



First Nations Health Authority
Health through wellness

Panorama Guide

General CD Management

Version 1.0

panorama@fnha.ca

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

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CD Management in Panorama

Communicable Disease (CD) Investigations will be created in Panorama by Regional Health Authorities (RHAs) based on positive lab results.

You will be notified by the RHA that an investigation has been opened for one of your clients. You will be given the ID of the Investigation in Panorama. Your role is to complete the Case Report form in Panorama and add any additional information required as per BCCDC guidelines.

It is important to clarify roles of the RHA and your First Nations Health Service Organization (FNHSO) when working together on an investigation. If your FNHSO is leading the follow-up, your FNHSO should be made one of the Responsible Organizations in Panorama. You may help with contact tracing, provide immunizations and give counseling. If you have any questions about your role in an investigation, please contact the CD Nurse Advisor at Health Protection, FNHA through email cd@fnha.ca or call the office.

The RHA will close the investigation when appropriate. Some forms use an asterisk (*) to indicate which elements are required.

To make the workflow easier, it is suggested to use the paper form as your guide. Complete it fully and then data enter into Panorama.

You can use Panorama to document your encounters with a client as you manage the case or you can chart in Mustimuhw as determined by your organization. Follow-up for recommendations made by a MHO should be documented in Panorama. If you use Mustimuhw to chart your daily interactions with the client, when follow-up is complete, please enter a note in Panorama that outlines steps taken and outcomes. Inform your RHA that follow-up is complete so that they can review the documentation and close the investigation

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). Enter Notes at the Investigation level.

Use the Contact Management form to track your work with Pertussis contacts. (from BCCDC website). If one of these clients becomes a case, the RHA will create an investigation for that client based on a positive lab result. Chart your encounters with contacts in ENCOUNTER NOTES. (See section re: Contacts below)

If you have questions about whether an investigation needs to be opened, please contact your RHA CD unit/nurse.

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

If you have questions about the client/case, please connect with your local RHA CD unit or contact. The FNHA CD Nurse Specialist is also available to help you.

When the case report form has been completed in Panorama, notify your RHA and FNHA by sending an email including the Client ID # and Panorama Investigation # to:

Panorama@fnha.ca

VIHA: Jenna.Graczyk@viha.ca and Wendy.Stark@viha.ca

IHA: cdunit@interiorhealth.ca

VCH:

NHA:

Getting Ready to Enter Your Information

Surveillance Forms

Adverse Events Following Immunization	+
Cocaine-Associated Agranulocytosis	+
Creutzfeldt-Jakob Disease	+
Enteric, Food and Waterborne	+
Sexually Transmitted & Blood Borne Infections	+
Tuberculosis	+
Vaccine Preventable & Respiratory	+
Vectorborne, Zoonotic & Environmental	+

*Note: In the form, the items with an asterisk * are required to be completed.

Vaccine Preventable & Respiratory

Enterovirus D68

- [Enterovirus D68 Case Report Form](#)
- [Neurologic Illness Associated with Enterovirus D68 Case Report Form](#)

All lab-confirmed cases of enterovirus D68 (EV-D68) should be entered in an electronic data management system for communicable diseases (PANORAMA/PARIS). For EV-D68 cases associated with respiratory (non-neurologic) clinical presentation, please use the general 'Enterovirus D68 Case Report Form'. For EV-D68 cases associated with neurologic illness, please use the 'Neurologic Illness Associated with Enterovirus D68 Case Report Form'. Case definitions can be found in the linked forms.

Hepatitis B: Acute HBV

- [Acute HBV Case Report Form](#)

Download the BCCDC paper forms as your guide:

1. Go to <http://www.bccdc.ca/health-professionals/professional-resources/surveillance-forms>
2. Click on the + to open the link to show a list of available *Case Report* forms. Most often this will be in the *Vaccine Preventable & Respiratory* section.
3. Scroll down to the appropriate disease (listed in alphabetical order) and select the hyperlink to open the form.
4. Print off the form which includes instructions for entry into Panorama.

