



First Nations Health Authority
Health through wellness

Panorama Guide

COVID-19 Entry Guidance

Version 1.0 – April 7, 2020

panorama@fnha.ca

<http://www.fnha.ca/what-we-do/communicable-disease-control/panorama>

[FNHA COVID-19 Information for Health Professionals](https://www.fnha.ca/what-we-do/communicable-disease-control/coronavirus/health-professionals)
<https://www.fnha.ca/what-we-do/communicable-disease-control/coronavirus/health-professionals>

PLEASE NOTE: As information is changing frequently with regards to COVID-19, please refer to our FNHA coronavirus website for the latest updated resources

Table of Contents

COVID-19 Data Entry in Panorama.....	3
Getting Ready to Enter Your Information	5
Search and Update Client.....	5
Risk Factors	7
Signs and Symptoms	9
Updating Case or Contact UDF Forms	9
Viewing and Entering Notes	11

COVID-19 Data Entry in Panorama

The novel coronavirus (COVID-19) Investigations will be created in Panorama by Regional Health Authorities (RHAs) based on probable and confirmed cases. This applies in all instances, whether or not there is a Community physician or NP/RN swabbing clients, the test results go through the lab and the appropriate RHA for initial Panorama entry.

COVID-19 Panorama Entry Workflow

Each RHA will create an Investigation either through direct entry into Panorama or by Case Report Form (CRF) faxed into BCCDC for entry. For reporting and surveillance purposes, an Investigation should only have one version or instance of a UDF (User Defined Form) completed. **Panorama users are to not create a new UDF if there is an existing one.**

You may be notified by the RHA or called by a community member regarding a COVID case. Your role as the CHN is to communicate and work with your local Public Health Unit (PHU) to update any existing UDF's, and provide any additional information required as per your RHA guidelines.

It is important to clarify roles of the RHA and your First Nations Health Service Organization (FNHSO) when working together on an investigation. You may work with the RHA with daily case monitoring, contact monitoring, and give counseling/education. If you have any questions about your role in an investigation, please contact your local Public Health Unit If you have questions regarding entries into Panorama contact panorama@fnha.ca.

***Please use the [FNHA Panorama Case and Contact Workflow For Indigenous Communities](#) for supplementary guidance**

What can CHNs with access to Panorama do?

If A FNHA/FNHSO CHN is aware of a Probable/Positive COVID-19 case:

1. **Ensure that this client is a confirmed positive case. Connect with your local Public Health Unit. Share your contact information and work schedule with them.**
2. Check in Panorama to see if a COVID-19 Investigation has already been initiated/created by the RHA.
3. If there is an open COVID investigation:
 - a. The CHN collaborates with the RHA to assist as needed with client follow up. Notify the FNHA CD Management Team cdmgmt@fnha.ca or the Panorama team panorama@fnha.ca if additional support is needed

4. If there is no investigation initiated: Refer symptomatic client to contact 811 for next steps. The CHN should follow up test results (if testing criteria met) and let the RHA know they are available for follow up and assistance.

Panorama Entry Tips:

- To make the workflow easier, it is suggested to use the [BCCDC Active Daily Monitoring for a Case/Contacts of a Case](#) paper/pdf form as your guide. Complete it fully and then data enter into Panorama. Some forms use an asterisk (*) to indicate which elements are required. Forms for monitoring a case or contact of COVID-19 can be found in the [BCCDC website](#) or your RHA may have their own forms for completion.
- All COVID-19 related notes should be entered directly into Panorama regardless of the EMR you are using. All COVID-19 related information should also be relayed to your local Public Health Unit. All Case and Contact Daily monitoring forms must be entered directly into the corresponding Panorama UDF.
- Please ensure that all documentation pertaining to an Investigation is entered with the Investigation in context (Investigation header is at the top of the page below the Client header) if an Investigation is opened. Otherwise, enter Notes as an Unassociated Encounter (Non-Investigation).
- The RHA will be responsible for closing the investigation when appropriate.
- **If you believe there should be an Investigation and you can't find it in Panorama, please connect with your local RHA CD unit or Public Health Unit.**

If you require assistance completing work in Panorama, please email panorama@fnha.ca

Getting Ready to Enter Your Information

Case management

Interim guidelines for public health management of cases and contacts associated with novel coronavirus (COVID-19) in the community have been developed and added to the [Communicable Disease Control Manual](#). The guidelines include:

