



Investigations: Create a Cohort and Add Multiple Contacts to a TE

PRE-WORK

- 1) Identify Case in PHIMS: Client ID, Case Investigation ID, TE ID
- 2) Identify list of contacts, write down PHIMS PHIN # or Client ID's or last name & birth date

For this Scenario we will use the following:

Case or Contact	First Name	Last Name	PHIMS Client ID
Case	Amy	Addario	3921
Contact	Alyssa	Agosti	3922
Contact	Norma	Nash	3923
Contact	Nola	Novak	3927
Contact	Ryder	Varley	3926
Contact	Pino	Reeve	3924
Contact	Donald	Underwood	3925

Workflow – starting from the Search Clients screen:

- 1) Search for the first contact on your list: **Alyssa**
- 2) Select the radio button to the left of **Alyssa's** name in the *Search Results* panel
- 3) Click the [**Create Cohort**] button

The screenshot shows the 'Search Results' window with a table of search results. The 'Create Cohort' button is highlighted with a yellow box. The first row of the table is highlighted, and the radio button to its left is circled in red. The table columns are: Client ID, Health Card Number, Last Name, First Name, Gender, Date of Birth, Health Region, and Active. The first row contains: 3922, 222333111, Agosti, Alyssa, Female, 2012 Mar 01, MB Health, Active.

- 1) Enter a cohort name (i.e. Arborgate School Grade 3)
- 2) Enter a client list name (i.e. Arborgate School Contacts)
- 3) Select the correct encounter group for your cohort (*Outbreak Response*)
- 4) Effective from date should default to current date
- 5) Jurisdictional Organization should default to your logged-in organization
- 6) Click [**Save**]



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Update Cohort

Cancel Save Reset log print ?

Cohort ID: 70  Cohort Name: Abrogate School Grade 3 Encounter Group(s): Outbreak Response Client List Name/ ID: -

Cohort Details

* Cohort Name: Abrogate School Grade 3 * Cohort Type: Static

Status: Active Created By: Desrosiers, Robert Cohort Source: Search Clients

* Effective From: 2020/10/15 To: yyyy/mm/dd

Available Encounter Groups: Communicable Diseases, Family Health, Immunization, Rh Clinic, Screenings, Sexually Transmitted and Bloodborne Infections, Tuberculosis, Youth Services

* Selected Encounter Groups: Outbreak Response

Description: (200 characters remaining.)

* Jurisdictional Organization: Southern Health - Sante Sud, Southport, Man  

Client Lists

Upload Client Data File Upload Client ID List

Update Client List View Client List Select and Return

Client List ID	Client List Name	Number of Clients	Created On	Created By
<input type="radio"/> 52	Abrogate School Grade 3	1	2020 Oct 15	Desrosiers, Robert

Total: 1 1 10

7) After clicking [**Save**], scroll to view the list of clients associated with the cohort.

8) Select the radio button beside the 'Client List ID' and click [**Update Client List**]

Client Lists

Upload Client Data File Upload Client ID List

Update Client List View Client List Select and Return

Client List ID	Client List Name	Number of Clients	Created On	Created By
<input checked="" type="radio"/> 52	Abrogate School Grade 3	1	2020 Oct 15	Desrosiers, Robert

Total: 1 1 10



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Alyssa is the first contact in the cohort as added from the previous steps, you will now add the rest of the contacts into the cohort

Update Client List Members
Save Delete Update Cohort Reset log Print ?

Cohort ID: 70

Cohort Name: Aborgate School Grade 3

Encounter Group(s): Outbreak Response

Client List Name/ ID: Aborgate School Grade 3 / 52

Status: Active Cohort Source: Search Clients

Client List Details

Client List Details

Cohort ID: 70 Cohort Name: Aborgate School Grade 3

Client List Name: Aborgate School Grade 3 Created By: Desrosiers, Robert Created On: 2020 Oct 15

Actions on all records listed:

View Map Create Investigation Create Intervention Export Client List

Client: Underwood, Donald | 3925 | 666555222 | Male | 2012 Jun 01 Search Type: Add

Client Last Name or ID

Preview Client View Imms Profile Remove Update

<input type="checkbox"/>	<input type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender	City of Residence	Phone Number
<input type="checkbox"/>	<input type="checkbox"/>	3922	Agosti, Alyssa	2012 Mar 01	Female		
<input type="checkbox"/>	<input type="checkbox"/>	3923	Nash, Norma	2012 Apr 01	Female		
<input type="checkbox"/>	<input type="checkbox"/>	3927	Nola, Novak	2012 Aug 01	Male		
<input type="checkbox"/>	<input type="checkbox"/>	3924	Pino, Reeve	2012 May 01	Male		
<input type="checkbox"/>	<input type="checkbox"/>	3926	Varley, Ryder	2012 Jul 01	Male		

Total: 5 10

9) Enter client id number or PHIN in the 'Client' type-ahead field (when you start entering client's id number you will see the client's information display, click on the greyed-out client name bar to select, click **[Add]**). (If you enter the PHIN number, you will need to select 'Health Card Number' from the Search Type dropdown list)

10) Repeat for the other contacts.

