

## P16-0371 Panorama Project

# Panorama Investigation Management User Manual

## **PNS IOM 103 Investigation Management Part 2**

Version 1.0

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## **1 INCUBATION & COMMUNICABILITY**

The Incubation & Communicability screen lets a user view and record communicability and incubation periods and related information for a subject's Disease Event. This information has different meanings for case and contact investigations.

The **Incubation period** is the time interval between initial contact with the infectious agent and the onset of symptoms associated with the infection. For contact investigations, the incubation period is applied forward in time from the contact date, as estimated by the PHAC date, to determine a date range when Disease Onset would be expected to occur. For case investigations the incubation period is applied backward in time from the disease onset date, as estimated by the PHAC date, to determine a date range when the subject could have been exposed to the infectious agent.

The **Communicability period** is the time interval when the subject is capable of transmitting an etiologic agent to another subject. For case investigations, the communicability period is applied relative to the onset date, as estimated by the PHAC date, to determine a date range for contact tracing. Recording negative values indicates the subject may have been communicable before the onset of their symptoms. The Communicability period does not apply to contact investigations.

#### Defining Incubation and Communicability Periods for an Investigation

For a case investigation, the Incubation & Communicability screen displays date ranges for the exposure period and communicability period, as well as a list of drugs and signs & symptoms that could modify the communicability period. For a contact investigation, it displays date ranges for the expected disease onset period.

There are three options for calculating date ranges on the Incubation & Communicability screen. Different options may be used for the exposure date range and communicability date range on a case investigation:

- 1. Do not Calculate: no calculation of date ranges will occur,
- 2. Manual Override: date ranges are manually recorded, or
- 3. **System**: the system calculates date ranges based on system configured values for the microorganism portion of the etiologic agent, which may be modified if the investigation is part of an outbreak. A onset symptom must be selected in the Signs & Symptoms section and onset date set.

Refer to the **Incubation & Communicability Tips and Tricks** document for a list of diseases for which the Incubation & Communicability periods have been configured in Panorama.

**Note**: An Etiologic agent **must be selected** for the disease event to view this screen.

A client and investigation **must** be in context to use this screen.

#### **1.1 Incubation & Communicability**

To access the Incubation & Communicability screen

1. Go to the Left-Hand Navigation menu.



2. Select Incubation & Communicability.



The Incubation & Communicability screen is displayed.

For diseases where Incubation & Communicability periods are configured in Panorama, the periods are displayed, and the **Calculate Based On** field = **System**.



#### Incubation and Communicability ? 旦 ACTIVE Name(Last, First Middle)/Gender: Sprout, Brussel / Male Date of Birth / Age: 1994 Jun 15 / 24 years Client ID: Health Card No: 265 Phone Jurisdiction info: Additional ID Type / Additional ID: Provincial health service provider Number: Eastern Zone, Antigonish Public -(-) Health Office Identifier / Investigation Investigation ID: Disposition: Status: Investigator: 217 Open Pending . Etiologic Agent: Disease: PHAC Date/Type: Authority/Classification: Measles virus Measles 2018 Aug 01 / Most Recent National / Contact - Person Under Investigation / 2018 Exposure Aug 15 Save Reset

Disease / Etiologic Agent: Measles / 221 / Measles virus

PHAC Date/Type: 2018 August 01 / Most Recent Exposure

Incubati	tion for Conta	ct									
с	Calculate Based	On: System	Disease								
Е	Earliest Possible	Onset Date/Time:			Latest Pos	sible Onse	t Date/Tir	ne:			
2	2018 / 08	/ 08 🔛	00 : 00	: ADT	2018	08	22	##	00	: 00	: ADT
<u>y</u>	ryyy mm	dd	hh mm		уууу	mm	dd		hh	mm	
E	Earliest Probable	e Onset Date/Time:			Latest Pro	bable Onse	et Date/TI	me:			
2	2018 / 08	/ 08	00 : 00	: ADT	2018	08	/ 15	110	00	: 00	: ADT
20	сууу тт	dd	hh mm		уууу	mm	dd		hh	mm	
Onset Ca	alculation Detail	8:									
						1					
						· · · ·	1				
					(250	) characters	5)				
										[	Save Reset

For diseases where Incubation & Communicability periods are not configured in Panorama, the **Calculate Based On** field = manual override and the fields contain no values.



#### Incubation and Communicability

ACTIVE Date of Birth / Age: 1960 Jan 01 / 58 years Client ID: Name(Last, First Middle)/Gender: Sprint2, Plague / Male Health Card No: <u>126</u> Phone Jurisdiction Info: Additional ID Type / Additional ID: Provincial health service provider Number: -(-) Western Zone, Wolfville Public Health Office identifier / -Investigation Investigation Status: Disposition: Investigator: ID: <u>81</u> Open Investigation in . progress PHAC Date/Type: 2018 Jun 01 / Date Authority/Classification: National / Case - Person Under Investigation / 2018 Jun Etiologic Agent: Yersinia pestis Disease: Plague Reported 01

Save Reset

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Disease / Etiologic Agent: Plague / 84 / Yersinia pestis PHAC Date/Type: 2018 June 01 / Date Reported

Incubation for Case	<b>☆</b> Hide
Calculate Based On: Manual Override	
Earliest Possible Exposure Date/Time:	Latest Possible Exposure Date/Time:
/ / : ADT	/ / ADT
yyyy mm dd hh mm	yyyy mm dd hh mm
Earliest Probable Exposure Date/Time:	Latest Probable Exposure Date/Time:
/ / : : ADT	/ / : ADT
yyyy mm dd hh mm	yyyy mm dd hh mm



sure Calculation Details:	^	
	$\sim$	
	(250 characters)	
municability for Case		*
Calculate Based On: Manual Override		
Farliest Possible Communicability Data/Times	Latest Possible Communicability Date	Time
		: ADT
yyyy mm dd hh mm	yyyy mm dd	hh mm
Earliest Probable Communicability Date/Time:	Latest Probable Communicability Dat	e/Time:
,,,,,,,, ADT		: ADT
yyyy mm dd hh mm	yyyy mm dd	hh mm
Beginning of High Communicability Date/Time:	End of High Communicability Date/Tin	ne:
/ / ADT		:
yyyy mm dd hh mm	yyyy mm dd	hh mm
nunicability Calculation Details:		
	(250 characters)	
	(200 (10/00/07))	
	_	Save

### **1.2 Define Incubation and Communicability periods**

1. If the investigation has multiple diseases, select the disease/etiologic agent incubation and communicability periods that are to be defined.

Note: if there is only one disease, no selection is required and the fields are displayed.

2. Click View/Update Properties button



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#### Incubation and Communicability

				ACTIVE
Client ID: 126	Name(Last, First Middle)/Ger Sprint2, Plague / Male	der: Health Card No:	Date of Birth / Age: 1960 Jan 01 / 58 years	
Phone Number: -(-)	Jurisdiction Info: Western Zone, Wolfville Public	Additional ID Type / ID: Provincial health servi	Additional	
	Health Office	identifier / -		
			<u>∧ Inv</u>	vestigation
Investigation ID:	Status:	Disposition:	Investigator:	
<u>81</u>	Open	Investigation in progress	·	
Disease: Plague	PHAC Date/Type: 2018 Jun 01 / Date Reported	Etiologic Agent: Yersinia pestis	Authority/Classification: National / Case - Person Under Investigation / 2 Jun 01	2018
Diphtheria	2018 Jun 01 / Date Reported	Corynebacterium species (specify)	National / Case - Person Under Investigation / 2 Aug 30	2018
Select Disease	/ Etiologic Agent			☆ Hide
Disease / Etiologi	c Agent:			
			View/Update Periods	

Current incubation and communicability periods are displayed that are appropriate to the selected disease event, depending on whether it is a Case or Contact.

- 3. Select **option** for defining for calculating date ranges.
- 4. If **Manual Override** is selected, record the date ranges and describe the **Calculation Details** if needed.

\_\_\_\_\_

5. Click **Save** button.

Disease / Etiologic Agent:	Influenza / 72 / Influ	ienza virus / Influenza B		
PHAC Date/Type:	2018 June 01 / Date	e Reported		
Incubation for Case				🛠 Hid
Calculate Based	On: Manual Overrid	de 🔽		
Earliest Possible	Exposure Date/Tin	ne:	Latest Possible Exposure Date/Tim	e:
2018 / 05	/ 28	:	2018 / 05 / 31 🔛	:
yyyy mm	dd	hh mm	yyyy mm dd	hh mm
Earliest Probable	Exposure Date/Tin	ne:	Latest Probable Exposure Date/Tim	ie:
2018 / 5	/ 29 🔛	: ADT	2018 / 5 / 31 🔛	: ADT
уууу mm	dd	hh mm	yyyy mm dd	hh mm
Exposure Calculation De	tails:			
Test data			^	
			$\sim$	
1			(241 characters)	

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#### Communicability for Case

Calculat	e Based C	Dn: Manua	al Overric	le 🗸										
	-	Internet												
Earliest	Possible		ability D	ate/Tim	ne:		Latest P	ossible C		ability D	ate/Time	: 		
2018	. 100	dd		 hh	 		2018	, 100 mm	, 100		 hh	 		
,,,,,		44					,,,,,		00					
Earliest	Probable	Communio	cability [	Date/Tin	ne:	_	Latest Pr	robable C	ommunic	ability D	ate/Time		_	
2018	6	/ 2			:	: ADT	2018	6	/ 4			:	: ADT	
уууу	mm	dd		hh	mm		уууу	mm	dd		hh	mm		
Beginnir	ng of High	Commun	icability	Date/Ti	me:		End of H	ligh Comr	nunicabili	ity Date/	Time:			
	-													
2018	/ 06	/ 01			:	: ADT	2018	/ 06	/ 03			:	: ADT	
2018 УУУУ	/ 06 mm	/ 01 dd		hh	: mm	: ADT	2018 УУУУ	/ 06 mm	/ 03 dd		hh	: mm	: ADT	
2018 уууу unicabilit	/ 06 mm	dd	s:	hh	: mm	: ADT	2018 УУУУУ	/ 06 mm	/ 03 dd		hh	: mm	: ADT	
2018 уууу unicabilit ata	/ 06 mm y Calculat	/ 01 dd tion Details	s:	hh	: mm	: ADT	2018 уууу	/ 06 mm	/ 03 dd		hh	: mm	: ADT	
2018 уууу unicabilit ata	/ 06 mm	dd dd	s:	hh	mm	_ : ADT	2018 УУУУ	/ 06 mm	/ 03 dd		hh	: mm	ADT :	
2018 уууу unicabilit ata	y Calculat	dd	s:	hh	mm	ADT	2018 УУУУУ (2	/ 06 mm	/ 03 dd		hh	mm	: ADT	
2018 уууу unicabilit ata	y Calculat	dd	s:	hh	mm	ADT	2018 уууу (2	/ 06 mm	/ 03 dd		hh	: mm	ADT	
2018 уууу unicabilit ata	y Calculat	dd	s:	hh	: [	ADT	2018 УУУУУ (2	/ 06 mm	/ 03 dd		hh	: mm	ADT	
2018 уууу unicabilit ata	y Calculat	dd	s:	hh	mm	ADT	2018 уууу (2	/ 06 mm 41 charac	dd		hh	: mm	ADT	
2018 уууу unicabilit ata	/ 06 mm y Calculat	D1 dd	s:	hh	mm	ADT	2018 уууу (2	/ 06 mm 41 charac	dd dd		hh	: mm	ADT	
2018 уууу unicabilit ata	y Calculat	] / D1 dd	s:	hh	; <b></b>	ADT	2018 уууу (2	/ D6 mm 41 charac	dd dd		hh	] : <b></b> mm	_ : ADT	<b>]</b>

☆ Hide

A message indicating that the incubation and communicability details were successfully saved is displayed.

**Note:** The system enforces appropriate order in the dates for manually overridden incubation and communicability ranges. For example:

- Latest Probable Exposure Date/Time must be less than or equal to PHAC date.
- Probable Exposure Date range must be within the Possible Exposure Date range.
- Probable Communicability Date range must be within the Possible Communicability Date rate.



### 2 TREATMENT PROFILE

The Treatment Profile screen allows the User to view the Subject's Intervention summary and initiate the creation of Interventions. For human Subjects only, the User can view active Medications and initiate the creation of Immunizations.

Note: both a client and investigation must be in context to access this screen.

### 2.1 Treatment Profile Screen

To access the Treatment Profile screen

- 1. Go to the Left-Hand Navigation menu.
- 2. Under the Treatment & Interventions section, select Treatment Profile.

<ul> <li>Treatment &amp; Interventions</li> </ul>
Treatment Profile
Intervention Summary
TB Skin Test Summary
Mass TB Event Summary
<ul> <li>Medications</li> </ul>
Exposure Summary
View Client Imms profile

The **Treatment Profile** screen is displayed.

Note: in Nova Scotia, the Treatment Profile section of this screen will not be used.



Treatment Profile	
* Required field	
* Treatment Start Date:	2018 / 08 / 21 🔤 * Reason For Treatment:
Treatment End Date:	/ / / Treatment initiation Location:
Treatment Status:	Reason Treatment Ended:
Major Mode of Treatment:	Transferred Juriediction:
Treatment Outcome:	bbA 🗸
Row Actions: Delete Treatment	t Outcome
Treatment Outcome	Created By Created Date
	Save Clear

Investigation Medications	Hide Investigation Medications
Row Actiona: Dispense / Administer Order	Maintain Medication View Tx History Initiate Dot
Tx     Drug     Drug       State     Protocol     Protocol   Dosage / Frequency / Route	Tx Effective From / Valid     DOT     Special       To     Direction
Select All	
Investigation Related Interventions	Hide Investigation Related Interventions
	Create Intervention
Intervention Type	Start Date         End Date         Location
Investigation Related Immunizations	Alide Investigation Related Immunizations
	Create Immunization
Agent Date	<u>Dose #</u>

#### 2.2 Investigation Medications

From the Treatment Profile Screen, a user can access the Maintain Medication and Initiate DOT screens.

1. Click Maintain Medication button to open the Maintain Medications screen.

**Note**: HIV and TB drugs recorded through the Maintain Medications screen will appear in the factory table on the Treatment Profile screen. Other Meds, when selected do not appear in this table.



- 2. Click View TX History button to open the Medications History screen.
- 3. Click Initiate DOT to open the Directly Observed Therapy Details screen.

Investigation Medications										
Row	Actio	ns: Disper	ise / Administer	Maintain Medication View	v Tx Hist	ory Initiate Dot				
		Tx State	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	<u>DOT</u> ▼	Special Direction	
Đ		Active	-	Atazanavir	300 mcg / one time daily / Oral	12 Months	2018 Jul 1 / 2019 Jun 25	-	-	
Sele	ct All	Deselect /	All							

**Tip**: Click the expand button to show further detail of a medication record. Click again to close the detail.

I	Investigation Medications Aride Investigation Medications										
Row Actions: Dispense / Administer			Order	Maintain Medica			ation View Tx History Initiate Dot				
	Tx Drug State Protocol		Drug Protocol	<u>Drug</u>	Dosage / Frequency / Du     Route		Duration	Tx Effective From / Valid To		<u>DOT</u> ▼	Special Direction
	⊖ _ Active - Ataz		Atazanav	vir 300 mcg / 12 one time daily / Months Oral		2018 Jul 1 / 2019 Jun 25		-	-		
	Status / Date Med Rec			Interrupted Doses Discontinued		Reason	Prescribed DRAKE, W	I / Autho endy	rized By		
[	Select All   Deselect All										

### 2.3 Investigation Related Interventions

Ô

1. Click **Create Intervention** button to open the **Intervention Details** screen from which interventions can be viewed and recorded.

All interventions related to the investigation in context appear in the factory table.



	nvestigation Related Interventions Alide Investigation Related Interventions								
					С	reate Intervention			
	Intervention Type	Intervention Sub-Type	Disposition	<u>Start Date</u>	End Date	Location 🔻			
ſ	Isolation	Isolation	In Progress	2018 Jul 1	-	Halifax PHO			
[									



**Tip**: From the Intervention Details screen, click **Cancel** to return to the Treatment Profile Screen.

#### 2.4 Investigation Related Immunizations

1. Click **Create Immunization** to open the **Client Immunization Profile** screen from which Immunizations can be viewed and recorded.

Investigation Related Imr	munizations	<b>☆</b> Hide Inve	Hide Investigation Related Immunizations		
			Create Immunization		
Agent	▼ <u>Date</u>	<u>Dose #</u>	•		

**Tip**: From the Immunization Profile screen, click **Return** to return to the Treatment Profile Screen.



### **3 INTERVENTION SUMMARY**

The Intervention Summary screen allows the User to view a summary of interventions and the associated follow-ups for a selected Subject, and optionally an Investigation.

The User can indicate to add pre-set interventions which are cross-referenced to the disease and classification on the Investigation selected.

From the Intervention Summary screen the User can initiate the creation of new interventions and follow-ups as well as select existing records to view the details for.

**Note**: Although putting an investigation in context is not mandatory to use the interventions screens, Nova Scotia practise is to **always** have an Investigation as well as the client in context.

#### 3.1 Intervention Summary Screen

To access the Treatment Profile screen

- 1. Go to the Left-Hand Navigation menu.
- 2. Under the Treatment & Interventions section, select Intervention Summary.



The Intervention Summary screen is displayed.



#### Intervention Summary

				ACTIVE
Client ID: 270	Name(Last, First Middle)/Gender: Tree, Willow / Female	Health Card No: -	Date of Birth / Age: 2000 Aug 01 / 18 years	0 months
Phone Number: -(-)	Juriediction Info: Department of Health and Wellness,Nova Scotla Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -		
				Investigation
Investigation ID 230	: Status: OPEN	Disposition: Investigation in progress	Investigator: <u>Sarah Meddah</u>	
Disease: Hepatitis C	PHAC Date/Type: 2018 May 01 / Date Reported	Etiologic Agent: Hepatitis C virus / 3 / B	Authority/Classification: Provincial / Case - Confirmed /	2018 Aug 22
Preset Interven	tions			A Hide Preset Interventions
Row Actions:	dd Preset			
Түре	SubType		Added	
Grouped Interv	entions			Hide Grouped Interventions
Intervention Gro	up:	~		
Row Actions:	dd Intervention			
Туре	SubType		Added	
Interventions				☆ Hide Interventions
Row Actions:	dd Follow Up			Create Intervention
	▼ SubType ▼ Disposition	Start Date	End Date	Location

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#### 3.2 Pre-set Interventions

This section will **not** be used by Nova Scotia.

#### 3.3 Grouped Interventions

Interventions are grouped into categories such as STI or enteric to facilitate the selection of appropriate interventions by disease.

1. Select Intervention Group.

Ŷ

Tip: Select All Interventions to display all intervention types.



The system displays a table of associated intervention types.

srou	ped interventions		upeu mu
Inter	Actions: Add interaction		
NUW	Type	SubType	Added
0	Communication	Communication to general public (specify	-
0	Communication	Letter (specify)	-
0	Communication	Other communication (specify)	-
0	Communication	Public health advisory	-
0	Communication	Public health alert	-
0	Communication	Public health order	-
0	Contact tracing	Contact tracing	-
۲	Education/counselling	Education/counselling	-
0	Environmental Health	Inspection - personal service facility	-
0	Environmental Health	Inspection -work	-
0	Notification for action	Other (specify in comments)	-
0	Notification for action	Canadian Blood Services	-
0	Notification for action	Nova Scotla Environment	-
0	Notification for action	Provincial Multi-Organ Transplant Progra	-
0	Notification for action	Regional Tissue Bank	-
0	Notification for action	Nova Scotla Dept. of Health and Wellness	-
0	Prophylaxis	Chemoprophylaxis	-
0	Prophylaxis	Immunoprophylaxis	-
0	Referral	Other (specify in comments)	-
$\sim$	Referral	Primary care provider	-

- 2. Select the applicable intervention.
- 3. Click **Add Intervention** button.