Completing the Case Report Form

Search by:

Investigation ID:

Investigation Group:

Row Actions:

	Investigation ID	Last Name, First Name	Date of Birth
<input checked="" type="checkbox"/>	70430	TIME, Justin	1979 Sep 22

Investigation ID: [70430](#) . St: OF

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

Row actions:

	Form ID	Form Name
<input checked="" type="radio"/>	94	Pertussis Case Inves Form

Completing the Case Report form for an existing Investigation.

1. With the Investigation module open, Choose Search for Investigation. Enter the ID# (only) and select SEARCH.
2. Select the Investigation by clicking on the box to the left in the table.
3. Select UPDATE. This will put the Investigation in context. Skip to step 7.
4. If you do not know the Investigation ID, Search for the client and select VIEW SUBJECT SUMMARY from row choices on search result table
5. On Subject Summary page, the first area is for Communicable Diseases excluding TB and STI Encounter Group.
6. Open the appropriate Investigation by clicking on the Investigation ID number which is blue and underlined. Eg [1234](#).
7. To bring up the Case Report form, go to the Left Hand Navigation pane under Investigation Details choose Links & Attachments
8. You will see a table with Available Forms. For most diseases, there will be only one form. If there is more than one, they are all required to be completed.
9. Choose the form by clicking in the circle to the left of the form in the table.
10. Choose Fill Out Form button just above the table.
11. The form will open in a new window. Work through the form completing all fields.
12. Once complete, choose SUBMIT which saves the form on the client's file.
13. Close the window by selecting the X on the top right corner.

*Please see Panorama Guide: Core Data Entry for more information about Encounters and Notes

14. You will now see a new table on the Links & Attachments page showing the form you have completed.

15. Inform your contact at the RHA that the case report form is complete.

You must also complete areas such as Risk Factors, Signs & Symptoms, External Sources as outlined on the Case Report Form from BCCDC. (see instructions below).

Encounters and Notes

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 field are complete, select SAVE

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

1. Scroll down the page to the Notes area
2. Select Author Note
3. Subject = Your FNHSO and Disease e.g. Three Corners Pertussis
4. Note type = Nurse
5. Do not use Common Phrases
6. Enter the content of your note in the box

7. Select Note Complete which saves your note.

Signs & Symptoms

If No S&S Present

1. Ensure Investigation is in context (open – that is, the Investigation Header is on the page at the top under the Client header)
2. Under LHN> Investigation>Signs & Symptoms
3. Scroll down to the table where the pertinent S&S are listed.
4. Choose the Select All button
5. Under Present, choose NO from drop-down list
6. Select Apply Update button
7. SAVE

Recording S&S Which are Present

1. Ensure Investigation is in context (open – that is, the Investigation Header is on the page at the top under the Client header)
2. Under LHN> Investigation>Signs & Symptoms
3. Scroll down to the table where the pertinent S&S are listed.
4. Choose the Select All button
5. Under Present, choose NO from drop-down list
6. Select Apply Update button
7. Choose Deselect All
8. One by one, select the S&S that is present by clicking in the box at the left
9. Under Present, choose YES from Drop-down list
10. Enter Onset Date if known
11. Select Apply Update
12. Repeat steps 8-11 until all S&S entered
13. To add details for any S&S, click on the No hyperlink under Details Exist

14. Observation Details - Fill out details and ADD
15. Continue with other S&S as required
16. SAVE

Risk Factors

Ensure the Investigation header is at the top of the page below the general client information.

LHN>Subject>Risk Factors

Scroll to the bottom of the Risk Factor page where there is a table containing all pertinent Risk Factors.

IF NO RISK FACTORS ARE IN CLIENT FILE FROM ANOTHER INVESTIGATION AND THERE ARE NO RISK FACTORS IDENTIFIED

1. Select All
2. Set Response to: NO from drop-down
3. Select SET button
4. SAVE

IF NO RISK FACTORS ARE IN CLIENT FILE FROM ANOTHER INVESTIGATION AND THERE ARE RISK FACTORS IDENTIFIED

1. Choose SELECT ALL button
2. Set response to NO
3. DESELECT ALL. If any risk factors are present, choose the box next to that risk factor
4. Set response to PRESENT. Include dates if appropriate
5. SAVE

IF RISK FACTORS ARE PRESENT FROM ANOTHER INVESTIGATION you must follow this procedure:

1. One by one, Select each Risk Factors which remains the same, whether no or yes
2. Select UPDATE

3. Just above the table, Click in the box Risk Factor Pertinent to Investigation in Context
4. Apply Update
5. Repeat step 1-4 for the entire list
6. Select any Risk Factors which were not previously YES but now are identified by clicking in the box to the left of the Risk Factor on the table
7. Select UPDATE
8. Just above the table, Click in the box Risk Factor Pertinent to Investigation in Context
9. Change Response to YES from NO
10. Enter a start date if known
11. Reported by: Select appropriate response from drop-down list. Specify: enter information about the reporter here if appropriate
12. Select Apply Update

Repeat steps 6-12 for other active Risk Factors not yet identified.

SAVE

Other important information to be completed for a Confirmed Case

LHN > Client Details > Personal Information

1. Ensure address and phone numbers are correct including ON RESERVE information if appropriate
2. Ensure the correct Health Authority is in Health Region Information
3. LHN > Client Details > Aboriginal information – Update Aboriginal Information
4. LHN > Client Details > Immigration Information
 - a. Indicate if Canadian citizen (yes/no)
 - b. Fill out other applicable areas if client is an immigrant

*Please see Panorama Guide: Core Data Entry for more information about Personal Information

Other External Source

Name:

Role/Organization:

Country:

Address Line 1:

Address Line 2:

Province/Territory: City:

Postal Code:

Phone Number: () - International

Fax Number: () International

Effective Date From: 2017 / 03 / 30 Effective Date To: / /

Service Delivery Location

To specify a Service Delivery Location, first click on the "Find" button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on "Select" button. Then click "Close" to close.

Service Delivery Location: Panorama > BC/Yukon > BC > Aboriginal Health Organizations > Three Corners Health Services > [451 Three Corners Health Centre]

Type: Search

Start typing the name of the Service Delivery Location. Matches will begin to appear below. Select the match with the keyboard or mouse.

SDL Name: Three Corners Health Centre

City, Province: Williams Lake, British Columbia Status: Active

SDL Address: 150 North First Avenue P.O. Box 4720 Williams Lake, British Columbia

SDL Contact Phone Number: Administrative: (250) 398-9614

SDL Contact Fax Number:

- c. Country of Birth. If Canada, indicate Province (if known)
 - d. If comments are entered, ADD
5. SAVE

External Sources

This is where to record the Family Physician, NP or FNHSO involved with this client. If the client doesn't have a GP or NP, use your FNHSO location.

1. With Investigation in Context (Investigation Header at the top of the page under the Client header) go to Left Hand Navigation bar, under Investigation Details, select External Sources
2. Please use the Other Provider area to enter the information about the Physician or NP
3. When complete, select Add. SAVE
4. If the client does not have a GP or NP, FIND and Select your Organization
 - a. Use the drop-down lists to select the address and contact information
5. Select Add. SAVE

Charting Notes for Contact Tracing

Do not create an investigation for contacts of a case. Instead, chart your encounters at the Client Level.

In the Investigation module, have the Client in context (only the client header at the top of the page)

1. Select Encounter Details from the Left Hand Navigation bar
2. Use the drop-down lists to make your selections
3. SAVE
4. Scroll down to NOTES area. Choose AUTHOR NOTE

Encounter Details Hide Encounter

* Required field

* Encounter Group: Communicable Disease Investigation, excluding TB and STI

* Encounter Date: 2017 / 03 / 30

Duration (minutes):

* Encounter Type: Phone

Encounter Reasons: Hold Ctrl and then click to select multiple items.

Available Encounter Reasons:

- Consultation - Client
- Consultation - Health Care Provider
- Consultation - Other
- Follow-Up
- Immunization
- Results

Selected Encounter Reasons:

- Contact Tracing

* Responsible Organization: Three Corners Health Services Society

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 > BC/Yukon > BC > Aboriginal Health Organizations > [Three Corners Health Services] Find

* Location: Canoe Creek Health Station

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 > BC/Yukon > BC > Aboriginal Health Organizations > Three Corners Health Services > [455 Canoe Creek Health Station] Find

Save Clear

5. Subject: FNHSO+Disease i.e. Three Corners Pertussis
6. Note type: Nurse
7. No common phrases to choose
8. Enter your note
9. Choose Note Complete to save your note.