11) Click the **[Save]** button

* Make a note of the Cohort ID (70)



Investigations: Create a Cohort and Add Multiple Contacts to a TE

Update Client List Members

Save Delete Update Cohort Reset log ?

Cohort ID: 70 Cohort Name: Aborgate School Grade 3 Encounter Group(s): Outbreak Response Client List Name/ ID: Aborgate School Grade 3 / 52

Status: Active Cohort Source: Search Clients

Client List Details

Client List Details

Cohort ID: 70 Cohort Name: Aborgate School Grade 3

Client List Name: Aborgate School Grade 3 Created By: Desrosiers, Robert Created On: 2020 Oct 15

Actions on all records listed:

View Map Create Investigation Create Intervention Export Client List

Client: Search Type: Client Last Name or ID Add

Preview Client View Imms Profile Remove Update

	Client ID	Client Name	Date of Birth	Gender	City of Residence	Phone Number
<input type="checkbox"/>	3922	Agosti, Alyssa	2012 Mar 01	Female		
<input type="checkbox"/>	3923	Nash, Norma	2012 Apr 01	Female		
<input type="checkbox"/>	3927	Nola, Novak	2012 Aug 01	Male		
<input type="checkbox"/>	3924	Pino, Reeve	2012 May 01	Male		
<input type="checkbox"/>	3925	Underwood, Donald	2012 Jun 01	Male		
<input type="checkbox"/>	3926	Varley, Ryder	2012 Jul 01	Male		

Total: 6 1 10

Linking the Contacts to the Case Investigation:

Has a Transmission Event been created?

If **'No'** go to page 9

If **'Yes'** continue

- 1) Navigate to the Case Investigation.
- 2) Scroll down to the *'Known Contact Search'* panel
- 3) Ensure the [**Cohort Result Set**] radio button is selected
- 4) Click [**Search**]



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Known Contact Search ↑ Hide Known Contact Search

Cohort Result Set: -
 Client: -
 Non-Human Subject: -
 Investigation: -

5) Enter the cohort id (70) and click [**Search**]

Search Cohort Cancel Retrieve Reset ?

Basic Search Criteria ✓

Cohort ID: **Cohort Name:** **Status:** **Created By User ID:**

Available Encounter Groups: **Selected Encounter Groups:**

- Communicable Diseases
- Family Health
- Immunization
- Outbreak Response
- Rh Clinic
- Screenings
- Sexually Transmitted and Bloodborne Infections
- Tuberculosis
- Youth Services

Jurisdictional Organization: Exact Match **Cohort Source:**

Search Results

6) Select the radio button to the left of the *Cohort ID* in the *Search Results* panel and click [**Update**]

Search Results ✓

View

<input type="checkbox"/>	Cohort ID	Cohort Name	Created On	Created By	Cohort Type	Status	Effective From	Effective To	Client Lists
<input checked="" type="checkbox"/>	70	Aborgate School Grade 3	2020 Oct 15	Desrosiers, Robert	Static	Active	2020 Oct 15		1

Total: 1 1 50



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7) Select the radio button beside the *Client List ID* and click [**Select and Return**]

Client List ID	Client List Name	Number of Clients	Created On	Created By
52	Aborgate School Grade 3	6	2020 Oct 15	Desrosiers, Robert

Total: 1

8) The *Maintain Transmission Event Details* page displays, in the *Known Contacts Search* panel, the *Cohort Result Set* is displayed.

Known Contact Search

Cohort Result Set: 52 - Aborgate School Grade 3

Client: -

Non-Human Subject: -

Investigation: -

Search Add

9) Click [**Add**]. You will now create contact investigations for each of the clients in the cohort.

10) Enter the required information to create the investigation



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Create Investigation



Submit Clear Cancel

Additional details (e.g., disease, diagnosis, attached documents) may be entered after the investigation has been created.