Grou	Grouped Interventions Aride Grouped Interventions						
Inter	vention Group: Bloodborne Pathogens	~					
Row	Actions: Add In ervention						
	Туре	SubType	Added				
0	Communication	Communication to general public (specify	-				
0	Communication	Letter (specify)	-				
0	Communication	Other communication (specify)	-				
0	Communication	Public health advisory	-				
0	Communication	Public health alert	-				
0	Communication	Public health order	-				
0	Contact tracing	Contact tracing	-				
۲	Educaticn/counselling	Education/counselling	-				
0	Environmental Health	Inspection - personal service facility	-				
0	Environmental Health	Inspection -work	-				
0	Notification for action	Other (specify in comments)	-				
0	Notification for action	Canadian Blood Services	-				
0	Notification for action	Nova Scotia Environment	-				

The **Intervention Details** screen is displayed with fields populated from the intervention selected.



Intervention Det	ails Alide Intervention Details
*Required field	
Encounter Group:	Communicable Disease Investigation
* Intervention Typ	e: Education/counselling V * Intervention Sub Type: Education/counselling V
Intervention Dispo	sition:
* Outcome:	$\checkmark$
* Start Date:	2018 / D8 / 22 End Date: / / / / III
Next Follow Up Da	te: / / / III yyyy mm dd
Workgroup Organization	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on Select' button. Then click 'Close' to close.
_	Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Find C]
Workgroup:	Vuser:
*Organization:	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
	Organization: Panorama Cloud > Province of Nova Scotla > Department of Health and Wellness > [Nova Scotla 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.
	Service Delivery Location: Panorama Cloud > Province of Nova Scotla > Department of Health and Wellness > Nova Scotla Health Authority > Central Zone > Halifax Public Health Office > [Halifax PHO]
Primary Provider:	Use this Provider:     Click Find to select a provider:
	Provider:
	O Use Other Provider:
Intervention Pro	ducts Show Intervention Products
Comments	A Hide Comments

Comments	\$ Hk	de Comments
Comment:		
	^	
	~	
	(4000 characters remaining )	Add

- 4. Complete the mandatory (\*) fields and other fields as applicable.
- 5. Click Save button.



Intervention Deta	ails Alide Intervention Details
* Required field	
Encounter Group:	Communicable Disease Investigation
* Intervention Typ	Education/counselling V * Intervention Sub Type: Education/counselling V
Intervention Dispo	sition: Completed V
* Outcome:	Do Not Use 🗸
* Start Date:	2018       /       07       /       08       End Date:       2018       /       07       /       31       III         yyyy       mm       dd       yyyy       mm       dd
Next Follow Up Da	te: / / / III / III yyyy mm dd
Workgroup Organization	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.           Organization:         Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia           Health Authority]         Find Q
Workgroup: Cent	tral Zone V User: Sarah Meddah/Antigonish PHO V
* Organization:	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
	Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]
* Location:	To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
	Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Halifax PHO]



Primary Provider:	Use this Provider: Click Find to select a prov	rider:	
	Provider:DRAKE, We	endy, Medical Doctor, CPSNS ID #: 11416	Find Q
	Please select among the	2 available search methods; Search or Type.	Close X
	Type Search		
	Name of Provider:	Start typing the last name of the Provider. Matches will begin to appea Select the match with the keyboard or mouse. DRAKE, Wendy, Medical Doctor, (	ar below.
			Select
	O Use Other Provider	:	
Intervention Pro	ducts		Show Intervention Products
Comments			A Hide Comments
Comment:			
			< >
		(4	000 characters remaining )
Date	Comments	(4	000 characters remaining ) Add Recorded By
Date 2018 Aug 22	Comments Client attended clinic at F	(4 PHO and was provided with written documentation.	000 characters remaining ) Add Recorded By MacKirdy, Susan
Date 2018 Aug 22	Comments Client attended clinic at F	(4 PHO and was provided with written documentation.	000 characters remaining ) Add Recorded By MacKirdy, Susan
Date 2018 Aug 22 Follow Up Summ	Comments Client attended clinic at F nary	(4 PHO and was provided with written documentation.	000 characters remaining ) Add Recorded By MacKirdy, Susan
Date 2018 Aug 22 Follow Up Summ	Comments Client attended clinic at F nary	(4 PHO and was provided with written documentation.	000 characters remaining ) Add Recorded By MacKirdy, Susan K Hide Follow Up Summary Add Follow Up

Document Management				A Hide Document Management
0 attached documents			Click Document Titl	e to open document. Manage Documents
Document Title	Size[KB]	▼ <u>Түре</u>	Posted By	▼ <u>Posted On</u> ▼
				Save Clear Cancel

The system responds with a message that an encounter was created for this event and the intervention was successfully saved.

6. Click **Cancel** button to return to the Interventions Summary screen.

The intervention is now displayed in the Interventions factory table on the **Interventions Summary** screen.

**Note**: the Encounter created during the Save event has now been put into context as well. The encounter date was set to the start date added to the intervention.

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#### Intervention Summary

								ACTIVE
270	ent ID: ]	Name(Last, First I Tree, Willow / Fem	diddie)/Gender: ale	Health Card No: -		Date of Birth / 2000 Aug 01 / 1	Age: 18 years 0 months	
Pho	ne	Jurisdiction Info:		Additional ID Typ	e/			
Nur	nber:	Department of Hea	ith and Wellness Nova	Additional ID: Provincial health s	enilee			
-(-)		Scotla Health Auth	ority	provider identifier /	-			
							20	vestigation
230	estigation i	D: Status: OPEN		Disposition: Investigation in progre	investi ss <u>C Sara</u>	gator: ah Meddah		
Dise	aaa-	PHAC Date	e/Type:	Etiologic Agent:	Author	ity/Classificati	on:	
Нер	atitis C	2018 May (	1 / Date Reported	Hepatitis C virus / 3 / 8	8 Provinc	al / Case - Cor	nfirmed / 2018 Aug 2	22
							î	Encounter
En	counter Da	te: Enco	unter Group / Type:	Section ( later section		Encounter	Activity:	
201		Com	municable Disease inves	ugation / intervention		-		
Pres	et Interve	ntions					☆ Hide Pr	eset Interventions
Row	Actions:	Add Dreast						
now a	Actions.	Add Preset						
	Type		SubType			T Add	ed	
_					_			
Grou	iped Inter	ventions					A Hide Grou	uped Interventions
Info	cuention Cr	2011D:						
Inter	rvenuon G	oup.		~				
Row	Actions:	Add Intervention						
	Туре		SubType			T Add	ed	
Inter	ventions						ا 🖈	Hide Interventions
	A altana a							
ROW	Actions:	Add Follow Up					Creat	te intervention
	Iyp	e 🔽	SubType	Disposition	Start Date 🔻	End Date 🔺	Provider 💎	Location 🔍
0	⊕ Edu	cation/counseiling	Education/counseiling	Completed	2018 Jul 8	2018 Jul 31	DRAKE, Wendy	Hallfax PHO

? 且

7. Repeat these steps for each Intervention to be added to the Investigation.

**Note**: the system may display the following message when adding subsequent interventions. Click **OK** to continue.



Message from webpage	ollow Up Summary
The Encounter in context does not match the current Date. Continue?	Add Follow Up
OC Cancel	ment Management
Click Document Title to open document. Mana	age Documents
Size[KB] Type Posted By Posted On	•
Save	Clear Cancel

#### 3.4 Add Follow Up

A clinician can record a follow up to an Intervention that was applied to a Subject or an Outbreak. The extent to which a Subject complies with the recommended Intervention(s) may lead Public Health to make recommendations to alter the treatment plan and monitor compliance for the Intervention. This compliance is recorded in the form of follow ups. An Intervention may last a period of time and require a series of follow-ups. The follow up functionality can be used to remind Public Health to perform a follow-up by creating work management tasks and placing them on a users task list.

A follow up can be added to an intervention from either the **Intervention Summary Screen > Interventions** section or from the **Intervention Details** screen **> Follow up Summary** section.

- 1. From the Intervention Summary Screen select the appropriate Intervention.
- 2. From either screen, click Add Follow Up button.

Interventions A Hide Intervention								
Row Actions: Add Follow Up Create Interv							e Intervention	
		Туре	SubType	Disposition 🔻	Start Date 🔻	End Date	Provider	Location
۲	Ð	Communication	Letter (specify)	Completed	2018 Jul 8	-	DRAKE, Wendy	Halifax PHO
0	Ð	Education/counselling	Education/counselling	Completed	2018 Jul 8	2018 Jul 31	DRAKE, Wendy	Halifax PHO

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Follow Up Summary				Alide Follow Up Summary
				Add Follow Up
Follow Up Type  Follow Up Disposition	Follow Up Date	Provider	Recurrence	Next Follow Up Date

The Follow Up Details screen is displayed.

Follow Up	Details					?	
						ACT	IVE
Client ID: 270	Name(Last, First Tree, Willow / Fer	Middle)/Gender: male	Health Card No:	Date of Birl 2000 Aug 0	th / Age: 1 / 18 years 0 months		
Phone Number: -(-)	Jurisdiction Info Department of He Scotia Health Aut	: alth and Wellness,Nova hority	Additional ID Type / Additional ID: Provincial health service provider identifier / -				
Investigation ID	: Status:		Disposition:	Investigator:	<u> </u>	tigation	
Disease: Hepatitis C	PHAC Da 2018 May	te/Type: 01 / Date Reported	Investigation in progress Etiologic Agent: Hepatitis C virus / 3 / B	Authority/Classifi Provincial / Case -	cation: Confirmed / 2018 Aug 22		
Intervention Su	mmary						
Intervention Type	:	Education/counselling	Intervention Su	b-Type:	Education/counselling		
Intervention Disp	osition:	Completed	Primary Provid	er:	DRAKE, Wendy		
Start Date:		2018 Jul 8	End Date:		2018 Jul 31		
Follow Up Sum	mary				<b>☆</b> Hide Follow	v Up Sum	imary
					Add	Follow	Up
Follow Up Date	Follow Up Type	E Follow Up Dispositi	on Has Symptoms Pro	vider <mark>Next Recur</mark>	rence Date▼ Next Follo	w Up Dat	<u>te</u> ▼
scotia ca/CasoMami	Web/searchInve	tigations/SearchInvestic	ration visteral				



New Follow Up			tide New Follow Up
* Required field			
* Follow Up Type:	×	Other Follow Up Type:	
* Follow Up Date:	2018 / 08 / 22 III yyyy mm dd		
Follow Up Dispositio	n: 🗸 🗸	Has Symptoms:	✓
* Organization:	To specify an Organization first click on the 'Find' button.' click on 'Select' button. Then click 'Close' to close.	Then search, or type the name of the Organ	ization you wish to specify, select it and
	Organization: Panorama Cloud > Province of Nova Health Authority]	Scotia > Department of Health and We	Iness > [Nova Scotia Find Q
* Location:	To specify a Service Delivery Location first click on the 'Fi to specify, select it and click on 'Select' button. Then click 'V	nd' button. Then search, or type the name o Close' to close.	f the Service Delivery Location you wish
	Service Delivery Location: Panorama Cloud > Pro Nova Scotia Health Authority > Central Zone > Halifa	vince of Nova Scotia > Department of H ax Public Health Office > [Halifax PHO]	lealth and Wellness > Find Q
Provider:	Use this Provider: Click Find to select a provider:		
	Provider:		Find Q
	O Use Other Provider:		
Date Commo	ents	(4000	characters remaining ) Add Recorded By
Date Com	nents		Recorded By
Part of Recurrence:			
Next Follow Up Dat	e: / / @d	3	
Workgroup Organization	To specify an Organization first click on the 'Find' button click on 'Select' button. Then click 'Close' to close.	. Then search, or type the name of the Orgo	nnization you wish to specify, select it and
	Organization: Panorama Cloud > Province of Nov Health Authority]	a Scotia > Department of Health and W	/ellness > [Nova Scotia Find Q
Workgroup:	V User:		
			Save Delete Clear Cancel
* Recurrence			☆ Hide Recurrence
			Start Recurrence

- 3. Complete the mandatory (\*) fields and other fields as applicable in the New Follow-up section.
- 4. A work management task can be created and a workgroup selected.
- 5. If the task is to be repeating, click the **Start Recurrence button**.
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Date Comme	ents Recorded By
Part of Recurrence:	
Next Follow Up Date:	yyyy mm dd
Workgroup Organization	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
	Organization: Panorama Cloud > Province of Nova Scotia > Department of Health and Wellness > [Nova Scotia Health Authority]
Workgroup:	Vuser:
	Save Delete Clear Cancel
* Recurrence	★ Hide Recurrence
	Start R scurrence

- 6. Enter recurrence details.
- 7. Click Save Recurrence button.



The system responds with a message that the task has been assigned and recurrence set.

**Note**: to end a recurrence of a follow-up task, click **End Recurrence** button.

8. Click Save button.

The system responds with a message that the follow up has been successfully created.

Tip: From the Interventions Summary screen, follow up details can be viewed when the record expansion button is clicked,

Note: To view or update a follow up, click the Follow Up Type hyperlink.

Ir	nterv	entic	ons										<b>☆</b> H	lide Interventions
Row Actions: Add Follow Up							Create Intervention						Intervention	
-1			<u>Түре</u>		<u>SubType</u>	-	Disposition		Start Date		End Date	Provid	er 🔻	Location
	0	Θ	<u>Communi</u>	cation	Letter (specify)		Completed		2018 Jul 8		-	DRAKE	E, Wendy	Halifax PHO
	Follo	ow Uj	Туре	Disposition	Follow Up Date	Has	Symptoms	P	rovider	Next	Recurrence Da	te	Next Follow	v Up Date
	Ema	<u>il</u>		In Progress	2018 Aug 22	-		-		-			2018 Sep 7	

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#### 3.5 Delete Follow Up

- 9. Expand the details on the applicable Intervention.
- 10. Click the Follow Up Type hyperlink.

Inter	ventions										¢۲	lide Interventions
Row	Row Actions: Add Follow Up										Creat	e Intervention
	Туре	•	<u>SubType</u>	•	Disposition	-	Start Date	•	End Date	<u>Provic</u>	ler 🔻	Location
0	⊖ <u>¢omn</u>	nication	Letter (specify)		Completed		2018 Jul 8	}	-	DRAK	E, Wendy	Halifax PHO
Fo	low Up Type	Dist osition	Follow Up Date	Has	Symptoms	P	rovider	Next	Recurrence Da	ite	Next Follow	v Up Date
Em	ail	In Plogress	2018 Aug 22	-		-		-			2018 Sep 7	

The Follow Up Details screen is displayed.

11. Click Delete button.



Follow Up Details		Alide Follow Up Details
* Required field		
* Follow Up Type:	Email V Other Follow Up Type:	
* Follow Up Date:	2018 Aug 22	
Follow Up Dispositio	on: In Progress V Has Symptoms:	~
Organization:	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wit click on 'Select' button. Then click 'Close' to close.	sk to specify, select it and
	Organization: Panorama Cloud > Province of Nova Scotla > Department of Health and Wellness > [Nov Health Authority]	ra Scotia Find 🔍
Location:	To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service D to specify, select it and click on 'Select' button. Then click 'Close' to close.	elivery Location you wish
	Service Delivery Location: Panorama Cloud > Province of Nova Scotia > Department of Health and We Nova Scotia Health Authority > Central Zone > Halifax Public Health Office > [Halifax PHO]	eliness > Find Q
Provider:	Use this Provider:     Click Find to select a provider:	
	Provider:	Find Q
	O Use Other Provider:	
Comment:		
		<u> </u>
	(4000 characters r	emaining) Add
Date	Comments	Recorded By
2018 Aug 22	Email required to ensure client understands documentation provided	MacKirdy, Susan
Part of Recurrence:		
Next Follow Up Date	e: 2018 / 09 / 07 III yyyy mm dd	
Workgroup Organization	To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wi click on 'Select' button. Then click 'Close' to close.	sh to specify, select it and
	Organization: Panorama Cloud > Province of Nova Scotla > Department of Health and Wellness > [Nov Health Authority]	Find Q
Workgroup: Centra	al Zone V User: V	
	Save	elete Reset Cancel

The system prompts the user to confirm.

The system responds with a message that the follow up has been successfully deleted.

#### 3.6 Delete Intervention

12. Click the **Type hyperlink** of the intervention to be deleted.



Inter	terventions Aride Interventions							
Row	Actio	ns: Add Follow Up					Creat	e Intervention
		Туре	SubType	Disposition	Start Date	End Date	Provider	Location
0	œ	Communication	Letter (specify)	Completed	2018 Jul 8	-	DRAKE, Wendy	Halifax PHO
0	Ð	Referral	Primary care provider	Completed	2018 Jul 8	-	DRAKE, Wendy	Halifax PHO
0	Ð	Education/counselling	Education/counselling	Completed	2018 Jul 8	2018 Jul 31	DRAKE, Wendy	Halifax PHO

The Intervention Details screen is displayed.

- 13. Select Reason for Deletion.
- 14. Click Delete button.



The system prompts the user to confirm.

15. Click **OK** to continue.

The system responds with a message that the intervention was successfully deleted.

16. Click Save button.



### 4 TB TEST SUMMARY

The TB Test Summary screen is used to collect and view test and result information pertaining to Tuberculosis (TB) skin tests, either through administration and interpretation of tuberculin serum or as the MTb IGRA blood test. It is also used to create a TB follow up without administering a test when no test is necessary. Finally, it generates a TB test outcome report for any TB test that has a result.

TB testing may be performed using either or both of two methods: skin tests and interferon-gamma release assay (IGRA).

Note: A subject or investigation must be in context before accessing this screen.



**Tip**: At any time, click the Clear button to clear all entry fields and set them back to their default values.

#### 4.1 Access TB Test Summary

 Select Investigation -> Treatment & Interventions -> TB Skin Test Summary from the Left-Hand Navigation menu.

<ul> <li>Treatment &amp; Interventions</li> </ul>
Treatment Profile
Intervention Summary
TB Skin Test Summary
Mass TB Event Summary

The TB Test Summary screen is displayed.

### 4.2 View TB Skin Test and Follow Up Summary

The TB Test Summary screen has three sections. The TB Skin Test and Follow Up Summary section is where the user views a summary of all TB skin tests and follow ups for the client in context. TB skin tests consist of an administration of tuberculin serum, documented as Test Given, followed by interpretation of the result, documented as Test Read.

- 1. Select **Investigation -> Treatment & Interventions -> TB Skin Test Summary** from the Left-Hand Navigation menu.
- 2. View the **TB Skin Test and Follow Up Summary** section.



#### **TB Test Summary**

Alerts	1 Notes				ACTIVE
Client ID: 179	Name(Last, First Middle)/Gende EKM Demo, Sprint 7 / Female	er: Health Card No:	Date of 1998 Jr	f Birth / Age: un 02 / 20 years	
Phone Number: -(-)	Jurisdiction Info: Nova Scotia Health Authority,Central Zone	Additional ID Type / A ID: Provincial health servio identifier / -	<b>dditional</b> e provider		
TB Skin Test a	and Follow Up Summary			🗙 Hide TB Skin Te	est and Follow Up Summary
Row Actions:	View/Update View TB Test Outco eason for Deletion:	me Report	Create T	B Skin Test Cr	eate TB Follow Up Only
Test/Folio	ow Up Date of Give/Service	Date of Reaction Size Read (mm)	Interpreted Result	Follow	Pertinent Investigations
0 4	2018 Aug 14 -	• <b>•</b> 3	-	-	
Total: 1	Page 1 of 1				Jump to page:
IGRA Summaı	ry				A Hide IGRA Summary
			View TB Tes	t Outcome Repor	t View Lab Summary
Requisiti	on ID Collection Date	Test Name Res	ult Name 🔻 Result	<u>t Date</u> <u>Int</u>	terpreted Result 🔹
TB History Su	mmary				★ Hide TB History Summary
Previous Diagn Previous Treatn	osis: - nent: -	Previo Previo	us TB Test: - us BCG Vaccine: -		Update

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### 4.3 Create a TB Skin Test

The user can create a new TB skin test for the Client in context. When creating a new TB skin test, the user can link the test to an investigation by first putting the desired investigation in context.

