First Nations Health Authority
Health through wellness

Panorama User Guide #3

TB Screening Data Entry
Follow-up Without a Skin Test

Version 3.2

Contact us at: panorama@fnha.ca

Find our guides at: **http://www.fnha.ca/what-we-do/communicable-disease-control/panorama**

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Please Note:

It is required for CHNs working in FN communities with Panorama access to have training with the FNHA Panorama team prior to use of the Panorama system. Panorama guides are to be used in conjunction with formal FNHA Panorama training. To arrange a training session, please contact **panorama@fnha.ca**

This guide is appropriate for TB screens where **there is no TB skin test involved** (ie. Client has a previous positive TST). This detailed guide will show you through the steps in entering your client's TB screening information:

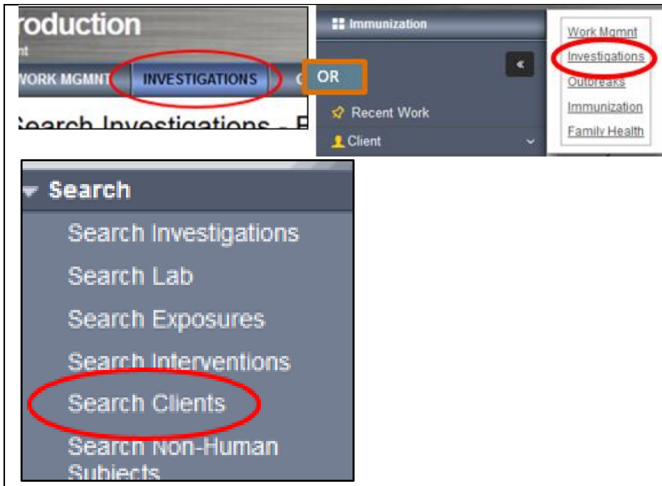
Use the tool "***Which Panorama TB Guide Should I Use***?" To help you to determine how to enter your screens.

This detailed guide will show you through the steps in entering your client's TB screening information:

- **Search and update client information** (Last/First Name, DOB; Jurisdictional Registry)
    - Review/Edit Client Demographics
    - Add/Update Indigenous Information
    - Add Immigration Information
    - Add Allergies
- **Create TB Investigation**
    - Add External Sources
- **Add Risk Factors**
- **Add Signs and Symptoms**
- **Enter TB History Summary**
- **Enter TB Follow Up-Only**
- **Close Investigation (if applicable)**

This guide accompanies *Panorama TB Screening Data Entry – QuickGuide (for Guide #2 and Guide #3)*

Search for Client Chart



For more information about creating, searching and opening client charts please see our **Core Guide**

In the INVESTIGATIONS Module:

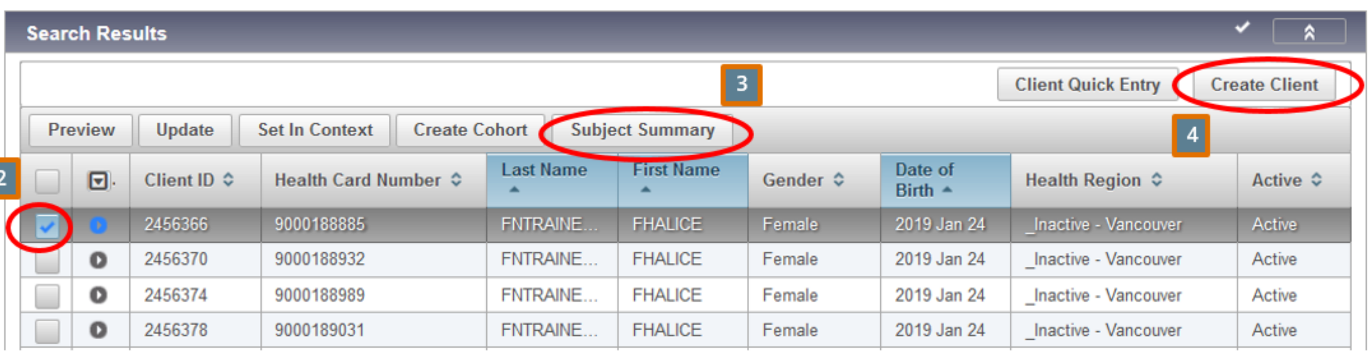
Search/Create Client

LHN > Search > **Search Clients**

Ensure you have done a thorough search for the correct client and that all demographic information are correct and up-to-date.

1. Search client following your choice of search options (See **Panorama Core Guide**).
2. Using the search results table, choose a single client by selecting the checkbox next to the *Client ID column*
3. Under *Row actions*, you will have several choices depending upon which module you are in. Select **SUBJECT SUMMARY**.
4. Alternately, you can select **CREATE CLIENT** if you have done a thorough search and the client does not have a chart in Panorama. You can then create the client's chart.

Ensure you have done a thorough search for the correct client and that all demographic information are correct and up-to-date.



Subject Summary

A client's subject summary page is a great way to get a quick overview of client encounters and investigations

Tip: To "hide" and show" components of the screen, click the *hide* or *show* hyperlinks along the encounter headers to view/hide more details

When the User does not have data access to a module or an Investigation, the Investigation and all associated Encounters are not displayed

The Subject Summary screen lists all *Encounters* and *Investigations* that have been recorded for a client under the various *Encounter Groups* (Communicable Disease, Sexually Transmitted Investigations, and Tuberculosis Disease Investigation, Immunization). Depending on which Module you are in, the subject summary page may vary slightly.

Viewing Subject Summary

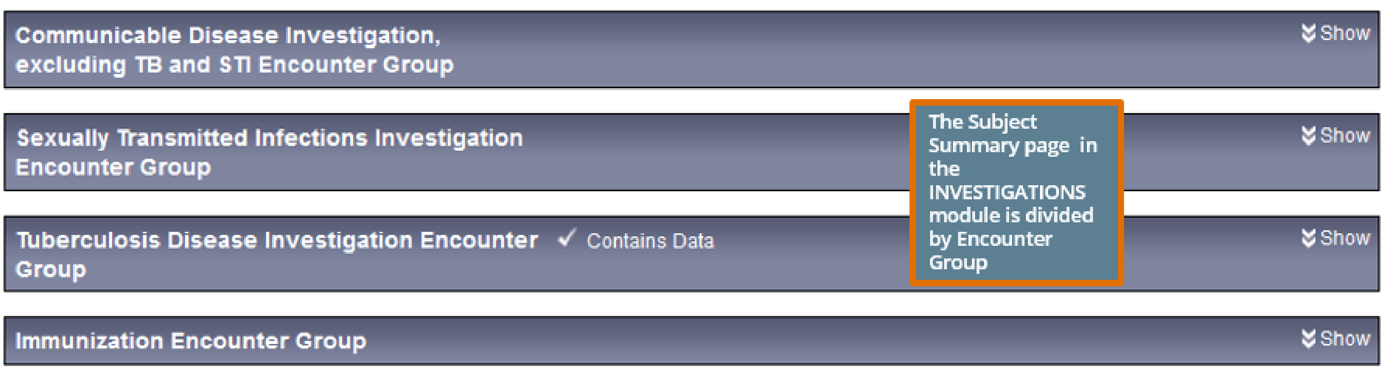
With your client in context:

LHN > Investigation > **Subject Summary**

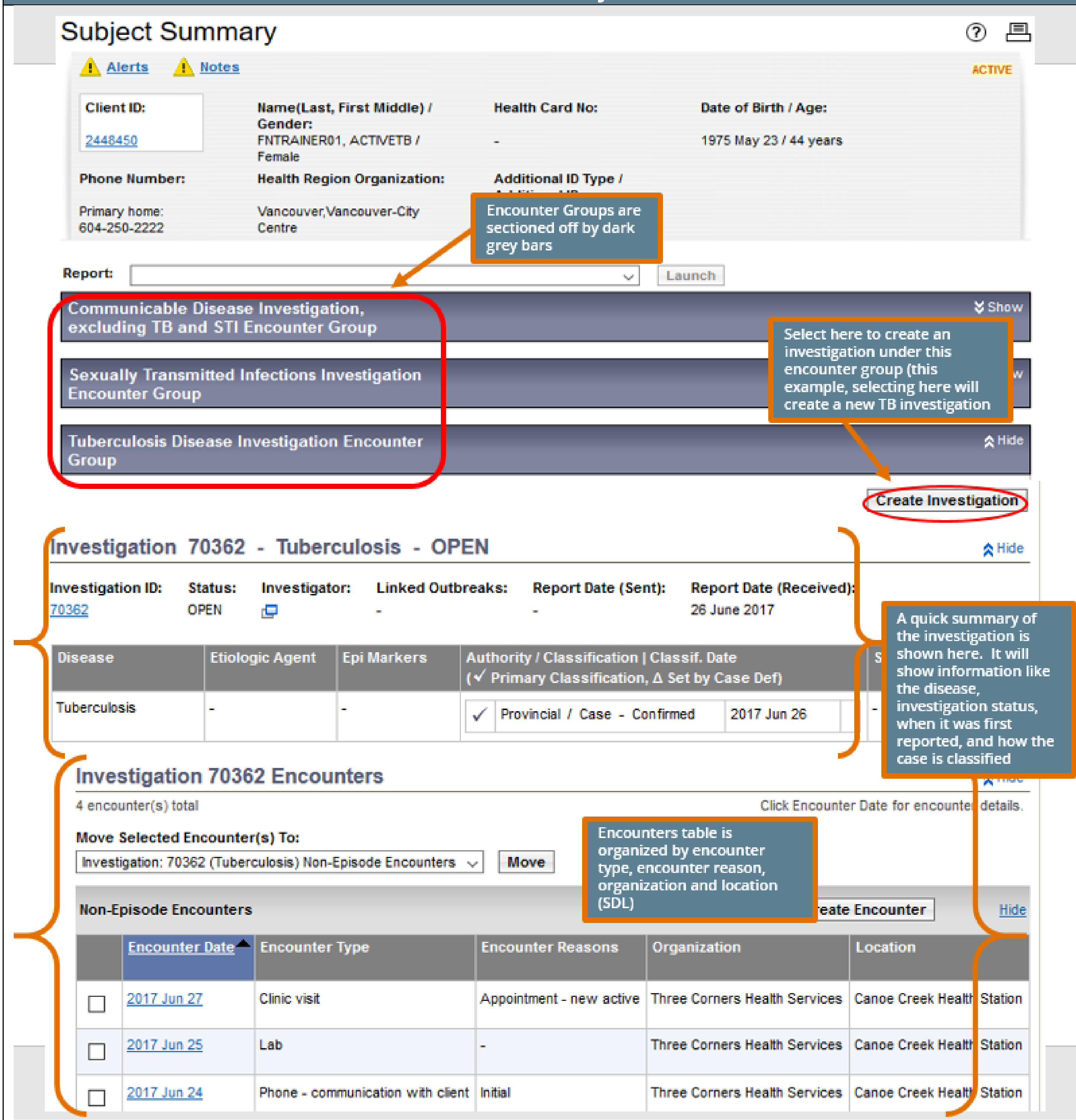
Investigation Encounter Groups are sectioned off by:

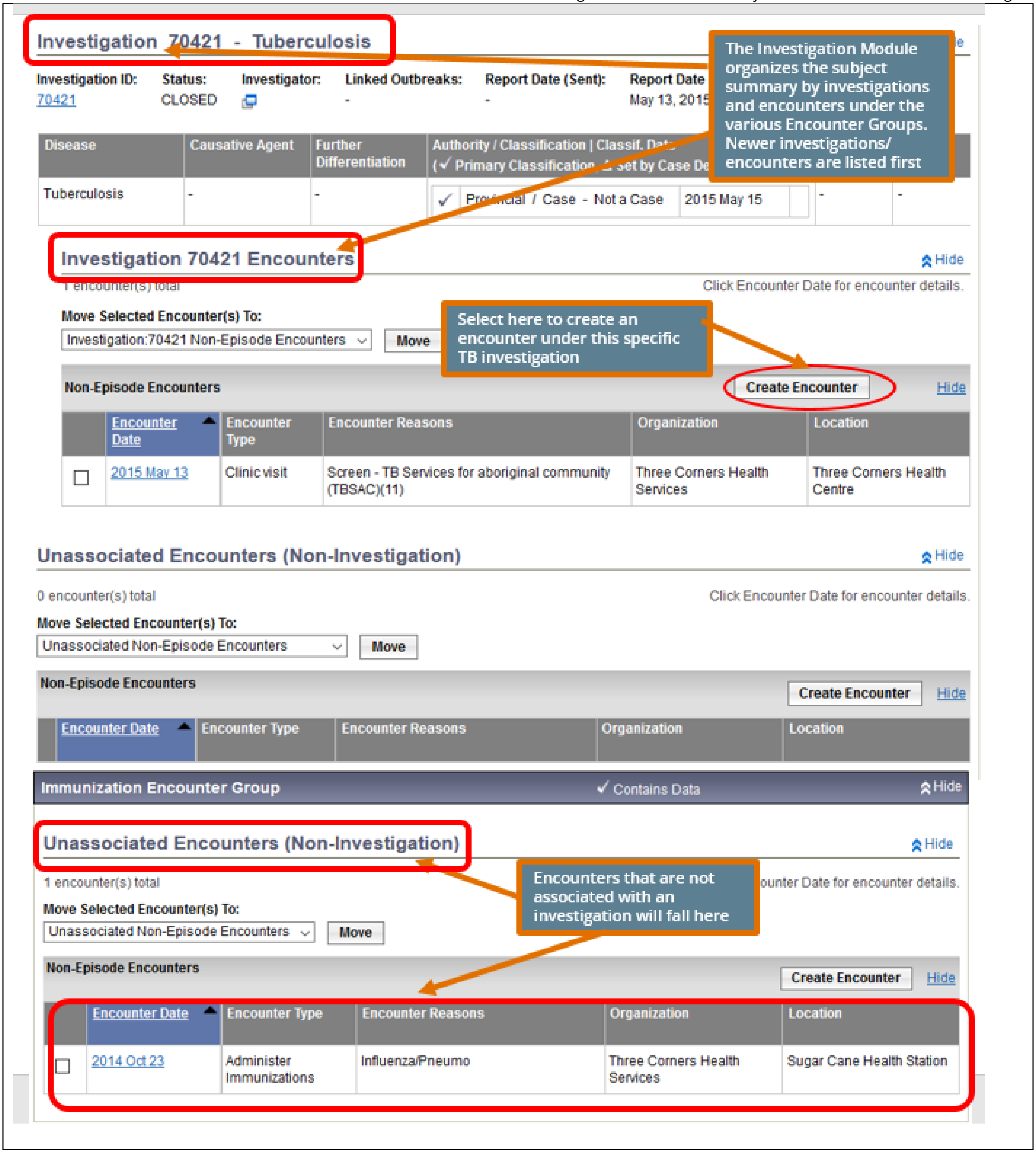
- **CD** Investigations (excluding TB and STIs)
- **STI** and **HIV** Investigations
- **TB** Investigations
- and **Immunizations**.

You can navigate to any investigation or encounter that are listed on the screen by clicking the appropriate hyperlink: Investigation ID, Encounter Date. This also sets the Investigation or Encounter in context.

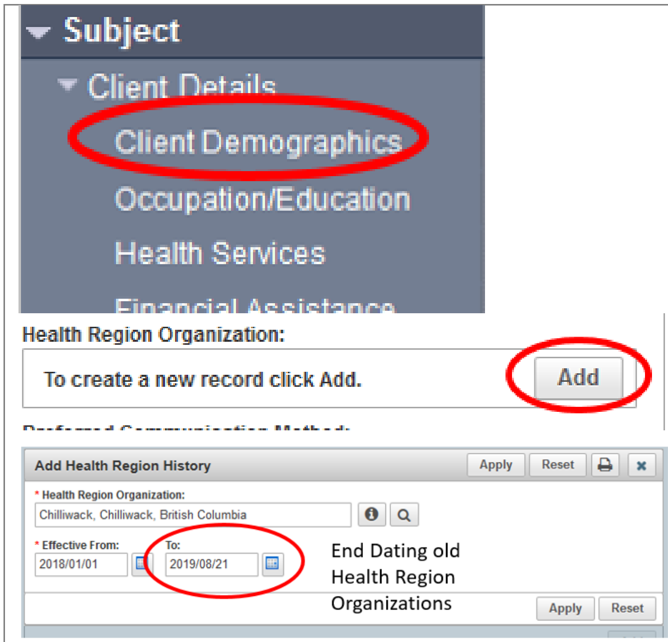


INVESTIGATIONS MODULE SUBJECT SUMMARY PAGE




Investigation 70421 - Tuberculosis
The Investigation Module organizes the subject summary by investigations and encounters under the various Encounter Groups. Newer investigations/ encounters are listed first
Investigation ID: 70421
Status: CLOSED
Investigator:
Linked Outbreaks: -
Report Date (Sent): -
Report Date May 13, 2015
Disease
Causative Agent
Further Differentiation
Authority / Classification | Classif. Date
Tuberculosis
Provincial / Case - Not a Case
2015 May 15
Investigation 70421 Encounters
Hide
1 encounter(s) total
Click Encounter Date for encounter details.
Move Selected Encounter(s) To:
Investigation:70421 Non-Episode Encounters
Move
Select here to create an encounter under this specific TB investigation
Non-Episode Encounters
Create Encounter
Hide
Encounter Date
Encounter Type
Encounter Reasons
Organization
Location
2015 May 13
Clinic visit
Screen - TB Services for aboriginal community (TBSAC)(11)
Three Corners Health Services
Three Corners Health Centre
Unassociated Encounters (Non-Investigation)
Hide
0 encounter(s) total
Click Encounter Date for encounter details.
Move Selected Encounter(s) To:
Unassociated Non-Episode Encounters
Move
Non-Episode Encounters
Create Encounter
Hide
Encounter Date
Encounter Type
Encounter Reasons
Organization
Location
Immunization Encounter Group
Contains Data
Hide
Unassociated Encounters (Non-Investigation)
Hide
1 encounter(s) total
Encounters that are not associated with an investigation will fall here
Move Selected Encounter(s) To:
Unassociated Non-Episode Encounters
Move
Non-Episode Encounters
Create Encounter
Hide
Encounter Date
Encounter Type
Encounter Reasons
Organization
Location
2014 Oct 23
Administer Immunizations
Influenza/Pneumo
Three Corners Health Services
Sugar Cane Health Station

Edit/Update Client Demographics



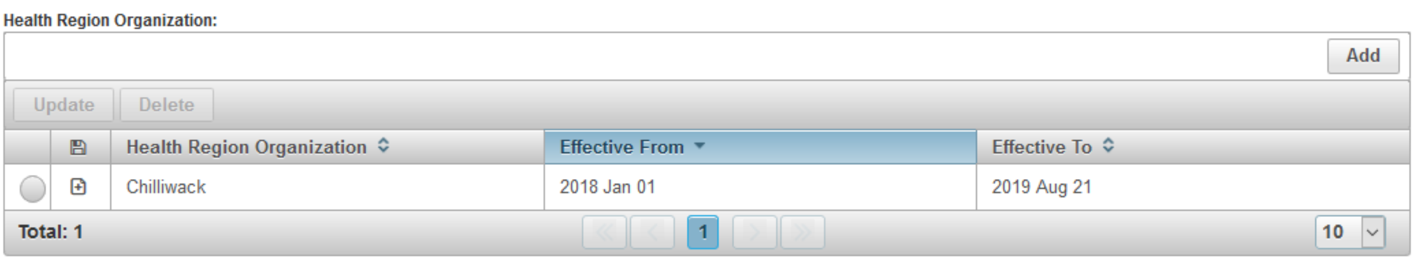
For more information on updating client information and Indigenous Information and allergies please refer to the **Core Guide**

