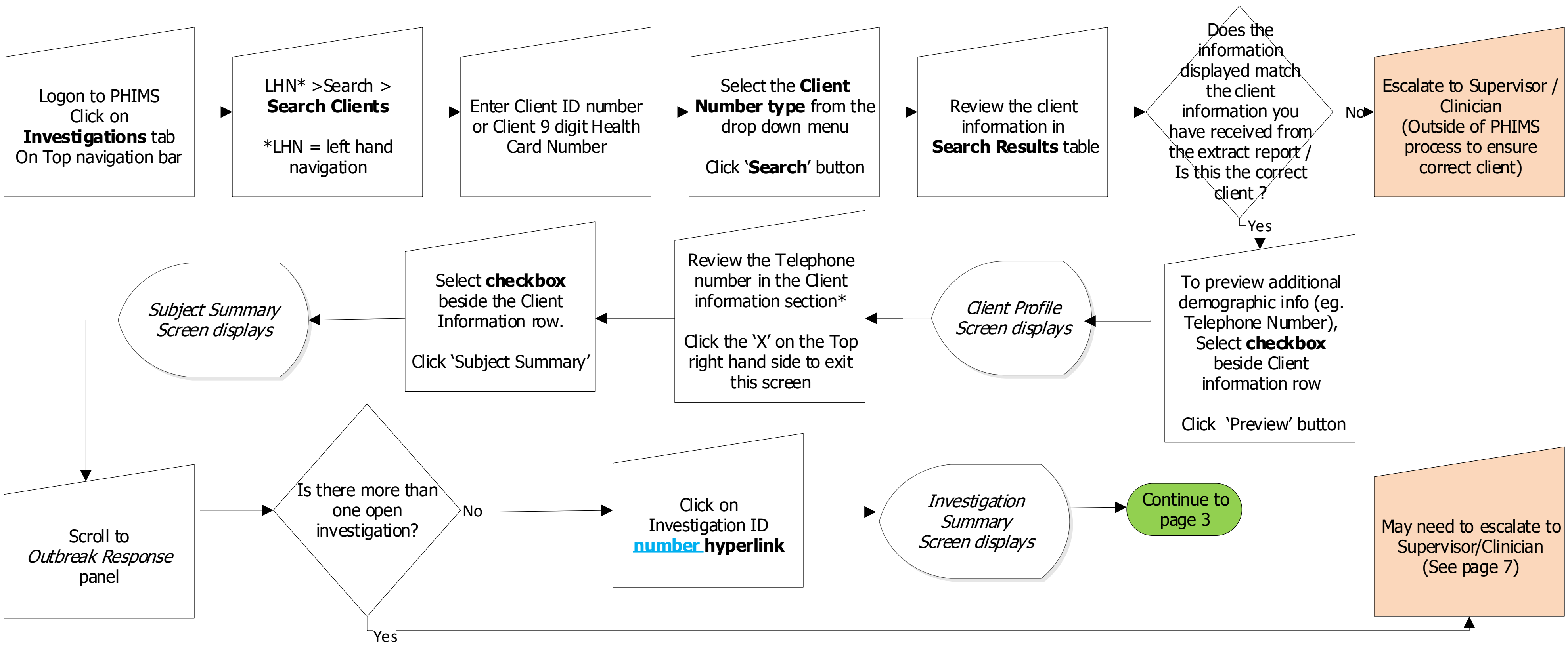
Quick Reference Card (QRC) for Covid-19 Call Center
Active Monitoring (AM) Case or Contact
Search Client & Investigation - Place 'In Context'



Searching client records:
PHIMS client records can be searched in a variety of ways.
For Call Centers it is recommended to search for a client file using the Client ID number provided on the extract/ report from Mb Health. Client ID is a unique number in PHIMS. The client will not be aware of this number. The client record can also be accessed using the Mb PHIN number (PHIMS refers to this number as the 'Health Card Number'). When entering one of these numbers you must select the number type [Client ID number or if entering Mb PHIN # = Health Card Number]. Entering additional information such as client name or birth date is not necessary.
In Context: Setting a client record 'in context' refers to opening the client file. Before any additional information can be added to the file (e.g. an additional phone number) the client file must be set 'in context'.
Setting an investigation in context refers to opening the investigation. Before any additional information can be added to the investigation (eg. the phone call follow up) the investigation must be set 'in context'.
When the client is 'in context' you will see at the top of the screen a grey shaded rectangle that displays the client's demographic information. Similarly when an investigation is in context there is another grey shaded rectangle under the client information which will display the investigation information for that specific investigation.
***Client Telephone Number**: If there is no telephone number on the extract/spreadsheet provided to the call center, the telephone number documented in PHIMS can be used.

