

<b>Update a Case Investigation – IOM WS</b>	<b>Name of Activity:</b> Case Investigation - Updating		
	<b>Role performing Activity:</b>		
	<b>Location:</b>	<b>Department:</b>	
	<b>Document Owner:</b>		
	<b>Date Prepared:</b> April 26, 2018	<b>Last Revision:</b> July 2022	<b>Date Approved:</b>

**ASSUMPTIONS:** Client is in context, Investigation created, Lab is entered and uploaded.  
Not all diseases have data for every field listed below – refer to the disease specific DCW.

<b>Essential Tasks:</b>	
<b>1.</b>	<p><b>LHN &gt; SUBJECT SUMMARY</b></p> <ul style="list-style-type: none"> <li>➤ Click on the investigation ID hyperlink in the applicable encounter group <ul style="list-style-type: none"> <li>○ This will open up the Investigation Summary page</li> </ul> </li> <li>➤ Click on the “Investigation Details” hyperlink <ul style="list-style-type: none"> <li>○ This will open up the Disease Summary page</li> </ul> </li> <li>➤ Click Row Actions “Add” Button <ul style="list-style-type: none"> <li>○ This will open up the <b>Disease Event Details page</b></li> </ul> </li> <li>➤ Select Disease Origin to – Not relevant</li> <li>➤ Living on Reserve (DO NOT USE)</li> <li>➤ Select Disease from drop down list if not prepopulated</li> <li>➤ Select Microorganism from drop down list if not prepopulated</li> <li>➤ Select Virus/Genotype (disease specific) from drop down list – if applicable</li> <li>➤ Information Source – select ‘epi link’ if known (be sure to add risk factor of ‘contact to a known case’ with the known case’s investigation ID # in the add’l info field/</li> <li>➤ Select Site(s); Click “Add” Button – disease specific – must enter if available. <ul style="list-style-type: none"> <li>• The use of Site is disease specific. For example, within influenza and COVID-19 investigations the site reflects severity. In the context of Monkeypox, the site reflects the INITIAL presentation of illness (signs and symptoms will reflect the progression of illness when entering through the monitoring period).</li> </ul> </li> <li>➤ Enter Staging from drop down list - disease specific – must enter if available.</li> <li>➤ <b>IMPORTANT: Updating Classification</b> <ul style="list-style-type: none"> <li>○ <b>The Classification of “Person Under Investigation” must be updated to a higher level of certainty as soon as possible in the course of the investigation (see Policy – Updating Classification).</b></li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ <b>If Classification has changed, click on radio button beside existing classification</b> at bottom of page. Will bump the classification up to the section above. Change the classification and date to current day. Click add.</li> </ul> <p>Defintion: Date classification is assigned/updated by the investigator</p> <ul style="list-style-type: none"> <li>○ Click on “Apply Update” Button if the Classification has been updated.</li> </ul> <p>➤ Click SAVE</p>
2.	<p><b>With Investigation in context:</b></p> <p><b>LHN &gt; INVESTIGATION DETAILS &gt; INVESTIGATION INFORMATION</b></p> <ul style="list-style-type: none"> <li>➤ <b>Priority – DO NOT USE</b></li> <li>➤ Select Disposition from drop down list and update as needed as per definitions in the configuration dictionary. – update status from open to closed as per data dictionary and CDC Manual.</li> <li>➤ Disposition Date <ul style="list-style-type: none"> <li>○ <b>Defintion: Date disposition is selected</b></li> </ul> </li> <li>➤ <b>IMPORTANT: Client Address at the time of infection.</b> Select <b>‘Address at time of infection’</b>. If not present in the drop down – go to client demographics and add addresses as needed. If street address is not known, enter the city. <u>Use Documenting Geography to select the appropriate address.</u></li> </ul> <p><b>Definition: Will reflect where they were living when they were tested</b> – this is the <u>physical address</u> whenever possible (i.e. First nation community name VS box #).</p> <p><b>SEE policy <i>Address at time of the infection field</i></b></p> <ul style="list-style-type: none"> <li>➤ Click “Save” Button</li> </ul> <p>NOTE: Diagnosis Area is only used for AIDS Defining Illnesses.</p>
3.	<p><b>LHN &gt; INVESTIGATION&gt;SIGNS &amp; SYMPTOMS</b></p> <ul style="list-style-type: none"> <li>➤ See Signs and Symptoms IOM -WS</li> </ul>
4.	<p><b>LHN &gt; INVESTIGATION &gt; INCUBATION AND COMMUNICABILITY</b></p> <ul style="list-style-type: none"> <li>➤ See Incubation and Communicability – IOM WS</li> </ul>
5.	<p><b>LHN &gt; SUBJECT &gt; RISK FACTORS</b></p> <ul style="list-style-type: none"> <li>➤ See – Risk Factor – IOM WS</li> </ul>
6.	<p><b>UDF</b></p> <ul style="list-style-type: none"> <li>➤ Only specific diseases require a UDF. The DCW will have a trigger for the investigator.</li> <li>➤ See UDF – IOM WS</li> </ul>
7.	<p><b>DOCUMENT MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>➤ Contact worksheets, non standard letters, public health orders, etc</li> <li>➤ See - Document mgmt – uploading – IOM-WS</li> </ul>

