



The Client Demographics screen displays.

- Uncheck **Inactive** field.

A prompt to **Confirm/Reactivate Client** appears.

- Click **Confirm** button.

Client Demographics [Add to WQ] [Save] [Reset] [Save and Sync with Registry] [log] [print] [?]

Deceased **INACTIVE**

Client ID: 211 Name (Last, First Middle)/Gender: Test1, Lauren / Female Health Card No: - Date of Birth / Age: 1977 Aug 01 / 41 years
 Date of Death / Age: 2018 Aug 14 / 41 years Phone Number: (-) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

Personal Information

Indeterminate

* Last Name: Test1 * First Name: Lauren Middle Name: Mother's Name: Suffix:

* Date of Birth: 1977/08/01 Estimated Age: 41 years months days

* Gender: Female Gender Identity: Other Identity:

Health Card Province: Health Card Number:

Health Region Organization: NSHA [i] [Q] [refresh]

Preferred Communication Method:

Inactivate Inactive Reason: Date of Death: yyyy/mm/dd

The Inactive Reason and Date of Death are removed.

11. Click **Save** button.

Client Demographics [Add to WQ] [Save] [Reset] [Save and Sync with Registry] [log] [print] [?]

Active

Client ID: 211 Name (Last, First Middle)/Gender: Test1, Lauren / Female Health Card No: - Date of Birth / Age: 1977 Aug 01 / 41 years
 Phone Number: (-) Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority Additional ID Type / Additional ID: Provincial health s

Personal Information

Indeterminate

* Last Name: Test1 * First Name: Lauren Middle Name: Mother's Name: Suffix:

* Date of Birth: Age:

Client was successfully updated.

Screen refreshes and confirmation message 'Client was successfully updated' displays. Client is now displaying as Active again.

12 CLOSE INVESTIGATION

Close Investigation allows Users to change the Investigation Status from Open to Closed. If the Investigation is Open, the Close Investigation button will be accessible. If the Investigation is Closed, the Re-Open Investigation button will be accessible. Closing an Investigation does not prevent Users from adding or modifying the Investigation record but does present the User with a warning.

12.1 Prerequisites to Closing an investigation:

- Update Classification: Classification should not equal “Person under Investigation”
- Ensure all related contact investigations are closed
- Ensure all Outcomes are recorded.
- Update Disposition to complete
- Review Investigation Summary screen for completeness
- Close Investigation

Investigation Summary



ACTIVE			
Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: Closed	Disposition: Completed, further action not required	Investigator: -	Investigation
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08	

 This investigation has a status of Closed. Please consider this when making updates to the investigation.

1. After setting a client and investigation In Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Investigation Information** under **Investigation Details**.

	WORK MGMT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH	INVENTORY	ADMIN
--	-----------	----------------	-----------	--------------	---------------	-----------	-------

Recent Work

Search

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

Investigation

- Subject Summary
- Investigation Summary
- Investigation Details
- Disease Summary
- Recommendations
- Investigation Information
- resp. Org / Investigator
- Reporting Notifications
- External Sources
- Links & Attachments
- Transfer Requests

Investigation Information

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

Close Investigation Re-Open Investigation Save Reset

* Required field

Investigation Information

The **Investigation Information** screen displays.

- Update **Disposition** and **Disposition Date**, then click **Save** button.

Close Investigation
Re-Open Investigation
Save
Reset

* Required field Merged Investigation No(s):

Investigation Information

Investigation History

Priority: Do Not Use

* Disposition: Completed, further action not required

* Disposition Date: 2018 / 08 / 08

* Status: OPEN * Status Date: 2018 Aug 9

Client Home Address at Time of Initial Investigation: ⌵

Sensitive Environment/Occupation: Health care facility - Work/volunteer

Environment/Occupation Details:

Investigation Information



ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: OPEN	Disposition: Completed, further action not required	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

Investigation details successfully saved.

Screen refreshes, and a confirmation message 'Investigation details successfully saved' displays.

3. Click **Close Investigation**.
4. Accept or modify, '**Closed**' **Status Date**.
5. Click **Close Investigation** button.

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

Cancel

* Required field

Close Investigation

* 'Closed' Status Date: 2018 / 08 / 09

vvvv mm dd

Close Investigation Policies:

A pop-up message 'You are about to set the status of the investigation to 'Closed'. Do you want to close?' displays.

6. Click **OK**.

Close Investigation

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: CLOSED	Disposition: Completed, further action not required	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

This investigation has a status of CLOSED. Please consider this when making updates to the investigation.
Investigation successfully closed.

Screen refreshes, the **Close Investigation** screen with status as **CLOSED** and a confirmation message, 'This investigation has a status of CLOSED. Please consider this when making updates to the investigation. Investigation successfully closed' displays.

Note: Closed Investigations can be reopened by returning to the **Investigation Information** page and clicking **Re-Open Investigation**.

	WORK MGMNT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH	INVENTORY	ADMIN
--	------------	-----------------------	-----------	--------------	---------------	-----------	-------

Recent Work

Search

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

Investigation

- Subject Summary
- Investigation Summary
- Investigation Details
- Disease Summary
- Recommendations
- Investigation Information**
- Resp. Org / Investigator
- Reporting Notifications
- External Sources

Investigation Information

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 167	Status: CLOSED	Disposition: Completed, further action not required	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 08 / Clinical Diagnosis	Etiologic Agent: Measles virus	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 08

This investigation has a status of CLOSED. Please consider this when making updates to the investigation.