- [Novel Coronavirus \(COVID-19\) - Interim Guidelines](#)
 - Case management recommendations (confirmed, probable, PUI), page 4
 - Contact management recommendations, page 6
- [Active Daily Monitoring Form for a Case of COVID-19](#)
- [Active Daily Monitoring Form for Contacts of a Case of COVID-19](#)

Note: In the form, the items with an asterisk () are required to be completed

Download the BCCDC paper forms as your guide (optional):

1. Go to <http://www.bccdc.ca/health-professionals/clinical-resources/covid-19-care/public-health-management>
2. Scroll down to the *Case Management* section and select the hyperlink to open the form.
3. Print off the form which includes instructions for entering monitoring information into Panorama.

*Your RHA may have their own forms that need to be used/completed. Please discuss with your Public Health Unit contact.

Search and Update Client

*Your contact in the RHA may have a Panorama client ID and/or Investigation ID number for you to use to search your client

*Please see [Panorama Guide: Core Data Entry](#) for more information about searching, opening client charts updating client demographics, updating Indigenous Information, and updating allergies

Search Client and Open Client Chart:

Ensure you are in the **Investigation** module.

Left-Hand Navigation (LHN) > Search > **Search Clients**

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 **UPDATE**.

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

The screenshot shows a web interface for 'Communicable Disease Investigation, excluding TB and STI Encounter Group'. It displays an investigation for 'Investigation 70495 - Coronavirus infection - OP'. The investigation ID '70495' is highlighted with a red box. Below this, there are sections for 'Client ID' (2457062), 'Name (Last, First Middle) / Gender' (CONTACTFN, COVID19 / Female), 'Health Region - Branch' (Thompson Cariboo Shuswap, Williams Lake), 'Investigation ID' (70495), 'Status' (OPEN), 'Disposition' (Monitoring in progress), and 'Disease' (Coronavirus infection).

***IMPORTANT:** Do NOT delete, update, or expire an existing record. Only ADD new information to the client record.

Viewing the Coronavirus Investigation:

With your **Client** in context:
 LHN > Investigation > **Subject Summary**

1. Scroll to the Communicable Disease Investigation, excluding TB and STI section
2. Select the Coronavirus infection Investigation by clicking on the **Investigation ID** hyperlink.
3. You know you are in the Investigation when you see 2 banners on the top of the page (the client banner and the investigation banner)

Review Client Demographics

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

The RHA should have updated this information when the Investigation was created. If the information is incorrect, please notify your RHA.

Review Indigenous Information

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

The RHA should have updated this information when the Investigation was created. If the information is incorrect or missing, please notify your RHA.

Review Allergies

LHN > Subject > **Allergies**

The RHA should have updated this information when the Investigation was created. If the information is incorrect or missing, please update.

Risk Factors

For more detailed information about entering and updating Risk Factors for an Investigation, please refer to [TB Guide #2: Screening with a Skin Test](#) which includes Risk Factor topics:

- *Types of risk factors*
- *Entering 'Yes' responses into the risk factor table*
- *Making an old risk factor pertinent to the current investigation*
- *End-dating Risk Factors and adding Risk Factor details*
- *Adding a new risk factor to the table*

***Please Note:** if you are making updates to the Client's Risk Factors, please communicate this with your local Public Health Unit

Similar to a TB Investigation, the Coronavirus Investigation has a pre-populated list of Risk Factors (RF) for you to enter a response. Your RHA would have entered the client's risk factors (if they are a confirmed case) when they initially created the Coronavirus investigation.

FNHA enters their Risk Factors in Panorama by exception and does not document 'No' Risk Factors. 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 the client's Risk Factors

Have your **Subject/Client** and **Investigation** in context:

LHN > Subject > **Risk Factors**

You will see a table with the client Risk Factors and responses associated with the Investigation