Quick Reference Card (QRC): Covid-19 Call Center
Closing Multiple Open Contact Investigations

Continued from page 1

View all open investigations:

If there are multiple **Case investigations,** inform the Supervisor to refer back to region (Page #7)

For multiple **Contact** investigations:
View all open **Contact investigations** listed in *Subject Summary* and determine which investigation has the most recent exposure (which extends the isolation period). Isolation end dates can be viewed on Investigation Summary screen [LHN > Investigation > Investigation Summary]

The investigation to be kept open has the most recent Classification Date, which extends the isolation period the furthest. Note this investigation ID number.
The other contact investigation(s) need to be closed with the disposition of 'concurrent contact investigation.'
***Note**: Review with Supervisor as to WHO can close multiple open contact investigations; may differ between call centers.

Select the investigation(s) to be closed by **clicking** on the **Investigation ID** number hyperlink

Investigation Summary screen is displayed

LHN > Investigation> Investigation Details > Investigation information

Investigation Information screen is displayed

Select '**Concurrent contact investigation'** from the Disposition drop list

Accept or update **Status Date**

Click '**Save'**

Click on **Close Investigation** on LHN >Investigation > Investigation Details

Accept or update **'Closed Status' date**

Click '**Close Investigation**'

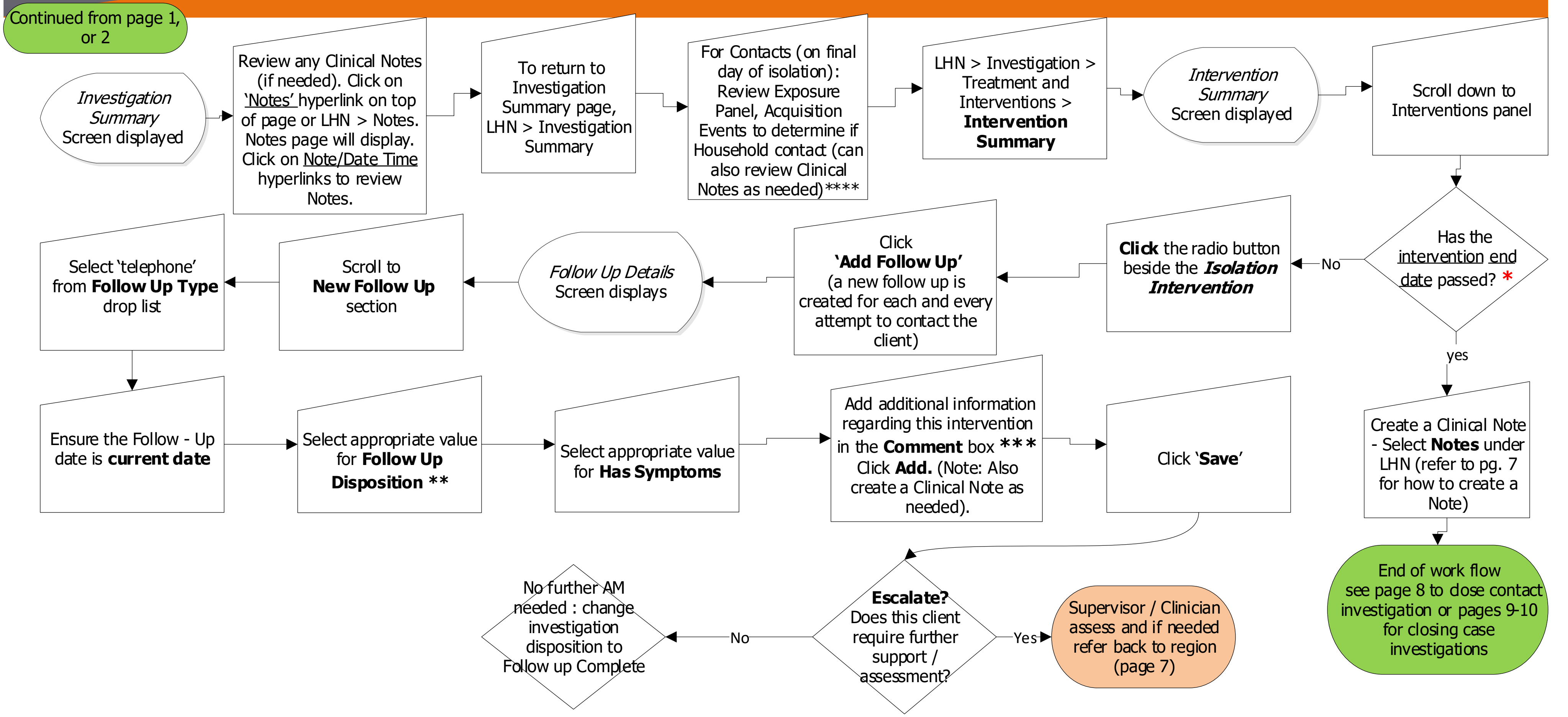
Message 'you are about to set the status of the investigation to 'Closed.' Do you want to close?