Close Investigation
Re-Open Investigation
Save
Reset

13 INVESTIGATION SUMMARY

13.1 Overview

The Investigation Summary screen contains summary information of a single investigation in context - as opposed to the Subject Summary screen which contains a summary of all investigations of one Subject. The Investigation Summary offers viewing of investigation information on Reporting Source details, Disease Classification, Investigation Disposition, Investigation Status, Responsible Organization Authority, and Investigator Assigned within the summary as well as populating the INV banner in the Client Context Header at the top of the screen.

Client ID:	Name (Last, First Middle)/Gender:	Health Card No:	Date of Birth / Age:
211	Test1, Lauren / Female	-	1977 Aug 01 / 41 years
Phone Number:	Jurisdiction Info:	Additional ID Type / Additional ID:	
-(-)	Department of Health and Wellness, Nova Scotia Health Authority	Provincial health service provider identifier / -	
Investigation ID:	Status:	Disposition:	Investigator:
167	CLOSED	Completed, further action not required	-
Disease:	PHAC Date/Type:	Etiologic Agent:	Authority/Classification:
Measles	2018 Aug 08 / Clinical Diagnosis	Measles virus	National / Case - Person Under Investigation / 2018 Aug 08

⚠ This investigation has a status of CLOSED. Please consider this when making updates to the investigation.

The **Investigation Summary** screen can be viewed via the Search Investigations search results set, Subject Summary screen or clicking any Investigation ID hyperlink in Panorama. Within the body of the Investigation Summary screen displays key investigation-related data, including:

- Investigation Details
- Investigation/Encounter UDFs
- Linked Outbreaks
- Signs and Symptoms
- Lab Tests
- Treatment Profile
- Investigation Medications
- Interventions

- o Exposures
- o Outcomes
- o Risk Factors
- o Immunization History Interpretation
- o Immunization – Pertinent to Investigation

The Investigation Summary screen also allows users to navigate to the areas above.

Note: Show & Hide functions can show or hide sections of the form.

Investigation ID: 252	Status: Open	Disposition: Out of Province referral	Investigator: -
Disease: Salmonellosis	PHAC Date/Type: 2018 Aug 30 / Date Reported	Etiologic Agent: Salmonella / species	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 30

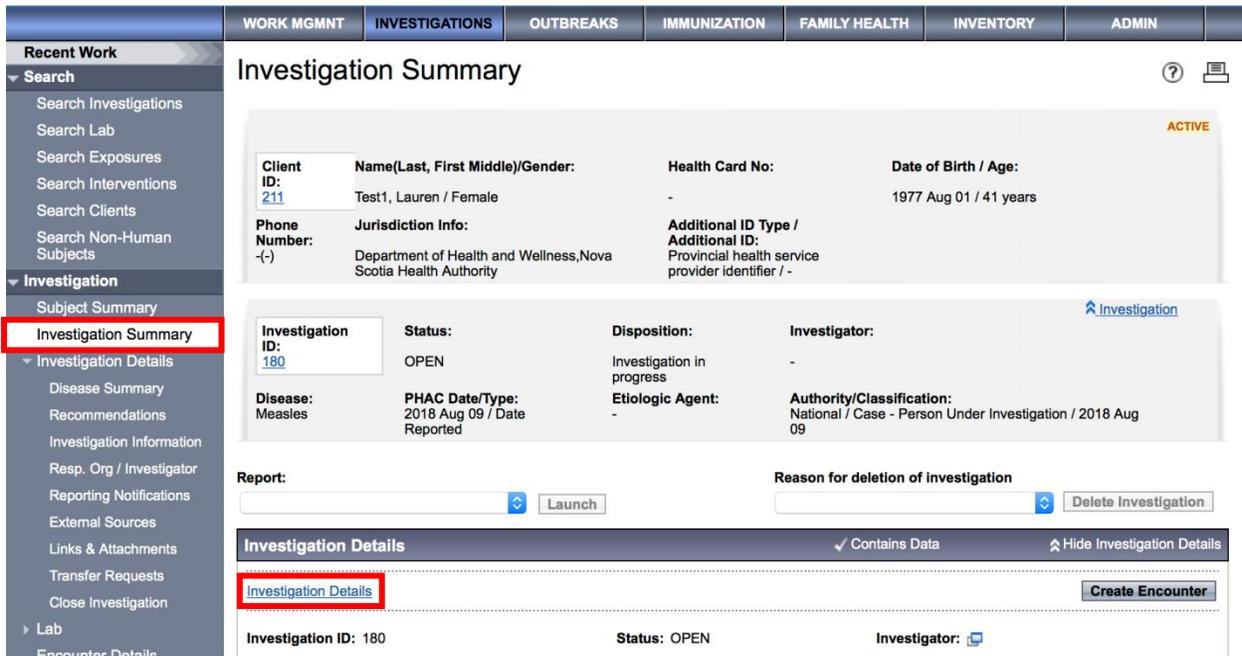
Investigation Details	✓ Contains Data	⌵ Show Investigation Details
Investigation/Encounter UDFs	✓ Contains Data	⌵ Show Investigation/Encounter UDFs
Linked Outbreaks		⌵ Show Linked Outbreaks
Signs and Symptoms		⌵ Show Signs and Symptoms
Lab Tests		⌵ Show Lab Tests
Treatment Profile		⌵ Show Treatment Profile
Investigation Medications		⌵ Show Investigation Medications
Interventions		⌵ Show Interventions
Exposures	✓ Contains Data	⌵ Show Exposures
Outcomes		⌵ Show Outcomes
Risk Factors		⌵ Show Risk Factors
Immunization History Interpretation		⌵ Show Immunization History Interpretation
Immunizations - Investigation Specific		⌵ Show Immunizations

13.2 Details

Investigation Details provides the User with disease information and Investigator information that can also be found in the Investigation Header as well. From here, a user can add additional diseases to the investigation and update/delete each disease.