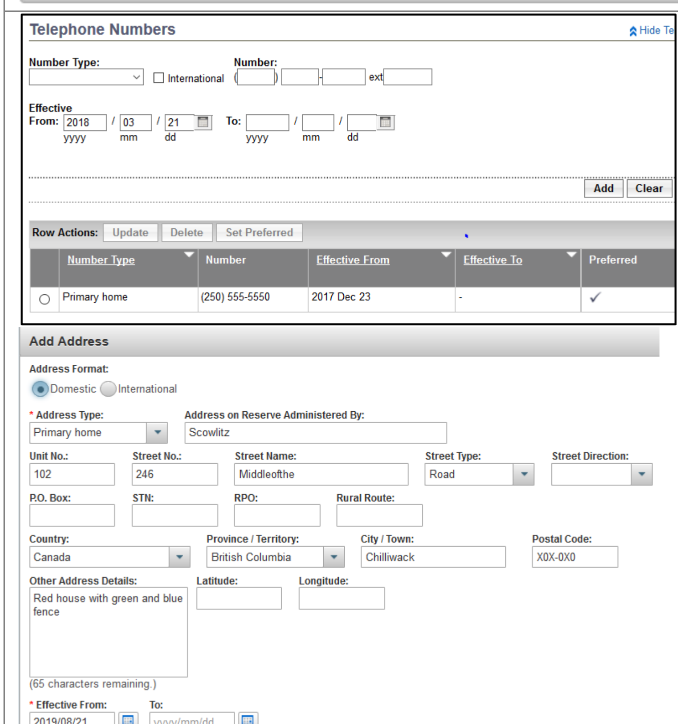
Client Demographics

LHN > Subject > Client Details **> Client Demographics**

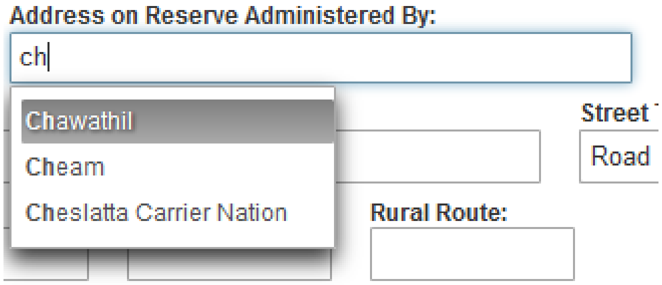
1. Ensure Client skeleton information is correct (First Name, Last Name, DOB, PHN)
2. Ensure *Health Region Organization* is correct. Use the **ADD** button to add the most recent location of residence (ie. The associated Public Health Unit for their Health Centre/Nursing Station). End Date old Health Regions. Select **APPLY** and **SAVE** your changes

Eg. For Stolo Nation, their closest Regional Health Authority branch is Chilliwack





3. Ensure *Phone Numbers* and *Addresses* are correct including *Address Located On Reserve* information if appropriate. **ADD** and **SAVE** your changes to the table below each section. End date any old phone numbers and addresses. DO NOT DELETE old numbers or addresses
4. Ensure all other fields in the *Client Demographics* page are up-to-date (if information is known)
5. **SAVE** your work



<u>Indigenous Information</u>

LHN > Subject > Client Details > **Indigenous Information**

1. Complete the *Indigenous Information* questions and add your client's current *Aboriginal Organization* (use **(I)** location). **SAVE** your work

For more detailed information on how to update Indigenous Information, please see the **Panorama Core Guide** or **Completing Indigenous Information Guide**

<u>Immigration Information</u>

LHN > Subject > Client Details > **Immigration Information**

1. For TB screens, the *Immigration Information* section <u>must be entered</u>.
2. Indicate if *Canadian citizen* (yes/no)
3. *Country Born In*:
   - If born in ***Canada***, indicate Province (if known)
4. Complete the other fields if known/applicable
5. **SAVE** your work

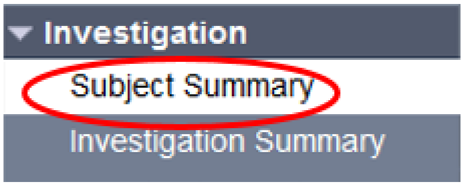
<u>Add Client Allergies</u>

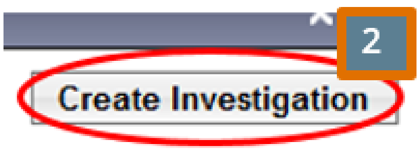
LHN > Subject > **Allergies**

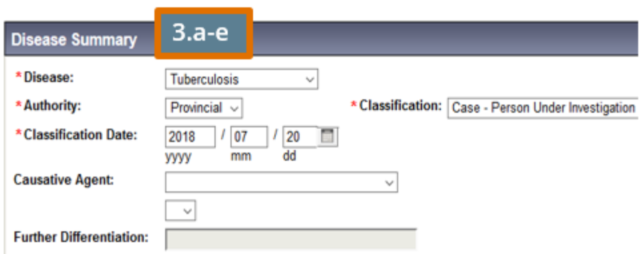
1. If client has no allergies, select **SET NKA** or **CONFIRM NKA** or
2. Select **ADD** and enter client's allergies.

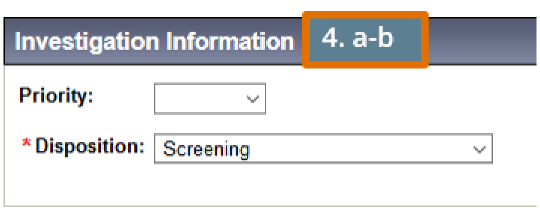
For more detailed information on how to update client allergies, please see the **Panorama Core Guide**

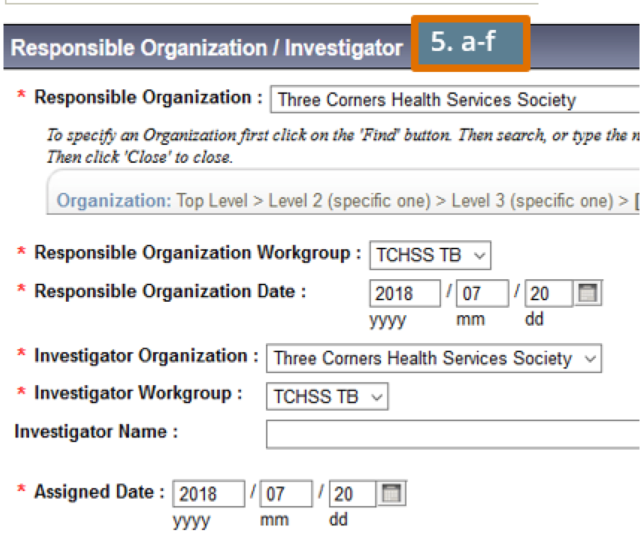
Create a TB Investigation





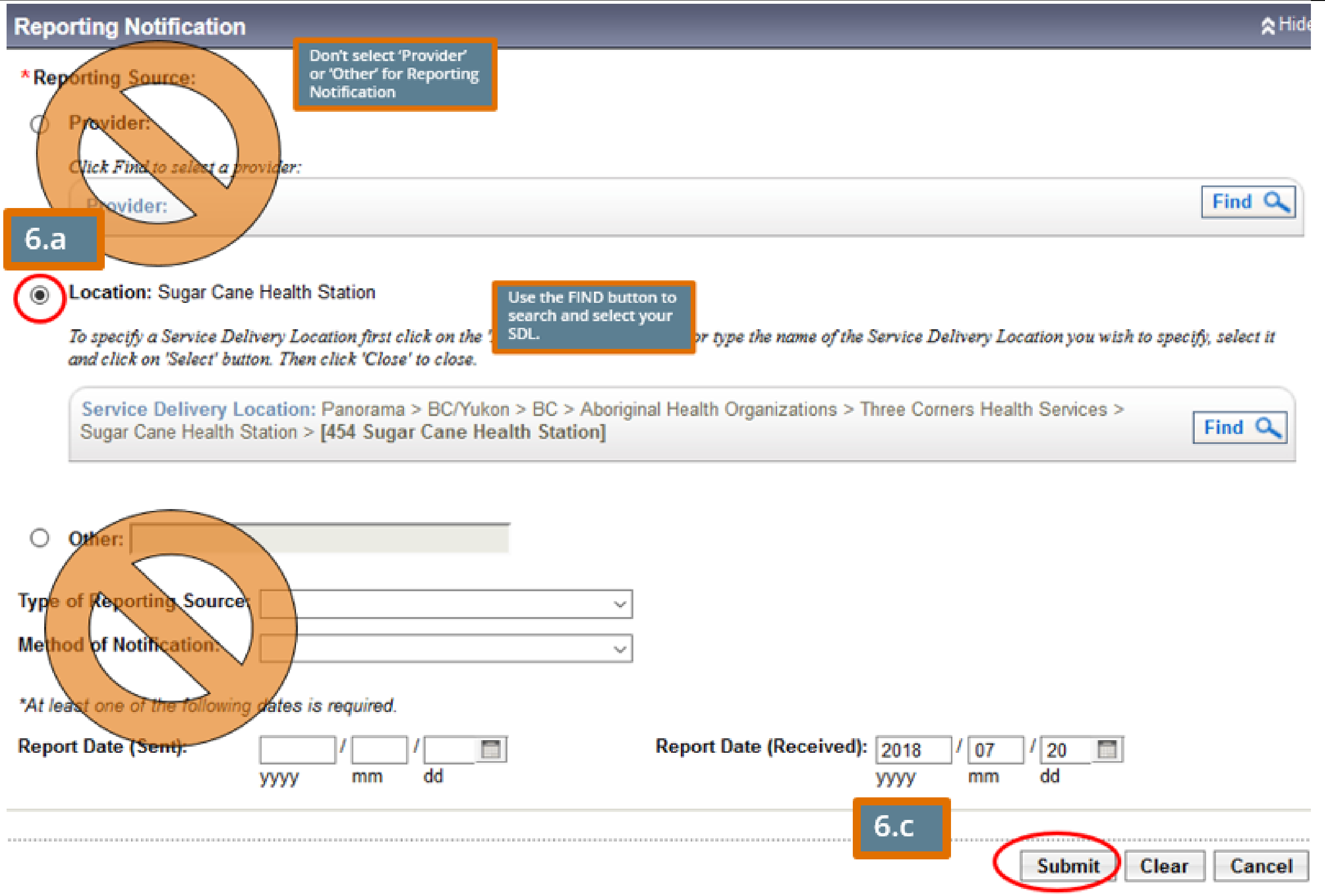


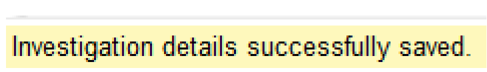




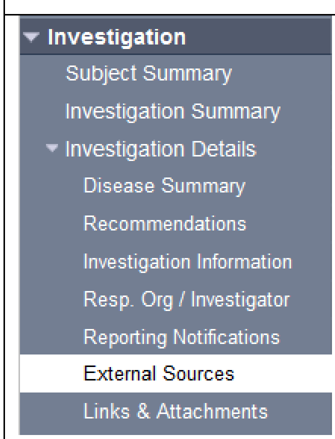
Create a **TB Investigation** for your TB screen. For more details, use the instructions from **Panorama User Guide #2: TB Screening Data Entry With Skin Test**