Click **'OK'**

Message 'This investigation has a status of CLOSED. Please consider this when making updates to the investigation. Investigation successfully closed.

Continue with workflow for remaining open investigation see page 3

Shared health Soins communs Manitoba



* If the intervention end date has passed, create a Clinical Note to document the follow-up.

Follow Up Disposition: Use **'Completed' when 1) call was successful and client has no concerns 2) call was successful but client identified concerns (symptoms or issues). In this situation, escalate and discuss with supervisor. If the supervisor can address the issues without sending back to the region, the supervisor needs to document their own follow up with the client by adding a **Clinical Note**.

Quick Reference Card (QRC): Covid-19 Call Center Active Monitoring (AM) Case or Contact Updating Demographic info – Adding Phone Number

Ensure Client is in context

If searching for client from *Search Client* screen select '**Update**' button on top of the Search Results table

If the client is already in context go to LHN >Subject> Client Details> **Client Demographics**

1. *Client Demographics* Screen displayed
2. Scroll down to telephone numbers panel Open section by clicking the arrows to the right of the title bar
3. Click '**Add' button**
4. *Add telephone pop-up window* displayed
5. Enter the phone **Number**
6. Select a value from the Usage drop list
7. Click '**Apply**'
8. To indicate the client's 'preferred' phone number, select the radio button beside the telephone number and select 'Set Preferred'
9. Click **Save** The new number will now appear on the top left corner of the page
10. To update am existing Telephone Number: Select the radio button beside the telephone number
11. Update the Phone Number or Usage
12. Click '**Apply**'
13. To indicate the Client's 'preferred' phone number, select the radio button beside the telephone number
14. Click **'Set Preferred'**
15. Click '**Save**'
16. End of work flow
17. Continue to page 3

Shared health Soins communs Manitoba

Ensure Client is in context

If searching for client from *Search Client* screen select '**Update**' button on top of the Search Results table

If the client is already in context go to LHN >Subject> Client Details> **Client Demographics**

Client Demographics Screen displayed

Scroll down to Addresses panel. Open section by clicking the arrows to the right of the title bar. **If there is an Official Registry address listed, DO NOT update the Official Registry address.**

Click '**Add' button**

Add Address pop-up window displayed

Enter new Address Type as **MHSU**.

Enter new Address Details (Street no., Street Name, Street Type, City and Postal Code)

Click '**Apply**'

Review Addresses listed. If there is an **Official Registry Address listed, keep that address as the 'Preferred' address. DO NOT change Official Registry Address**

If there are **only MHSU addresses listed**, indicate the client's 'preferred' address by selecting the radio button beside the preferred MHSU address and select 'Set Preferred'

Click **Save**

To update an existing MHSU address, select the radio button beside the MHSU address and select Update. **Remember DO NOT update the Official Registry Address**

Update the MHSU address

Click '**Apply**'

To indicate the Client's 'preferred' MHSU address, select the radio button beside the MHSU address and select 'Set Preferred'

Click '**Save**'

End of work flow

Return to **Page 3**

Official Registry Address:
This is the address that the client is registered with in the MB Health Client registry. DO NOT change or update the Official Registry address in PHIMS, it must remain as the 'Preferred' address. The client will need to contact MB Health directly in order to change their Official Registry address.