1. Click Create TB Skin Test button



low	Actions: View/Upd	late View TB Test (	Outcome Report		Create TB SI	(in Test	Create TB Follow Up Onl
	Reason fo	r Deletion:					
1	Test/Follow Up	Date of Give/Service	Date of Read	Reaction Size (mm)	▼ Interpreted ▼ Result	<u>Follow</u> Up	Pertinent Investigations

The TB Test Details screen is displayed.

Note:

- Checking Historical prevents the mandatory fields from being enforced.
- If an investigation is in context, the system will display and select the **Pertinent to Investigation** check box.
- 2. Complete the **Organization**, **Location**, **Given By**, **Date Test Given**, **TB Serum Agent**, **Lot Number** and other fields as applicable.

est Given Detail	\$	★ Hide Test Given Det
istorical 🗌 leason for Test: M	edical reason	
		Clea
Organization:	To specify an Organization first click on the 'Find' button. Then search, or type click on 'Select' button. Then click 'Close' to close.	the name of the Organization you wish to specify, select it and
	Organization: Top Level > Level 2 (specific one) > Level 3 (specific on	e) > [Selected Level 4 Organization] Find Q
		Clea
Location:	To specify a Service Delivery Location first click on the 'Find' button. Then sear to specify, select it and click on 'Select' button. Then click 'Close' to close.	rch, or type the name of the Service Delivery Location you with
	Service Delivery Location: Top Level > Level 2 (specific one) > Level Location]	3 (specific one) > [Selected Level 3 Find Q
Given By:		Clea
owen by.	<ul> <li>Use this Provider: Click Find to select a provider:</li> </ul>	
	Provider:	Find Q
	O Use Other Provider:	
Date Test Given:	2018 / 08 / 22 III yyyy mm dd	
TB Serum Agent:	PPD V	
_ot Number:	C5037AB - Exp. 2018 Sep 30 🗸	
st Strength: ose:	0.1 0.1 mL	
	tion: Intradermal Body Sites	2

3. Click Save button.

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The system saves the TB skin test details and creates a "TB Skin Test Give" encounter event.

**Note**: If the user filled in the Test Read Details then the system also creates a "TB Skin Test Read" encounter event. Once the TB skin test is created, the user can add documents to it.

#### 4.4 Update a TB Skin Test

The user can update a new TB skin test for the client in context to update the original give event, add a read event when the outcome of a TB Skin test is known or document another follow up activity.

- 1. Select **Investigation -> Treatment & Interventions -> TB Skin Test Summary** from the Left-Hand Navigation menu.
- 2. Select the TB Skin Test to be updated in the TB Skin Test And Follow Up Summary section of the screen.
- 3. Click View/Update button

TR Test Summary

<u>A</u>	Alerts A	Notes					ACTIV
Clie 179	ent ID:	Name(Last, First Middle)/ EKM Demo, Sprint 7 / Fem	/Gender: Heal nale -	th Card No:	Dat 199	e <mark>of Birth / Age:</mark> 8 Jun 02 / 20 year	5
Phoi Num (-)	ne 1ber:	Jurisdiction Info: Nova Scotia Health Authority,Central Zone	Addi ID: Prov ident	itional ID Type / Add incial health service ifier / -	ditional provider		
100	kin Toot and	Eollow Un Summany				Hide TB Skir	n Test and Follow Up Summ
ow	Actions: Vie Reas	w/Update View TB Test	Outcome Report		Creat	e TB Skin Test	Create TB Follow Up Only
low	Actions: Vie Reas Ent Test/Follow	w/Update View TB Test son for Deletion: ered in Error V Delete Up Date of <u>Give/Service</u>	Outcome Report           Date of Read	Reaction Size (mm)	▼ Interpreted Result	• TB Skin Test	Create TB Follow Up Only Pertinent Investigations
<b>ow</b>	Actions: Vie Reat Enter ID 4	w/Update View TB Test son for Deletion: ered in Error V Delete Up Date of <u>Give/Service</u> 2018 Aug 14	Outcome Report	r <u>Reaction Size</u> (mm)	▼ Interpreted Result	Follow Up     -	Create TB Follow Up Only     Pertinent     Investigations
ow 0	Actions: Vie Reas Ent D 4 9	w/Update View TB Test son for Deletion: ered in Error V Delete Up Date of <u>Give/Service</u> 2018 Aug 14 -	Dutcome Report           Date of Read           -           2018 Aug 22	r <u>Reaction Size</u> (mm) -	Creat	Follow Up     Follow Up	Create TB Follow Up Only Pertinent Investigations

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The TB Test Details screen is displayed.


## 4.5 Enter TB Skin Test Read Details and TB Follow Up

The user updates the TB Skin Test by entering the TB Skin Test Read details when the outcome of a TB Skin test is known.

Tip: The Date Test Read must be at least 2 days after the Date Test Give.

- 4. Navigate to the **Test Read Details** section of the screen.
- 5. Complete the **Date Test Read**, **Organization**, **Location**, **Read By**, **Interpreted Result** and other fields as applicable.
- 6. Complete the Follow Up, Reason For Not Having a Chest X-ray and Follow Up Details if applicable.
- 7. Click Save Button

Ñ

Test Read Details		Alide Te	est Read Detai
* Date Test Read:	2018 / 08 / 22 III yyyy mm dd		
			Clear
Organization:	To specify an Organization first click on the 'Find' click on 'Select' button. Then click 'Close' to close	button. Then search, or type the name of the Organization you wish to specify,	select it and
	Organization: Panorama Cloud > Province of Health Authority]	of Nova Scotia > Department of Health and Wellness > [Nova Scotia	Find Q
			Close
Location:	To specify a Service Delivery Location first click or to specify select it and click on 'Select' button. The	n the 'Find' button. Then search, or type the name of the Service Delivery Loca molick 'Close' in close	tion you wish
	Service Delivery Location: Panorama Clou Nova Scotia Health Authority > Central Zone	d > Province of Nova Scotia > Department of Health and Wellness > > Halifax Public Health Office > [Halifax PHO]	Find Q
Read By:	Use this Provider:     Click Find to select a provider:		Clear
	Provider:		Find Q
	O Use Other Provider:		
* Interpreted Result	Negative V	Reaction Size: mm	
TB Follow Up		A Hic	de TB Follow (
Follow Up:	Requires two-step	$\sim$	
Reason For Not Hav	ing Chest X-ray: Other (specify in Follow Up D	)etails) V	
Follow Up Details:			
follow up details here		(3978 characters remaining )	
		Save Clear View TB Test Outcome Re	port Cance
reated By	Created Date/Time	Last Updated By Last Upd	lated Date/Tin

The system saves the TB skin test details and creates a "TB Skin Test Read" encounter event.



## 4.6 Create a TB Follow Up

The TB Follow Up Details screen allows a user to collect and update Tuberculosis (TB) follow up information without performing a TB test.

- 1. Select Investigation -> Treatment & Interventions -> TB Skin Test Summary from the Left-Hand Navigation menu
- 2. Click Create Follow Up Only button.

#### TB Test Summary

Client ID: 179	Name(Last, First Middle)/ EKM Demo, Sprint 7 / Fem	Gender: Heal ale -	th Card No:	Date 1998	of Birth / Age: Jun 02 / 20 years	
Phone lumber: (-)	Jurisdiction Info: Nova Scotia Health Authority,Central Zone	Addi ID: Provi ident	tional ID Type / Ad incial health service ifier / -	ditional provider		
8 Skin Test	and Follow Up Summary				☆ Hide TB Skin	Test and Follow Up Sumn
					CONTRACTOR DESCRIPTION OF A DESCRIPTION OF A DESCRIPTION OF A DESCRIPTIONO	
ow Actions:	View/Update View TB Test Reason for Deletion: Entered in Error V Delete	Outcome Report		Create	TB Skin Test	Create TB Follow Up Onl
ow Actions: F <u>Test/Foll</u> ID	View/Update View TB Test teason for Deletion: Entered in Error V Delete ow Up Date of <u>Give/Service</u>	Outcome Report           Date of Read	Reaction Size (mm)	Interpreted     Result	TB Skin Test	Pertinent     Investigations
Row Actions: F Test/Foll D C 4	View/Update View TB Test teason for Deletion: Entered in Error V Delete ow Up Date of <u>Give/Service</u> 2018 Aug 14	Outcome Report           Date of Read	Reaction Size (mm)	Interpreted     Result     -	TB Skin Test	Pertinent     Investigations

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The TB Follow up Details screen is displayed.

- 3. Navigate to the Clinical Information section of the TB Follow Up Details screen.
- 4. Complete the Encounter Group field if not pre-populated, Other TB Case Contact, Other Exposure Date, Recent Illness, Recent Illness Date as is appropriate and other fields as applicable.

Tip: The Exposure Date and Date and Recent Illness Date will be mandatory depending on the answer provided for Other TB Case Contact and Recent Illness respectively.



Alerts /	Notes				ACI	TIVE
Client ID: 179	Name(Last, First Middle)/Gender: EKM Demo, Sprint 7 / Female	Health Card No:	Date of Birth / Age: 1998 Jun 02 / 20 years			
Phone Number: (-)	Jurisdiction Info: Nova Scotia Health Authority,Central Zone	Additional ID Type / Additional ID: Provincial health service provider identifier / -				
				Save Cle	ar Ca	ind
lequired Field						
t/Follow Up ID:	•					
incounter Group	:	¥				
inical Informa	tion			A Hide Clinic	al Inform	na
inical Informa	ition			A Hide Clinic	al Inform	na
inical Informa	ition			A Hide Clinic	al Inform	na
inical Informa	ition	nt exposure		thide Clinic	al Inform	na
inical Information period ther TB Case Co	ins to previous contact, other than the curve intact:	at exposure sposure Date: Use Full Date: )		≮ Hide Clinic	al Inform	na
inical Information period	ntion	at experime sposure Date: Use Full Date: )	yyyy mm dd	tide Clinic	al Inform	na
inical Information period	ntion	at exposure posure Date: Use Full Date: Use Partial Date:	yyyy mm dd	Hide Clinic	al Inform	na
inical Informa	ntion	at exposure sposure Date: Use Full Date: Use Partial Date:	yyyy mm dd yyyy mm	★ Hide Clinic	al Inform	n:
inical Informa	ntion	at exposure sposure Date: Use Full Date: Use Partial Date:	yyyy mm dd yyyy mm dd yyyy mm	★ Hide Clinic	al Inform	na
inical Informa ther TB Case Co Recent Illness:	ntion	nt exposure sposure Date: Use Full Date: Use Partial Date: Date: Use Full Date: The	yyyy mm dd yyyy mm dd		al Inform	na
inical Informa ther TB Case Co Recent Illness:	ntion	et eroorwe (posure Date: Use Full Date: Use Partial Date: Date: Use Full Date: VVV	yyyy mm dd	CHide Clinic	al Inform	na
inical Informa ther TB Case Co Recent Illness:	ntion	et exposure posure Date: Use Full Date: Use Partial Date: Date: Use Full Date: YYY Use Partial Date: YYY	yyyy mm dd	★ Hide Clinic	al Inform	na
inical Informa ther TB Case Co Recent Illness:	ntion	rt evanuere rposure Date: Use Full Date: Use Partial Date: I Date: Use Full Date: Use Partial Date:	yyyy mm dd	★ Hide Clinic	al Inform	n:
inical Informa ther TB Case Co Recent Illness:	ntion	rt evanuure sposure Date: Use Full Date: Use Partial Date: I Date: Use Full Date: Use Partial Date: YYY Use Partial Date: YYY	yyyy mm dd yyyyy mm dd yyyyy mm dd y mm dd	★ Hide Clinic	al Inform	<b>n</b> :
inical Informa ther TB Case Co Recent Illness:	ntion	rt expositive (posure Date: Use Full Date: Use Partial Date: I Date: Use Full Date: Use Partial Date:	yyyy mm dd yyyyy mm dd yyyyy mm dd y mm dd	★ Hide Clinic	al Inform	
Inical Information Berry ther TB Case Co Recent Illness:	ntion	et exposure sposure Date: Use Full Date: • Use Partial Date: • Date: Use Full Date: • Use Partial Date: • Yyy: Use Partial Date: • Yyy:	yyyy mm dd yyyyy mm dd yyyyy mm dd y mm dd	★ Hide Clinic	al Inform	
Inical Information Berna ther TB Case Co Recent Illness:	ntion	et exposure sposure Date: Use Full Date: Use Partial Date: Date: Use Full Date: Use Partial Date: Use Partial Date:	yyyy mm dd yyyy mm dd yyyy mm dd y dd y	★ Hide Clinic	al Inform	na
Inical Information Determined for the sub-section Determined for the section Determined for the section of the	ntion	et exposure sposure Date: Use Full Date: • Use Partial Date: • Date: Use Full Date: • Use Partial Date: • Yyy Use Partial Date: • Yyy	yyyy mm dd yyyy mm dd yyyy mm dd y f f f f f f f f f f f f f f f f f f f	★ Hide Clinic	al Inform	
Inical Information Particular Par	ntion	et exposure (posure Date: Use Full Date: Use Partial Date: Date: Use Full Date: Use Partial Date: Use Partial Date:	yyyy mm dd yyyy mm dd yyyy mm dd	★ Hide Clinic	al Inform	
Inical Information Device TB Case Co Recent Illness:	ntion	et exposure (posure Date: Use Full Date: Use Partial Date: Date: Use Full Date: Use Partial Date: Use Partial Date: Yyy	yyyy mm dd yyyy mm dd yyyy mm dd y mm dd y mm	Hide Clinic	al Inform	
Inical Information Device TB Case Co Recent Illness:	ntion	et erooruse (posure Date: Use Full Date: Use Partial Date: Date: Use Full Date: Use Partial Date: Yyy Use Partial Date: Yyy	yyyy mm dd yyyy mm dd yyyy mm dd y mm dd y mm dd	Hide Clinic	al Inform	A

- 5. Continue to the **TB Follow Up** section of the screen.
- 6. Complete the **Date Test Read**, **Organization**, **Location**, **Read By Interpreted Result** and other fields as applicable.
- 7. Complete the Follow Up Date, Follow Up, Reason For Not Having a Chest X-ray and Follow Up Details if applicable.
- 8. Click Save button.



Denses for Test 11	dia di secono							
Reason for Test: M	edical reason	~						Clear
* Organization:	To specify an Or click on 'Select'	ganization first click on the button. Then click 'Close' to	'Find' button. Then s close	earch, or type the name of the t	Organization you	wish to spec	ify, select	it and
	Organization Health Author	i: Panorama Cloud > Pro prity]	vince of Nova Scoti	ia > Department of Health ar	nd Wellness > [N	ova Scotia	Fin	d Q
							-	Clear
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 Deliv Nova Scotia	very Location: Panorama Health Authority > Centra	a Cloud > Province I Zone > Halifax Pu	of Nova Scotia > Departmer blic Health Office > [Halifax	nt of Health and PHO]	Wellness >	Fin	d Q
								Clear
* Provider:	Use this P Click Find to sel	rovider: lect a provider:						
	Provider:						Fi	nd Q
	O Use Other	Provider:			1			
Follow Up Date:		2018 / 8 /	29					
Follow Up		yyyy mm	dd					
Follow op.	ine Cheet V	Refer to primary care p	provider for evaluati	ion 🗸				
eason For Not Hav	ing Chest A-ray:	Other (specify in Follow	v Up Details) 🔽					
ollow up Details:					~			
				(4000 -		ining )		
				(4000 0	naracters reina	ning /		
						Save	Clear	Cance
eated By	0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 808 0 8	Created Date/Time		Last Updated By		Last U	pdated I	Date/Tir

The TB follow up details are saved and a 'TB Follow Up' encounter event is created.

Note: Click Clear button to clear any unsaved values on the screen.

## 4.7 View or Update a TB Follow Up

A user can view or update a TB Follow Up.

- 1. Select the TB Follow up to be updated in the TB Skin Test And Follow Up Summary section of the screen
- 2. Click View/Update button.



## TB Test Summary

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Client ID: 179	Name( EKM D	Last, First Middle emo, Sprint 7 / Fer	/Gender: Heannale -	alth Card No:	Date 1998	of Birth / Age: Jun 02 / 20 years	
'hone lumber: (-)	Jurisdi Nova S Authori	iction Info: cotia Health ty,Central Zone	Ade ID: Pro ider	ditional ID Type / Ad vincial health service htifier / -	ditional provider		
						A Hide TB Skin Te	st and Follow Up Sumr
8 Skin Test	r and Folio	w up Summary					
3 Skin Test ow Actions:	View/Upda Reason for Entered in E	te View TB Tes Deletion: irror V Delete	t Outcome Report	<u>.</u>	Create	TB Skin Test   Cre	eate TB Follow Up On
3 Skin Test ow Actions: <u>Test/Fo</u> ID	View/Upda Reason for Entered in E	te View TB Tes Deletion: mor V Delete Date of <u>Give/Service</u>	t Outcome Report	Reaction Size	Create Interpreted Result	TB Skin Test Cre	eate TB Follow Up On Pertinent Investigations
Skin Test ow Actions: <u>Test/Fo</u> 1D ) 4	View/Upda Reason for I Entered in E	te View TB Tes Deletion: mor V Delete Date of <u>Give/Service</u> 2018 Aug 14	t Outcome Report	Reaction Size (mm)	Create	TB Skin Test Cre	eate TB Follow Up On Pertinent Investigations

The TB Follow Up Details screen is displayed for further action.

## 4.8 Delete a TB Skin Test or Follow Up

The user can delete TB skin tests or follow ups.

- 1. Select the desired TB test or follow up from the **TB Skin Test and Follow Up Summary** section.
- 2. Select a Reason for Deletion.
- 3. Click **Delete** button.

Row	Actions: View/Upd	late View TB Test C	utcome Report		Create	TB Skin Test C	reate TB Follow Up Onl
	Reason fo	r Deletion: Error V Delete					
	Test/Follow Up	Date of Give/Service	Date of Read	Reaction Size (mm)	Interpreted Result	▼ Follow Up	<ul> <li>Pertinent Investigations</li> </ul>
С	4	2018 Aug 14	120	-	-	-	
۲	9	~	2018 Aug 22	-	Negative	Requires two- step	



A confirmation prompt is displayed indicating the test or follow up will be deleted. If the TB test or follow up is linked to any investigations, the confirmation also warns these relationships will be deleted.

4. Click OK button.



The TB skin test or follow up is deleted.

Note: If the user clicks Cancel, the deletion is cancelled and no changes are made.

## 4.9 IGRA Summary

TB testing that has occurred using interferon-gamma release assay (MTb IGRA) will be displayed in the IGRA Summary section of the TB Test Summary Screen. The test is entered via the Lab section of Panorama but will be displayed in the section below.

See Lab User Guide for instructions on entering lab data.

The lab result displayed in the IGRA Summary Screen allows the user to navigate review the lab details.

1. Click View Lab Summary button

The system displays the Lab Summary screen for the client and investigation in context.

2. Click Result Name hyperlink

The system displays the Human Lab Report screen with both the test and result portion of Result Details section populated.

3. Click the **Requisition ID** hyperlink

The system opens the Human Requisition screen populated with the pertinent lab details contained there.