13.2.1 Create New Disease Within an Investigation

1. After setting a client and investigation In Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Investigation Summary** under **Investigation Details**.



Investigation Summary ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

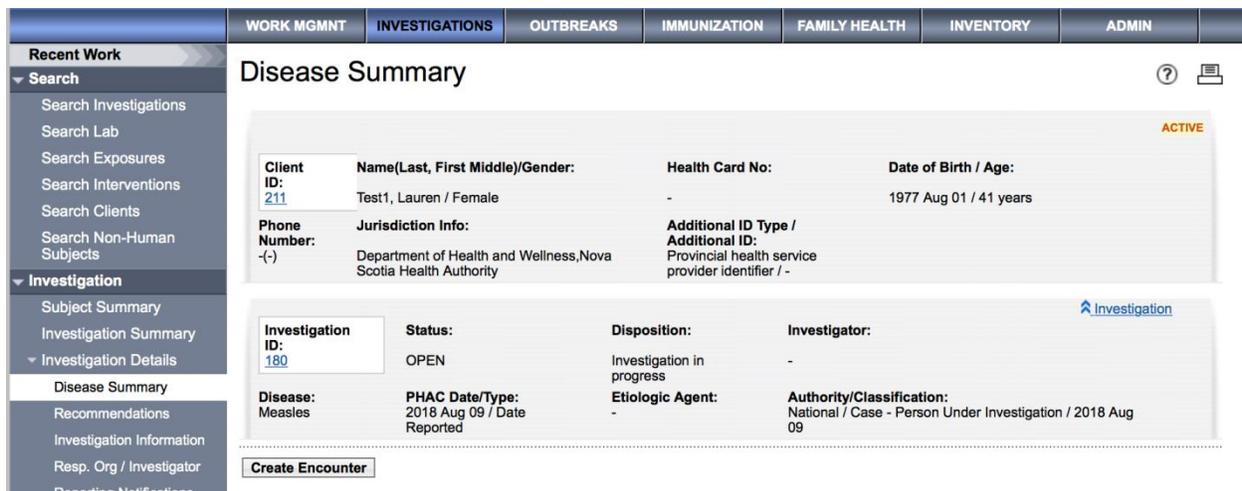
Report: **Reason for deletion of investigation**

Investigation Details Contains Data Hide Investigation Details

Investigation Details

Investigation ID: 180 Status: OPEN Investigator: 

2. Click **Investigation Details** hyperlink.



Disease Summary ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

The **Disease Summary** screen displays.

3. For investigations where two diseases will be co-managed, the user can add a disease to the Investigation by clicking **Add New Disease**.

Merged Investigation No(s):

Disease Summary		
		Add New Disease
Disease Event 183 - Measles Hide		
PHAC Date / Date Type: 2018 Aug 9 / Date Reported	Disease Origin:	Living on Reserve Most of the Time:

4. Add the value for the **Disease**.

Add **Investigation Classification Information**:

5. Entering a value for **Authority**.
6. Enter a value for **Classification**.
7. **Classification Date** defaults to Today's Date. Change if necessary.
8. Click **Add Classification**.

Disease Event History

*** Disease:** Influenza

Microorganism:

Information Source:

Site(s): Hold Ctrl and then click to select multiple items.

Available Sites: **Add >** **< Remove** **Selected Sites(s):**

Staging:

*** Investigation Classification**

*** Authority:** *** Classification:**

*** Classification Date:** 2018 / 08 / 09
yyyy mm dd

Add Classification **Clear**

Row Actions:

	Primary	Authority	Classification	Classification Date
<input type="radio"/>	<input checked="" type="checkbox"/>	National	Case - Person Under Investigation	2018 Aug 9

Save **Clear** **Cancel**

The screen refreshes and displays the new disease in the table below Investigation Classification.

9. Click **Save**.

[Investigation](#)

Investigation ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

X Disease Event already exists for this Investigation. Are you sure you wish to continue? Select a different Disease or save again to bypass this validation.

Save **Clear** **Cancel**

If the **Disease Event** screen refreshes and displays the message “Disease Event already exists for this Investigation. Are you sure you wish to continue? Select a different Disease or click save again to bypass this validation.

10. Click **Save** button.

Investigation ID:	Status:	Disposition:	Investigator:
180	OPEN	Investigation in progress	-
Disease:	PHAC Date/Type:	Etiologic Agent:	Authority/Classification:
Influenza	2018 Aug 09 / Date Reported	-	National / Case - Person Under Investigation / 2018 Aug 09
Measles	2018 Aug 09 / Date Reported	-	National / Case - Person Under Investigation / 2018 Aug 09

Investigation details successfully saved.

The **Disease Event** screen refreshes and displays the message “Investigation details successfully saved”. The newly added Disease is added to the Disease List.

13.2.2 Update a Disease

1. After setting a client and investigation In Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Disease Summary** under **Investigation Details**.

Recent Work

▼ Search

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

▼ Investigation

- Subject Summary
- Investigation Summary
- ▼ Investigation Details
 - Disease Summary
 - Recommendations
 - Investigation Information
 - Resp. Org / Investigator
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Transfer Requests
 - Close Investigation
- ▶ Lab
 - Encounter Details
 - Signs & Symptoms
 - Complications
 - Outcomes
 - Basic Assessment
 - Medical History
 - ADT Record
 - Incubation & Communicability
 - ▶ Treatment & Interventions
 - ▶ Medications

Disease Summary

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Influenza	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09
Measles	2018 Aug 09 / Date Reported	-	National / Case - Person Under Investigation / 2018 Aug 09

[Create Encounter](#)

Merged Investigation No(s):

Disease Summary [Add New Disease](#)

Disease Event 184 - Influenza [Hide](#)

PHAC Date / Date Type: 2018 Aug 9 / Date Reported **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
Influenza	-	-		<input checked="" type="checkbox"/> National / Case - Person Under Investigation 2018 Aug 9	-	-

The **Disease Summary** screen displays.

