

Panorama – IOM WORK STANDARD	Create a Case Investigation – IOM WS			Name of Activity: Case Investigation -Create		
	Role performing Activity:					
	Location:			Department:		
	Document Owner:					
Date Prepared: March 26, 2018		Last Revision: July 25, 2022		Date Approved:		

Pre-requisites: Client has been created/demographics updated and is in context.

THREE ESSENTIAL TASKS

1. CREATE INVESTIGATION
2. SELECT 'CLIENT HOME ADDRESS AT TIME OF INVESTIGATION'
3. ENTER & UPLOAD LAB

1. **Receive a positive lab report for a notifiable disease.**
LHN > INVESTIGATION > SUBJECT SUMMARY
YIELD: Ensure there is not already an investigation on this client for this disease.
 - Subject Summary page will load
 - Scroll to the appropriate Encounter group
 - Click on "Create Investigation" Button

- Create Investigation page will load*
- Select Disease from drop down list
 - Select Authority – Always select "Provincial"
 - Select Classification as
 - **CASE - CONFIRMED: IMMEDIATELY BASED ON LAB REPORT ALONE FOR THE FOLLOWING;**
Enterics: Campylobacteriosis, Cryptosporidiosis, Cyclosporiasis, Giardiasis, Salmonellosis, Shigellosis, Verotoxigenic E. coli
STBBIs: Hep C, Hep B, Chlamydia, Gonorrhoea, Granuloma inguinale, LGV
Vectorborne: Malaria
 - **CASE - PERSON UNDER INVESTIGATION** for all other diseases require additional information to meet confirmed classification Refer to Case Definition in CDC Manual for disease. This should be updated as soon as possible based on clinical information and client history and can be progressive from PUI → Suspect → Confirmed as appropriate
 - **CASE – PREVIOUSLY REPORTED:** Available for previously reported (HIV, HB, HC, Syphilis, CJD, malaria and lyme disease) when new documentation is needed.
 A 'Flag' investigation may exist (if it was reported in iPHIS). IF new information needs to be documented or the client required additional follow-up. (HIV death notice, Syphilis RPR, Hep C that was lost to follow-up re-presents), create a 'previously reported' investigation, do not document inside the 'flag' investigation. IPHIS remains the reporting source.
 - Select Classification Date
 - **NOTE: Date classification is assigned/updated by investigator**

- Select Microorganism - must be selected if known. Is required for incubation and communicability to be entered. Disease specific fields may auto populate as below;
 - Select Genotype (HCV/HBV/HAV/Measles) or Virus Type (HIV) – if available
 - Select EMM Type from drop down list (iGAS) – if available

- Information Source – epi link, select if this case is epi linked to another case. See policy on Epi link field use. **Note: Add the risk factor of ‘contact to a known case’ and include the investigation ID # of the source/ epi linked case in the ‘additional info’ section of the risk factor.**
- Priority – **leave blank**
- Select Disposition from the drop down list – See definitions in the data dictionary
 - **NOTE: Select Disposition as “Pending” when referring to another Public Health office (Responsible Org)**
- Select Responsible Organization from the drop down box
 - This is the area assigned as the responsible organization for the investigation follow-up. (See Assign-Transfer Case Investigation to a different Org – IOM WS).
 - Responsible Org. can be shared if two areas are working to complete the investigation. (See Shared investigations between ORGs – IOM WS)
- Select Responsible Organization Workgroup from drop down list - as ‘Workgroup’
- Select Responsible Organization Date
 - Definition: Date Responsible organization assigned
- Select Investigator Organization from drop down list (defaults to your own)
- Select Investigator Workgroup from drop down list – as ‘Workgroup’
- Investigator Name - **leave blank**
- Select Assigned Date
 - Definition: Date that the responsible organization is assigned
- Click on radio button “Other” in Reporting Notification – located under the heading “Reporting Notification” bar
 - Enter appropriate reporting source (ie. Lab, physician, etc)
- Select Type of Reporting Source from drop down list - Optional
- Select Method of Notification from drop down list - Optional
- **Report Date (Sent) – DO NOT USE - Bottom left of page– leave blank**
- **Report Date (Received) - enter date**
 - **Definition: the day public health staff received the notification (ie. verbal or lab)**
- Click on “Submit” Button
- Disease Summary page will load

2.	<p>LHN > INVESTIGATION > INVESTIGATION DETAILS > INVESTIGATION INFORMATION</p> <ul style="list-style-type: none">➤ Select 'Client Home Address at Time of Initial Investigation'. If not present in the drop down – go to client demographics and add address' as needed. May only be city and postal code if specifics are not known. <u>Use Rules of residency to select this address – CD manual Sec 10.</u>➤ Diagnosis section on this page is ONLY to be used for AIDS cases.
3.	<p>Lab report entry – see work standards;</p> <ul style="list-style-type: none">○ Lab Quick Entry and○ 3.5 Document Management uploading