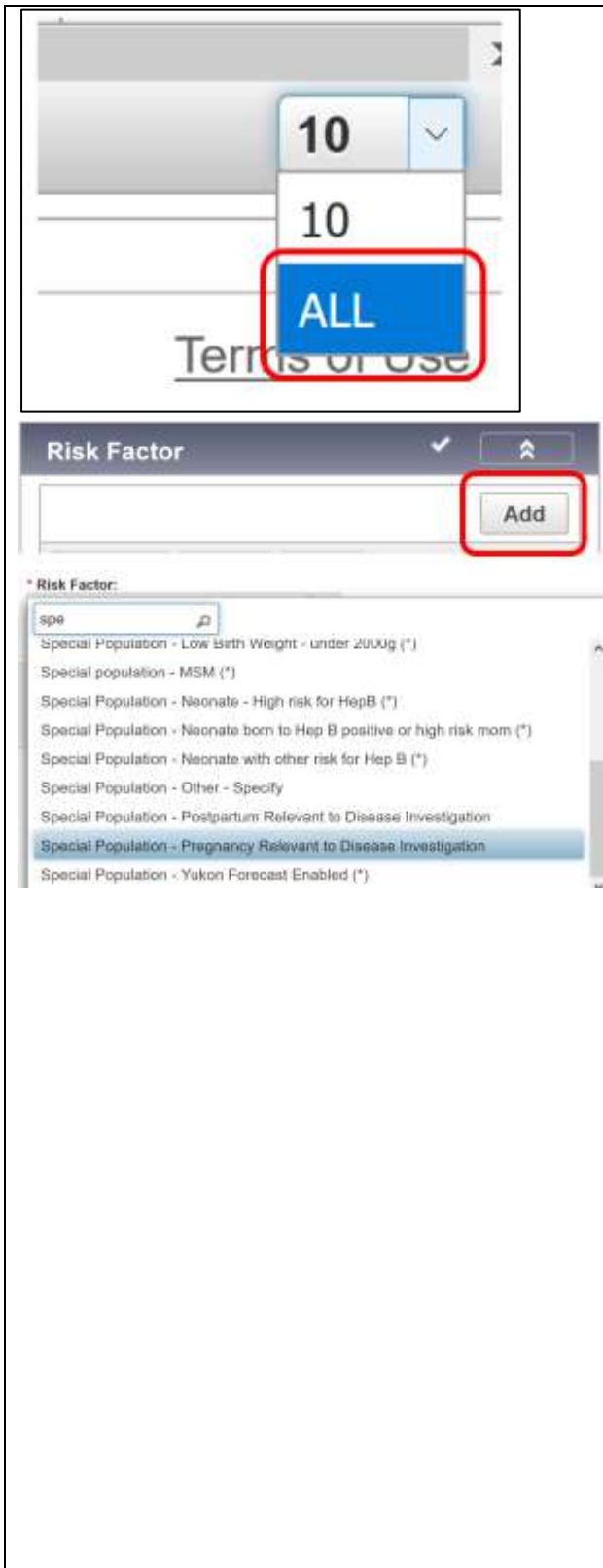
Entering Pregnancy Risk Factor

If a client is pregnant at the time of the investigation, this should be documented in their chart by the RHA as ***Special Population - Pregnancy Relevant to Disease Investigation***

If you know that your client is pregnant, and this risk factor is not shown, you can add this Risk Factor

With your **Subject/Client** and **Investigation** in context:

LHN > Subject > **Risk Factors**



Scroll down to the bottom right corner of the RF table. Using the dropdown, select **ALL**, so all available RF are visible on the table.

On the top right corner of the *Risk Factor* table, select the **ADD** button. An *Add Risk Factor* modal will appear.

1. Under the *Risk Factor* field, search and select the Risk Factor ***Special Population - Pregnancy Relevant to Disease Investigation***
2. The *Additional Information* field - Record expected due date
3. For *Response*, select **Yes**
4. *Reported By* – select from the drop down list
5. *Effective From* – Enter estimated date of conception. If unknown, use the first day of the estimated month of conception.
6. *Effective To* - Enter as the date when Public Health was made aware that the Client is no longer pregnant. End *date Reason*, are not required fields. Complete if known/applicable.
7. *Reported Date* populates to today's date. Can be changed to the date report was received by the RHA.
8. Select **APPLY** to add the risk factor to the table.
9. Repeat steps **1-8** to add additional Risk Factors not listed in the table.
10. Select **SAVE** to save the entered risk factors. The risk factor table will update with your entry(ies).

If there are many RF, you may need to scroll down the table to see your updates.