2. In the Disease Event table, locate the Disease Event requiring updates and click **Update** button.
3. Update **Disease** as necessary.
4. To update the existing **Authority** and **Classification**, click the **radio button** of the investigation classification table, then click **Update** button.

Row Actions:	<input style="border: 2px solid red;" type="button" value="Update"/>	<input type="button" value="Delete"/>	<input type="button" value="Set as Primary"/>
	<input checked="" type="radio"/>	Authority	Classification
	✓	National	Case - Person Under Investigation
			Classification Date
			2018 Aug 9

5. Update Investigation Classification and click **Apply Update** button.

*** Investigation Classification**

* Authority: * Classification:

* Classification Date: / /

yyyy mm dd

Row Actions:

	Primary	Authority	Classification	Classification Date
<input type="radio"/>	<input checked="" type="checkbox"/>	National	Case - Person Under Investigation	2018 Aug 9

- Click **Save** button after confirming that the update has been applied to the Investigation Classification table.

*** Investigation Classification**

* Authority: * Classification:

* Classification Date: / /

yyyy mm dd

Row Actions:

	Primary	Authority	Classification	Classification Date
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	National	Case - Confirmed	2018 Aug 9

Note: An Investigation Classification can also be added by clicking on **Add Classification**, completing the mandatory fields,

Disease Event Details



ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Influenza	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Confirmed / 2018 Aug 09
Measles	2018 Aug 09 / Date Reported	-	National / Case - Person Under Investigation / 2018 Aug 09

Investigation details successfully saved.

The **Disease Event** screen refreshes and displays the message “Investigation details successfully saved”.

13.2.3 Delete a Disease

A User can delete a disease but only after another disease has been added to be set as the primary disease.

1. After setting a client and investigation In Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Disease Summary** under **Investigation Details**.

- Search Investigations
- Search Lab
- Search Exposures
- Search Interventions
- Search Clients
- Search Non-Human Subjects
- ▼ Investigation
 - Subject Summary
 - Investigation Summary
 - ▼ Investigation Details
 - Disease Summary**
 - Recommendations
 - Investigation Information
 - Resp. Org / Investigator
 - Reporting Notifications
 - External Sources
 - Links & Attachments
 - Transfer Requests
 - Close Investigation
- ▶ Lab
 - Encounter Details
 - Signs & Symptoms
 - Complications
 - Outcomes
 - Basic Assessment
 - Medical History
 - ADT Record
 - Incubation & Communicability
 - ▶ Treatment & Interventions
 - ▶ Medications
 - Exposure Summary

ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 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 ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Influenza	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Confirmed / 2018 Aug 09
Measles	2018 Aug 09 / Date Reported	-	National / Case - Person Under Investigation / 2018 Aug 09

[Create Encounter](#)

Merged Investigation No(s):

[Add New Disease](#)

Disease Event 184 - Influenza [Hide](#)

PHAC Date / Date Type: 2018 Aug 9 / Date Reported **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
Influenza	-	-		✓ National / Case - Confirmed 2018 Aug 9	-	-
Influenza	-	-		✓ National / Case - Person Under Investigation 2018 Aug 9	-	-

[Update](#) [Delete](#)

The **Disease Summary** screen displays.

2. Click **Delete** button.

Disease: Influenza	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Confirmed / 2018 Aug 09
Measles	2018 Aug 09 / Date Reported	-	

[Disease Event 184 - Influenza] - The Disease Event will be deleted. Do you want to proceed?

[Cancel](#)
OK

Create Encounter

Disease Summary **Add New Disease**

Disease Event 184 - Influenza [Hide](#)

PHAC Date / Date Type: 2018 Aug 9 / Date Reported **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
Influenza	-	-		✓ National / Case - Confirmed 2018 Aug 9	-	-
Influenza	-	-		✓ National / Case - Person Under Investigation 2018 Aug 9	-	-

Update
Delete

A pop-up displays asking the user to confirm the deletion.

3. Click **OK**.

Disease Summary



ACTIVE

Client ID: 211	Name(Last, First Middle)/Gender: Test1, Lauren / Female	Health Card No: -	Date of Birth / Age: 1977 Aug 01 / 41 years
Phone Number: (-)	Jurisdiction Info: Department of Health and Wellness, Nova Scotia Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

