

Panorama – IOM WORK STANDARD	Contact Investigation – Create			Name of Activity: 3.6 Contact Investigation - Create		
				Role performing Activity: CDC Nurse		
	Location:			Department:		
	Document Owner:					
Date Prepared: May 24, 2018		Last Revision: Feb 2022		Date Approved:		

See 'Contact Investigation/Documentation in Panorama – IOM' Policy
'Contact-More than one disease within a single investigation' –IOM WS

Essential Tasks:	
1.	<p>ONLY IDENTIFIABLE CONTACTS TO CASES OF HIV, SYPHILIS AND HEPATITIS B (ACUTE) and MONKEYPOX (high risk exposures) require a Panorama investigation created – see contact investigation policy for definition of 'identifiable contact'.</p> <p>Minimum standard;</p> <ol style="list-style-type: none"> 1. Contact investigation is created in Panorama for HIV, Syphilis, Heb B contacts and Monkeypox (high Risk Exposures) 2. Risk Factor – contact to a known case 3. Intervention - Immunoprophylaxis (if applicable for MPX or Hepatitis B) 4. Medications - if applicable (i.e. Bicillin for syphilis contacts) 5. Close investigation <p>Follow-up work may be recorded in Panorama investigation, but is not required.</p> <p><i>NOTE: Contacts to other notifiable diseases may have a contact investigation created and documentation in Panorama.</i></p> <p>LHN > INVESTIGATION > SUBJECT SUMMARY</p> <ul style="list-style-type: none"> ○ YIELD: Ensure there is not an existing recent investigation for this disease on this client. When an HIV case investigation exists, proceed to step 3 – Risk Factor. ➤ Subject Summary page will load ➤ Scroll to the appropriate Encounter group ➤ Click on "Create Investigation" button

<p>2.</p>	<p>Create Investigation page will load</p> <ul style="list-style-type: none"> ➤ Select Disease from drop down list ➤ Select Authority – Always select “Provincial” ➤ Select Classification from drop down list <ul style="list-style-type: none"> ○ NOTE: Must meet Contact Definition in CDC Manual. ○ NOTE: choose “Contact – Contact”. If it is determined through the investigation that the client does not meet contact definition, it can be changed to “Contact – Not a contact” before closing. ➤ Select Classification Date <ul style="list-style-type: none"> ○ NOTE: Date classification is assigned/updated by investigator ➤ Select Microorganism if applicable ➤ Select Information Source – epi link, select if appropriate. Note: Be sure to add a risk factor of ‘contact to a known case’ and include the investigation ID # of that known case in the additional info section of the risk factor. ➤ Priority – leave blank
	<ul style="list-style-type: none"> ➤ Select Disposition from the drop down list – See definitions in the data dictionary <ul style="list-style-type: none"> ○ NOTE: Select Disposition as “Pending” when referring to another Public Health office (Responsible Org) ➤ Select Responsible Organization from the drop down box <ul style="list-style-type: none"> ○ This is the area assigned as the responsible organization for the investigation follow-up. (See Assign - Transfer a Contact Investigation to a different Org – IOM WS) ○ Responsible Org. can be shared if two areas are working to complete the investigation. (See Shared ORG – IOM WS) ➤ Select Responsible Organization Workgroup from drop down list – use Workgroup ➤ Select Responsible Organization Date <ul style="list-style-type: none"> ○ Definition: Date Responsible organization assigned ➤ Select Investigator Organization from drop down list ➤ Select Investigator Workgroup from drop down list – use Workgroup ➤ Investigator Name - leave blank ➤ Select Assigned Date <ul style="list-style-type: none"> ○ Definition: Date that the responsible organization is assigned ➤ Click on radio button “Other” in Reporting Notification – located under the heading “Reporting Notification” bar <ul style="list-style-type: none"> ○ Enter appropriate reporting source (ie. ‘Case’ – do not include the case’s name) ➤ Select Type of Reporting Source from drop down list - Optional ➤ Select Method of Notification from drop down list – Optional ➤ DO NOT USE- Report Date (Sent) — leave blank ➤ Select Report Date (Received) date <ul style="list-style-type: none"> ○ Definition: the day public health staff received the notification (ie. verbal or paper) ➤ Click on “Submit” Button ➤ Disease Summary page will load

3.	<p>Create a Risk Factor</p> <ul style="list-style-type: none"> ➤ Note: Be sure to add a risk factor of ‘contact to a known case’ and include the investigation ID # of that known case in the additional info section of the risk factor.
4.	<p>Create an Intervention for Immunoprophylaxis or Treatment if applicable.</p>
5.	<p>Document Immunoprophylaxis details in Panorama Imms module for any vaccine or Immune globulin Document medications for chemoprophylaxis in Treatment – refer to Work Standard – Medications</p>
6.	<p>Documentation of Contact follow up may be done in Panorama, other database or paper.</p> <p>If documentation will not be done in Panorama, create an intervention – other investigation findings, investigator notes and indicate where follow up work may be found.</p> <p>Close the contact investigation.</p>
7.	<p>Contact becomes a Case during this investigation</p> <ul style="list-style-type: none"> • Update the classification from Contact to Case ((this is not a selection on the drop list (PROD) select Case Confirmed?))– including the date the case was diagnosed. Continue follow up within the same investigation. (No need to create a new investigation, so long as the contact investigation does not include multiple diseases) • If it was ‘closed’, you will need to re-open the investigation and select a disposition. <p>Contact becomes a case at a later date (based on incubation and stage – investigator determines was not related to the previous contact investigation)</p> <ul style="list-style-type: none"> • Leave original ‘contact’ investigation intact • Create a new ‘case’ investigation for the same disease
	<p>Revision</p>
<p>June 29, 2022</p>	<p>Added Monkeypox contact requirement and provided clarification for documenting public health interventions of prophylaxis.</p>