First Nations Health Authority
Health through wellness

*Prior to entering TB screen, refer to the **TB Algorithm** to determine how to enter information into Panorama

Panorama TB Screening Data Entry – QuickGuide (for TB Guide #1)

In the **INVESTIGATIONS** module, use the search page to find your client and select the row action **VIEW SUBJECT SUMMARY**. If the client does not have a Panorama chart, **CREATE** a client chart.
***Note**: This Quickguide is to only be used for client TB screens that have a **NEGATIVE** TST, **NO** Signs & Symptoms of TB AND **NO** TB Risk Factors

EDIT/UPDATE CLIENT INFORMATION

	Menu/Actions	Important Notes
1	**With your client in context:** LHN > Client > Client Details > **Client Demographics**	**Edit and update the client's *Client Demographics*** Ensure that Health Region Organization is selected to the client's branch (location of closest Public Health Unit for client location of residence) Ensure client address and phone numbers are updated
2	LHN > Client > Client Details > **Indigenous Information**	**Edit and update client's *Indigenous Information.*** Complete questions and enter client's current Indigenous Organization. The name of your community organization will have an **(I)** following it's name.
3	LHN > Subject > Client Details > **Immigration Information**	Complete: *Canadian Citizen (yes/no); Country Born In, Province Born In* fields. Complete other fields on this page if known.
4	LHN > Subject > **Allergies**	Add/Edit client Allergies or set to/confirm **NO KNOWN ALLERGIES**

ENTER CLIENT TST CONSENT

	Menu/Actions	Important Notes
5	LHN > Subject > Consent Directives > **All Services**	**ADD** new TST consent. Complete all required fields and select **APPLY** and **SAVE** to save your work.

INITIAL APPOINTMENT (TST GIVE)

	Menu/Actions	Important Notes
6	LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**	**UPDATE** client's ***TB History Summary*** then **CANCEL** to go back.
		Select **CREATE TB SKIN TEST.** Enter required fields, *Reason for Test* and *Test Given Details* section
		If client is being sent for CXR or sputums, enter CXR location (hospital, clinic) under ***Follow Up Details.*** **SAVE** your work.

TST READ APPOINTMENT/NO SHOW

Search for your client and select the row action **VIEW SUBJECT SUMMARY**. Scroll to your current Investigation and select the *Investigation ID* hyperlink

	Menu/Actions	Important Notes	
7	LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**	In the *TB Skin Test and Follow Up Summary* section, select the radio button (**O**) next to your TB give/service visit. Select **VIEW/UPDATE** Scroll down and complete the *Test Read Details* and *TB Follow Up* section	
		For negative screens (ie. No S&Sx, no RF, (-) TST) select *Follow Up:* ***No Follow Up Required***	**If client does not show up for their TST read**, under *Test Read Details* section, select *Interpreted Result:* ***Not Read*** and under the *TB Follow Up* section, select *Follow Up:* ***Repeat Skin Test***
		SAVE your work.	

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*Prior to entering TB screen, refer to the **TB Algorithm** to determine how to enter information into Panorama

Panorama TB Screening Data Entry – QuickGuide (for Guide #2 and Guide #3)

In the **INVESTIGATIONS** module, use the search page to find your client and select the row action **VIEW SUBJECT SUMMARY**. If the client does not have a Panorama chart, **CREATE** a client chart.

EDIT/UPDATE CLIENT INFORMATION

	Menu/Actions	Important Notes
1	**With your client in context:** LHN > Client > Client Details > **Client Demographics**	**Edit and update the client's *Client Demographics*** Ensure that Health Region Organization is selected to the client's branch (location of closest Public Health Unit for client location of residence). Ensure client address and phone numbers are updated.
2	LHN > Client > Client Details > **Indigenous Information**	**Edit and update client's *Indigenous Information.*** Complete questions and enter client's current Indigenous Organization. The name of your community organization will have an **(I)** following it's name.
3	LHN > Subject > Client Details > **Immigration Information**	Complete: *Canadian Citizen (yes/no); Country Born In, Province Born In* fields. Complete other fields on this page if known.
4	LHN > Subject > **Allergies**	Add/Edit client Allergies or set to/confirm **NO KNOWN ALLERGIES**

CREATE A TB INVESTIGATION

	Menu/Actions	Important Notes
5	LHN > Investigation > **Subject Summary** (Scroll to the *Tuberculosis Disease Investigation Encounter Group* section)	**CREATE INVESTIGATION.** Complete required (*) fields. *Classification: Case – Person Under Investigation; Disposition: Screening.* Reporting Notification: Select *Location* radio button and enter your SDL. **SUBMIT**
6	LHN > Investigation > Investigation Details > **External Sources**	**FIND** and **SELECT** your *SDL, SDL address, phone and fax number*. Select *Other External Source* and enter any other external sources (eg. Family practitioner, specialist). **ADD** each source and **SAVE** the page.