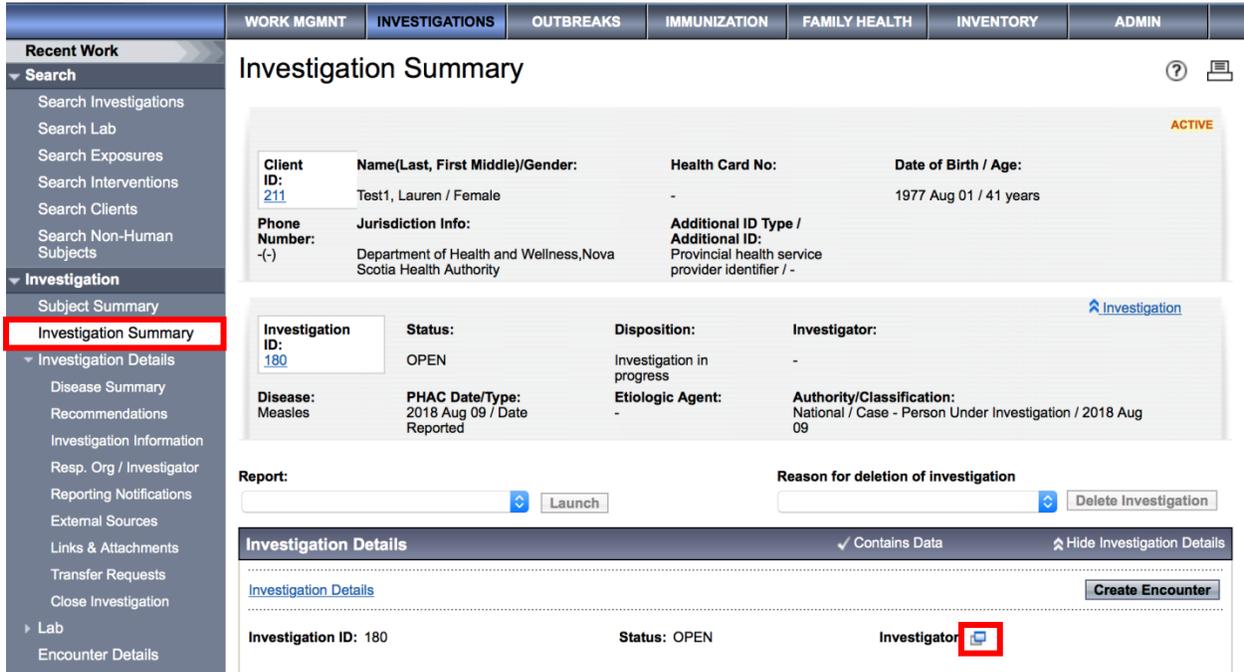
Investigation ID: 180	Status: OPEN	Disposition: Investigation in progress	Investigator: -
Disease: Measles	PHAC Date/Type: 2018 Aug 09 / Date Reported	Etiologic Agent: -	Authority/Classification: National / Case - Person Under Investigation / 2018 Aug 09

Disease Event deleted successfully.

The Disease Summary screen refreshes with the message “Disease event deleted successfully.

13.2.4 View Investigator Details

1. After setting a client and investigation In Context in the Investigations Module, navigate to the **Left-Hand Navigation** menu and select **Investigation Summary** under **Investigation Details**.



Investigation Summary

Client ID: 211 **Name(Last, First Middle)/Gender:** Test1, Lauren / Female **Health Card No:** - **Date of Birth / Age:** 1977 Aug 01 / 41 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 ID: 180 **Status:** OPEN **Disposition:** Investigation in progress **Investigator:** -

Disease: Measles **PHAC Date/Type:** 2018 Aug 09 / Date Reported **Etiologic Agent:** - **Authority/Classification:** National / Case - Person Under Investigation / 2018 Aug 09

Report: [Dropdown] [Launch] **Reason for deletion of investigation:** [Dropdown] [Delete Investigation]

Investigation Details (Contains Data) [Hide Investigation Details]

[Investigation Details](#) [Create Encounter]

Investigation ID: 180 **Status:** OPEN **Investigator:** [Printer Icon]

2. Click **Investigator Hyperlink** icon.



Investigator Contact Information [Close]

Name:
Phone No:
E-mail:
Health Unit:

[Close]

A pop-up window appears with **Investigator Contact Information**.

Note: There is an option to print by clicking the print icon. To close the window, click **Close** button.

13.2.5 Investigation / Encounter UDFs

Investigation/Encounter UDFs
Hide Investigation/Encounter UDFs

Filled Out Investigation Forms [Links & Attachments \(Investigation UDFs only\)](#)

0 forms found. Click on Instance ID to view Form.

Instance ID	Form Name	Form Description	Version	Needs Migration	Updates Allowed By	Status	Created By/On	Last Updated By/On

Filled Out Encounter Forms

0 forms found. Click on Instance ID to view Form.

Instance ID	Form Name	Form Description	Version	Needs Migration	Updates Allowed By	Status	Created By/On	Last Updated By/On

The User can view any completed forms and hyperlink to **Links and Attachments** screen to Create/View/Update/Delete UDFs or Documents. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.6 Linked Outbreaks

Linked Outbreaks
Hide Linked Outbreaks

Click Outbreak Name for Outbreak Summary.

Outbreak Name	Outbreak No	Outbreak Group	Study

The User can view Outbreaks linked to the Investigation and hyperlink to the **Outbreak Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.7 Signs and Symptoms

Signs and Symptoms Hide Signs and Symptoms				
Signs and Symptoms				
Onset Date/Time	Sign/Symptom	Present	Recovery Date/Time	Duration
2017 May 14 23:00 GMT+03:00	Koplik Spots	Yes	-	-
2017 May 11 23:00 GMT+03:00	Conjunctivitis	Yes	-	-
2017 May 11 23:00 GMT+03:00	Coryza	Yes	-	-
2017 May 11 23:00 GMT+03:00	Cough	Yes	-	-
2017 May 11 23:00 GMT+03:00	Fever (Temperature > 38C)	Yes	-	-
-	Maculopapular Rash	Yes	-	-

The User can view existing Signs & Symptoms for the investigation and hyperlink to the **Signs & Symptoms Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.8 Lab Tests

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	

* Flag indicates sensitivities present

Diagnostic Imaging(DI) Hide DI					
Lab Summary					
Imaging Date	Result Name	Interpreted Result	Accession No.	Physician Recommendation	Result Status

TB Skin Tests and Follow Ups Hide TB Skin Tests and Follow Ups				
TB Test Summary				
Date of Give/Service	Date of Read	Reaction Size (mm)	Interpreted Result	Follow-up

The User can view existing Lab information for the investigation and hyperlink to the **Lab Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to Investigation Summary screen.