				View TB Test Outcome	e Report View Lab Summa
Requisition ID	Collection Date	Test Name	Result Name	Result Date	Interpreted Result
81	2018 Aug 28	MTb IGRA	MTb IGRA	2018 Aug 29	Positive

Note: click **Cancel** on any lab related screen will return the user to the TB Test Summary screen.

## 4.10 TB History Details

The TB History Details screen allows the user to record and view historical Tuberculosis (TB) information for a client.

The TB History Details is intended to only include historical information for periods prior to the use of Panorama or before an individual becomes a client. Current information about TB tests and follow ups after the individual became a client would be documented using the TB Skin Test and Follow Up Summary and IGRA Summary sections on the TB Test Summary screen.

**Note**: The user must navigate to the **TB Test Summary** screen to access the **TB History** screen.

#### 4.10.1 View or Update the Client's TB History

1. On the TB Test Summary screen, click **Update** button in the TB History Summary section.



## **TB Test Summary**

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Alerts	Notes		ACTIVE
Client ID: 179	Name(Last, First Middle)/Gende EKM Demo, Sprint 7 / Female	r: Health Card No:	Date of Birth / Age: 1998 Jun 02 / 20 years
Phone Number: -(-)	Jurisdiction Info: Nova Scotia Health Authority,Central Zone	Additional ID Type / Addit ID: Provincial health service pro identifier / -	ional ovider
Ɓ Skin Test a	and Follow Up Summary		A Hide TB Skin Test and Follow Up Summa
Row Actions:	View/Update    View TB Test Outco	me Report	Create TB Skin Test Create TB Follow Up Only
F	Reason for Deletion:		
Test/Follo	ow Up Date of <u>Give/Service</u>	Date of Reaction Size (mm)	Interpreted         Follow         Pertinent           Result         Up         Investigations
0 4	2018 Aug 14 -	-	
Total: 1	Page 1 of 1		Jump to page:
GRA Summa	ry		🗙 Hide IGRA Summa
			View TB Test Outcome Report View Lab Summary
<u>Requisiti</u>	on ID Collection Date	Test Name Result N	ame Result Date Interpreted Result
B History Su	immary		★ Hide TB History Summa
Previous Diagn	osis:	Previous T	B Test: -

The TB History Details screen is displayed.

- 2. Edit any values as necessary.
- 3. Click **Save** button.



											Save	Clear	Cance
B History Details	5										🛠 Hid	le TB Hist	ory Deta
Previous TB Test: Source:	No	ne	~	,	<b>&gt;</b>	Previous Test Date:	Use Full Date: Use Partial Date:	•	ууууу ууууу	/   r   /	nm nm	dd	
Previous Test Count	try:				-								
Previous Diagnosis:	Nor	ie V				Previous Diagnosis Date:	Use Full Date: Use Partial Date:	<ul> <li></li> <li><td>уууу ууууу ууууу</td><td>]'[ </td><td>nm</td><td>dd</td><td></td></li></ul>	уууу ууууу ууууу	]'[ 	nm	dd	
Previous Treatment:	Nor	e Required		~		Previous Treatment Date:	Use Full Date: Use Partial Date:	•	ууууу ууууу ууууу	]'[ ]'[	nm nm	dd	
Previous BCG <mark>V</mark> acci	ine: Yes	~				BCG Vaccine Date:	Use Full Date: Use Partial Date:	•	уууу ууууу ууууу	]'[ ' ]'[ '	nm nm	dd	
3CG Vaccine Count 3CG Scar Visible:		not use 🗸				Client Age at Las	t BCG: [		Years	1			
IB HIStory Co	mments							140	00 chars	octor	remaini	Ç	Ad
Date 🔻	Comments							[+(	roo cridic	iotel a	Reco	orded By	
2018 Aug 22	History										McCl	arty, Erin	
											Save	Clear	Canc
eated Bv		Created Dat	e/Time			Last Unda	ited By				Last	Undated	Date/Ti

The updated TB history is saved and a message is displayed.

Note:

- Click **Reset** button to cancel any unsaved changes made on the TB History Details screen.
- The user can close the TB History details at anytime without saving by clicking the **Cancel** button. Any unsaved changes are discarded and the TB Test Summary screen is displayed.



## 5 MASS TB EVENTS

The Mass TB Event is comprised of two screens:

The **Mass TB Event Details** screen allows the user to create, update, or view the details of an existing Mass TB Event.

The **Mass TB Event Clients** screen allows the user to view the list of clients for the mass TB event. From this screen, the user can create a 'give' event for selected clients, create a 'read' event for selected clients.

**Note**: A cohort **must be** in context before a Mass TB Event Details screen can be accessed. Reference the Investigations User Guide for instructions how to create a cohort.

## 5.1 Mass TB Event Summary

The user can search for an existing Mass TB Event or create a new one from the Mass TB Summary screen.

1. Select Investigation -> Treatment & Interventions -> Mass TB Event Summary from the Left-Hand Navigation menu.



The Mass TB Event Summary screen is displayed

2. Enter search criteria as appropriate and click Search button. .



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## Mass TB Event Summary

Mass IB Event Se	earch Criteria		🗙 Hide Mass	TB Event Search Criteria
Wildcard characters 9 matching phonetically Organization: To specify an Organizat	, (multiple letters) and _ (single letters) can . Wildcard-only searches will be treated as ion first click on the 'Find' button. Then search	<ul> <li>be used on any text field - except oblank searches.</li> <li>or type the name of the Organization.</li> </ul>	on Client Number and on First ar you wish to specify, select it and cli	nd Last Name when
click 'Close' to close.	evel > Level 2 (specific one) > Level 3 (sp	ecific one) > [Selected Level 4 Ord	anization	Find Q
Service Delivery Los	ation	1 1 0		
To specify a Service Del on 'Select' button. Then	ivery Location first click on the 'Find' button. I click 'Close' to close. cation: Top Level > Level 2 (specific one)	Then search, or type the name of the Ser > Level 3 (specific one) > [Selecte	rvice Delivery Location you wish to	specify, select it and click
Created By:	Current User All Users			
Event Status: Event From Date:	In Progress	Event Name: Event To Date:		
	yyyy mm dd		yyyy mm dd	
			Sear	ch Retrieve Clear
Mass TB Event Se	arch Results		Sear	TB Event Search Result
Mass TB Event Se Row Actions: Upd	earch Results ate Event Update Event Clients		Sear	TB Event Search Result
Mass TB Event Se Row Actions: Upd <u>Event ID</u>	earch Results ate Event Update Event Clients Event Name Event	Date SDL	Sear A Hide Mass Organization	TB Event Search Result Create Event rent Status

Mass TB Events matching the search criteria are displayed.



ne qu	ery returned 2 res	sult(s).				
lass	TB Event Sea	arch Criteria			🛠 Hio	de Mass TB Event Search Crite
Vildca natch Orgar	ard characters % ing phonetically. iization: cify an Organizatio	(multiple letters) and _ (sing Wildcard-only searches will on first click on the 'Find' butto	gle letters) can be used o be treated as blank sear m. Then search, or type the	on any text field - except rches. : name of the Organization	on Client Number and or you wish to specify, select	n First and Last Name when
Orga	nization: Top Le	evel > Level 2 (specific one)	> Level 3 (specific one)	> [Selected Level 4 Or	ganization]	Find Q
Servio	e Delivery Loca	ation:				
o spe	cify a Service Deliv sct' button Then c	very Location first click on the lick 'Close' to close	'Find' button. Then search	, or type the name of the Se	ervice <mark>Deli</mark> very Location yo	u wish to specify, select it and clic
Serv	ice Delivery Loo	cation: Top Level > Level 2	(specific one) > Level 3	(specific one) > [Selecte	ed Level 3 Location]	Find O
vent	ed By: Status: From Date:	Current User All Users In Progress V yyyy mm	dd	Event Name: Event To Date:	/ yyyyy mm	] / [] []] dd
1000	TD Event Co	arah Daaulta			۸ Hir	Search Retrieve Cle
ass	Actional Line	arch Results	017		×1110	le mass TD Event Search Res
tow	Event ID	Event Name	Event Date	SDL	Organization	Event Status
	2	Aug 16 demoEvent	2018 Aug 14	Halifax PHO	NSHA	In Progress
0	1	Test	2018 May 17	Halifax PHO	Nova Scotia	In Progress
-						

## 5.2 Create a Mass TB Event

The user can create new Mass TB Events.

1. Click **Create Event** on the Mass TB Event Summary screen.

Row	Actions: Upda	ate Event Update Event Cl	lients			Create Even
	Event ID	Event Name	Event Date	<u>SDL</u>	Organization	Event Status
۲	2	Aug 16 demoEvent	2018 Aug 14	Halifax PHO	NSHA	In Progress
0	1	Test	2018 May 17	Halifax PHO	Nova Scotia	In Progress

The system displays the Mass TB Event Details screen.

#### Note:



- A cohort with at least one result set must be in context before accessing this screen
- Click Clear button to clear any unsaved values on the screen.
- On the Event Details section of the screen enter the Event Name, Event Status, Organization, Service Delivery Location, Event Date, Result Set from the cohort in context, Encounter Group, Reason for Test and optionally enter the other fields as applicable in the Event Details section.

Cohort ID: 28	Cohort Name: ekmCohort	Encounter Group(s): Tuberculosis Disease Investigation	Client List Name/ ID: <u>EKM clientList / 22</u>
			Save Clear Cance
Required Field			
Event Details			<b>☆</b> Hide Event Detail
Complete and click Event ID:	Save to generate the Event ID. -		
* Event Name:	Mass TB Event Name		
* Event Status:	In Progress \$		
Event Description:		1	
Organization:	To specify an Organization first cl on 'Select' button. Then click 'Clo.	lick on the 'Find' button. Then search, or type the nan se' to close.	ne of the Organization you wish to specify, select it and click
	Organization: Panorama Clo Health Authoritv1	oud > Province of Nova Scotia > Department of I	Health and Wellness > [Nova Scotia Find Q
* Service Delivery	To specify a Service Delivery Loca specify, select it and click on 'Sele	ation first click on the 'Find' button. Then search, or s ct' button. Then click 'Close' to close.	type the name of the Service Delivery Location you wish to
Location:	Service Delivery Location: Scotia Health Authority > Cer	Panorama Cloud > Province of Nova Scotia > D htral Zone > Halifax Public Health Office > [Halif	epartment of Health and Wellness > Nova          ax PHO1       Find Q
* Event Date:	2018 / 08 / 31		
* Result Set	22 - EKM_clientList \$		
From Cohort:		action	
From Cohort: * Encounter Group:	Tuberculosis Disease Investi	gauon	

3. Add one or more providers by selecting the desired provider and clicking **Add Provider** button.



Prov	iders Entry	/	Alide Providers Entry
Select	a provider and	d click Add Provider To List to include them in the available	pool of providers.
Prov	ider:	Use this Provider: Click Find to select a provider:	
		Provider:	Find Q
		O Use Other Provider:	
Row	Actions	emove Provider	Add Provider
Row	Actions R	emove Provider	Add Provider Clear Provider
Row	Actions R Provider DRAKE, M	emove Provider	Add Provider Is Other Provider?

The system displays the added providers in the list of providers.

**Note**: To remove a provider, select the provider and click **Remove Provider** button.

4. Add one or more lots by selecting a TB Serum Agent and a Lot Number and clicking **Add Lot** button.

Lot	Numbers Entry					☆ Hide Lot Numi	pers Entr
TB S	erum Agent: lumber:		<b>~</b>	Expiry D	)ate:		5
						Add Lot C	lear Lot
Row	Actions: Remove Lot						
	TB Serum Agent	· · · · ·	Lot Number		Expiry Date		
۲	PPD		C5037AB		2018 Sep 30		
0	PPD		C4904AB		2018 Apr 30		
				Mass	TB Event Clients	Save Reset	Cance
reate	d By	Created Date/Time		Last Updated By		Last Updated I	Date/Time
AcClar	ty, Erin	2018 Aug 16 10:40 ADT		McClarty, Erin		2018 Aug 16 1	5:39 AD

The system displays the added lots in the list of lots.

**Note**: To remove lots, select the lot and click **Remove Lot** button. To clear a lot before it has been added, click **Clear Lot** button.

5. Click **Save** button.

The system saves the Mass TB Event



## 5.3 Update a Mass TB Event

- 1. Navigate to the Mass TB Event Summary screen.
- 2. Perform a search for the target Mass TB Event. See <u>Section 5.1</u> for details on searching for a Mass TB Event.
- 3. Select the Event to update.
- 4. Click Update Event button on the Mass TB Event Summary screen

Row	Actions:	Update E	vent	Update Event CI	ients						Create Even
	Event II	2	Even	<u>it Name</u>	Event Date	•	<u>SDL</u>	Organi	tation	Event	<u>Status</u>
۲	2		Aug 1	6 demoEvent	2018 Aug 14	-	Halifax PHO	NSHA		In Progr	ess
0	1		Test		2018 May 17		Halifax PHO	Nova Sc	otia	In Progr	ess

The system displays the Mass TB Event Details screen.

- 5. Edit any values as necessary in the Event Details section.
- 6. Click Save button.

The system updates the mass TB event.

## 5.4 View Mass TB Event Clients

The system displays the list of cohort clients for the event on the Mass TB Event Clients screen. The user can view the list of clients associated to a Mass TB Event.

The user can access the Mass TB Event Clients screen from both the Mass TB Event Summary Screen and the Mass TB Event Details screen.

## 5.5 View Mass TB Clients from the Mass TB Event Summary screen

- 1. Navigate to the Mass TB Event Summary screen.
- 2. Perform a search for the target Mass TB Event. See <u>Section 5.1</u> for details on searching for a Mass TB Event.
- 3. Select the target Mass TB Event



#### 4. Click Update Event Clients button.

Row	Actions: Upda	ate Event	Update Event Cl	lients			Create Even
	Event ID	Ever	<u>nt Name</u>	Event Date	SDL	Organization	Event Status
۲	2	Aug 1	6 demoEvent	2018 Aug 14	Halifax PHO	NSHA	In Progress
0	1	Test		2018 May 17	Halifax PHO	Nova Scotia	In Progress

The Mass TB Event Clients screen is displayed.

# 5.6 View Mass TB Clients from the Mass TB Event Details screen

- 1. Open the Mass TB Event Details screen.
- 2. Click Mass TB Event Clients hyperlink.

/lass TB E	vent Details		0
Cohort ID: 28	Cohort Name: ekmCohort	Encounter Group(s): Tuberculosis Disease Investigation	Client List Name/ ID: EKM_clientList / 22
			Mass TB Event Clients ave Reset Cano
Required Field	- U - U - U - U - U - U		
Event Details			Alide Event Deta
Complete and click Si	ave to generate the Event ID.		
Event ID:		2	

The Mass TB Event Clients screen is displayed.



## 5.7 Using the Mass TB Event Clients screen

The Mass TB Event Clients screen allows the user creates a give and read event for selected clients.

**Note**: TB Give and Read events created using the Mass TB Event screens will NOT be associated with an TB Investigation until they are moved manually via the Subject Summary Screen. See <u>Section 7</u> for instructions.

## 5.8 Create or Update a Give Event

The user can create or update a 'give' event for selected clients

1. Select the desired clients by selecting the check box next to the client name. Click **Select All** button to select all clients in the list.

Note: The user can click Deselect All button to deselect all clients in the list.

2. Click Create Give Event button.

Sele	ect All Deselect All	Row Act	ions: Creat	e Give Event	Create Read	Event	verride Co	nsent		
	Client Name	Date Given	Body Site	Lot Number	<u>Given By</u> 🔻	Date Read	Read ▼ By	Reaction Size (mm)	Interpreted Result	<u>Has</u> Consent?
~	EKM Demo. Sprint 7	2018 Aug 14	Forearm: Left	C5037AB	OLIVER, GERTRUDE	-	-	2	-	
~	EKM LabTES [More]	2018 Aug 14	Forearm: Right	C5037AB	OLIVER, GERTRUDE	<b>4</b> 9	-	4	-	
	ekmtest, client 2	2018 Aug 16	Forearm: Right	C5037AB	DRAKE, MARY	-	-	• 1	-	
	ekmtest, test	2018 Aug 16	Forearm: Right	C5037AB	DRAKE, MARY	-	-	÷	-	
	TestSEM2, Susan	2018 Aug	Forearm: Right	C5037AB	DRAKE, MARY		120	20		

The system displays the Give Event Entry section at the bottom of the screen.

- 3. Enter or update the **Given by Provider**, **Date Test Given**, **Lot Number** and other details as required.
- 4. Click Save button.



Give Event Entry		Alide Give Event Entry
* Given By Provider:	✓	
* Date Test Given:	2018 / 08 / 22 III yyyy mm dd	
* Lot Number:	~	
Expiry Date:		
Test Strength:	-	
Dose:		
Route of Administration:		
Body Site:	×	

The system validates the entered details and creates or updates the give event information on a TB skin test for each of the selected clients. If any errors are encountered, the system displays a count of the tests that failed validation.

For each client, the system also creates a "TB Skin Test Give" encounter event if one does not exist.

## 5.9 Create or Update a Read Event

The user can create or update a 'read' event for selected clients.

Note: Read data may be entered only after give data has been entered.

- 1. Select the desired clients by selecting the check box next to the client name or click **Select All** button to select all clients in the list.
- 2. Click Create Read Event button.

Select All Deselect All Row Actions: Create Give Event				Create Read	Create Read Event Override Consent			nt		
	Client Name	Date Given	Body Site	Lot Number	<u>Given By</u>	Date Read	Read By	Reaction Size (mm)	Interpreted Result	Has Consent?
~	EKM Demo. Sprint 7	2018 Aug 14	Forearm: Left	C5037AB	OLIVER, GERTRUDE	-	2	2	2	
~	EKM LabTES [More]	2018 Aug 14	Forearm: Right	C5037AB	OLIVER, GERTRUDE	÷.	-	-	-	
	ekmtest, client 2	2018 Aug 16	Forearm: Right	C5037AB	DRAKE, MARY	-	-	•		
	ekmtest, test	2018 Aug 16	Forearm: Right	C5037AB	DRAKE, MARY	-	-	•	-	
	TestSEM2, Susan	2018 Aug 16	Forearm: Right	C5037AB	DRAKE, MARY	2	120	241	-	

The system displays the Read Event Entry section at the bottom of the screen.



- 3. Enter or update the **Date Test Read, Read By Provider, Interpreted Result** and other read details as required.
- 4. Click **Save** button.

Read Event Entry		☆ Hide Read Event Entry
* Date Test Read:	2018 / 8 / 18 🛄	
* Read By Provider:	OLIVER, GERTRUDE 🗸	
Reaction Size	0 mm	
* Interpreted Result:	Negative V	
Follow Up:	None required	

The system validates the entered details and creates or updates the read event information for each of the selected clients. If any errors are encountered, the system displays a count of the tests that failed validation.

For each client, the system creates a "TB Skin Test Read" encounter event if one does not exist.

## 5.10 Move a TB Skin Test to an Investigation

If a TB Skin Test Give/Read event, Follow Up or IGRA lab was not created with an investigation in context it can be moved to the investigation from the **Subject Summary** screen.

This is done by moving the automatically generated encounter for each of those types of events. When the user moves an encounter, the system moves the encounter and all associated data to the investigation.

**Note:** All TB skin Test Gives/Reads created from the Mass TB Event section will not be associated with an Investigation until they are moved. The event must have initially been created with the same TB encounter group as the investigation to which it will be moved.

**Note**: Once an encounter is moved to an investigation, it cannot be removed from an investigation, but may be moved to another open investigation.

**Note**: TB Skin Tests generate TB Skin Test Give and TB Skin Test Read encounters. Follow – ups Lab reports generate lab encounters.