1. Scroll down to the *Tuberculosis Disease Investigation Encounter Group* section of the page
2. Select **CREATE INVESTIGATION**. You will be brought to the *Create Investigation* page
3. Complete the *Disease Summary* section:
4. In the *Investigation Information* section:
5. Complete the *Responsible Organization/Investigator* section:
6. Complete the *Reporting Notification* section. Press **SUBMIT**





You will now see 2 banners along the top of the page, the Client banner and an Investigation banner. A confirmation will appear below the banners showing that your Investigation has been successfully created.



Note: The *External Source* section in Panorama needs to be completed for the screen to be followed up. If your client does not have a health care provider, please contact **FNHATB@fnha.ca**

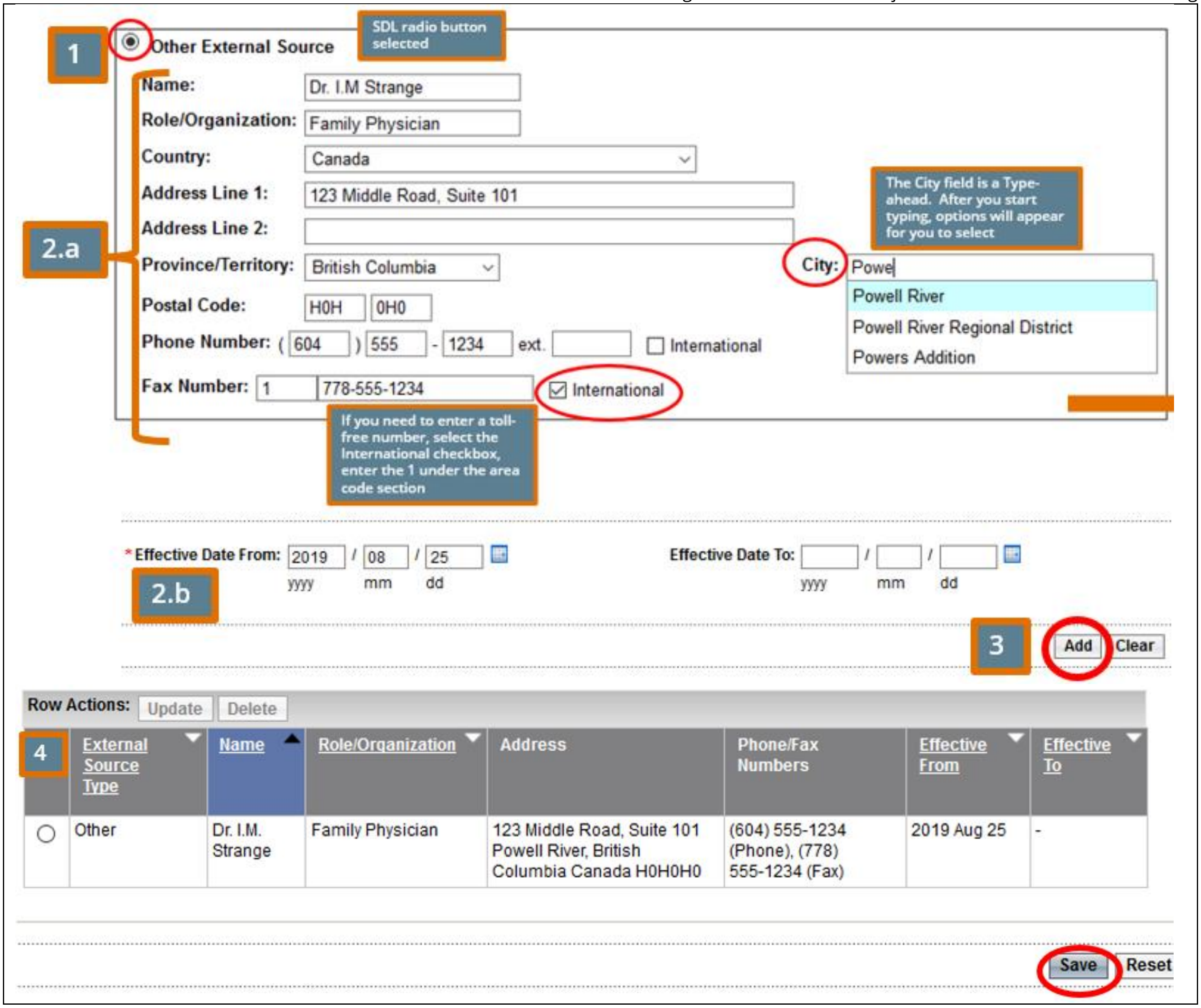
Adding External Sources

Ensure your **Subject/Client** and **Investigation** is in context:

LHN > Investigation > Investigation Details > ***External Sources***

1. Select the radio button **(O)** next to the *Other External Source*
2. Using the free text fields, enter the P*rovider's Name, Role/Organization, Country, Address, Province, City, Postal Code, Phone Number and Fax Number*.
3. Select **ADD**
4. The provider contact information will appear in the table at the bottom of the page.

Repeat steps **1-4** to add additional providers involved with the TB screening. When you are done, **SAVE** the page.


1
Other External Source
SDL radio button selected
2.a
Name: Dr. I.M Strange
Role/Organization: Family Physician
Country: Canada
Address Line 1: 123 Middle Road, Suite 101
Address Line 2:
Province/Territory: British Columbia
Postal Code: H0H 0H0
Phone Number: (604) 555 - 1234 ext. International
Fax Number: 1 778-555-1234 International
The City field is a Type-ahead. After you start typing, options will appear for you to select
City: Powe
Powell River
Powell River Regional District
Powers Addition
If you need to enter a toll-free number, select the International checkbox, enter the 1 under the area code section
*Effective Date From: 2019 / 08 / 25
yyyy mm dd
Effective Date To: / /
yyyy mm dd
2.b
3
Add
Clear
Row Actions: Update Delete
4
External Source Type
Name
Role/Organization
Address
Phone/Fax Numbers
Effective From
Effective To
Other
Dr. I.M. Strange
Family Physician
123 Middle Road, Suite 101 Powell River, British Columbia Canada H0H0H0
(604) 555-1234 (Phone), (778) 555-1234 (Fax)
2019 Aug 25
-
Save
Reset

Risk Factors

The pre-populated table of risk factors in the TB module reflect the risk factors listed in the BCCDC TB screening (939) form

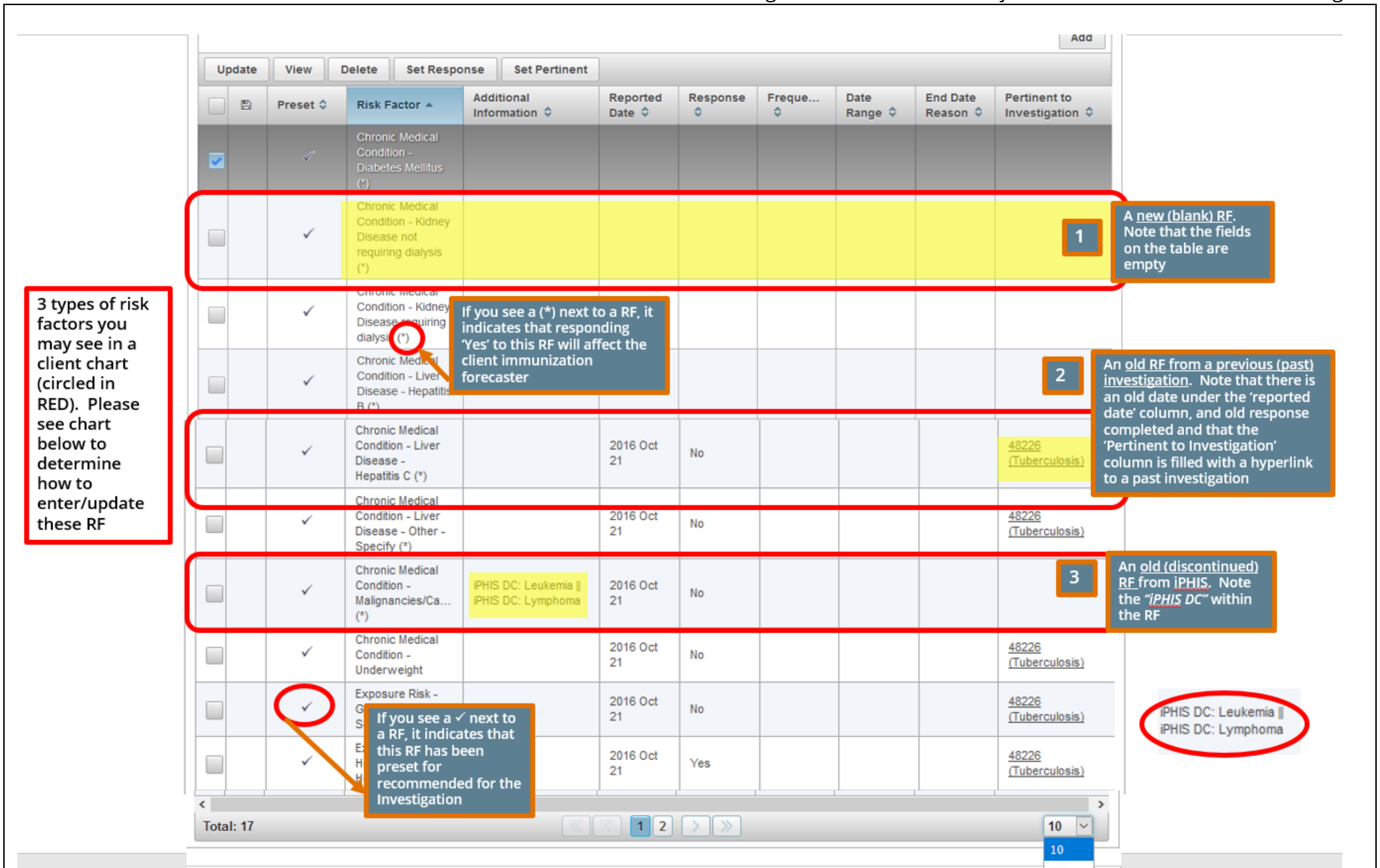
As of December 1, 2018, FNHSO users will enter Risk Factors by exception. This change in process is to avoid redundancy and eliminate charting errors. This change will also simplify the data entry process.