13.2.9 Treatment Profile

Treatment Profile Hide Treatment Profile					
Treatment Profile					
Treatment Start Date	Reason for Treatment	Treatment Status	Reason Treatment Ended	Treatment End Date	Treatment Outcome(s)
2017 May 9	CAT 1 - Never Treated (Less than 1 Month)	Ended	Not Evaluated	2017 May 18	-

The User can view existing Treatment Profile for the investigation and hyperlink to the **Treatment Profile** screen to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.10 Investigation Medications

Investigation Medications Hide Investigation Medications								
Investigation Medications								
Medications / Interruptions								
Tx State	Drug Protocol	Drug	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	DOT	Special Direction	

Other Medications Hide Other Medications							
Drug	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	Course Completed	

The User can view existing Investigation Medications for the investigation and hyperlink to the **Medication Summary** screen to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.11 Interventions

Interventions Hide Interventions							
Intervention Summary							
Intervention Type	Intervention Sub-Type	Disposition	Start Date	End Date	Location	No. of follow-ups	

The User can view existing Interventions for the investigation and hyperlink to the **Interventions Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.12 Exposures

Exposures Hide Exposures					
					Exposure Summary
Transmission Events Hide Transmission					
Exposure Name	Setting Type	Location Name	Transmission Start	Transmission End	#No. of Contacts
Acquisition Events Hide Acquisition					
Exposure Name	Setting Type	Location Name	Acquisition Start	Acquisition End	Most Likely Source

The User can view existing Exposures (Transmission Events/Acquisition Events) for the investigation and hyperlink to the **Exposure Summary** to Create/Update information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.13 Outcomes

Outcomes Hide Outcomes	
Outcomes	
Outcome Date	Outcome

The User can view existing Outcomes for the investigation and hyperlink to the **Outcomes Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.14 Risk Factors

Risk Factors Hide Risk Factors			
Risk Factors			
Risk Factor Name	Response	Risk Factor Start Date	Risk Factor End Date

The User can view existing Risk Factors for the investigation and hyperlink to the **Risk Factors Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.15 *Immunization History Interpretation*

Immunization History Interpretation ^ Hide Immunization History Interpretation					
Imms History Interpretation					
Status	Date	Disease	Interpretation of Disease Immunity	Reason	Vaccine

The User can view existing Immunization History information for the investigation and hyperlink to the **Immunization Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

13.2.16 *Immunization – Pertinent to The Investigation*

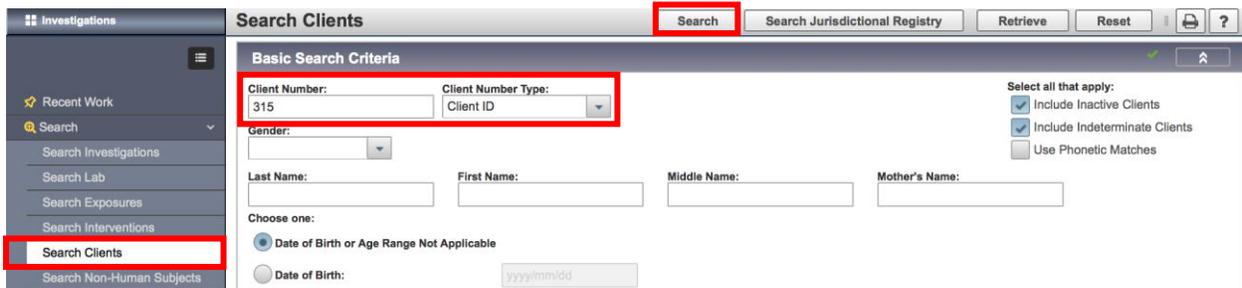
Immunizations - Investigation Specific ^ Hide Immunizations		
Treatment Profile		
Agent	Date	Dose #

The User can view existing Immunization – Pertinent to the Investigation information for the investigation and hyperlink to the **Immunization – Pertinent to the Investigation Summary** to Create/View/Update/Delete information. When complete, click **Investigation ID** to return to **Investigation Summary** screen.

14 COHORT FUNCTIONS

14.1 Create a New Cohort

1. From the **Left-Hand Navigation** menu, select **Search Clients**.



Search Clients screen displays

2. Search and select the first client to be added to the cohort.



	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	315		Apple	Honeycrisp	Female	1982 Aug 11	NSHA	Active

3. Click the check box next to the client to add to the cohort and then click **Create Cohort**.

Create Cohort Cancel Save Reset Print Help

Cohort Details

* Cohort Name: Cohort 1

* Cohort Type: Static

* Effective From: 2018/09/04 To: yyyy/mm/dd

* Client List Name:

* Available Encounter Groups:

- Family Health
- Immunization
- Screenings
- Sexually Transmitted Infections Investigation
- Tuberculosis Disease Investigation
- Youth Services

Selected Encounter Groups:

- Communicable Disease Investigation

Description: (200 characters remainin...)

* Jurisdictional Organization: Antigonish PHO

Create Cohort screen displays.

- Complete mandatory fields and additional known details, and then click **Save**.