- 1. In the appropriate encounter group section, select the check box next to the encounters to be moved to the investigation.
- 2. From the **Move Selected Encounter(s) To** drop-down list, select the investigation.



3. Click **Move** button.

Tuber Group	culosis Disea )	se Investigation	Encounter					<b>☆</b> Hide
							Create Inv	vestigation
Inve	stigation 2	60 - Tubercu	losis - Oper	n				🛠 Hide
Invest 260	gation ID: St Op	atus: Investigato pen 🗗	or: Linked Outb	ereaks: Report Date (Sent)	: Report Dat 31 August 2	<b>e (Received):</b> 2018		
Disea	ISE	Etiologic Agent	Epi Markers	Authority / Classification   0 ( √ Primary Classification, /	Classif. Date ∆ Set by Case D	)ef)	Site(s)	Staging
Tuber	culosis	-	-	✓ National / Contact - F Under Investigation	Person 201	18 Aug 31		-
In	vestigation	260 Encount	ers					🔉 Hide
0 e	encounter(s) total	(				Click Encounter	Date for encour	nter details.
Mc	ve Selected End nvestigation:260	counter(s) To: (Tuberculosis) Episod	le:Non-Episode End	counters \$ Move			Create	e Episode
	10-00-00 BE 5280							•
N	on-Episode Enco	ounters				Create E	ncounter	Hide
	Encounter Da	<u>ite</u> 🔶 E	ncounter Type	Encounter Reasons	5	Organization	Local	tion
Una	ssociated E	ncounters (N	on-Investiga	tion)				🗙 Hide
1 enco	unter(s) total					Click Encounte	r Date for encou	unter details.
Move	Selected Encour	nter(s) To:						
Inves	tigation:260 (Tub	erculosis) Episode:N	on-Episode Encoun	ters 🗘 Move			Create	e Episode
Non-E	pisode Encount	ters					Create Encoun	iter <u>Hide</u>
	Encounter Date	Encounter Ty	rpe Encounte	r Reasons	Organization	L	ocation	
	2018 Aug 16	TB Skin Test 0	Give -		NSHA	H	alifax PHO	

The system moves the selected encounters and all associated data to the investigation.



## **6 MEDICATION SUMMARY**

The Medications Summary screen lets a user create, update, delete, view, and discontinue medications for a client. Medications are created or recorded to complete the client's treatment profile and add to the historical profile for assessment purposes. As Public Health does not prescribe medications, all **functionality/fields** related to the provision of prescriptions can be ignored.

The full set of medication screens will only be used for TB only. The instructions can be used for additional medications, such as those for HIV, if future needs dictate.

#### Both a client and investigation must be in context to use these screens.

### **Viewing Medications**

Medications are presented in two sections. The Medications section displays medications that are prescribed or otherwise authorized for the client as part of the client's treatment – for Nova Scotia these will be TB and HIV drugs only.

The Other Meds section displays additional medications that the client is taking or previously taken.

By default, the Medications and Other Meds sections displays all medications, including those that have ended or been discontinued.

To display only active medications in a section, click **Show Active** button. To revert to showing all medications, click **Show All** button.

Each row in the Medications and Other Meds sections can be expanded to display additional details. To expand a row, click the **"plus"** icon for that row. To collapse it, click the **"plus"** icon. To expand all rows in the Medications section, click **Expand All Rows** button. To collapse all the rows in the Medications section, click **Collapse All Rows** button.

## 6.1 Medications Summary

To access the Medications Summary screen

- 1. Go to the Left-Hand Navigation menu.
- 2. Under the Medications section, select Medications Summary.





The Medications Summary screen is displayed.

#### Medications Summary ⑦ 旦 ACTIVE Date of Birth / Age: 2000 Aug 01 / 18 years 0 months Name(Last, First Middle)/Gender: Health Card No: Client ID: Tree, Willow / Female 270 Additional ID Type / Phone Jurisdiction Info: Number: Additional ID: Provincial health service -(-) Department of Health and Wellness,Nova provider identifier / -Scotla Health Authority Investigation Investigation ID: Status: Disposition: Investigator: Investigation in progress 230 OPEN C Sarah Meddah PHAC Date/Type: Authority/Classification: Disease: Etiologic Agent: 2018 May 01 / Date Reported Hepatitis C virus / 3 / B Hepatitis C Provincial / Case - Confirmed / 2018 Aug 22 Save Reset Get External Medication Profile Relevant Information Alide Relevant Informatio Treatment Start Date: Treatment End Date: Reason For Treatment: Number of Days Treated: . . Client Allergies: Date Weighed: Client Weight: Wears Contact Lenses: **Client Drug Resistances** Etiologic Agent Disease Result Date Antimicrobial/Drug Interpretation Sensitivity Value Adverse Drug Reactions Drug(s) Date Received Signe & Symptome View Medications History Add Adverse Drug Reaction Interruptions



Medications	:	Hide Medications
Row Actions:	Report Title:       ✓         Address:       ✓         Generate Report         Status:       ✓         Status: <th>Show Active Expand All Collapse All</th>	Show Active Expand All Collapse All
Maintain Mad	ine interesting in	Madiaatian Dataila
Maintain Med		Medication Details
* Required field		
Other Meds:		
<ul> <li>Protocol:</li> <li>Standard T</li> <li>Drug:</li> </ul>	x: Select Drug	
Status: Status Date:	yyyy mm dd	
Authorized By	Use this Provider:     Click Find to select a provider:     Provider:	Find Q
	O Use Other Provider:	



* Dosage:	* Unit:
* Route:	
* Frequency:	
* Duration:	* Unit:
Treatment Duration:	Unit: 🗸
Order Duration:	Unit: 🗸
* Tx Prescribed / Authorized Date:	2018 / 08 / 23 III yyyy mm dd
* Tx Effective From Date:	2018 / 08 / 23 III yyyy mm dd
Reason:	V Other Reason:
Special Direction:	DOT: (100 characters)
·····	Add Clear
Other Meds	☆ Hide Other Meds
Row Actions: Update Delete Course Completed:	V Update Course Completed
Drug Dosage / Frequency / Route	Duration <u>Tx Effective From /</u> Special     Prescribed /       Valid To     Direction     Authorized By     Course
External Medication Profile	★ Hide External Medication Profile
Issues: Work Item	Show Work Item
	Save Reset Get External Medication Profile

V Client Drug Resistances Section: drug resistances are entered via the lab screens and will appear in this section for information purposes.

Adverse Drug Reaction Section: ADR functionality will not be used in Nova Scotia.

## 6.2 Record TB or HIV Medication

- 1. Navigate to the **Medications Summary** screen > **Maintain Medications Detail** section.
- 2. Click the radial button for **Drug**.
- 3. Begin entering the HIV or TB drug name.
- 4. Select the applicable drug.
- 5. Click **Select Drug** button.



Tip: Drug is a type-ahead field. Once 2 or more letters have been entered, a list of drugs matching the entry will appear. Click the appropriate drug to add.

 $\nabla$  **Tip: Protocol** and **Standard Tx** functions will not be used in Nova Scotia.

Maintain Medication Details		Hide Maintain Medication Details
* Required field		
Other Meds:		
O Protocol:		
O Standard Tx:		
• Drug:	Capreomycin ×	Select Drug

The system adds the selected drug.

Enter other details as required. Note: mandatory fields are marked with a red asterisk (\*).

Note: Use "Prescribed" as medication status until patient begins taking medications.

7. Click **Add** button.



Maintain Medicatio	n Details				☆ Hide Mair	ntain Medication Details
* Required field						
Other Meds:						
O Protocol:						
O Standard Tx:						
Orug:	Capreomy	cin			Select Drug	
Status:	Prescribed	<b>~</b>	[			
Status Date:	2018 / УУУУ	07 /03 🔛 mm dd				
* Tx Prescribed / Authorized By:	O Use this Provider:					
,	Click Find to select a pro	wider:				Find Q
	Use Other Provide	er: Dr. Smith (New Br	runswick)			
* Dosage:		20.0	* Unit	: mg 🗸		
* Route:		Intramuscular	$\checkmark$			
* Frequency:		one time daily	~			
* Duration:		120	* Unit	:Days 🗸		
Treatment Duration:		24	Unit:	Months 🔽		
Order Duration:			Unit:	~		
* Tx Prescribed / Auth	norized Date:	2018 / 07	/03 📖			
		yyyy mm 2018 /07				
* Tx Effective From D	ate:	yyyy mm	dd			
Reason:		Active disease	~	Other Reason:		
Special Direction:			(100 characte	DOT: ers)		
						Add Clear

The medication is added to the **Medications** table.



Medications	s							★ Hide Medications
Row Actions	Report Addres	t Title:			Generate R	Report		Show Active
	Status	:		Status Date: 2018 УУУУ	/08 / mm c	27 Update Statu	IS	Expand All Collapse All
	Updat Link M	te Delete Se Med Rec View	t DOT Clear	DOT Discontinue Dis tory	spense / Ac	dminister Order		
	T <u>x</u> State	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	<u>Tx Effective From /</u>	<u>DOT</u> ▼	Special
	Vew	-	Capreomycin	20 mg / one time daily / Intramuscular	120 Days	2018 Jul 3 / 2020 Jun 21	-	

- 8. Confirm details are correct. Once the record is saved, only the Status, Status Date and DOT indicator field can be updated. The medication cannot be deleted.
- 9. If record is correct, click **Save** button.

The system prompts the user to confirm.

10. Click **OK** to continue.

		_
Message	from webpage	X
?	Except for the Medication Status, Status Date and DOT indicator, and for Other Medications Course Completed, the Medications and Other Medications cannot be updated or deleted once the data has been saved. Do you wish to continue?	
	OK Cancel	



• Required field   Other Meds:   ● Protocol:   ● Standard Tx:   ● Drug:   ● Use this Provider:   Clack Find to select a provider:   ● Clast this Provider:   ● Duration:   ● Duration:   120   ● Unit:   ● Duration:   120   ● Unit:   ● Duration:   120   ● Unit:   ● Trescribed / Authorized Date:   > YYY mm   * Tx Prescribed / Authorized Date:   > YYY mm   * Tx Effective From Date:   > YYY mm   * Tx Effective From Date:   > YYY mm   * Clock # Active disease   > Other Reason:   (100 characters)	Maintain Medicatio	n Details					<b>☆</b> Hi	de Maintain Medicati	on Details
Other Meds:   Protocol:   Standard Tx:   Trug:   Capreomycin   Select Drug   Status:    Prescribed /   Authorized By:   Click Find to select a provider:   Provider:   Provider:   Provider:   Provider:   Provider:   Prequency:   one time daily   Streatment Duration:   120   Vunit:   Portation:   120   Vunit:   Vunit:   Yyyy mm   Authorized Date:   Yyyy mm   Yyyy mm   Active disease   Other Reason:   Special Direction:   (100 characters)	* Required field								
Protocol: Standard Tx: Standard Tx: Select Drug Status: Prescribed Status Date: 2018/07/03 Status Date: Provider: Citek Find to zelet a provider: Provide:	Other Meds:								
Standard Tx:       Image: Capreomycin       Select Drug         ● Drug:       Capreomycin       Select Drug         Status:       Prescribed       Image: Prescribed         Status Date:       2018_07_03_00       Image: Prescribed         * Tx Prescribed / Ouse this Provider:       Clock Find to select a provider:       Find C         * Tx Prescribed / Subscription:       Ouse Other Provider:       Find C         • Ousage:       20.0       • Unit: Img Image: Previder:       Find C         • Dosage:       20.0       • Unit: Img Image: Previder:       Find C         • Dosage:       20.0       • Unit: Img Image: Previder:       Find C         • Dosage:       20.0       • Unit: Img Image: Previder:       Find C         • Dosage:       20.0       • Unit: Img Image: Previder:       Find C         • Trequency:       One time daily Image: Previder:       Previde: Previd	O Protocol:								
• Drug:       Capreomycin       Select Drug         Status:       Prescribed       V         Status Date:       2018_07_03_0       V         *Tx Prescribed /       Use this Provider:       V         Clck Find to select a provider:       Clck Find to select a provider:       Find C         • Tx Prescribed /       Use Other Provider:       Find C         • Obsage:       20.0       • Unit: Img V         • Dosage:       20.0       • Unit: Img V         • Route:       Intramuscular       V         • Duration:       120       • Unit: Days V         • Duration:       120       • Unit: Months V         • Treatment Duration:       24       Unit: Months V         • Tx Prescribed / Authorized Date:       2018_07_03_0         • Tx Effective From Date:       2018_07_03_0         • Tx Effective From Date:       2018_07_03_0         • Tx Effective From Date:       2018_07_03_0         • Type in und d       Other Reason:       Image: Clear	O Standard Tx:	$\sim$							
Status: Prescribed Status Date: 2018 07 03 3 * Tx Prescribed / Authorized By: Ouse this Provider: Provider: Click Find to select a provider: Provider: Click Find to select a provider: Provider: Click Find to select a provider: * Dosage: 20.0 * Unit: mg * * Dosage: 20.0 * Unit: mg * * Route: Intramuscular * * Frequency: One time daily * * Duration: 120 * Unit: Days * * Duration: 120 * Unit: Months * Order Duration: 24 Unit: Months * Order Duration: 24 Unit: Months * * Tx Prescribed / Authorized Date: 9018 07 03 3 * Tx Effective From Date: 9018 07 03 4 * Tx Effective From Date: 9018 07 04 4 * Tx Effective From Date: 9018 0	Orug:	Capreomy	in				Selec	t Drug	
Status Date: 2018 07 03 3 'Tx Prescribed / Authorized By: Ouse this Provider: Click Find to select a provider: Provider: Click Find to select a provider: Provider: Provider: Dr. Smith (New Brunswick) * Dosage: 20.0 * Unit: mg V * Dosage: 20.0 * Unit: mg V * Route: Intramuscular V * Frequency: one time daily V * Duration: 120 * Unit: Days V * Duration: 120 * Unit: Months V Order Duration: 24 Unit: Months V Order Duration: 24 Unit: Months V * Tx Prescribed / Authorized Date: 2018 07 03 3 * Tx Prescribed / Authorized Date: 2018 07 03 3 * Tx Effective From Date: 2018 07 00 4 * Tx Effect	Status:	Prescribed		<u>-</u>					
* Tx Prescribed / Authorized By:       O Use this Provider: Citck Find to select a provider:         Provider:       Provider:         * Dosage:       20.0         * Dosage:       20.0         * Route:       Intramuscular         * Frequency:       one time daily         * Duration:       120         * Unit:       Months         Order Duration:       24         Unit:       Work         * Tx Prescribed / Authorized Date:       2018         yyyy       mm         * Tx Effective From Date:       yyyy         yyyy       mm         Special Direction:       Cherk eisease         Color autoin:       Other Reason:         (100 characters)       Cherk eisease	Status Date:	2018 / yyyy n	07 /03 nm dd						
Provider:       Find C            • Dosage:	* Tx Prescribed / Authorized By:	O Use this Provider: Click Find to select a pro	vider:						
Use Other Provide: Dr. Smith (New Brunswick) * Dosage: 20.0 * Unit: mg * Route: Intramuscular * Frequency: one time daily * Duration: 120 * Unit: Days Treatment Duration: 24 Unit: Months Order Duration: 24 Unit: Months Order Duration: 2018 / 07 / 03 III Yyyy mm dd * Tx Effective From Date: Yyyy mm dd Reason: Active disease Other Reason: Special Direction: Clear Apply Undate Clear		Provider:					_	Fin	d Q
* Dosage: 20.0 * Unit: mg   * Route: Intramuscular   * Frequency: one time daily   * Duration: 120 * Unit: Days   Treatment Duration: 24 Unit: Months   Order Duration: 24 Unit: Immodeling   * Tx Prescribed / Authorized Date: 2018 / 07 / 03   yyyy mm dd   * Tx Effective From Date: 2018 / 07 / 03   yyyy mm dd   * Tx Effection: Active disease   Special Direction: DOT:		Use Other Provide	: Dr. Smith (New	Brunswick)					
* Route: * Frequency: • Duration: 120 • Unit: Days • Unit: Days • Treatment Duration: 24 • Unit: Months Order Duration: Order Duration: • Tx Prescribed / Authorized Date: 2018 2018 07 03 903 903 904 • Tx Effective From Date: 907 903 907 103 100 </td <td>* Dosage:</td> <td></td> <td>20.0</td> <td></td> <td>* Unit:</td> <td>mg 🗸</td> <td></td> <td></td> <td></td>	* Dosage:		20.0		* Unit:	mg 🗸			
<ul> <li>Frequency:</li> <li>one time daily</li> <li>Duration:</li> <li>120</li> <li>Unit: Days</li> <li>Treatment Duration:</li> <li>24</li> <li>Unit: Months</li> <li>Order Duration:</li> <li>Unit: V</li> <li>Tx Prescribed / Authorized Date:</li> <li>2018</li> <li>07</li> <li>03</li> <li>yyyy mm dd</li> <li>* Tx Effective From Date:</li> <li>2018</li> <li>07</li> <li>03</li> <li>yyyy mm dd</li> <li>Reason:</li> <li>Active disease</li> <li>Other Reason:</li> <li>Special Direction:</li> </ul>	* Route:		Intramuscular	$\checkmark$					
* Duration: 120 * Unit: Days   Treatment Duration: 24 Unit: Months   Order Duration: Unit: V   * Tx Prescribed / Authorized Date: 2018   yyyy mm   * Tx Effective From Date: 2018   yyyy mm   dd   * Tx Effective From Date: 2018   yyyy mm   dd   Reason: Active disease   Special Direction: DOT:   (100 characters)	* Frequency:		one time daily	~					
Treatment Duration:       24       Unit: Months v         Order Duration:       Unit: v         * Tx Prescribed / Authorized Date:       2018 / 07 / 03 · ···         yyyy mm dd       2018 / 07 / 03 · ···         * Tx Effective From Date:       2018 / 07 / 03 · ···         yyyy mm dd       Active disease       Other Reason:         Special Direction:       00 · ···         Clear       (100 characters)	* Duration:		120		* Unit:	Days 🗸			
Order Duration: * Tx Prescribed / Authorized Date: * Tx Prescribed / Authorized Date: yyyy mm dd * Tx Effective From Date: yyyy mm dd Reason: Special Direction: Clear Clear	Treatment Duration:		24		Unit: M	onths 🗸			
* Tx Prescribed / Authorized Date: yyyy mm dd * Tx Effective From Date: yyyy mm dd Reason: Special Direction: Clear Active disease V Other Reason: DOT: (100 characters)	Order Duration:				Unit:	$\checkmark$			
* Tx Effective From Date: 2018 07 03 III yyyy mm dd Reason: Special Direction: Characters) DOT: Characters	* Tx Prescribed / Aut	norized Date:	2018 /07 yyyy mm	/03 dd					
Reason: Active disease Other Reason: Special Direction: DOT: Clear (100 characters)	* Tx Effective From D	ate:	2018 /07 yyyy mm	/03 dd					
Special Direction: DOT: V (100 characters)	Reason:		Active disease	~	1	Other Reason:			
Apply Update Clear	Special Direction:			(100	characters	DOT:			
								Apply Update	Clear

## 6.3 Update/Delete TB or HIV Medication

Medications can only be updated or deleted **before** the record is saved.

#### 6.3.1 Update TB or HIV Medication

- 1. Click radial button next to the **Drug** to be updated.
- 2. Click **Update** button.
- 3. Update medication details.
- 4. Click Apply Update button.
- 5. Click Save button.

The system prompts the user to confirm.

6. Click **OK** to continue.



#### 6.3.2 Delete TB or HIV Medication

- 7. Click radial button next to the **Drug** to be deleted.
- 8. Click **Delete** button

The system removes the drug.