Enter Client **Risk Factors** for your TB screen. For more details, use the instructions from **Panorama User Guide #2: TB Screening Data Entry With Skin Test**

FNHA enters their Risk Factors in Panorama **by exception**. This means that unless you are changing a specific Risk Factor response to a 'yes', or making a risk factor pertinent to an investigation, there is no need to enter a response.

To view client's risk factors, have your **Subject/Client** and **Investigation** in context:

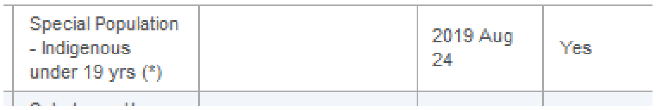
LHN > Subject > **Risk Factors**



Types of Risk Factors

Once you have determined the Type(s) of Risk Factors that you client currently has listed, this will determine how you will enter/update into Panorama

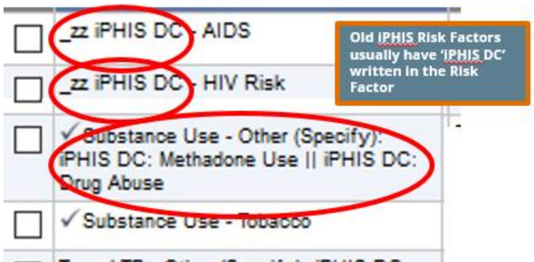
Type of Risk Factor:		If:	What to do:
1	**A new (blank) risk factor**	You wish to add a **'YES'** response	Freely enter the response to **'YES'** for this risk factor
		You wish to add a **'NO'** response	**Ignore** this RF and do not alter/change
2	**A risk factor that is pertinent to an old investigation**	The old response is **'NO',** and will stay as a **'NO'**	**Ignore** this RF and do not alter/change
		The old response is **'YES'** and will stay as a **'YES'**	Make this risk factor pertinent to your current investigation
		The old response is switching from a **'NO'** to a **'YES'**	End-date the **'NO'** risk factor**;** Add the same risk factor with the new **'YES'** response
		The old response is switching from a **'YES'** to a **'NO'**	End-date the **'YES'** risk factor
3	***'iPHIS DC'* – [RISK FACTOR]**	You see this listed for a client RF	**Ignore** this RF and do not alter/change
4	**Risk Factor is not listed**	If you need to add a Risk Factor that is not currently in the table	Add the Risk Factor with a **'YES'** response

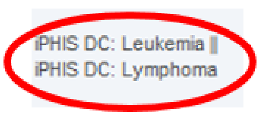


Special Population - Indigenous under 19 yrs (*)		2019 Aug 24	Yes

For more information, please see the **[Immunization Data Entry Guide]**

When *iPHIS* (the Province's previous Public Health charting system) charts were converted over to Panorama, some old Risk Factors that are no longer used, were pulled over to the client's Panorama chart.





<u>For Children under the age of 19</u>

Similar to adding the '*Special Population: Aboriginal under 19 years'* Risk Factor for children in the **Immunization** module, please ensure that children who qualify for the hepatitis A vaccine have the risk factor '*Special Population: Aboriginal under 19 years'* added to the TB risk factor table as well.

<u>Risk Factors from iPHIS Transfer:</u>

Some client charts may have old iPHIS risk factors on the table when you open their risk factor page. These risk factors were brought over from iPHIS and are no longer used.

*Please see examples of old iPHIS RF on the left hand column.

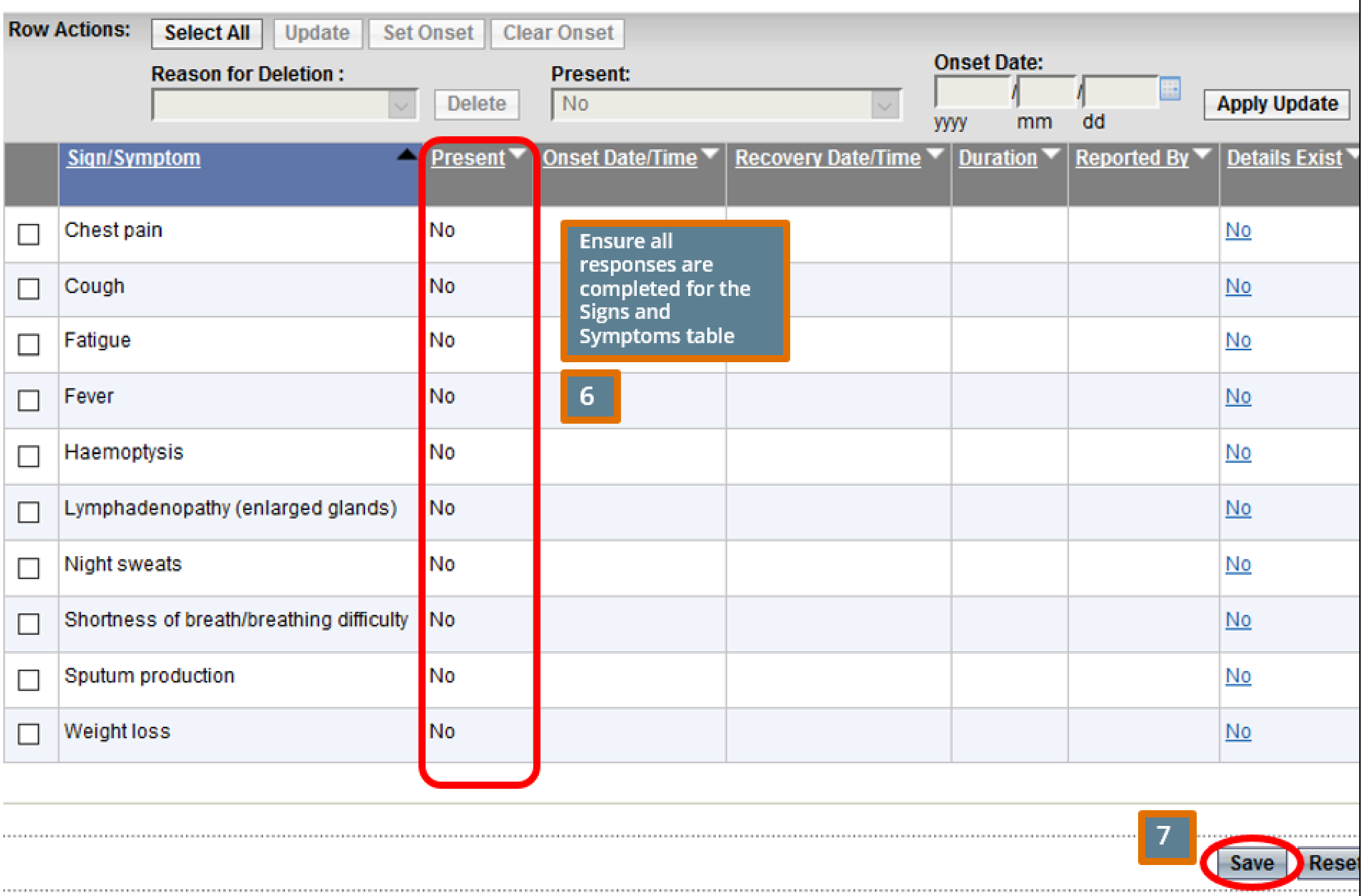
If you encounter any of these risk factors, please ignore. If you see **'iPHIS DC'** in front of the Risk Factor, <u>DO NOT CHANGE</u> the response

Signs & Symptoms

Enter Client **Signs and Symptoms** for your TB screen. For more details, use the instructions from **Panorama User Guide #2: TB Screening Data Entry With Skin Test**

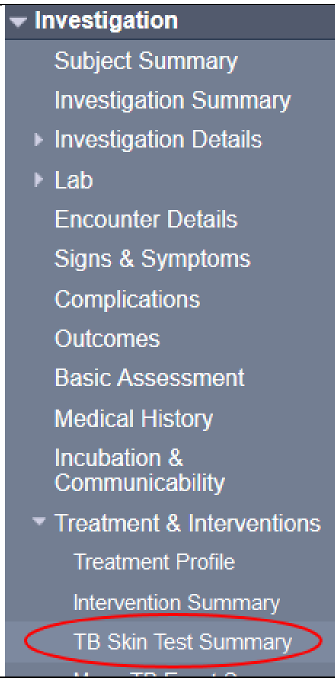
The Signs and Symptoms page in Panorama is displayed as the old 'Classic' version of Panorama

*All S&Sx in the table needs to have a documented response. ie. Do not leave blank. When you create a TB investigation for a client, a table of S&Sx recommended for the investigation appears.