Update Cohort Cancel Save Reset Log Print Help

Cohort ID: 32 Cohort Name: Cohort 1 Encounter Group(s): Communicable Disease Investigation Client List Name/ ID: -

Cohort Details

* Cohort Name: Cohort 1

* Cohort Type: Static

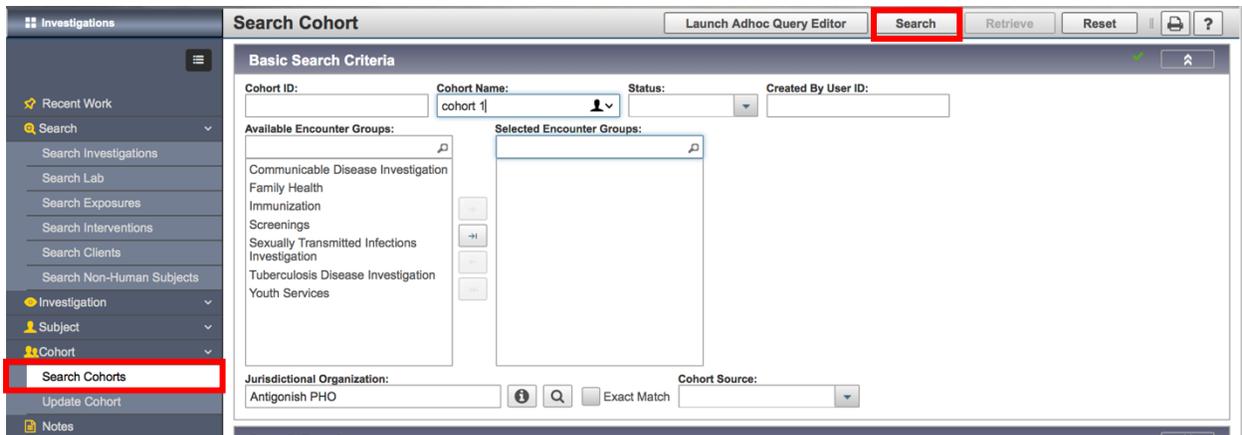
Status: Active Created By: Yis... Cohort Source: Search Clients

Cohort was successfully created.

Screen refreshes and confirmation message 'Cohort was Successfully created' displays

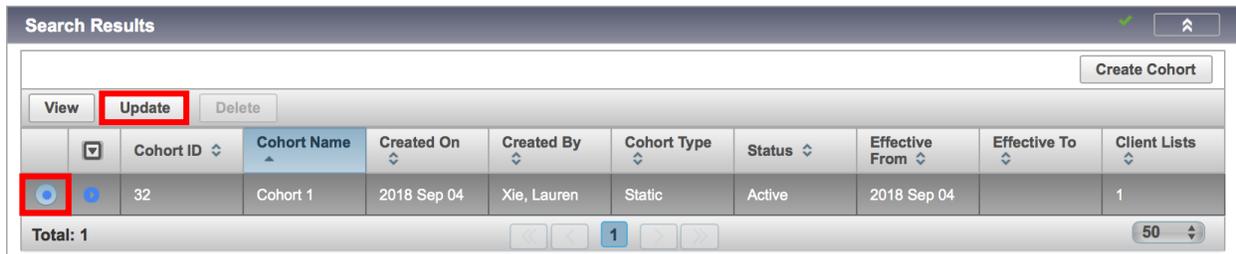
14.2 Update or Add Clients to an Existing Cohort

- From the **Left-Hand Navigation** menu, select **Search Cohorts**.



Search Cohort screen displays.

2. Enter search criteria and click Search.



Search results display.

3. Select radio button next to the correct cohort.
4. Click **Update**.

Update Cohort
Save Reset log print ?

Cohort Details

*** Cohort Name:**
Cohort 1

Status: Active

Effective From: 2018/09/04

Available Encounter Groups:

- Family Health
- Immunization
- Screenings
- Sexually Transmitted Infections Investigation
- Tuberculosis Disease Investigation
- Youth Services

*** Cohort Type:** Static

Created By: Xie, Lauren

To: yyyy/mm/dd

Selected Encounter Groups:

- Communicable Disease Investigation

Cohort Source: Search Clients

Description:
(200 characters remaining.)

*** Jurisdictional Organization:** Antigonish PHO

Client Lists

Upload Client Data File
Upload Client ID List

Update Client List
View Client List

Client List ID	Client List Name	Number of Clients	Created On	Created By
26	Cohort 1	1	2018 Sep 04	Xie, Lauren
Total: 1				

Update Cohort page displays.

5. To update the Cohort, make changes to the Update Cohort page as needed, then click **Save**.
6. To add more clients to the cohort, click the radio button next to the client ID to activate row actions. Then click **Update Client List**.

Update Client List Members Update Cohort Delete log print ?

Cohort ID: 32 Cohort Name: Cohort 1 Encounter Group(s): Communicable Disease Investigation Client List Name/ ID: Cohort 1 / 26

Status: Active Cohort Source: Search Clients

Client List Details ↑

Client List Details

Cohort ID: 32 Cohort Name: Cohort 1 i

Client List Name: Cohort 1 Created By: Xie, Lauren Created On: 2018 Sep 04

Actions on all records listed:

View Map Create Investigation Create Intervention Export Client List

Client: Search Type: i Q Add Add Multiple

Preview Client View Imms Profile Remove Update

<input type="checkbox"/>	Client ID ↕	Client Name ▲	Date of Birth ↕	Gender ↕	City of Residence ↕	Phone Number ↕
<input type="checkbox"/>	315	Apple, Honeycrisp	1982 Aug 11	Female		

Update Client List Members page displays.

7. Search for client to add to cohort by entering client's last name or client ID or HCN.

Note: To search by HCN, cut and paste the number into the field.