9. Click **Save** button.

The system prompts the user to confirm.

10. Click **OK** to continue.

Row A	Address: Generate Report										
	Status:       Status Date:       2018       08       27       Update Status         yyyy       mm       dd         Update       Delete       Set DOT       Clear DOT       Discontinue       Dispense / Administer       Order         Link Med Rec       View Tx Change History										
		<u>Tx</u> <u>State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	<u>DOT</u> ▼	Special Direction		
	Ð	New	-	Capreomycin	20 mg / one time daily / Intramuscular	120 Days	2018 Jul 3 / 2020 Jun 21	~	-		

## 6.4 Set/Clear DOT Indicator for TB Medication

In order to enter details into the Directly Observed Therapy screen, the Set DOT indicator must be set.

#### 6.4.1 Set DOT Indicator

- 1. Click radial button next to the drug for which DOT will be recorded.
- 2. Click **Set DOT** button.

This will allow details to be recorded in the Directly Observed Therapy screen.

3. Click **Save** button.

The system asks the user to confirm.

4. Click **OK** button.

#### 6.4.2 Clear DOT Indicator

- 1. Click radial button next to the drug for which DOT will be discontinued.
- 2. Click Clear DOT button.



3. Click Save button.

The system asks the user to confirm.

4. Click **OK** button.

Medi	catio	ns						;	Hide Medications	
Row	Row Actions:       Report Title:       Image: Constraint of the second s									
		Tx <u>State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To		pecial irection	
✓	Ð	Active	-	Amikacin	15 mg/kg / One dose only / Intramuscular	12 Months	2018 Jun 6 / 2019 May 31			

## 6.5 Discontinue TB or HIV Medication

The Medication Discontinue Details screen lets a user discontinue a medication for the selected client before the full duration of the drug has been reached.

- 1. Click radial button next to the drug to be discontinued.
- 2. Click **Discontinue** button.

Me	edic	atior	15						<b>☆</b> Hie	de Medications
R	ow	Actior	s: Report Addres Status: Updat Link M	Title:	DOT C	Status Date: 2018 Yyyy lear DOT Discontinue History	Generate /08 mm Dispense / /	Report 28 Update Status dd Administer Order	s C	how Active kpand All ollapse All
			Tx State	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid       To	DOT Speci Direc	ial ▼ tion
	2	Ð	Active	-	Amikacin	15 mg/kg / One dose only / Intramuscular	12 Months	2018 Jun 6 / - 2019 May 31		

The Medication Discontinue Details screen is displayed.



? 旦

## Medication Discontinue Details

									ACTIVE
Client ID: 270	Name(Last, Fi Tree, Willow /	rst Mie Female	ddle)/G	ender:		Health Card No:	Date of 2000 A	f Birth / Age: ug 01 / 18 years 0 months	
Phone Number: -(-)	Jurisdiction In Department of Scotia Health	n <b>fo:</b> Health Authori	i and W	ellness,No	ova	Additional ID Type / Additional ID: Provincial health service provider identifier / -	e		
Investigation ID	Status Open	:			Di	sposition: vestigation in progress	Investigator:	<u>Alnvestic</u> dah	<u>ation</u>
Hepatitis C	2018 N	lay 01	/ Date F	Reported	He	epatitis C virus / 3 / B	Provincial / Ca	ise - Confirmed / 2018 Aug 22	
Discontinue Dru	ıg Details							A Hide Discontinue	Drug Details
* Required field * Discontinued By	Use the Click Find to Provide	iis Prov to select	vider: t a provi	der:				[	Find Q
	O Use O	ther Pi	rovider:						
Drug: Dosage: * Discontinued Da	Am 15 ate: 20	iikacin mg/kg 118 /y	/08 mm	/ 28 dd		Frequency: Discontinued	Reason:	One dose only	1
Actual End Date:	נעע	y	/ mm	dd		Reason Drug I	Not Stopped:	×	[
								Submit	Cancel

- 3. Complete the fields as required. Panorama mandatory fields are indicated with a red asterisk (\*).
- 4. Click **Submit** button.

**Note**: "Duplicate Record" to be used as a Discontinued Reason where a medication has been entered and saved (as it can't be deleted.

Note: Reason Drug Not Stopped should be documented in clinical notes.



## Medication Discontinue Details

ACTIVE Client ID: Date of Birth / Age: Name(Last, First Middle)/Gender: Health Card No: 2000 Aug 01 / 18 years 0 months 270 Tree, Willow / Female Phone Jurisdiction Info: Additional ID Type / Number: Additional ID: Department of Health and Wellness, Nova -(-) Provincial health service Scotia Health Authority provider identifier / -Investigation Investigation ID: Status: Disposition: Investigator: <u>230</u> Open Investigation in progress Sarah Meddah PHAC Date/Type: 2018 May 01 / Date Reported Authority/Classification: Disease: Etiologic Agent: Hepatitis C virus / 3 / B Hepatitis C Provincial / Case - Confirmed / 2018 Aug 22 A Hide Discontinue Drug Detail **Discontinue Drug Details** \* Required field \* Discontinued By: O Use this Provider: Click Find to select a provider: Find Q Provider: Use Other Provider: Dr. Jones Drug: Amikacin 15 mg/kg Dosage: Frequency: One dose only 2018 /21 /8 \* Discontinued Date: **Discontinued Reason:** Intolerance  $\mathbf{\mathbf{v}}$ уууу mm dd Actual End Date: Reason Drug Not Stopped: ~ уууу mm dd Submit Cancel

⑦ 旦

The system responds with a message that the medication was discontinued successfully.

5. Click Save button.

Μ	edication	s Summary				?≞
						ACTIVE
	Client ID: 270	Name(Last, First Middle Tree, Willow / Female	e)/Gender:	Health Card No: -	Date of Birth / Age: 2000 Aug 01 / 18 years 0 months	
	Phone Number: -(-)	Jurisdiction Info: Department of Health an Scotia Health Authority	d Wellness,Nova	Additional ID Type / Additional ID: Provincial health service provider identifier / -		
					<u> </u>	estigation
	Investigation ID 230	Status: Open		Disposition: Investigation in progress	Investigator: t⊒ <u>Sarah Meddah</u>	
	Disease: Hepatitis C	PHAC Date/Typ 2018 May 01 / D	e: ate Reported	Etiologic Agent: Hepatitis C virus / 3 / B	Authority/Classification: Provincial / Case - Confirmed / 2018 Aug 22	2
Me	dication was disc	ontinued successfully.				
					Save Reset Get External Med	ication Profile



Medication status is changed to Discontinued.

		<u>Tx State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	<u>DOT</u> ▼	Special Direction			
	Ð	Discontinued	-	Amikacin	15 mg/kg / One dose only / Intramuscular	12 Months	2018 Jun 6 / 2018 Aug 20	-	-			

The system asks the user to confirm.

6. Click **OK** button.

## 6.6 Update Status and Status Date after a TB or HIV Medication has been saved.

- 1. Select the drug to be updated.
- 2. Select the Status and, optionally, Status Date.

ľ	Medica	tion	s							Hide Medications	
	Row Ac	Row Actions: Report Title:								Show Active Expand All	
Status: Publich health administered V Status Date: 2018 / 08 / 28 🔛 Update Status										Collapse All	
Update Delete Set DOT Clear DOT Discontinue Dispense / Administer Order Link Med Rec View Tx Change History											
			<u>Tx State</u>	Drug Protocol	<u>Drug</u> 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	<u>DOT</u> ▼	Special   Direction	
	•	Ð	Active	-	Capreomycin	15 mg/kg / one time daily / Intramuscular	60 Days	2018 Aug 2 / 2018 Nov 29	~	-	

- 3. Click Update Status button.
- 4. Click Save button.

The system asks the user to confirm.

5. Click **OK** to continue.

## 6.7 View TB or HIV Tx Change History

To view the medication change history of the changes to the DOT indicator, Status and Status Date for a single medication.



- 1. Select Medication to be viewed.
- 2. Click View Tx Change History button.

Medications	;							A Hide Medications		
Row Actions: Report Title: Address: Status:										
	Link Med Rec View Tx Change History									
1	T <u>x State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	<u>DOT</u> ▼	Special Direction		
	active	-	Capreomycin	15 mg/kg / one time daily / Intramuscular	60 Days	2018 Aug 2 / 2018 Nov 29	~	-		

The system responds with the change record of date/time and user information.

### 3. Click Close button

Medication Change History								
Date/Time Updated	Updated By	Status Date	Status	DOT				
2018 Aug 28 15:16 ADT	MacKirdy, Susan	2018 Aug 28	Publich health administered	$\checkmark$				
2018 Aug 28 14:52 ADT	MacKirdy, Susan	2018 Aug 1	Prescribed	✓				
Close X								

## 6.8 Medication Interruptions

The Medication Interruption Details screen lets a user enter an interruption for a client's medication to record a period of time during which a client is not taking the medication. This information can be used to calculate compliance and determine appropriate future prophylaxis.

1. Click Interruption button.



#### **Client Drug Resistances**

Disease Etiologic Agent Result Date Antimicrobial/Drug Interpretation Sensitivity Value											
Adverse Drug Reactions											
Date	Rece	ived		•	Drug(s)	rug(s) Signs & Symptoms					
View Medications History Add Adverse Drug Reaction Inter											
Medio	catio	ns							A Hide Medications		
Row	Actio	ns: Report Ti Address: Status: Update Link Med	Delete Set [ J Rec View Tx	OOT Clear D Change Histo	Status Date: 2018 yyyy OT Discontinue Dis	ienerate Rej 08 / 28 mm dd pense / Adm	port Update State	15	Show Active Expand All Collapse All		
		<u>Tx State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From /  Valid To	<u>DOT</u> ▼	Special Direction		
	Ð	Active	-	Capreomycin	15 mg/kg / one time daily / Intramuscular	60 Days	2018 Aug 2 / 2018 Nov 29	~	-		
	Ð	Discontinued	-	Amikacin	15 mg/kg / One dose only / Intramuscular	12 Months	2018 Jun 6 / 2018 Aug 20	-	-		

The **Medication Interruptions Details** screen is displayed with a list of current medications.



## Medication Interruption Details



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Medications Redications										
Row Actions: Interrupt	Show Active									
Tx State         Drug         Drug           Protocol         Protocol         Drug	g Dosage / Frequency / Duration Route	Tx Effective From /     DOT       Valid To     Direction								
O      Active - Capital	nreomycin 15 mg/kg / 60 Days one time daily / Intramuscular	2018 Aug 2 / 2018 Nov 29 -								
O	kacin 15 mg/kg / 12 One dose only / Months Intramuscular	2018 Jun 6 / 2018 Aug 20								

Maintain Medication Interruption	s					🛠 Hide Mai	ntain Medication Interruptions
* Required field							
Drug: Tx Effective From Date: Tx Prescribed / Authorized By:	-			Do Du	sage: iration:	-	
* Start Date:	уууу	/ mm	/ dd	En En	d Date:	yyyy m	m dd
Interrupted Doses:	-			Int	erruption Duration:	-	
Interruption Reason:			$\checkmark$				
							Add Clear
Row Actions: View/Update Delete	;						
Drug Dosage Tx Effective From Date	<u>e</u> •	<u>Start</u> Date	End Date	▼ <u>Duration</u> ▼	Prescribed / Authorized By	▼ Interrupted Doses	I Therrupted Reason
							Save Reset Cancel

#### 6.8.1 Add Interruption


- 2. Select the drug to be interrupted.
- 3. Click **Interrupt** button.

Medi	Medications Alde Medication											
Row	Row Actions Interrupt											
		<u>Tx State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	<u>DOT</u> ▼	Special Direction			
۲	Ð	Active	-	Capreomycin	15 mg/kg / one time daily / Intramuscular	60 Days	2018 Aug 2 / 2018 Nov 29	~	-			
0	÷	Discontinued	-	Amikacin	15 mg/kg / One dose only / Intramuscular	12 Months	2018 Jun 6 / 2018 Aug 20	-	-			

- 4. Select Start Date, End Date (if known), and Interruption Reason.
- 5. Click Add button.

Maintain Medication Interruptions										
* Required field										
Drug:	Capreomycin	Dosage:	15 mg/kg							
Tx Effective From Date:	2018 Aug 2	Duration:	60 Days							
Tx Prescribed / Authorized By:	DRAKE, Wendy									
* Start Date:	2018 / 8 / 28 🔛	End Date:	2018 / 9 / 27 🔛 yyyy mm dd							
Interrupted Doses:	-	Interruption Duration:	-							
Interruption Reason:	Side effects									
			Add Clear							

- 6. The interruption is added to the table of interruptions.
- 7. Click Save button.



Maint	tain Medicati	on Interru	iptions					🛠 Hid	e Maintai	n Medication Ir	terruptions
*Req	uired field										
Drug Tx Ef Tx Pr	: fective From D rescribed / Auth	ate: horized By:	- - -			Dosag Durati	e: on:	-			
* Sta Interr Interr	rt Date: rupted Doses: ruption Reason	:	, уууу -	mm dd	 ]	End Da	ate:	уууу -	_/ mm	dd	
Row	Actions: Viev	w/Update Dosage	Delete Tx Effective From Date	∑ <u>Start</u>	End Date	<u>Duration</u>	Prescribed / Authorized By	▼ Inter Dos	rrupted es	Add	Clear
0	Capreomycin	15 mg/kg	2018 Aug 2	2018 Aug 28	2018 Sep 27	31 Days	DRAKE, Wendy	31		Side effe	cts
									Si	ave Reset	Cancel

The system responds with a message that the interruption was successfully saved.

The duration and interrupted doses are automatically calculated and displayed in the interruptions table.

**Note**: If a drug interruption falls within or overlaps the dates of an adherence period, an icon will be displayed for the drug on the adherence screen.

#### 6.8.2 Update Interruption

- 1. Select the interrupted drug.
- 2. Select the interruption to be updated under the **Maintain Medication Interruptions** section.
- 3. Click View/Update button



Main	tain Medicati	ion Interru	uptions					🛠 Hid	e Maintai	n Medication Inter	ruptions
* Req	uired field										
Drug Tx Ef Tx Pr	: ffective From D rescribed / Aut	ate: horized By:	- - -			Dosag Durati	e: on:	-			
* Sta Intern Intern	rt Date: rupted Doses: ruption Reasor	1:	איזיאי -	mm dd	]	End D	ate: uption Duration:	уууу -	/ mm	dd 🔛	
Row	Actions: Viet	w/Update	Delete Tx Effective	▼ Start ▼	End 🔻	Duration	Prescribed /	▼ Inte	rrupted	Add	Clear
۲	Capreomycin	15 mg/kg	From Date	Date 2018 Aug 28	Date 2018 Sep 27	31 Days	Authorized By DRAKE, Wendy	<u>Dos</u> 31	<u>es</u>	Reason Side effects	
									S	ave Reset C	ancel

- 4. Modify Start Date, End Date, or Interruption Reason.
- 5. Click **Apply Update** button.

Maintain Medication Interruption	s		hide Main ∕	tain Medication Interruptions	
* Required field					
Drug: Tx Effective From Date: Tx Prescribed / Authorized By:	Capreomycin 2018 Aug 2 DRAKE, Wendy	Dosage: Duration:	15 mg/kg 60 Days		
* Start Date: Interrupted Doses: Interruption Reason:	2018 /08 /28 yyyy mm dd 31 Side effects	End Date:	2018 /9 yyyy mr n Duration: 31	19 📖 n dd	
Drug     Dosage     Tx Eff       Drug     Dosage     Tx Eff	ective V Start V E Date Qate	End <u> Duration</u> <u> Pre</u> <u> Aut</u>	scribed / Interrupted horized By Doses	Apply Update Clear	
Capreomycin 15 mg/kg 2018 A	Aug 2 2018 Aug 2 28 2	2018 Sep 31 Days DRA 27	AKE, Wendy 31	Side effects	

The interruption is updated in the table of interruptions.

6. Click **Save** button.



Row	Row Actions: View/Update Delete												
	Drug 🔺	<u>Dosage</u> ▼	Tx Effective From Date	<u>Start</u> Date	End Date	<u>Duration</u> ▼	Prescribed / Authorized By	Interrupted  Toses	Interrupted Reason				
۲	Capreomycin	15 mg/kg	2018 Aug 2	2018 Aug 28	2018 Sep 19	23 Days	DRAKE, Wendy	23	Side effects				
						- 							
								Save	Reset Cancel				

The duration and interrupted doses are automatically calculated and displayed in the interruptions table.

If a drug interruption falls within or overlaps the dates of an adherence period, an icon will be displayed for the drug on the adherence screen.

#### 6.8.3 Delete Interruption

- 1. Select interruption to be deleted
- 2. Click **Delete** button.

Row Actions: View/Update				Delete						
	<u>Drug</u>		<u>osage</u> ▼	Tx Effective From Date	<u>Start</u> Date	End Date	<u>Duration</u> ▼	Prescribed / Authorized By	Interrupted Doses	Interrupted Reason
۲	Capreomyc	in 15	5 mg/kg	2018 Aug 2	2018 Aug 28	2018 Sep 19	23 Days	DRAKE, Wendy	23	Side effects
									Save	Reset Cancel

The interruption is removed from the table of interruptions.

3. Click Save button.

The interruption is deleted and the system responds with a message that the medication interruption was successfully saved.

# 6.9 Record a Medication Other than a TB or HIV Drug - Other Meds

- 1. Scroll to the Maintain Medication Details section.
- 2. Click Other Meds checkbox.



Maintain Medicatio	n Details				Hide Maintain Medication Details
* Required field					
Other Meds: Course Completed:			~		
<ul> <li>Protocol:</li> <li>Standard Tx:</li> <li>Drug:</li> <li>Drug Description</li> </ul>					Select Drug
Tx Prescribed / Authorized By:	Use this Provider: Click Find to select a prov Provider: Use Other Provider	vider:			Find Q
Dosage:	ſ		Unit:	$\checkmark$	
Route:	Γ		$\checkmark$		
Frequency:	Γ		$\checkmark$		
Duration:	Γ		Unit:	~	
Order Duration:	Γ		Unit:	~	
Tx Prescribed / Autho	prized Date:	2018 08 /yyy mm	23 📖 dd		
Tx Effective From Da	te:	2018 / 08 / /yyy mm	dd	Estimated:	
Reason:	[		~	Other Reason:	
Special Direction:	[		(100 characters)	)	
					Add Clear

- 3. Click **Drug Description** radial button.
- 4. Enter name of drug in **Drug Description** text box.
- 5. Enter **Dosage** and select **Unit** only.

Note: all other fields can be left blank.

6. Click **Add** button.



Maintain Medication Details		Hide Maintain Medication Details
* Required field		
Other Meds:  Course Completed:	V	
Protocol:     Standard Tx:     Drug:		Select Drug
Drug Description:     Ep	clusa	
Tx Prescribed / Authorized By:	ovider: et a provider: Provider: 1 Unit: Dose	Find Q
Route:		
Frequency:		
Duration:	Unit:	
Order Duration:	Unit:	
Tx Prescribed / Authorized Date:	2018 /08 /27 III yyyy mm dd	
Tx Effective From Date:	2018 /08 /27 III Estimated:	
Reason:	Other Reason:	
Special Direction:	(100 characters)	
		Add Clear

The **Medications Summary** screen is displayed, The medications entered have been added to the **Other Meds** table located near the bottom of the screen.

Oth	ner Meds						☆ Hide Other Meds
Ro	w Actions:	Update Delete					Show All
		Course Completed:			Update Course	Completed	
l	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	Course Completed
	Epclusa	1 Dose	-	2018 Aug 27	-	-	-

**Important**: Confirm all information is correct. Once the record is saved, **only Course Completed** information can be updated. The medication cannot be deleted.

7. If record is correct, click **Save** button



The system prompts the user to confirm.