	Sign/Symptom	Present	Onset Date/Time	Recovery Date/Time	Duration	Reported By	Details Exist
☐	Chest pain	No					No
☐	Cough	No					No
☐	Fatigue	No					No
☐	Fever	No					No
☐	Haemoptysis	No					No
☐	Lymphadenopathy (enlarged glands)	No					No
☐	Night sweats	No					No
☐	Shortness of breath/breathing difficulty	No					No
☐	Sputum production	No					No
☐	Weight loss	No					No

Update TB History Summary

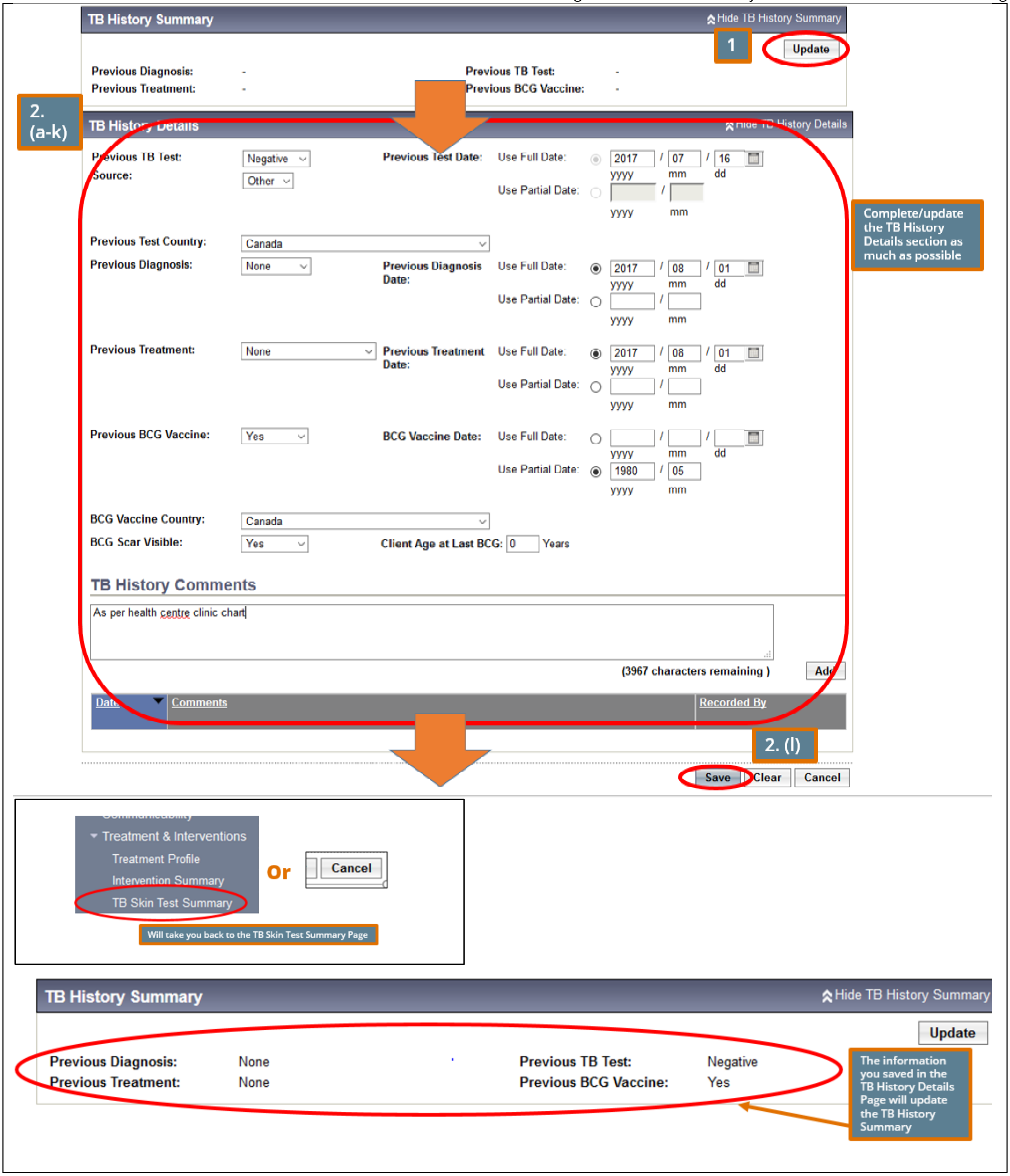


Enter Client **Signs and Symptoms** for your TB screen. For more details, use the instructions from **[Panorama User Guide #2: TB Screening Data Entry With Skin Test]**

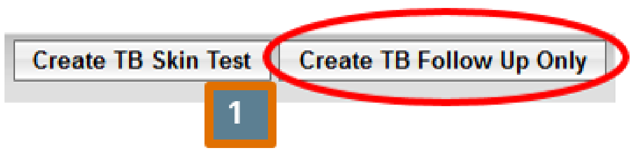
*Please note the TB History Summary Page is displayed as the old 'Classic' version of Panorama.

Before entering the client TST, first review and update your client's TB history summary.

LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**


TB History Summary
Hide TB History Summary
1
Update
Previous Diagnosis: -
Previous Treatment: -
Previous TB Test: -
Previous BCG Vaccine: -
2. (a-k)
Hide TB History Details
Previous TB Test: Negative
Source: Other
Previous Test Date: Use Full Date: 2017 / 07 / 16
yyyy mm dd
Use Partial Date:
yyyy mm
Previous Test Country: Canada
Previous Diagnosis: None
Previous Diagnosis Date: Use Full Date: 2017 / 08 / 01
yyyy mm dd
Use Partial Date:
yyyy mm
Previous Treatment: None
Previous Treatment Date: Use Full Date: 2017 / 08 / 01
yyyy mm dd
Use Partial Date:
yyyy mm
Previous BCG Vaccine: Yes
BCG Vaccine Date: Use Full Date:
yyyy mm dd
Use Partial Date: 1980 / 05
yyyy mm
BCG Vaccine Country: Canada
BCG Scar Visible: Yes
Client Age at Last BCG: 0 Years
Complete/update the TB History Details section as much as possible
TB History Comments
As per health centre clinic chart
(3967 characters remaining)
Date
Comments
Recorded By
2. (l)
Save
Clear
Cancel
Treatment & Interventions
Treatment Profile
Intervention Summary
TB Skin Test Summary
Or
Cancel
Will take you back to the TB Skin Test Summary Page
TB History Summary
Hide TB History Summary
Update
Previous Diagnosis: None
Previous Treatment: None
Previous TB Test: Negative
Previous BCG Vaccine: Yes
The information you saved in the TB History Details Page will update the TB History Summary

Create TB Follow-Up Only

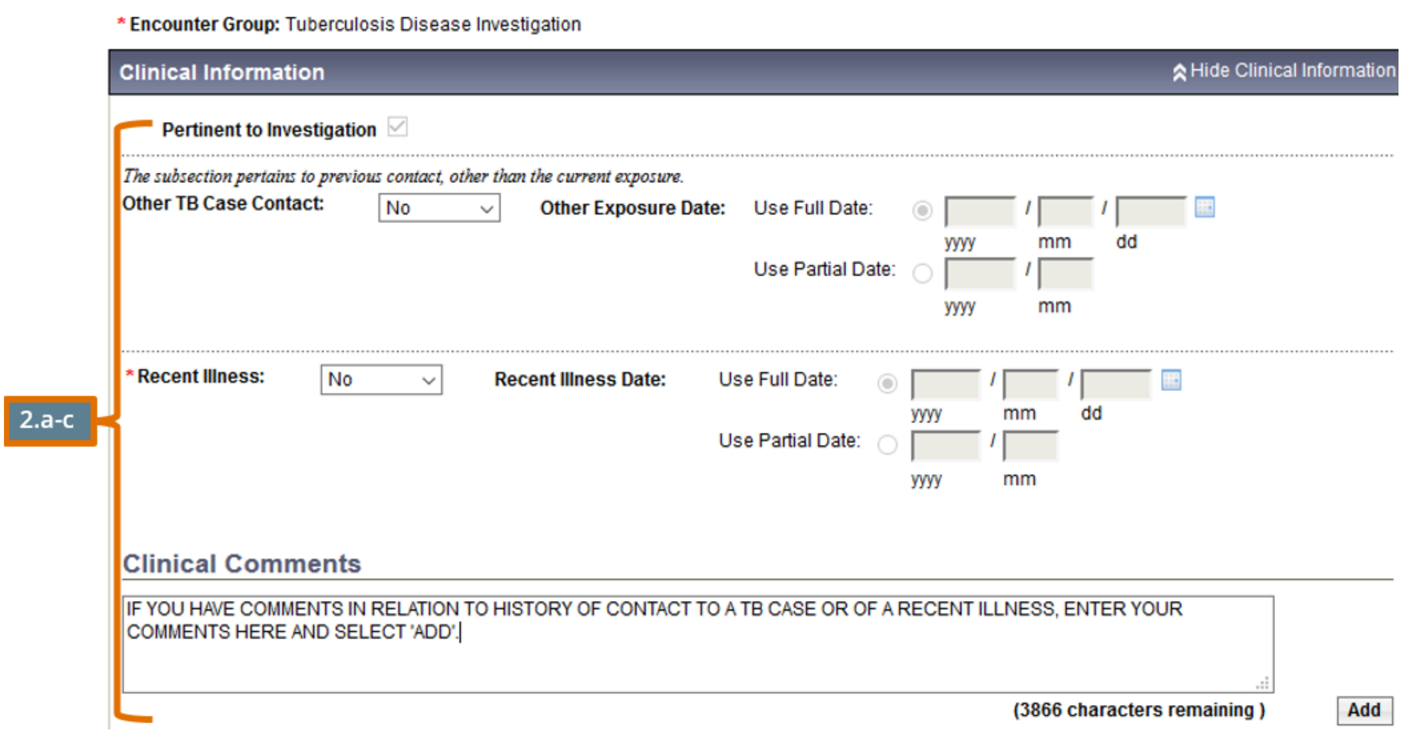


Ensure your **Subject/Client** and **Investigation** is open:

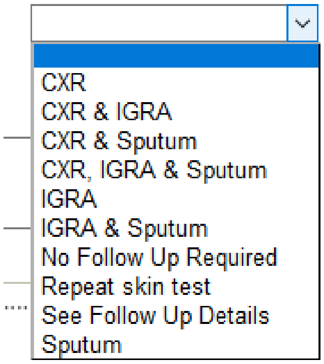
LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**

Since the client will not be receiving a TST test:
From the *TB Test Summary* Page:

1. Select **CREATE TB FOLLOW UP ONLY** from the *TB Skin Test and Follow Up Summary* section. You will be taken to the *TB Follow Up Details* page.
2. In the *Clinical Information* section:
   a. *Contact to other TB Case* – choose from **No, Unknown, Yes** and enter date if applicable
   b. *Recent illness* – choose from **No, Unknown, Yes** and enter date if applicable
   c. If *clinical comments* are entered, select **ADD**



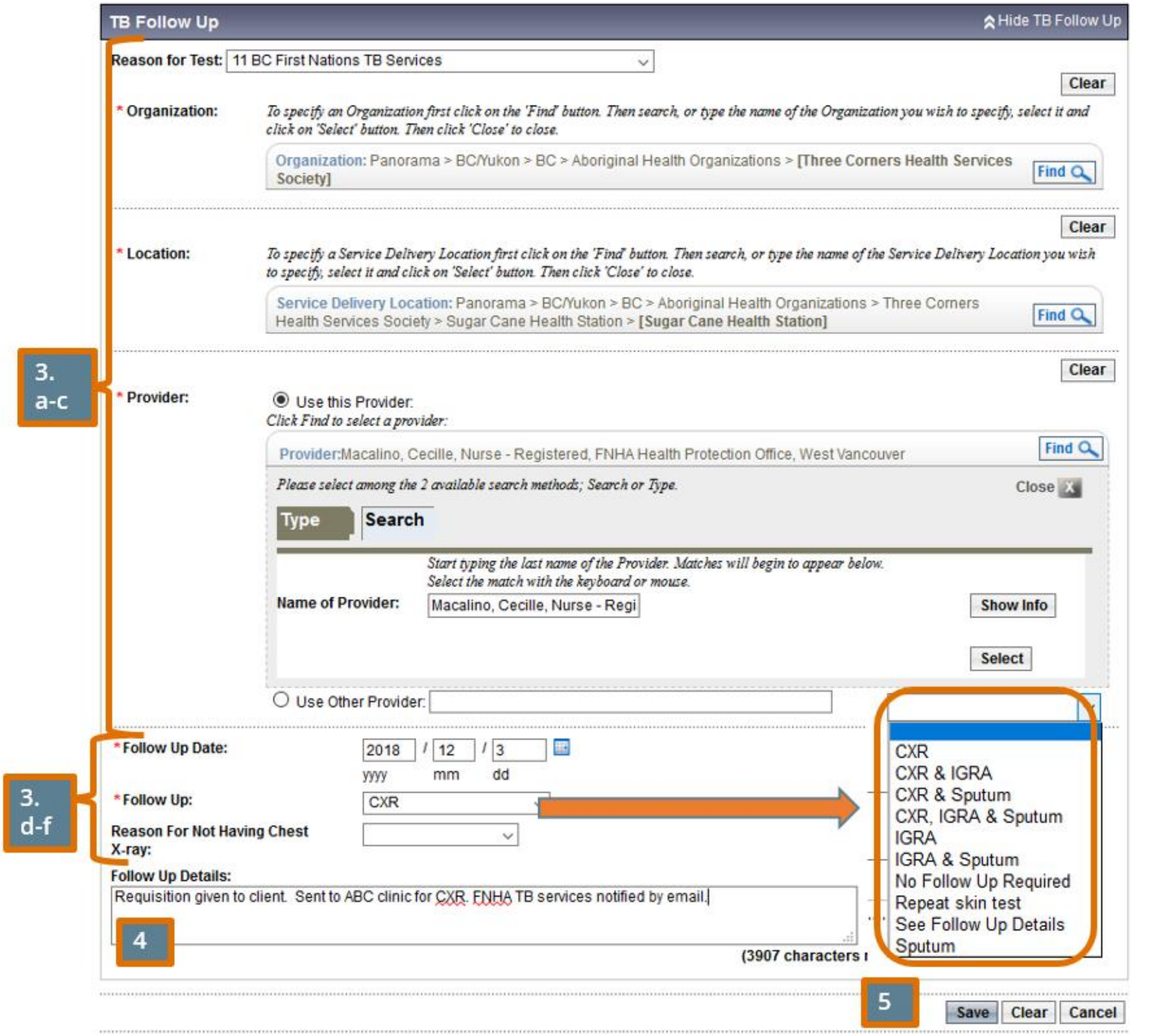
3. In the *TB Follow Up* section:
   a. Select *Reason for Test* from the drop down list (codes as per the BCCDC TB screening form)
   b. *Organization* and *Location* default to your organization. This can be changed if needed.
   c. Either **FIND** and **SELECT** yourself or another provider as the *Provider.* Providers are listed last name, first name, designation. If the name is not listed in the provider list, use the radio button



(❍) in the *Other Provider* area and enter the provider name in the free text field.

d. Enter *Follow-up Date*: the date the client TB screen was done
e. *Follow-Up* selections from drop-down list (*see photo on left)
f. Select *Reason for not having chest x-ray* if applicable (*see photo on left)

4. *Follow-up Details* is a free-text field where you can, enter the location where the client has been sent for CXR and that you will follow up with FNHA TB Services
5. **SAVE** your work. Select **CANCEL** or LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**
6. You will go back to the *TB Test Summary Page* and you will see your TB Follow Up appointment in the table

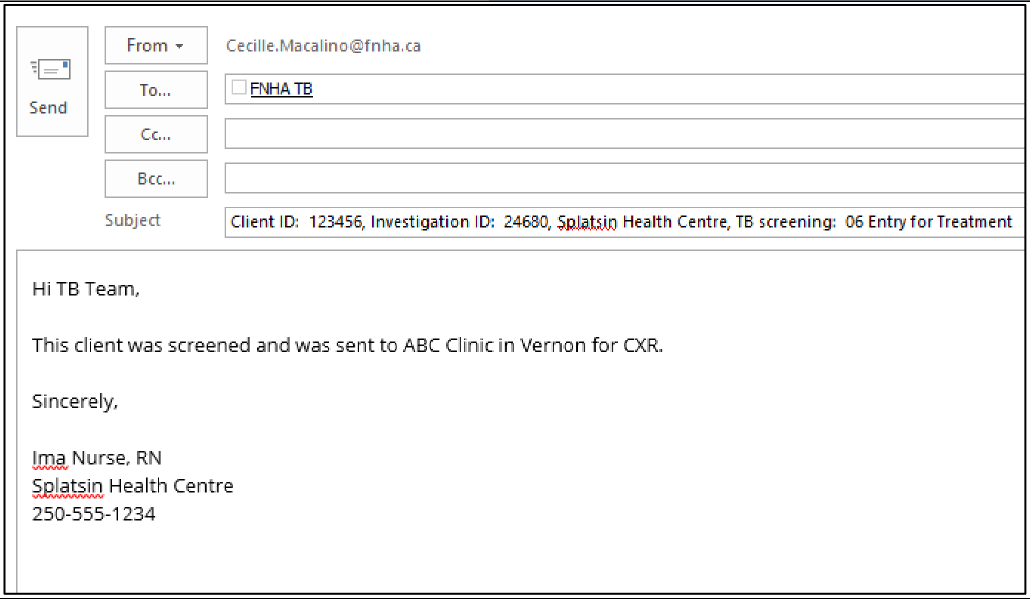


What your TB follow up will look like on the table:

	Test/Follow Up ID	Date of Give/Service	Date of Read	Reaction Size (mm)	Interpreted Result	Follow Up	Pertinent Investigations
○	60497	2019 Aug 23	-	-	-	CXR	70362 Tuberculosis

*See example email to FNHA TB Services in photo below:	**Notify FNHA TB Services by phone or email** FNHATB@fnha.ca if client follow up is needed. AT THIS

	POINT YOU WILL WAIT TO GET X-RAY RESULTS/ RECOMMENDATATIONS. You will be contacted by FNHA TB Services if further information is required or if there are physician recommendations


Send
From Cecille.Macalino@fnha.ca
To... FNHA TB
Cc...
Bcc...
Subject Client ID: 123456, Investigation ID: 24680, Splatsin Health Centre, TB screening: 06 Entry for Treatment

Hi TB Team,

This client was screened and was sent to ABC Clinic in Vernon for CXR.

Sincerely,

Ima Nurse, RN
Splatsin Health Centre
250-555-1234

Encounters

Encounters can be automatically, or manually created.

Enter Client **Encounters** (if needed) for your TB screen. For more details, use the instructions from **Panorama User Guide #2: TB Screening Data Entry With Skin Test**

An encounter represents a point of service between a client and healthcare provider for any type of service (eg. Clinic visit, home visit, telephone consult, etc).