Ensure Client is in context

If searching for client from *Search Client* screen select '**Update**' button on top of the Search Results table

If the client is already in context go to LHN >Subject> Client Details> **Client Demographics**

Client Demographics Screen displayed

Scroll down to Languages panel. Open section by clicking the arrows to the right of the title bar

Select the checkbox beside 'Interpreter Required'. Click Add.

Add Language pop-up window displayed

Enter the language the client requires for the Interpreter

Click '**Apply**'

Click **Save**

End of work flow

Return to LHN Page 3

Quick Reference Card (QRC): Covid-19 Call Center Supervisor / Clinician - Refer Investigation back to Region / Add a clinical note

Continued from Page 2 or 3

1. LHN > Investigation > Investigation Details > **Investigation Information**
2. *Investigation Information* screen displays
3. Scroll down to *Investigation Information* panel
4. Select either **'Pending'** or **'Pending -referred back to region for follow up'** from Disposition drop down*
5. Update **Disposition Date** to today's date
6. Click '**Save**'
7. Select **Notes** under LHN
8. *Clinical Notes* screen displays***
9. Scroll down to click **Author Note** button (lower right on screen)**
10. Enter subject/title in Subject box. Ensure date is current
11. Enter Text in Note section
12. Click **Note Complete**
13. Return to LHN **Investigation Information**

Continue to page 12

*Refer to 'Escalation, Trouble Shooting and Referral to Other Providers or Organization' section within the AM Caller script to determine most appropriate Disposition to use when referring back to the region.
**Clinical Notes are required to document the reason an investigation is being referred back to the Public Health region. Also include in the Note: the call agent's name, their role and the organization they are working with.
***The Client AND the Investigation need to both be 'in context' prior to adding a Clinical Note to ensure that the clinical note is being added at the Investigation level

Quick Reference Card (QRC): Covid-19 Call Center
Close Contact Investigation
(Update Intervention - isolation; Update Investigation - Disposition and Close Investigation)

Continued from Page 3

If you speak with contact and it is day 1-9 of their isolation, set the investigation disposition to "follow up complete" and author a clinical note. Do not change the isolation intervention. DO not close case.

Refer to the 'Documentation Summary' section in the AM Caller script for documentation requirements at Contact closure.

For Contacts who are not responding to phone calls, refer to the Caller script for further details and direction.

1. LHN Investigation >Treatments & Intervention > **Intervention Summary**
2. *Intervention Summary* screen displayed
3. Scroll down to the **Interventions** panel
4. Click on **Isolation** hyperlink
5. *Intervention Details* screen displayed
6. Scroll down to the **Intervention Detail** panel
7. Select '**Completed**' for Intervention Disposition and Outcome (Do not change the end date of the intervention)
8. Click '**Save**'
9. LHN > Investigation > > Investigation details > **Investigation Information**
10. *Investigation Information* Screen displayed
11. Select appropriate **Disposition***
12. Update **Disposition Date** (Today's date)
13. Click '**Save**'
14. LHN > Investigation > > Investigation details > **Close Investigation** Or Use 'Close investigation" button on screen
15. *Close Investigation* Screen displayed
16. Scroll to Close Investigation panel Confirm **Closed Status Date** (today's date)
17. Click **'Close Investigation'** button (either one)
18. *Message: 'You are about to set the status of the investigation to 'Closed'. Do you want to close?*
19. Click **'OK'**
20. *Message: This investigation has a status of CLOSED> Please consider this when making updates to the investigation. Investigation successfully closed*

*Symptomatic contacts are to isolate for 24 has (72 has for health care workers) past end of symptoms, even if they have a negative test result from day 7 or later.
Prior to closing CONTACT investigations the following needs to be done:
For the intervention of 'Isolation' - update the intervention disposition to 'Completed' and outcome to 'Completed'.
If the contact investigation has any other intervention(s) listed (eg. status assessment), do not update.
Update the Investigation Disposition to 'Follow up complete'.