8. Click OK to continue

# 6.10 Update/Delete Other Meds

Medications can only be updated or deleted **before** the record is saved.

#### 6.10.1 Update Other Meds

- 1. Click radial button next to the **Drug** to be updated.
- 2. Click **Update** button.
- 3. Update medication details.
- 4. Click **Apply Update** button.
- 5. Click Save button.

The system prompts the user to confirm.

6. Click **OK** to continue.

#### 6.10.2 Delete Other Meds

- 1. Click radial button next to the **Drug** to be deleted.
- 2. Click **Delete** button

The system removes the drug.

3. Click **Save** button.

The system prompts the user to confirm.

4. Click **OK** to continue.



Ot	her	Meds						☆ Hide Other Meds
R	ow	Actions:	Update Delete					Show Active
			Course Completed:			Update Course	e Completed	
I		Drug 🔻	Dosage / Frequency / Route	Duration	<u>Tx Effective From /</u> <u>Valid To</u>	Special Direction	Prescribed / Authorized By	Course Completed
	2	Ampicillin	250 mg / every twelve hours / Oral	5 Days	2018 Jul 16 / 2018 Jul 20	-	Dr. Jones (New Brunswick)	-

# 6.11 Indicate Course Completed – Other Meds

Once the record has been saved, only the **Course Completed** information can be updated for Other Meds.

- 1. Click radial button next to the Drug to be updated.
- 2. Select reason from **Course Completed**.
- 3. Click Update Course Completed button.

The system adds the reason selected to the **Course Completed** column in the **Other Meds** table.

Othe	r Meds						☆ Hide Other N	leds
Row	Show Active							
		Course Completed: Pres	scription Co	mplete	ete Update Course Completed			
	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid To	Special Direction	Prescribed / Authorized By	<u>Course</u> <u>Completed</u>	
	Epclusa	1 Dose / One dose only / Oral	12 Months	2018 Jul 9 / 2019 Jul 3	-	DRAKE, Wendy	Prescription Complete	

4. Click Save button.

The system prompts the user to confirm.

5. Click **OK** to continue.



# 7 MEDICATION HISTORY

The **Medications History** screen allows a user to view the Medication History for a client over a period of time. This screen amalgamates the Medication History from all investigations associated with the client.

To access the Medications Summary screen

- 1. Go to the Left-Hand Navigation menu.
- 2. Under the Medications section, select Medications History.



3. Alternatively, the **Medications History** screen can be access by clicking **View Medications History** button located on the **Medications Summary** screen.



AR &				T	preshold Notificat	ions: 0	Susan I	MacKirdy: su	peruser for	NSHA	
PANORAMA Public Health Solution for Discussion Superliance and Manager	PNS Test			<u></u>	irisdiction Notifica	ations: 0	Help	Contact Us	My Account	Change Role	Log
Chicage Guivellance and manage	WORK MGMNT	INVESTIGATIONS	OUTBREA	KS I	MMUNIZATION	FAMI	LY HEAL	TH INVE	INTORY	ADMIN	
Recent Work	Martinatio										
✓ Search	Inedication	ns Summar	у							(?	
Search Investigations											
Search Lab										A	TIVE
Search Exposures	Client ID:	Name(Last, First M	iddie)/Gender:		Health Card No:			Date of Birth /	Age:		
Search Interventions	201	Apple, Candy / Fema	ale		- 1974 Mar 08 / 44 years						
Search Clients	Phone	Phone Jurisdiction Info:		Additional ID Ty	pe /						
Search Non-Human Subjects	-(-)	Department of Healt Scotla Health Author	h and Wellness, rity	Nova	Provincial health : provider identifier	service					
<ul> <li>Investigation</li> </ul>											
Subject Summary	Investigation	Status:		anosifion:			Investig	ator:		Cinvestigation	
Investigation Summary	ID:	status.		epoendon.			mveeug	ator.			
<ul> <li>Investigation Details</li> </ul>	157	Open	Inv	vestigation I	n progress						
Disease Summary	Disease: Tuberculosis	PHAC Date/Ty 2018 Jul 23 / D	pe: Et ate Mi	iologic Age vcobacteriu	ent: m tuberculosis		Authorit National	y/Classificatio / Case - Perso	on: n Under Investi	oation /	
Recommendations		Reported	co	mplex / BC	G		2018 Jul	23			
Investigation Information	Medications succes	sfully saved.									
Resp. Org / Investigator								Pava Rosat	CotExtern	al Medication Dr	offic
Reporting Notifications								aave Neser	Get Externs		UIIIO
External Sources	Relevant Inform	nation							é Hir	le Relevant Infor	mation
Links & Attachments	Relevant Infor	nauon							× 116	ie reievant mior	mation
Transfer Requests	Treatment Start	Date:	2018 Aug 1		Treatment End	Date:					
Close Investigation	Number of Days	Treated:	27		Reason For Tre	atment:		Confirm	ned Disease		
+ Lab	Client Allergies:										
Lab Summary	Client Weight:		-		Date Weighed:			-			
Electronic Lab Report Inbox	Wears Contact L	enses:									
Lab Quick Entry	Client Drug	Resistances									
DI Quick Entry	Disease 🔻	Eficianic Agent	Result Da	ita 💌	Antimicrobial/Dr	110	T In	terpretation	▼ Senat	tivity Value	-
Encounter Details	<u>Broader</u>	Cuologio Agoin						tor prototion			
Signs & Symptoms											_
Complications	Adverse Dru	ug Reactions									
Outcomes	Date Received			Drug(a)		Sign	a & Sym	otoma			
Basic Assessment				5108(0)							
Medical History								_			
ADT Record					View Med	lications	History	Add Adver	se Drug React	Ion Interrupti	ons
Incubation & Communicability								-			

The **Medications History** screen is displayed.



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# Medications History

				ACTIVE
Client ID: 201	Name(Last, First Middle)/Gender: Apple, Candy / Female	Health Card No:	Date of Birth / Age: 1974 Mar 08 / 44 years	
Phone Number:	Jurisdiction Info:	Additional ID Type /		
-(-)	Department of Health and Wellness,Nova Scotia Health Authority	Provincial health service provider identifier / -		

|--|

Encounter Group:				$\checkmark$					
Effective Date Between (From):		/	1		Effective Date Between (To):		1	/	
	уууу	mm	dd			уууу	mm	dd	
The following additional search criteria is applicable to Medications only.									
Interrupted Between (From):		/	1		Interrupted Between (To):		1	1	
	уууу	mm	dd			уууу	mm	dd	
Discontinued Between (From):		/	/		Discontinued Between (To):		/	/	
	уууу	mm	dd			уууу	mm	dd	
									Display Clear

Medi	ledications Alide Medications									
	<u>Tx</u> <u>State</u>	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	Tx Effective From / Valid  To	<u>DOT</u> ▼	Special <u>Direction</u>		
Đ	Active	-	Capreomycin	1 mg / one time daily / Intramuscular	120 Days	2018 Jun 11 / 2019 Jun 5	~	-		
Ð	Active	-	Rifabutin	200 mg/kg / two times per week / Oral	90 Days	2018 Aug 1 / 2018 Oct 29	-	-		
Tota	: 2	Jump	to page:							

Other Meds	ther Meds									
Drug 🔻	Dosage / Frequency / Route	Duration	<u>Tx Effective From /</u> <u>Valid To</u>	Special Direction	Prescribed / Authorized By	Course Completed				
Acetaminophen	1 Capsule / every six hours / Oral	-	2018 Aug 27	-	-	-				
Acetaminophen	1 Capsule / every four hours / Oral	-	2018 Aug 27	-	-	-				
Ampicillin	250 mg / every eight hours / Oral	10 Days	2018 Aug 2 / 2018 Aug 11	-	DRAKE, Wendy	-				
Total: 3	Page 1 of 1	1			Jump	o to page: 📂				

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The view can be displayed by Encounter Group (default is all) and time ranges.

- 4. Enter the desired search criteria.
- 5. Click **Display**.

Medications History										
Encounter Group: Tuberculosis Disease Investigation										
Effective Date Between (From):		/	1		Effective Date Between (To):		/	1		
	уууу	mm	dd			уууу	mm	dd		
The following additional search crite	ria is applical	ble to Mea	dications on	ly.						
Interrupted Between (From):		/	/		Interrupted Between (To):		/	1		
	уууу	mm	dd			уууу	mm	dd		
Discontinued Between (From):		/	1		Discontinued Between (To):		1	1		
	уууу	mm	dd			уууу	mm	dd		_
									Display	Clear

The system displays the medication based on the search criteria.

Me	edic	cation	s							☆ Hide Medications
		<u>Tx</u> <u>State</u>	-	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	<u>Tx Effective From / Valid</u> ▼ <u>To</u>	<u>DOT</u> ▼	Special <u>Direction</u>
6	Ð	Active		-	Capreomycin	1 mg / one time daily / Intramuscular	120 Days	2018 Jun 11 / 2019 Jun 5	~	-
6	Ð	Active		-	Rifabutin	200 mg/kg / two times per week / Oral	90 Days	2018 Aug 1 / 2018 Oct 29	-	-
т	Total: 2 Mage 1 of 1 Mage Jump to page									
Ot	ther	Med	5							A Hide Other Meds
<u>0</u>	)rug		)osa( Route	ge / Frequency /	Duration	<u>Tx Effective From / Valid</u> ▼ <u>To</u>	<u>Special</u> Direction	Prescribed / Author           By	ized 🔻	Course
A	mpi	cillin 2 e C	50 m very Dral	g / eight hours /	10 Days	2018 Aug 2 / 2018 Aug 11	-	DRAKE, Wendy		-
т	otal:	1		Page 1 o	of 1 🕨 🖻				Jump	to page:



# 8 ADHERENCE SUMMARY – TB ONLY

Adherence allows a user to track drugs that were actually taken by a client as compared to those which were prescribed or otherwise authorized. T

his screen will be used to monitor **TB drugs only**. A client and investigation must be put into context.

The Adherence Summary screen lets a user create new adherence periods, and display previous periods and their percentage adherence. The screen also displays progress of the drug treatments relative to the total number of days of treatment prescribed or authorized for each drug. A drug reaches 100% completion when all the prescribed/authorized doses have been taken, based on the information recorded for the adherence periods.

To access the Adherence Summary screen

- 1. Go to the Left-Hand Navigation menu.
- 2. Under the Medications section, select Adherence Summary.



The Adherence Summary Screen is displayed.



#### Adherence Summary

				ACTIVE
Client ID: 270	Name(Last, First Middle)/Gender: Tree, Willow / Female	Health Card	No: Date of Birt 2000 Aug 01	h / Age:   / 18 years 0 months
Phone Number: -(-)	Juriediction Info: Department of Health and Wellness,No Scotia Health Authority	Additional IC Additional IC ova Provincial he: provider Iden	) Type / ): alth service tifler / -	
Investigation IC 230	): Status: Open	Disposition: Investigation in p	Investigator: rogress 🔂 Sarah Meddah	
Disease: Hepatitis C	PHAC Date/Type: 2018 May 01 / Date Reported	Etiologic Agent: Hepatitis C virus	Authority/Classific	cation: Confirmed / 2018 Aug 22
Adherence Sur	nmary			Alide Adherence Summary
*Adherence Sta	rt Date: / / / / / / / / / / / / / / / / / / /	Adherence	End Date: / / / / / / / / / / / / / / / / / / /	/ dd Create Adherence
0 adherence perio	ds found. Overall Ad	herence: 0/0 days	Overall Ac	therence %: 0%
Row Actions: Adhe	/lew/Update prence Period	Period Adherence	Period Ad	iherence %
Treatment Prog	jress			Alide Treatment Progress
Treatment Progr	ess To: - Overall Treatmen	t Completed: 0/62 da	iys Overall Treat	ment Completed %: 0%
Drug	Dosage / Frequency	Tx State	Treatment Completed	Treatment Completed %
Amikacin	15 mg/kg / One dose only	Discontinued	0 / 1 days	0%
Capreomycin	15 mg/kg / one time daily	Active	0 / 60 days	0%

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# 8.1 Create New Adherence Period

Adherence periods consist of a date range and automatically include all of the client's medications that are active in that range.

- 1. Select Adherence Start Date.
- 2. Select either Adherence End Date or enter Number of Days.
- 3. Click **Create** Adherence button.



Adherence Sun	nmary							☆ Hide Ad	Iherence Summary
*Adherence Sta	rt Date: 2018 УУУУ	/ 8 / 2 mm dd	Adheren Number	ce End Date: of Days:	60 /	mm	/ dd	C	reate Adherence
0 adherence perio	ds found.	Overall Add	nerence: 0 / 0 days		0	verall Adl	nerence %	: 0%	
Row Actions:	/iew/Update								
Adhe	erence Period	•	Period Adherence		▼ <u>F</u>	Period Adh	<u>ierence %</u>		•
Treatment Prog	jress							<b>☆</b> Hide 1	reatment Progress
Treatment Progre	ess To: -	Overall Treatment	Completed: 0 / 62	days	Over	all Treatm	ent Comp	leted %:	0%
Drug	Dosage / Frequ	iency	Tx State	Treatment	Completed		Treatmen	nt Comple	ted %
Amikacin	15 mg/kg / One	dose only	Discontinued	0 / 1 days			0%		
Capreomycin	15 mg/kg / one t	ime daily	Active	0 / 60 days			0%		

The system displays the **Adherence Details** screen with all drugs active in the specified time period. The **Adherence Details** screen lets a user enter adherence information for an adherence period and to track drugs that were actually taken by a subject as compared to those which were prescribed or otherwise authorized.

- 4. Enter data as applicable.
- 5. Optionally add a comment and click **Add** button.
- 6. Click Save button.



Deriod Adherence			
Adherence Start Date:	2018 Aug 2	Adherance End Date: 2018 See 20	
Total Treatment Days for Period:	2010 Aug 2	Autorence End Date. 2016 Sep 50	
Total Adherent Days for Period:			
rotal Adierent Days for Period.	Manual Override?	Calculate	
Period Adherence:	0%		
Active Medications in Adhere	nce Period	☆ Hide Active N	edications in Adherence Period
Amikacin			
Dosage:	15 mg/kg	Tx Effective From Date:	2018 Jun 6
Frequency:	One dose only	Drug Discontinued:	2018 Aug 21
Days of Medication for Period:	1	Interruption:	-
Days Taken During Period:	0	DOT:	-
Include In Period Adherence:			
Capreomycin			
Dosage:	15 mg/kg	Tx Effective From Date:	2018 Aug 2
Frequency:	one time daily	Drug Discontinued:	-
Days of Medication for Period:	60	Interruption:	-
Days Taken During Period:	o	DOT:	$\checkmark$
Include in Period Adherence:			
			All Dood Takon
Comments			A Hide Comments
Comment:			
			0
ļ		(4000 characte	ers remaining ) Add
Date Comments			Recorded By
		Interruption	s Save Clear Cancel

The system responds with a message that the Adherence Period is successfully saved and the Period Adherence is recalculated.

**Tip:** To view the calculated Period Adherence value prior to saving, click the **Calculate** button.

Tip: To exclude a drug from the adherence period calculations, uncheck its Include in Period Adherence box.



#### 8.2 Setting All Doses Taken

The **All Doses Taken** button is a shortcut that can be used when the client has taken all the prescribed/authorized medication during the adherence period.

#### From the Adherence Details screen

#### 1. Click All Doses Taken button.

All Days Taken During Period values are set to the corresponding Days of Medication for Period value, indicating that the client took all the prescribed/authorized doses.

2. Click **Save** button.

Active Medications in Adherence F	Period	Artive Me	edications in Adherence Period
Amikacin			
Dosage:	15 mg/kg	Tx Effective From Date:	2018 Jun 6
Frequency:	One dose only	Drug Discontinued:	2018 Aug 21
Days of Medication for Period:	1	Interruption:	
Days Taken During Period:	0	DOT:	-
Include in Period Adherence:			
Capreomycin			
Dosage:	15 mg/kg	Tx Effective From Date:	2018 Aug 2
Frequency:	one time daily	Drug Discontinued:	-
Days of Medication for Period:	60	Interruption:	
Days Taken During Period:	0	DOT:	$\checkmark$
Include in Period Adherence:			
			All Doses Taken
Comments			☆ Hide Comments
Comment:			
			$\sim$
		(4000 character	rs remaining ) Add
Date Comments		R	ecorded By
		Interruptions	Save Reset Cancel

The Adherence Period is saved and the Period Adherence is recalculated.

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#### 8.3 Overriding the Calculated Period Adherence Value

In some cases, the client may not have taken all doses of every medication but the effect of what was taken is sufficient to considered adherent. When this happens, a user can override the calculated Total Adherent Days for Period value and thus override the calculated Period Adherence value.

- 1. Check the Manual Override box.
- 2. Enter a value in the Total Adherent Days for Period.
- 3. Click **Save** button.

Reason for Deletion:		Interruptions	Save Reset Cancel
Period Adherence			
Adherence Start Date:	2018 Aug 2	Adherence End Date: 2018 Sep 30	
Total Treatment Days for Period:	60		
Total Adherent Days for Period:	Manual Override?	Calculate	
Period Adherence:	0%		
Active Medications in Adhere	nce Period	<b>☆</b> Hide Active Me	dications in Adherence Period
Amikacin			
Dosage:	15 mg/kg	Tx Effective From Date:	2018 Jun 6
Frequency:	One dose only	Drug Discontinued:	2018 Aug 21
Days of Medication for Period:	1	Interruption:	-
Days Taken During Period:	0	DOT:	-
Include in Period Adherence:			
Capreomycin			
Dosage:	15 mg/kg	Tx Effective From Date:	2018 Aug 2
Frequency:	one time daily	Drug Discontinued:	-
Days of Medication for Period:	60	Interruption:	
Days Taken During Period:	0	DOT:	$\checkmark$
Include in Period Adherence:			
			All Doses Taken

The Adherence Period is saved and the Period Adherence is recalculated.



**Tip:** To view the calculated Period Adherence value prior to saving, click the **Calculate** button next to it.



### 8.4 Updating an Adherence Period

An adherence period can be selected to view or maintain drug adherence.

From the Adherence Summary screen

- 1. Select the desired Adherence Period.
- 2. Click the View/Update button.

Adhe	renc	e Summary		★ Hide Adherence Summary
* Ad	heren	ce Start Date: / / / / / dd	Adherence End Date:	yyy mm dd
			Number of Days:	Create Adherence
1 adh	erenc	e periods found. Overall Ad	herence: 0 / 60 days	Overall Adherence %: 0%
ROW	Actio	Adherence Period	Period Adherence	▼ Period Adherence %
	œ	2018 Aug 2 - 2018 Sep 30	0 / 60 days	0%
•	-			

The Adherence Details screen is displayed.

- 3. Update the adherence details as required.
- 4. Click **Save** button.

# 8.5 Deleting an Adherence Period

An adherence period currently displayed on the Adherence Details screen can be deleted.

- 1. Select Reason for Deletion.
- 2. If the selected reason is Other, enter a reason in the text field.
- 3. Click **Delete** button.



# Adherence Details

					ACTIVE
Client ID: 270	Name(Last, First M Tree, Willow / Fema	iddle)/Gender: le	Health Card No:	Date of Birth / Age: 2000 Aug 01 / 18 yea	ars 0 months
Phone Number: -(-)	Jurisdiction Info: Department of Healt Scotia Health Autho	h and Wellness,Nova rity	Additional ID Type / Additional ID: Provincial health service provider identifier / -		
					Investigation
Investigation ID: 230	Status: Open		Disposition: Investigation in progress	Investigator: [] Sarah Meddah	
Disease: Hepatitis C	PHAC Date 2018 May 0	/ <b>Type:</b> 1 / Date Reported	Etiologic Agent: Hepatitis C virus / 3 / B	Authority/Classification: Provincial / Case - Confirme	d / 2018 Aug 22
Reason for Deletion Other Enter Reason if 'Ot Period entered inco	n: Delete her': rrect			Interruption	s Save Reset Cancel
Period Adhere	ence				
Adherence Start Da	te:	2018 Aug 2	Adherence E	and Date: 2018 Sep 30	
Fotal Treatment Day	ys for Period:	60			
Total Adherent Day	s for Period:	Manua	I Override? Calculate		
Period Adherence:		0%			

? 旦

The period is deleted. The user is returned to the **Adherence Summary** without the deleted adherence period shown.