Automatic Encounters

Panorama automatically creates an encounter for:

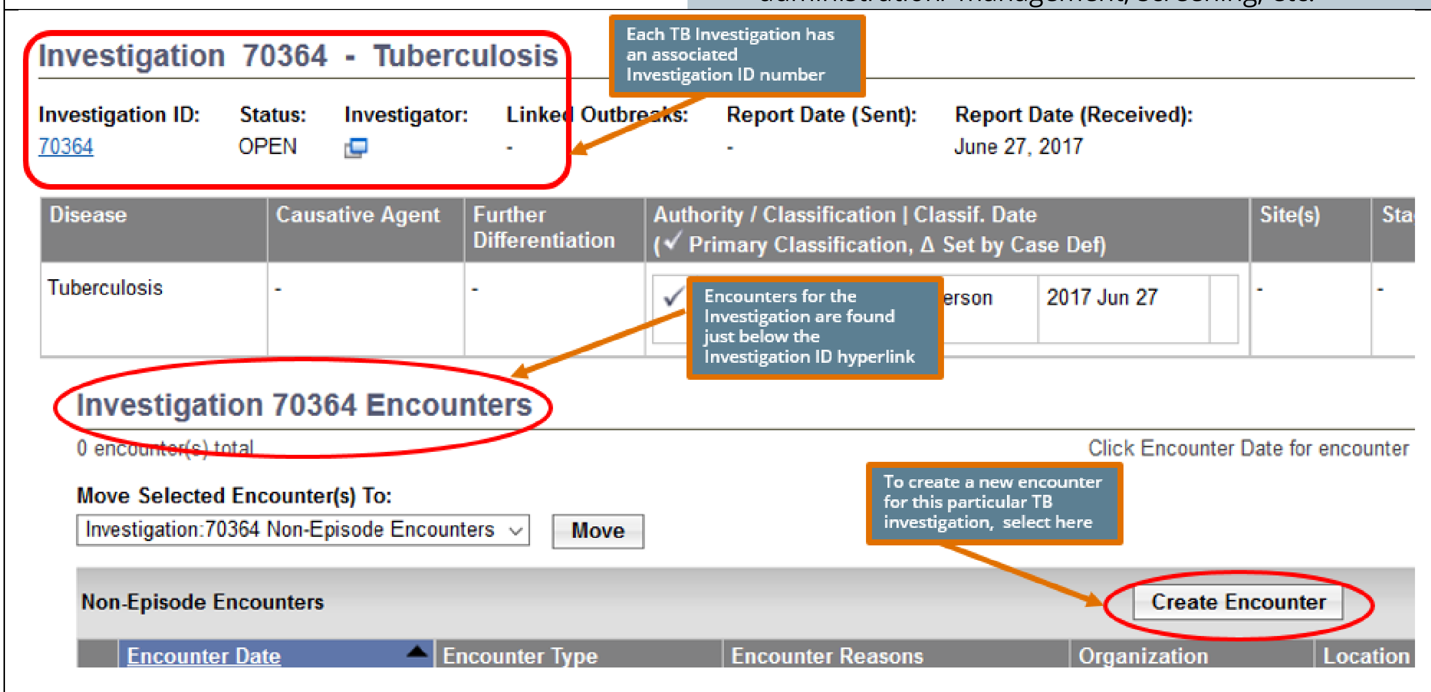
- Administered Immunizations
- AEFI (Adverse Event Following Immunization)
- Special Considerations
- Entry of Lab Results/Diagnostic Imaging Results
- Entry of TST
- Interventions

Eg. You can create a manual encounter to document a phone call or visit regarding immunization that did not include administration of a TB Skin Test.

Manual Encounters

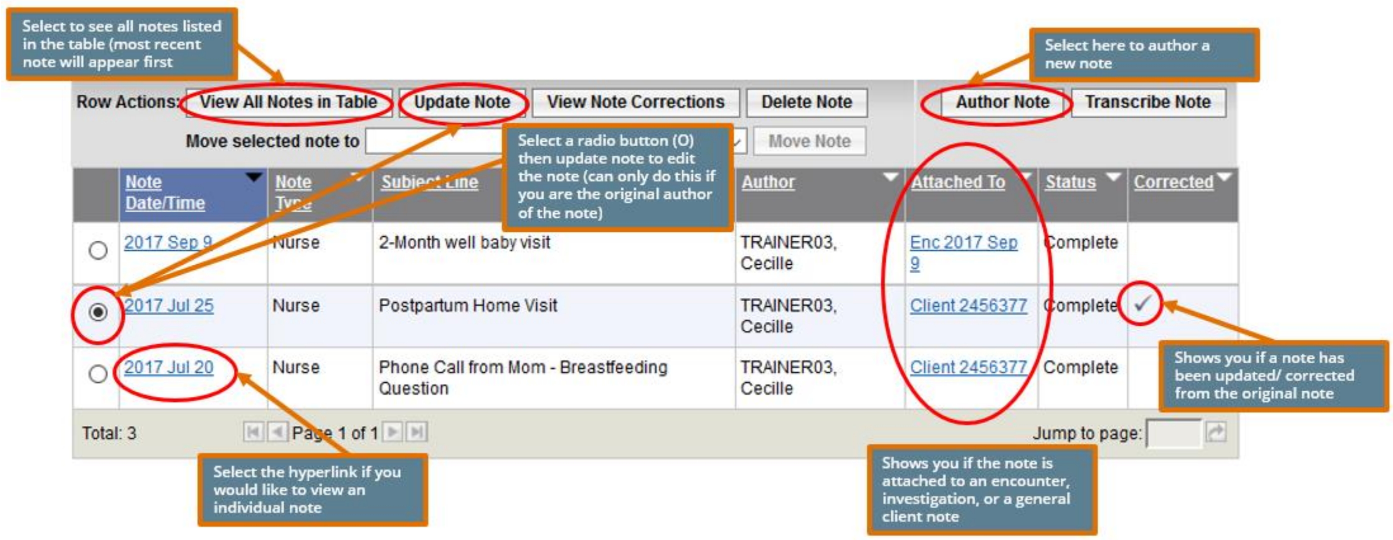
Users can manually create encounters for the following:

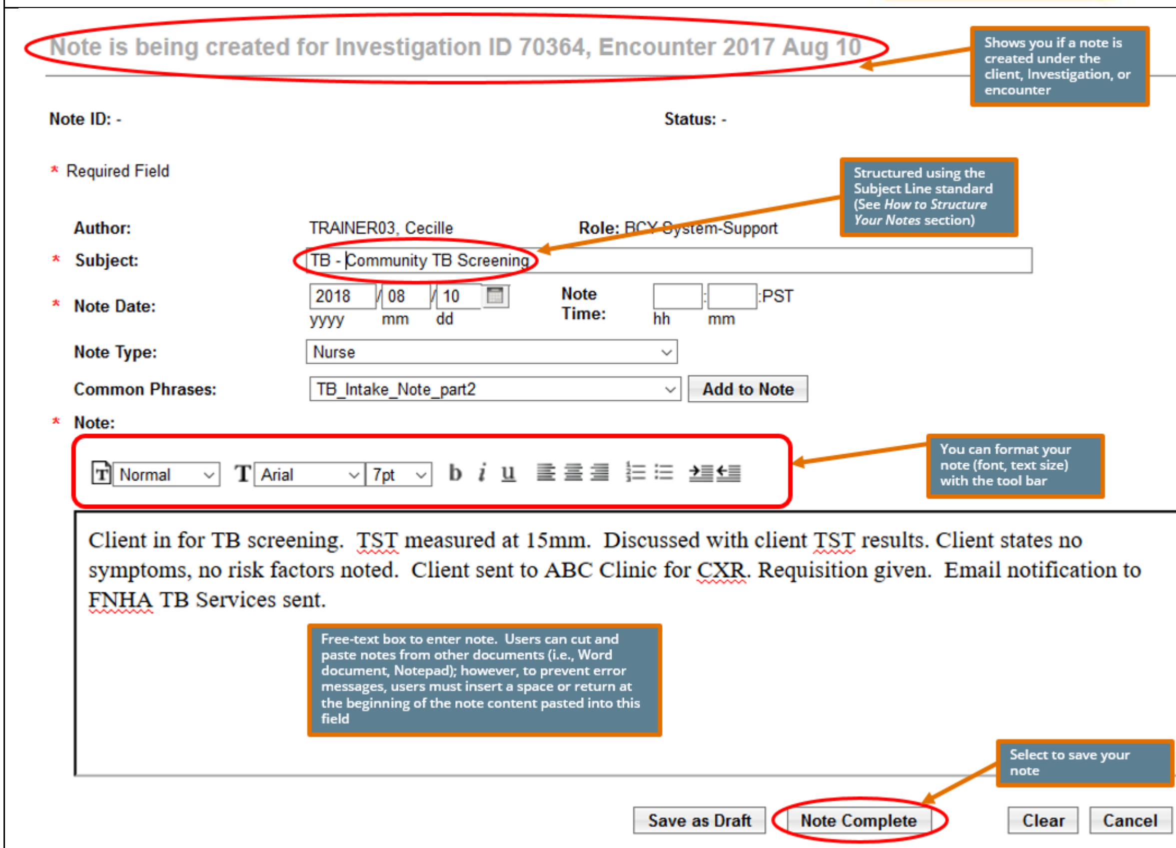
- Clinic/ Home/ Outreach/ Street/ Workplace visits
- Telephone assessments with the client/guardian
- Case conferences – Contact between multiple healthcare providers about a specific client
- Counselling/education, provision of care, medication administration/ management, screening, etc.



Notes

You can quickly see and access client notes by checking if a *Notes* hyperlink exists on the top left hand corner of the client banner. When selected, this will take you to the *Clinical Notes* screen. When selected, this will take you to the *Clinical Notes* screen. For more information, please refer to the **Core Data Entry Guide**	Enter Client **Notes** (if needed) for your TB screen. For more details, use the instructions from **Panorama User Guide #2: TB Screening Data Entry With Skin Test**





Closing Investigations

If you are unsure if you should be closing a client Investigation, please contact FNHA TB Services **fnhaTB@fnha.ca**	**If there is no follow-up required**, the investigation can be closed by the CHN. FNHA TB Services or the BCCDC will be responsible for closing all other TB Investigations. If you want to close your investigation, use the instructions from **Panorama User Guide #2: TB Screening Data Entry With Skin Test**