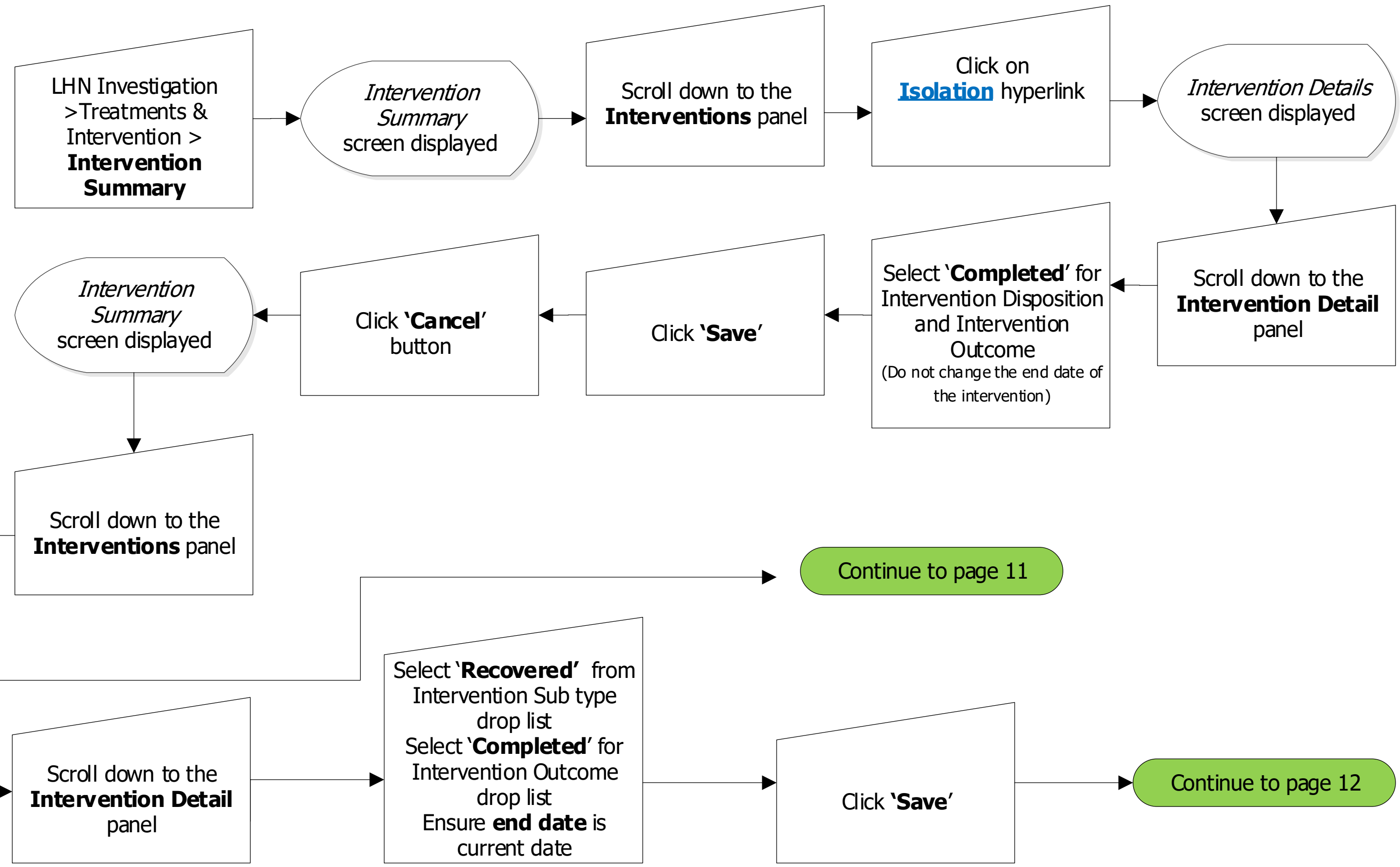
Shared health Soins communs Manitoba

Quick Reference Card (QRC): Covid-19 Call Center
Close Case Investigation
(Update Interventions – Isolation & Status Assessment)