Tip: An Interruption can be set from the Adherence Details screen. Reference Section 1.8 for instructions regarding Interruptions.

#### Adherence Details 鳳 ? ACTIVE Name(Last, First Middle)/Gender: Tree, Willow / Female Date of Birth / Age: 2000 Aug 01 / 18 years 0 months Client ID: Health Card No: <u>270</u> Phone Jurisdiction Info: Additional ID Type / Number: Additional ID: Department of Health and Wellness, Nova Provincial health service -(-) provider identifier / -Scotia Health Authority Investigation Investigation ID: Status: Disposition: Investigator: <u>230</u> Open Investigation in progress Sarah Meddah PHAC Date/Type: 2018 May 01 / Date Reported Authority/Classification: Disease: Etiologic Agent: Hepatitis C Hepatitis C virus / 3 / B Provincial / Case - Confirmed / 2018 Aug 22 Reason for Deletion: Interruptions Save Reset Cancel



# 9 DIRECTLY OBSERVED THERAPY (DOT) SUMMARY – TB ONLY

The **Directly Observed Therapy Summary** screen lists current and historical Directly Observed Therapy (DOT) periods for a client. This summary screen lists the DOT start date, estimated and actual end dates, and reason DOT ended for every DOT period for the selected client. When a DOT record is created, an adherence period is created, and an encounter record is created to indicate that a visit was made with the client.

From the Directly Observed Therapy Summary screen, a user can view or update DOT periods and create new ones.

This screen will be used to monitor **TB drugs only**. A client and investigation must be put into context.

To access the **DOT Summary** screen

- 1. Go to the Left-Hand Navigation menu.
- 2. Under the Medications section, select **DOT Summary**.



The Directly Observed Therapy Screen is displayed.



#### Directly Observed Therapy Summary

ACTIVE Date of Birth / Age: 2000 Aug 01 / 18 years 0 months Client ID: Health Card No: Name(Last, First Middle)/Gender: <u>270</u> Tree, Willow / Female Additional ID Type / Phone Jurisdiction Info: Additional ID: Number: Department of Health and Wellness, Nova Provincial health service -(-) provider identifier / -Scotia Health Authority Investigation Investigation ID: Status: Disposition: Investigator: Open Investigation in progress Sarah Meddah <u>230</u> PHAC Date/Type: 2018 May 01 / Date Reported Authority/Classification: Disease: Etiologic Agent: Provincial / Case - Confirmed / 2018 Aug 22 Hepatitis C Hepatitis C virus / 3 / B Directly Observed Therapy Summary A Hide Directly Observed Therapy Summary Row Actions: View/Update Create DOT DOT Started Estimated DOT End Date Actual DOT End Date Reason DOT Ended

⑦ 旦

# 9.1 Create DOT period

**Note:** Ensure that a DOT medication is active during the timeframe of the proposed DOT period. The DOT indicator **must** be set on the Medications Summary screen.

	Update         Delete         Set DOT         Clear DOT         Discontinue         Dispense / Administer         Order           Link Med Rec         View Tx Change History         View Tx Change History<									
		<u>Tx State</u> 📥	Drug Protocol	Drug 🔻	Dosage / Frequency / Route	Duration	<u>Tx Effective From /</u> <u>Valid To</u>	<u>DOT</u> ▼	<u>Special</u> <u>Direction</u>	
✓	Ð	Active	-	Capreomycin	15 mg/kg / one time daily / Intramuscular	60 Days	2018 Aug 2 / 2018 Nov 29	~	-	

#### 1. Click Create DOT button.

Directly Observed Therapy Summary		Hide Directly Observed Therapy Summary
Row Actions: View/Update		Create DOT
DOT Started   Estimated DOT End Date	Actual DOT End Date	Reason DOT Ender

The Directly Observed Therapy Details screen is displayed.

The Directly Observed Therapy Details screen lets a user maintain the DOT visits for individual Directly Observed Therapy (DOT) periods for a client.

When creating a new DOT period, enter the DOT start and estimated end dates. The relevant medications marked as DOT for the selected client are displayed in the DOT Outstanding Details section of the screen. Tasks are also created for the recurring DOT



visits. When a DOT period is created, an adherence period is also created, and when a DOT visit is recorded for a client, an encounter event is created.

As a dose is observed, the user selects the Scheduled Visit Date check box and enter the Date and Time Observed. The time can be in the past if entering historical data. When the DOT period is finished, enter the Actual DOT End Date and Reason DOT Ended.

Directly O	bserved Therapy Deta	ils	? E
			ACTIVE
Client ID: 270	Name(Last, First Middle)/Gender: Tree, Willow / Female	Health Card No: -	Date of Birth / Age: 2000 Aug 01 / 18 years 0 months
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness,Nova Scotla Health Authority	Additional ID Type / Additional ID: Provincial health service provider identifier / -	
Investigation IC 230	0: Status: Open	Disposition: Investigation in progress	Investigator: <u>Sarah Meddah</u>
Disease: Hepatitis C	PHAC Date/Type: 2018 May 01 / Date Reported	Etiologic Agent: Hepatitis C virus / 3 / B	Authority/Classification: Provincial / Case - Confirmed / 2018 Aug 22
			Save Clear Cancel
Directly Observ	ved Therapy		Alide Directly Observed Therapy
* Required field			
*DOT Started:	yyyy mm dd	Reason DOT Started:	$\checkmark$
* Estimated DOT	End Date: / / / / / / / / / / / / / / / / / / /	Actual DOT End Date:	yyyy mm dd
Reason DOT End	led:	$\checkmark$	
*Workgroup:	User:		
Overall DOT Con	npllance: 0%		
Total DOT Doses Prescribed:	o o		
Total DOT Doses	Taken: 0		
Commments			★ Hide Comments.
Comment:			
			$\langle \rangle$
			(4000 characters remaining ) Add
Date Co	mmente		Recorded By
			save clear cancel

- 2. Enter DOT Started and Estimated DOT End Date.
- 3. Complete other fields as required.
- 4. Enter the **Workgroup** and **User** the person who will be assigned the DOT tasks.
- 5. Click **Save** button.

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Directly Observed Thera	ру			A Hide Directly Observed There	ру
* Required field					
* DOT Started:	2018 / 8 уууу mr	/ 6 🔛	Reason DOT Started:	Suspected non-adherence or previous non-adherence	1
* Estimated DOT End Date:	2018 / 9 уууу mr	/ 8 🔛	Actual DOT End Date:	yyyy mm dd	
Reason DOT Ended:		~			
* Workgroup: TestSEM	Vuser:	Susan MacKirdy/NSH			
Overall DOT Compliance:	0%				
Total DOT Doses Prescribed:	0				
Total DOT Doses Taken:	0				
Commments				<b>☆</b> Hide Commme	nts
Comment:					
				$\bigcirc$	
				(4000 characters remaining ) Ad	Ŀ
Date Comments				Recorded By	
				Save Clear Can	el

The system responds with messages that the adherence period, DOT, and work management tasks were successfully created.

Adherence period successfully Directly observed therapy succ Task(s) successfully created in	saved. essfully saved. work management.		S	ave Delete Reset Cancel
Directly Observed Thera	ару			A Hide Directly Observed Therapy
* Required field * DOT Started:	2018 / 08 / 06	Reason DO Started:	Suspected non-adherence	e or previous non-adherence
* Estimated DOT End Date:	2018 / 09 / 08 yyyy mm dd	Actual DOT	End / / / / / dd	
Reason DOT Ended:		~		
Workgroup: TestSEM	User: Susan Mac	Kirdy/NSHA		
Overall DOT Compliance:	0%			
Total DOT Doses Prescribed:	34			
Total DOT Doses Taken:	0			

The **DOT Outstanding Visits** section of the screen is updated with the details for those medications selected as DOT where the medication date falls within the defined DOT period.



#### 9.1.1 Tracking Doses Taken

As a dose is observed, select the check box next to the desired **Scheduled Visit Date** and enter the **Date** and **Time Observed**. The date and time can be in the past if historical data is being entered.

**Tip: Outstanding Visits** can be filtered by **Drug** and/or by **Date**. After selecting filter criteria, click Display button. Click **Reset** button to clear filters.

Outstanding Visits		☆ Hide Outstanding Visits
Select appointment(s) from the table	enter 'Date Observed' or 'Reason Not Taken' then click 'Observe Dose Taken'Missed'	
Filter By Drug:		
Filter By Date:	yyyy mm dd	l isplay
Row Actions: Select All De	select All	

#### In the DOT Outstanding Visits section

1. Select the appropriate record(s)

Tip: All visits can be selected/deselected by clicking the appropriate Row Actions button.

- 2. Enter single Date Observed and Time Observed for the dose(s) taken.
- 3. Select **DOT Provider** if the correct name is not already displayed.
- 4. Click Observe Dose Taken button.
- 5. Enter **Comments** if desired and click **Add** button.



Select appointment(s) from the table, enter 'Date Observed' or 'Reason Not Taken' then elick 'Observe Dose Taken/Missed'								
Filter By Drug:								
Filter By Date: Display Display								
Row Actions: Select All Deselect All								
DOT Provider.	Use this Provider: Click Find to select a provi	dar						
	Provider:				Find Q			
	O Use Other Provider:	S. Smith, RN						
<ul> <li>Date Otserve</li> </ul>	d: 2018 / 08 / yyyy mm	08 🔝 Time Ob	served: 01 : 30	: ADT				
O Reason Not T	aken:				Observ <mark>e Dose Taken</mark>			
Scheduled VI	sit Date	Drug 🔻	Frequency 🔻	Dosage	Special Direction			
2018 Aug 8 12	DO ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 9 12	DO ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 10 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 11 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 12 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 13 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 14 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 15 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 16 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
2018 Aug 17 1	2:00 ADT	Capreomycin	one time daily	15 mg/kg	-			
Total: 29	🕅 🗏 Page 1 of 3 🕨 🗎				Jump to page: 🛃 🛃			
Comments Alde Comments								
Comment:								
					$\bigcirc$			
,				(4000 ch	aracters remaining ) Add			

The records are moved to the Directly Observed Therapy History section.

6. Click Save button.



Directly Observed	Therapy Hist	ory					A Hide Direc	tly Observed 1	Therapy History
Filter By Drug:			$\overline{}$						
Filter By Date:		yyyy m	n dd					Display	
Row Actions: Selec	t All Deselect	All							
DOT Provider:	Use this P     Click Find to sel	rovider: ect a provider:							
	Provider:								Find Q
	O Use Other	Provider:					]		
Date Observed	: 2018 / 0 yyyy m	08 / 30 im dd		Time Observed	hh	: ADT			
O Reason Not Ta	ken:		$\sim$						
						Restore	As Outstanding	Observe	Dose Taken
Scheduled Visit Date	Drug 🔻	Frequency <b>T</b>	Dosage	Special Direction	Dose Taken	Date/Time Observed	Reason Not Taken	DOT Provider	Created By
2018 Aug 6 12:00 ADT	Capreomycin	one time daily	15 mg/kg	-	$\checkmark$	2018 Aug 6 01:30 AST	-	S. Smith, RN	MacKirdy, Susan
Total: 1	Page 1 of	1 🕨 🖻						Jump to pag	e: 🔁
							Save	Delete R	eset Cancel

The system displays a message that the DOT and Adherence period were successfully updated and an encounter event was created.

Directly observed therapy successfully updated. Adherence period successfully updated. Encounter event(s) successfully created for observed DOT appointments.

#### 9.1.2 Tracking Doses Not Taken

If a dose is not taken, a reason must be entered. The user may choose to record an Interruption period if all doses are not taken for a day (or for several days).

When any dose is not taken, the Adherence value will be less than 100%.

In the DOT Outstanding Visits section

- 1. Select a Reason not Taken
- 2. Select the appropriate record(s).
- 3. Click Observe Dose Not Taken button.
- 4. Select **DOT Provider** if the correct name is not already displayed.



Outstanding Visits	☆ Hide Outstanding Visits			
Select appointment(s) from the table, enter 'I	Date Observed' or 'Reason Not Taker	ı' then click 'Observe Dose Tal	ten/Missed'	
Filter By Drug:				
Filter By Date:	yyyy mm dd			Display
Row Actions: Select All Deselect A	All			
DOT Provider: Use this Pro Click Fina to sele Provider: • Use other P	ovider: er a provider: Provider: S. Smith, RN	heerved:	×	Find Q
yyyy m	m dd	hh mm		
Reason Not Taken: patient obje	ection 🔽			
				Observe Dose Not Taken
Scheduled Visit Date	<u>Drug</u>	Frequency <b>T</b>	Dosage	Special Direction
✓ 2018 Aug 7 12:00 ADT	Capreomycin	one time daily	15 mg/kg	-

The records are moved to the **Directly Observed Therapy History** section.

5. Click **Save** button.

Filter By Drug:								
Filter By Date:	Display							
Row Actions: Select All Deselect All								
DOT Provider: Click Find to select a provider:								
Provider:	Find Q							
O Use Other Provider:								
Date Observed: 2018 / 08 / 30 III Time Observed: 2018 / 08 / 30 III Time Observed: 2018 / 08 / 30 III Time Observed: 2018 / 30	ved: : ADT							
Reason Not Taken:	Reason Not Taken:							
Restore As Outstanding Observe Dos								
<u>Scheduled</u> <u>Drug</u> ▼ <u>Frequency</u> ▼ Dosage <u>Special</u> <u>Visit Date</u>	Dose     Date/Time     Reason     DOT     Created       Taken     Observed     Not Taken     Provider     By							
2018 Aug     Capreomycin     one time     15       6 12:00 ADT     Capreomycin     one time     1g/kg	✓ 2018 Aug 6 01:30 AST - S. Smith, MacKirdy, RN Susan							
2018 Aug 7 12:00 ADT     Capreomycin Capreomycin daily     one time daily     15 mg/kg	patient S. Smith, MacKirdy, Susan							
Total: 2 Jump to page 1 of 1								

The **Directly Observed Therapy Details** screen is updated.



#### 9.1.3 Update DOT details

Records with have already been saved can be updated.

In the Directly Observed Therapy History section

- 1. Select a record and edit the desired fields.
- 2. Click Observe Dose Taken, Observe Dose Not Taken, or Restore As Outstanding button as appropriate.

If the **Observe Dose Taken** or **Observe Dose Not Taken** button was clicked, the modified record remains in the **Directly Observed Therapy History** section.

If the **Restore As Outstanding** button was clicked, the record is moved to the **DOT Outstanding Visits** section.

- 1. Select **DOT Provider** if the correct name is not already displayed.
- 2. Click **Save** button.

Directly Observed Therapy History							Hide Directly Observed Therapy History			
Filter By Drug: Filter By Date:							Display			
Row	Actions: Select /	All Deselect	All							
DOT	Provider:	<ul> <li>Use this Pr Click Find to sel</li> <li>Provider:</li> <li>Use Other</li> </ul>	rovider: ect a provider: Provider: S. Sr	mith, RN			×			Find Q
۲	Date Observed:	2018 / 0	)8 / 30		Time Observed	:	: ADT			
0	Reason Not Take	yyyy m en:	m dd	$\overline{}$		nn	mm			
							Restore A	As Outstanding	g Observe I	Dose Taken
	Scheduled Visit Date	Drug 🔻	Frequency <b>T</b>	Dosage	Special Direction	Dose Taken	Date/Time Observed	Reason Not Taken	DOT Provider	<u>Created</u> ▼ <u>By</u>
✓	2018 Aug 6 12:00 ADT	Capreomycin	one time daily	15 mg/kg	-	~	2018 Aug 6 01:30 AST	-	S. Smith, RN	MacKirdy, Susan
	2018 Aug 7 12:00 ADT	Capreomycin	one time daily	15 mg/kg	-	-	-	patient objection	S. Smith, RN	MacKirdy, Susan
Total	: 2	Page 1 of	1						Jump to pag	e: 🛃 🛃
									Sava D	vaat Canaal
									Save R	cancer

The Directly Observed Therapy Details screen is updated.

#### 9.2 Update DOT Period

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From the Directly Observed Therapy Summary screen

- 1. Select the DOT period to be updated or viewed
- 2. Click View/Update button

Directly Observed Therapy Summary								
			ACTIVE					
Client ID: 270	Name(Last, First Middle)/Gender: Tree, Willow / Female	Health Card No:	Date of Birth / Age: 2000 Aug 01 / 18 years 0 months					
Phone Number: -(-)	Jurisdiction Info: Department of Health and Wellness,Nova	Additional ID Type / Additional ID: Provincial health service						
	Scotia Health Authority	provider identifier / -	Investigation					
Investigation 230	ID: Status: Open	Disposition: Investigation in progress	Investigator:					
Disease: Hepatitis C	PHAC Date/Type: 2018 May 01 / Date Reported	Etiologic Agent: Hepatitis C virus / 3 / B	Authority/Classification: Provincial / Case - Confirmed / 2018 Aug 22					
Directly Obse	rved Therapy Summary		A Hide Directly Observed Therapy Summa					
Row Actions:	View/Update		Create DOT					
DOT Star	ted Estimated DOT End Date	Actual DOT Er	nd Date Reason DOT Ended					
	6 2018 Sep 8	-	-					

The Directly Observed Therapy Details screen is displayed.

- 3. Update information as required.
- 4. Click Save button.

The system responds with a message that the DOT and Adherence Period were successfully updated.

# 9.3 Delete DOT Period

If a DOT period has been created in error, a user may delete a DOT period if no visits have been recorded against it or if all existing historical visits have been saved as "restored as outstanding".

From the Directly Observed Therapy Summary screen

- 1. Select DOT period to be deleted.
- 2. Click View/Update button.

The Directly Observed Therapy Details screen is displayed.

3. Click **Delete** button.



		Save	Delete	Reset	Cancel					
Directly Observed Thera	ру	🛠 Hio	le Directly	Observed	Therapy					
* Required field										
* DOT Started:	2018     / 08     / 06     III     Reason DOT     Suspected non-adher       yyyy     mm     dd     Started:     Suspected non-adher	ence or p	revious no	n-adherer	ice 🔽					
* Estimated DOT End Date:	2018         /         09         /         08         Actual DOT End         /         /           yyyy         mm         dd         Date:         yyyy         mm	/ dd								
Reason DOT Ended:	V									
Workgroup: TestSEM	User: Susan MacKirdy/NSHA									
Overall DOT Compliance:	0%									
Total DOT Doses Prescribed:	34									
Total DOT Doses Taken:	0									
Outstanding Visits			<b>☆</b> Hide	Outstand	ing Visits					
Select appointment(s) from the ta	ble, enter 'Date Observed' or 'Reason Not Taken' then click 'Observe Dose Taken/Missed'									
Filter By Drug:										
Filter By Date:	yyyy mm dd	[	Display							
Row Actions: Select All	Deselect All									
DOT Provider: Use this Provider: Click Find to select a provider:										
Provider: Find Q										
0 ι	O Use Other Provider:									
Date Observed: 2018     Yyyy	3         / 08         / 30         III         Time Observed:         :         :         :         ADT           mm         dd         hh         mm         i									

The system responds with a message that the DOT and Adherence Period were successfully deleted.

The **Directly Observed Therapy Summary** screen is displayed.