Your investigation is now created and ready to accept information. There will be at least 2 banners at the top of the page, the **Client** and **Investigation banner** indicates that everything you enter will be captured as part of this particular investigation.

INITIAL APPOINTMENT (TST GIVE or TB FOLLOW UP ONLY)

	Menu/Actions	Important Notes
7	LHN > Subject > **Risk Factors**	Using the table, enter all present Risk Factors. DO NOT CHANGE any 'yes' Risk Factors from previous investigations to 'no'. **SAVE** all changes. Please **TB Guide #2 or #3** for further details.
8	LHN > Investigation > **Signs & Symptoms**	Using the table, enter all present and non-present client symptoms. Add details as needed. **SAVE** all changes
9	LHN > Subject > Consent Directives > **All Services**	**CREATE NEW** TST consent. Change *Directive Status* to ***Confirmed*** and complete fields. **SUBMIT.**
10	LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**	**UPDATE** client's ***TB History Summary*** then **CANCEL** to go back. Select **CREATE TB SKIN TEST** or **CREATE TB FOLLOW UP ONLY**. Enter a TST (Guide #2): ***Create TB Skin Test*,** enter required fields, *Reason for Test* and *Test Given Details* section. Previous positive TST (Guide #3): ***Create TB Follow Up Only*,** enter required fields, *Reason for Test* and *TB Follow Up* details If client is being sent for CXR or sputums, enter CXR location (hospital, clinic) under ***Follow Up Details.*** **SAVE** your work. (**NEXT PAGE ➔**)

*Prior to entering TB screen, refer to the **TB Algorithm** to determine how to enter information into Panorama

TST READ APPOINTMENT/NO SHOW

Search for your client and select the row action **VIEW SUBJECT SUMMARY**. Scroll to your current investigation and select the *Investigation ID* **hyperlink**

	Menu/Actions	Important Notes
11	LHN > Investigation > Treatment & Interventions > **TB Skin Test Summary**	In the *TB Skin Test and Follow Up Summary* section, select the radio button (**O**) with your TB give/service visit. Select **VIEW/UPDATE** Scroll down and complete the *Test Read Details* and *TB Follow Up* section
		For negative screens select *Follow Up: No Follow Up Required*
		For positive screens, or if follow up is required (eg. MD clearance) select *Follow Up: CXR* or *CXR & Sputum* and in the *Follow Up Details* comment box, enter the location where you send the client for their CXR
		If client does not show up for their TST, under *Test Read Details* section, select *Interpreted Result: **Not Read*** and under the *TB Follow Up* section, select *Follow Up: **Repeat Skin Test***
		SAVE your work

CLOSING TB INVESTIGATIONS

Client screens that have a negative TST, no signs and symptoms, no risk factors and no follow-up is required can be closed. All other cases, FNHA TB Services and BCCDC will be responsible for closing those investigations.

	Menu/Action	Important Notes
12	**Client** and **Investigation** in context: LHN > Investigation > Investigation Details > **Disease Summary**	Select **UPDATE.** Scroll to the bottom of the page and select the radio button (**O**)in the table and select **UPDATE** Above the table, change the dropdown box to *Classification: Case-Not a Case* **APPLY UPDATE** and **SAVE**
13	LHN > Investigation > Investigation Details > **Close Investigation**	Select **CLOSE INVESTIGATION.** A warning popup will come up confirming you want to close. Select **OK**

IF FOLLOW UP IS REQUIRED

Contact and notify the FNHA TB Services Team **FNHATB@fnha.ca** with the C*lient ID* and *Investigation ID* in the email header if you have:

- Sent a client for CXR and/or Sputum collection
- If they are a contact to a current TB case
- If they require further follow up (eg. special medication start, treatment centre eligibility requirement)