Client: Search Type: i Q Add Add Multiple

Preview Client View Imms Profile Remove Update

<input type="checkbox"/>	Client ID ↕	Client Name ▲	Date of Birth ↕	Gender ↕	City of Residence ↕	Phone Number ↕
<input type="checkbox"/>	315	Apple, Honeycrisp	1982 Aug 11	Female		

Total: 1 10 ↕

8. Click **Add** to add client to Cohort.

Preview Client View Imms Profile Remove Update

<input type="checkbox"/>	Client ID ↕	Client Name ▲	Date of Birth ↕	Gender ↕	City of Residence ↕	Phone Number ↕
<input type="checkbox"/>	315	Apple, Honeycrisp	1982 Aug 11	Female		
<input type="checkbox"/>	211	Test1, Lauren	1977 Aug 01	Female		
<input type="checkbox"/>	212	Test2, Lauren	1978 Feb 01	Female		

Total: 3 10 ↕

Added clients will appear in the Client List table.

14.3 Create Investigation From Cohort

1. From the Update Client List Members page, select all clients and click **Create Investigation**.

Update Client List Members
Update Cohort Delete

Cohort ID: 32

Cohort Name: Cohort 1

Encounter Group(s): Communicable Disease Investigation

Client List Name/ ID: Cohort 1 / 26

Status: Active Cohort Source: Search Clients

Client List Details

Client List Details

Cohort ID: 32 Cohort Name: Cohort 1

Client List Name: Cohort 1 Created By: Xie, Lauren Created On: 2018 Sep 04

Actions on all records listed:

View Map **Create Investigation** Create Intervention Export Client List

Client: Search Type: Client Last Name or Client ID Add Add Multiple

Preview Client View Imms Profile Remove Update

<input checked="" type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender	City of Residence	Phone Number
<input checked="" type="checkbox"/>	315	Apple, Honeycrisp	1982 Aug 11	Female		
<input checked="" type="checkbox"/>	211	Test1, Lauren	1977 Aug 01	Female		
<input checked="" type="checkbox"/>	212	Test2, Lauren	1978 Feb 01	Female		

Total: 3

Create Investigations from Cohort - Step 1 of 2

Cohort ID: 32

Cohort Name: Cohort 1

Encounter Group(s): Communicable Disease Investigation

Client List Name/ ID: Cohort 1 / 26

Create Investigations Cancel

* Required field

Create Investigations from Cohort - Step 1 of 2

* Cohort Results Set: Cohort 1 (26)

* Investigation Encounter Group: Communicable Disease Investigation

* Add investigations to Outbreak Group? No Yes

* New Investigation Group Name: Cohort 1 Investigation

New Investigation Group Description:

Create Investigations Cancel

Create Investigation page displays.

2. Complete Mandatory fields and click **Create investigation**.

Create Investigations from Cohort - Step 2 of 2



Cohort ID: 32	Cohort Name: Cohort 1	Encounter Group(s): Communicable Disease Investigation	Client List Name/ ID: Cohort 1 / 26
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Submit **Cancel**

Additional details (e.g. disease, diagnosis, attached documents) may be entered after investigations are created.

* Required field

Disease Summary ↑ Hide

* **Disease:**

* **Authority:** * **Classification:**

* **Classification Date:** / /
yyyy mm dd

Microorganism:

Serotype:

Genetic characterization:

NML No.:

Strain / Antigenetic characterization:

Subtype (NS-based Hemagglutinin testing):

Information Source:

Investigation Information ↑ Hide

Priority:

* **Disposition:**

- Complete mandatory fields in step 2 and enter any additional known information, then click **Submit**.

Create Investigations from Cohort - Step 1 of 2



Cohort ID: 32	Cohort Name: Cohort 1	Encounter Group(s): Communicable Disease Investigation	Client List Name/ ID: Cohort 1 / 26
-------------------------	---------------------------------	--	---

Create Investigations **Cancel**

* Required field

Create Investigations from Cohort - Step 1 of 2

* **Cohort Results Set:** Cohort 1 (26)

* **Investigation Encounter Group:**

* **Add investigations to Outbreak Group?** No Yes

* **New Investigation Group Name:**

New Investigation Group Description:

Create Investigations **Cancel**

Screen refreshes back to step 1.

4. Click **Create Investigations**.

Create Investigations from Cohort - Step 1 of 2



Cohort ID: 32	Cohort Name: Cohort 1	Encounter Group(s): Communicable Disease Investigation	Client List Name/ ID: Cohort 1 / 26
-------------------------	---------------------------------	--	---

3 investigation IDs successfully created from 3 Client IDs.

* Required field

Create Investigations from Cohort - Step 1 of 2

* **Cohort Results Set:** Cohort 1 (26)

* **Investigation Encounter Group:**

* **Add investigations to Outbreak Group?** No Yes

* **New Investigation Group Name:**

New Investigation Group Description:

Screen refreshes and confirmation message displays.

WORK MGMT	INVESTIGATIONS	OUTBREAKS	IMMUNIZATION	FAMILY HEALTH	INVENTORY	ADMIN
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Recent Work

- Search
- Search Investigations
- Search Lab
- Search Exposures
- Search Interventions
- Search Clients
- Search Non-Human Subjects
- Investigation**
- Subject Summary
- Investigation Summary
- Investigation Details
- Disease Summary
- Recommendations
- Investigation Information

Search Investigations - Basic

Search Criteria Hide Search Criteria

Wildcard characters % (multiple letters) and _ (singleletters) can be used when searching by First or Last Name -except when matching phonetically. Wildcard-only searches not allowed.

Disease / Basic Criteria Hide Disease / Basic Criteria

Include: Human Non-Human Both

Search by:

Investigation ID:

Investigation Group:

Outbreak Group:

Disease Event ID:

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

yyyy mm dd

The investigation can now be searched by Investigation Group from the Search Investigations page. The Investigation can also be updated using the group functionality.