Continued from Page 3

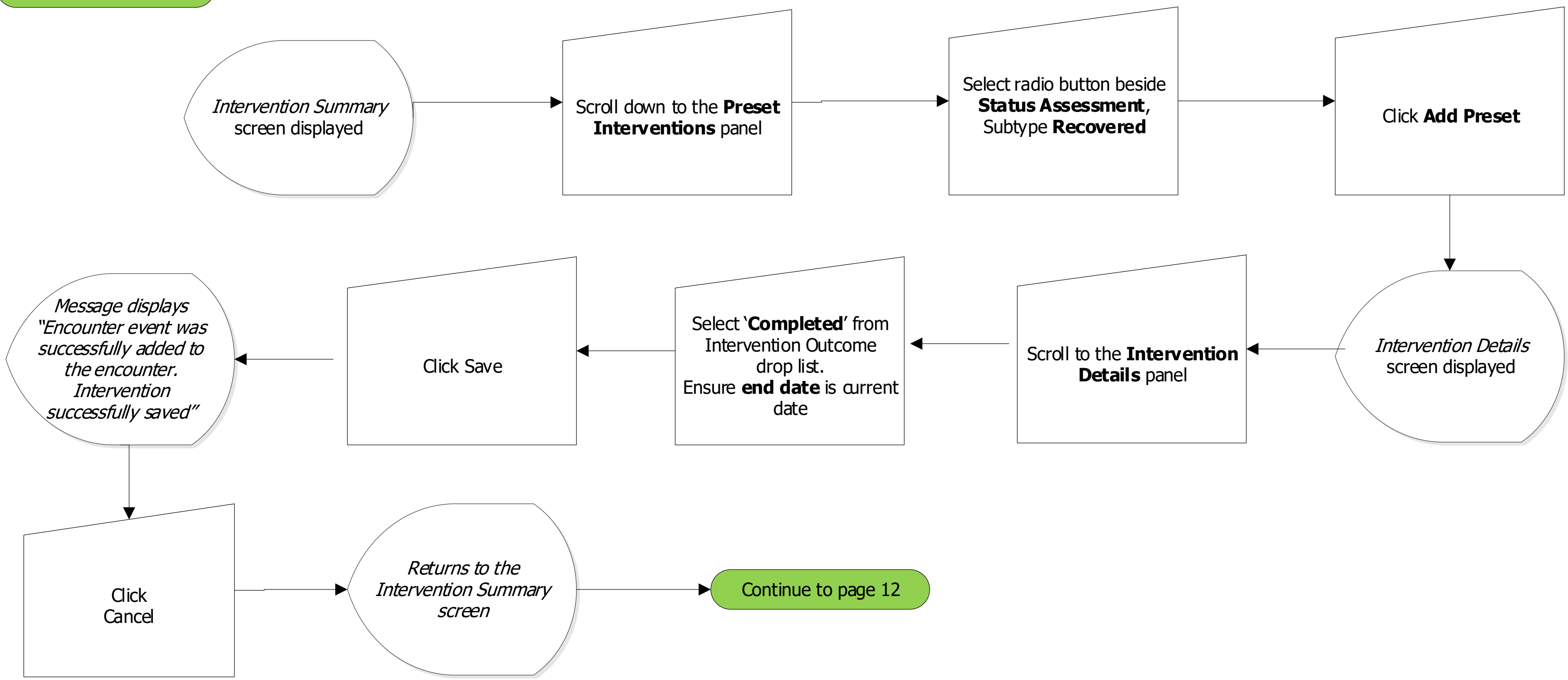
If you speak with case and it is day 1-9 of their isolation, set the investigation disposition to "Follow up Complete" and author a clinical note. Do not change the isolation intervention or status assessment. Do not close the case.

Refer to the 'Documentation Summary' section in the AM Caller script for documentation requirements at Case closure.



Prior to closing CASE investigations the following needs to be done:
For the intervention of 'Isolation' - update the intervention disposition to 'Completed' and the outcome to 'Completed'.
For the intervention of 'Status Assessment' - update the intervention sub-type to 'Recovered' and the intervention outcome to 'Completed'.
If there is no status assessment intervention listed, create an intervention of Status assessment, sub-type 'Recovered' and the intervention outcome to 'Completed'.
Update the Investigation Disposition to 'Follow up complete'.
If the CASE investigation has any other intervention(s) listed (i.e.. Symptom Monitoring), do not update.