8.	<p><b>COMPLICATIONS</b></p> <ul style="list-style-type: none"> <li>➤ Complications will only be used for a small number of specific diseases. Will be identified on the DCW. See Complications – IOM WS</li> </ul>
9.	<p><b>LHN &gt; SUBJECT &gt; IMMS HISTORY INTERPRETATION</b></p> <ul style="list-style-type: none"> <li>➤ See Imms History Interpretation – IOM WS</li> </ul>
10.	<p><b>LHN &gt; INVESTIGATION &gt; MEDICATIONS &gt; MEDICATION SUMMARY</b></p> <ul style="list-style-type: none"> <li>➤ See Medications – IOM WS</li> </ul>
11.	<p><b>LHN &gt; INVESTIGATION&gt;TREATMENT AND INTERVENTIONS &gt; INTERVENTION SUMMARY</b></p> <p>Documentation of the Public Health actions and notes.</p> <ul style="list-style-type: none"> <li>➤ See Interventions – IOM WS</li> </ul>
12.	<p><b>LHN &gt; INVESTIGATION &gt; OUTCOMES</b></p> <p>Documentation of medical actions (intubation, ICU) and the start date of the intervention and results (recovered, fatal).</p> <ul style="list-style-type: none"> <li>➤ See Outcomes –IOM WS</li> </ul>
13.	<p><b>CONTACTS</b></p> <p>Only contacts to Hep B, HIV, Syphilis, <b>Monkeypox (high risk exp[osures]</b> require an individual contact investigation be created in Panorama.</p> <ul style="list-style-type: none"> <li>➤ See Contact investigation – Create – IOM WS</li> <li>➤ Contact follow-up details will be documented within the contact investigation.</li> </ul> <p><u>All contact line lists will be uploaded into the case investigation (including those with a panorama contact investigation created - Hep B, HIV, Syphilis, <b>Monkeypox (high risk exp[osures]</b>).</u></p> <ul style="list-style-type: none"> <li>➤ See Document Mgmt – uploading – IOM WS</li> </ul> <p>Contact follow up where investigation has not been created (individuals or groups) will be;</p> <ul style="list-style-type: none"> <li>• recorded on the worksheet before uploading, or</li> <li>• indicator of transferred/referred to another location, or</li> <li>• indicator of follow up work being documented in a different electronic system</li> </ul>
14.	<p><b>EXPOSURE</b></p> <p>A single transmission event will be required for the entire communicable period to record the total number of contacts.</p> <ul style="list-style-type: none"> <li>➤ See Exposure – Tranmission events and total contacts – IOM WS</li> </ul> <p>Acquisition Events</p> <ul style="list-style-type: none"> <li>➤ See Exposure – Acquisition Events – IOM WS</li> <li>➤ See Travel – Exposure – Acquisition – IOM WS</li> </ul>
15.	<p><b>LHN &gt; NOTES</b></p> <p>Do not use</p> <p>All investigation narrative notes are to be recorded in <i>intervention – investigation findings</i>.</p>