Signs and Symptoms

For more detailed information about entering and updating Risk Factors for an Investigation, please refer to [TB Guide #2: Screening with a Skin Test](#) which includes Signs and Symptoms(S&Sx) topics:

- *Updating S&Sx Table*
- *Adding Additional Information to S&Sx*
- *Adding S&Sx details*
- *Adding Additional S&Sx*

***Please Note:** The Signs and Symptoms section in Panorama is only to be used for client's initial symptom review with the RHA. To enter client symptoms during monitoring, please refer to the [Updating Case or Contact UDF](#) forms section of this guide.

Similar to a TB Investigation, the Coronavirus Investigation has a pre-populated list of symptoms for you to enter a response. Your RHA would have entered the client's initial symptoms (if they are a confirmed case) when they initially created the Coronavirus investigation.

Viewing Client's Initial Signs and Symptoms:

Have your **Subject/Client** and **Investigation** in context:

LHN > Investigation > **Signs & Symptoms**

Client symptoms will be listed in the table. It will include if symptoms are present or not. It may also include Onset or Recovery dates/times, or symptom details.

Updating Case or Contact UDF Forms

***IMPORTANT** – DO NOT create/fill out a new User Defined Form. Only update existing UDFs

A User Defined Form (UDF) are pre-configured sets of questions. Whether those questions are asked during a client visit or screening program, as in STI, or entered later as follow-up, as in Case Investigation/Report Forms or in an Outbreak, will depend on the activity and workflow that the user is following.

Opening and Updating the client UDF:

The UDF (User Defined Form) is used to:

- Enter and Update the **COVID-19 Surveillance Case Investigation Form** or
- Enter and update the **COVID-19 Active Daily Case or Contact Monitoring Form**. This assessment completed by the nurse can include: temperature, client symptoms (if any), and other pertinent notes as needed.

With your **Client** and **Investigation** in context:

Filled Out Forms

2 forms found.

Row actions:		Update
Instance ID	Form Name	
<input checked="" type="radio"/> 4371145	COVID-19 Active Daily Case Monitoring Form	
<input type="radio"/> 4371144	COVID-19 Surveillance Case Investigation Form	

LHN > Investigation > Investigation Details > **Links & Attachments**

1. You will see a table with *Available Forms* and *Filled out Forms* listed.
2. Go to the *Filled Out Forms* Section and select the radio button (○) next to either:

COVID-19 Surveillance Case Investigation Form
COVID-19 Active Daily Case Monitoring Form or
COVID-19 Active Daily Contact Monitoring Form
(Forms depend on whether your client is a case or a contact)

3. Select **UPDATE** on the top left hand corner of the table.
4. The UDF form will open in a separate window. Update your form as indicated below:

Updating the **COVID-19 Surveillance Case Investigation Form**

1. After opening the UDF, review the information on the form completed by your RHA.
2. Update the form using the fields provided. In the *Notes* section of the UDF, Document the updates you have made to the UDF. Use the following format:

[ENTER DATE] - [NAME AND DESIGNATION]
[ENTER THE CHANGES YOU MADE TO THE CASE INVESTIGATION FORM] (see eg. on left)

3. Select **SUBMIT** which saves the updated form on the client's investigation. Close the modal (popup) window by selecting the 'X' on the top right corner.

Notes

Additional notes on the case:

[ENTER DATE] - [ENTER NAME AND DESIGNATION]

[ENTER THE CHANGES YOU MADE TO THE CASE INVESTIGATION FORM]

Eg.

April 1, 2020 - Jane Harper RN

Updated CXR summary

***IMPORTANT:** If you need to update the **COVID-19 Surveillance Case Investigation Form**, please ensure that you communicate this with your local Public Health Unit.

* Follow-up Date:

Unable to contact

Temperature (Celsius)

Symptoms (check all that apply):

No Symptoms

Chills

Conjunctivitis

Cough

Diarrhea

Sore throat

Runny nose

Shortness of breath/difficulty breathing

Other (add in notes)

Notes:

Person completing assessment

Out Forms + New Filter Out Forms

Filter: Click on instance ID to see Form. Click on status to select

Instance ID	Form Name	Form Description	Version	Language	Created By	Status	Created System	Last Updated
12345	COVID-19 Active Daily Case Monitoring Form	COVID-19 Active Daily Case Monitoring Form	3	Arabic	Public	FINISHED	TS	2020 Mar 21
12346	COVID-19 Surveillance Case Investigation Form	COVID-19 Surveillance Case Investigation Form	7	Arabic	Public	FINISHED	TS	2020 Mar 21 - 2020 Apr 8