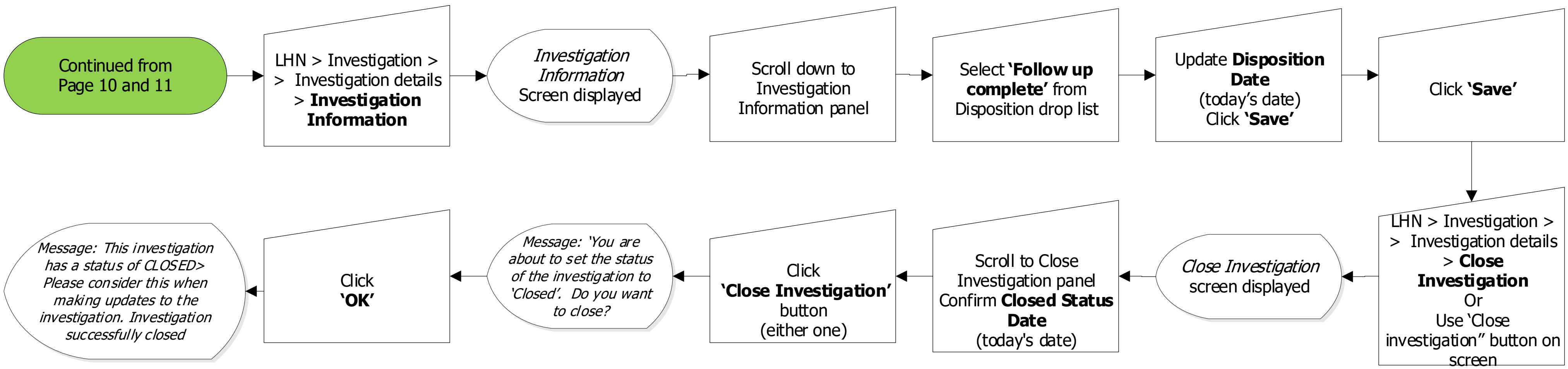
Continued from page 10



Prior to closing CASE investigations, (who are the end of their isolation) confirm that a Status assessment intervention has been created and updated to sub-type 'Recovered' and enter the intervention outcome to 'Completed'.
If there is no status assessment intervention listed, create an intervention of Status assessment, sub-type 'Recovered' and enter the intervention outcome to 'Completed'.

Shared health Soins communs Manitoba

Quick Reference Card (QRC): Covid-19 Call Center
Close Case Investigation Continued
Update Investigation Disposition and Close Investigation



Points to Remember:

- Clients selected for Active Monitoring have been contacted initially by Public Health (or a partner case / contact investigator). You will not be the first person to call them regarding their symptoms and isolation.
- To determine if you are calling a case or contact of Covid-19 view the Subject Summary screen (page 1) or anytime the investigation is in context you will see at the top of your screen the investigation information which lists the 'Authority / Classification.'
- Escalation to supervisor/clinician is a process done outside of PHIMS. Each call center will have their own procedure to address this action discuss with your supervisor.
- Documentation of the phone call(s) is done in the isolation interventions follow- up details screen (page 3). The comment box on this screen is where you document details such as client did not answer the phone at <time>; client is a minor and you spoke with parent / guardian (first & last name); symptoms (new symptoms, worsening symptoms, recovery from symptoms); as well as any issues that need escalation to a supervisor.
- If you do not have an isolation intervention in your investigation you cannot proceed and are required to consult with Clinical Support.
- Documentation of the reason an investigation is being referred back to the region is completed in the 'Notes' section of the investigation (page 7). Also include in the Note: the call agent's name, their role and the organization they are working with. The Investigation Disposition should be updated to 'Pending' OR 'Pending: referral back to region for follow up' - refer to Call script to determine most appropriate Disposition to use when referring back to the region.
- Closing investigations have a different workflow for Cases compared to Contacts. Ensure you are following the correct workflow (page 8, for closing contact investigations and pages 10-12 for closing cases).

FAQs:

If you make a mistake when documenting your phone call on the follow up details screen in the comment box how do you fix it?

- If you have 'added' the comment but not yet 'saved' you may add another comment with your correction then 'save'. If you have already 'saved' return to the LHN (left hand navigation menu) and create a new follow-up.

How do you get to your next client?

- Return to the LHN and select under the Search menu 'Search Clients'.

Date	Owner	Reason for change	Change Description
2021-09-27	Clinical Informatics Specialist	Clinical Notes now also required when documenting Follow ups	Pg. 3 – added step to review Clinical Notes prior to calling client. Added steps to add Clinical Note when documenting Follow ups. Pg. 9 – Added step at bottom of page to create Clinical Note if extending isolation period Pg. 10 – Added note at bottom of page re: not updating other interventions
2021-09-08	Clinical Informatics Specialist	Additional information for Contact Closure	Pg. 8 – Added to comments at the bottom of the page regarding process for symptomatic contacts.
2021-08-17	Clinical Informatics Specialist	Updates to workflow	Pg. 3 – Added to the comments at the bottom of the page, that 'Comments' are required for each and every Isolation Intervention Follow Up, as well as, the required details the 'Comments' should include. Also noted that a new isolation intervention follow up is required for every attempt to reach the client. Removed box/step that stated 'Optionally type comments in the Comment box'. Pg. 9 – Added in the comments at the bottom of the page that an Isolation Intervention Follow up and 'Comments' are required when extending the isolation period and provided the details to include in the 'Comments'. Pg 8 & 10 – Added note to refer to Documentation Summary section in AM Caller script for documentation requirements at Case and Contact closures. Pg.13 – Points to Remember; indicated if there is no isolation intervention included in the investigation, to consult with Clinical Support.
2021-08-06	Clinical Informatics Specialist	Updates to Investigation Dispositions	Pg. 3 – Removed 'Updating Investigation Disposition' workflow as AM agents are no longer required to update the Investigation Disposition upon receipt of the investigations. Pg. 7 – Updated workflow to reflect using a Disposition of 'Pending' OR 'Pending – referred back to region for follow' when referring back to region and to refer to the Call script to determine the appropriate disposition to use. Minor edits to page numbers

Shared health Soins communs Manitoba

Date	Owner	Reason for change	Change Description
2021-05-26	Clinical Informatics Specialist	Update to AM Follow-up data entry if Intervention date has passed	Pg. 4 Updated to reflect if follow-up done *after* the Isolation Intervention End date, to document a clinical note (aligns with AM Caller script)
2021-05-13	Clinical Informatics Specialist	Updates to Intervention Follow-up Disposition	Pg. 4 In the notes at the bottom, included 2 new Follow up dispositions that call center agents can select according to the workflow (‘Completed – SMS Requested’ and ‘Unsuccessful – Follow up Required’) Minor edits to page numbers on the Points to Remember page.
2021-04-07	Clinical Informatics Specialist	Updates to Workflows	Pg. 6 New page for Adding Address workflow Pg. 7 New page for Adding Interpretive Services workflow Pg.10 New page for Contact Investigations – Extending Isolation Period Pg. 2 Updated to reflect discussion with call center Supervisor as to WHO can close multiple open **Contact Investigations** as process may differ between call centers (ie. Call center agents may be able to complete this workflow) Pg. 4 Updated to include step to review the Investigation Summary page for the Exposure, Acquisition Event for Contacts (on final day of isolation) to determine if a household contact. Included in Points to Remember, to refer to Call Script if Contact’s Isolation period needs to be extended Pg. 8 Updated to reflect adding a Clinical Note via the LHN, not through Quick Entry Removed page on Reviewing Signs and Symptoms Edits to page numbers
2021-01-19	Clinical Informatics Specialist	Updated Workflow	Pg. 9 updated to include workflow to create Status Assessment intervention at case closure Pg. 10 new page to reflect workflow to create Status Assessment Minor edits to page numbers
2021-01-12	Clinical Informatics Specialist	Minor edits to page numbers and text	Pg. 3 updated page number refences for step in QRC referring to contact and case criteria for closure Pg. 9 updated to correct obstructed view of step #3 on the QRC
2020-12-16	Clinical Informatics Specialist	Updated workflow	Pg. 1 reflects adding step to Preview telephone numbers Pg. 2 created for updating Investigation Disposition Pg. 9 updated to remove entering Outcome when closing case investigations

Date	Owner	Reason for change	Change Description
2021-10-15	Clinical Informatics Specialist	Added comment re: Adding Clinical Notes	Pg. 7 – At the bottom of the page, added comment indicating the Client and the Investigation need to both be in context prior to adding a Clinical Note to ensure that the clinical note is being added at the Investigation level
2021-12-20	Clinical Informatics Specialist	All Pages Page 1	Update to dates and corresponding page numbers
2021-12-20	Clinical Informatics Specialist	All pages	Adding shape and text for continuation to next steps