4. You will now see an updated table on the Links & Attachments page showing the form you have updated.
5. Notify your local Public Health Unit of changes that were made to the Case Report Form

Updating the *COVID-19 Active Daily Case/Contact Monitoring Form*

1. After opening the UDF, review the information on the form completed by your RHA. Scroll down to the bottom of the form and select **ADD**.
2. The form will expand with a fresh set of daily monitoring questions for you to complete. Fill out all required (*) and applicable fields.
3. Once complete, choose **SUBMIT** which saves the updated form on the client's investigation. Close the modal (popup) window by selecting the 'X' on the top right corner.
4. You will now see an updated table on the *Links & Attachments* page showing the form you have updated.

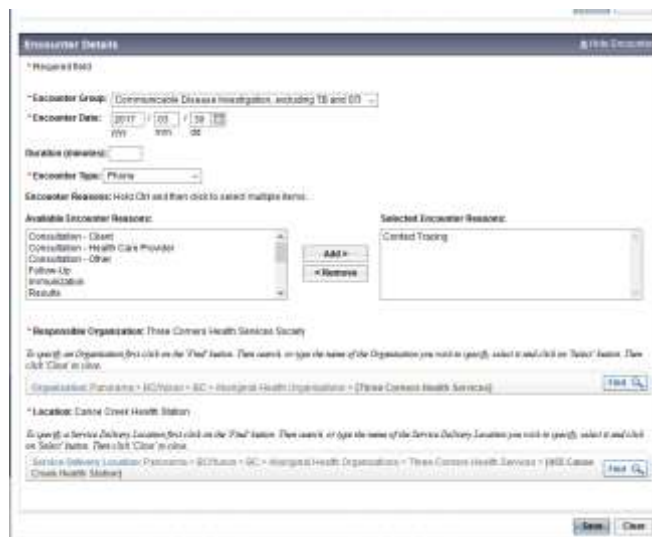
Viewing and Entering Notes



A Panorama Note for the client can be entered if additional information needs to be added that the Case Report Form or Daily Monitoring form

*For more information on Notes in Panorama, please see the [Panorama Core Guide](#). Which includes note topics:

*You can only enter an Investigation level note if the RHA has created a Coronavirus Investigation for your client.



does not capture, but is related to the Coronavirus investigation.

Viewing Notes

With your Client in Context:

LHN > **Notes**

The *Notes* screen displays with a table listing all Notes related to the client, including all Investigation and Encounter notes. You can use the *Display Notes For* search feature to filter the notes according to a specific Investigation or Encounter Group.

Entering an Investigation level Note for Coronavirus

When you meet with a client, or phone them, you chart this by creating an encounter and making notes in that encounter.

1. With the Investigation in context, select the **CREATE ENCOUNTER** button.
2. On the *Create Encounter Details* page, the *Encounter Date* will pre-populate with today's date. This can be changed.
3. Enter *Duration* (minutes) if desired.
4. Choose the *Encounter Type* from the drop-down list
5. Select the appropriate *Encounter Reason* by clicking on your choice and selecting **ADD**
6. The *Responsible Organization* and *Location* will be pre-populated with your organization. These can be changed using the **FIND** function.
7. When all fields are complete, select **SAVE**

Author Note**Note Complete**

*Enter an Unassociated Encounters (Non-Investigation) level note if there is no Investigation created for your client.

The Encounter will now be in context (open) under the Investigation. You can now chart your notes:

8. Scroll down the page to the *Notes* area
9. Select **AUTHOR NOTE** and complete the required fields:
 - a. *Subject* = **CD - COVID-19 - [SUBJECT LINE]** e.g. CD - COVID-19 - PHONE CALL
 - b. *Note Type* = Nurse
 - c. Do not use *Common Phrases*
 - d. Enter the content of your note in the free-text box
10. Select **NOTE COMPLETE** which saves your note.
11. You will get a yellow confirmation message that your note was successfully saved.

Entering an Unassociated Encounters (Non-Investigation) level note for Coronavirus

In the **Investigations Module** and with the **Client** in context:

LHN > Investigations > **Subject Summary**

1. Scroll to the *Unassociated Encounters (Non-Investigation)* section, near the bottom of the page.
2. Select **CREATE ENCOUNTER**
3. Follow steps **2-11** in the *Entering an Investigation level Note for Coronavirus* section above