* Required field

Disease Summary ↑ Hide			
Disease Event - COVID-19			
Disease	Etiologic Agent	Epi Markers	Authority / Classification Classif. Date (✓ Primary Classification)
COVID-19	-	-	<input checked="" type="checkbox"/> Provincial Contact - Person Under Investigation <input type="checkbox"/>

Investigation Information ↑ Hide	
Priority:	<input type="text"/>
* Disposition:	<input type="text" value="Pending"/>

Responsible Organization / Investigator ↑ Hide	
* Responsible Organization :	<input type="text" value="Interlake-Eastern Health"/>
<i>To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.</i>	
Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] Find 🔍	
* Responsible Organization Workgroup :	<input type="text" value="CD-Interlake-Eastern Health"/>
* Responsible Organization Date :	<input type="text" value="2020"/> / <input type="text" value="07"/> / <input type="text" value="23"/> <input type="button" value="📅"/> <small>yyyy mm dd</small>
* Investigator Organization :	<input type="text" value="Interlake-Eastern Health"/>
* Investigator Workgroup :	<input type="text" value="CD-Interlake-Eastern Health"/>
Investigator Name :	<input type="text"/>
* Assigned Date :	<input type="text" value="2020"/> / <input type="text" value="07"/> / <input type="text" value="23"/> <input type="button" value="📅"/> <small>yyyy mm dd</small>

- 11) Upon clicking [**Submit**], the application creates contact investigations for each client in the cohort and links them to the case. They are listed in the Acquisition Events section on the TE of the case
- 12) Each will be listed in the *Acquisition Events* panel below the *Known Contacts Search* panel
- 13) Click [**Save**]



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Acquisition Events ↑ Hide Acquisition Events

Row Actions: [Unlink](#)

	Acquisition Event ID	Investigation ID	Subject Name	Acquisition Start	Acquisition End	Classification	Disposition	Invalid
<input type="radio"/>	193	710	Agosti, Alyssa	2020 Oct 12	-	COVID-19 Contact - Person Under Investigation	Follow up performed by call center	-
<input type="radio"/>	194	711	Nash, Norma	2020 Oct 12	-	COVID-19 Contact - Person Under Investigation	Follow up performed by call center	-
<input type="radio"/>	190	707	Nola, Novak	2020 Oct 12	-	COVID-19 Contact - Person Under Investigation	Follow up performed by call center	-
<input type="radio"/>	191	708	Pino, Reeve	2020 Oct 12	-	COVID-19 Contact - Person Under Investigation	Follow up performed by call center	-
<input type="radio"/>	195	712	Underwood, Donald	2020 Oct 12	-	COVID-19 Contact - Person Under Investigation	Follow up performed by call center	-
<input type="radio"/>	192	709	Varley, Ryder	2020 Oct 12	-	COVID-19 Contact - Person Under Investigation	Follow up performed by call center	-

Total All Contacts: 6



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If **NO**, Create Transmission Event

Exposure Summary

Transmission Event panel

- 1) Click [**Exposure Quick Entry**]
- 2) Enter **Exposure Name**
- 3) Exposure *Transmission Start Date* and *Transmission End Date*
- 4) Select *Responsible Organization*

Exposure Location panel

- 1) Enter **Location Name**
- 2) *Setting Type*
- 3) *Setting*
- 4) *Address*
- 5)

Known Contacts panel

- 1) Click [**Add Contact List**]

Known Contacts

Client: Search Type:

- 2) Select **Cohort Name** from the dropdown list
- 3) Select **Client List Name** from the dropdown list
- 4) Click [**Select**]

Exposure Quick Entry

Save Reset

Link Cohort - Client List

Select existing cohort Create cohort via upload

* Jurisdictional Organization:
 Exact Match

* Cohort Name: * Client List Name:



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The **Contact List** is displayed under the Known Contacts section

Known Contacts ↑

Add Contact List

Client: Search Type:

Client	Investigation	Acquisition Event
<input type="checkbox"/> Agosti, Alyssa	New	New
<input type="checkbox"/> Nash, Norma	New	New
<input type="checkbox"/> Nola, Novak	New	New
<input type="checkbox"/> Pino, Reeve	New	New
<input type="checkbox"/> Underwood, Donald	New	New
<input type="checkbox"/> Varley, Ryder	New	New

Contact Investigation Details panel

- 1) First Reporting Source, select '**Other**' and enter "**Named as Contact**"
- 2) Select *Responsible Organization Workgroup* from the dropdown list
- 3) Select the *Investigator Workgroup* from the dropdown list
- 4) Select *Disposition* from the dropdown list

Contact Investigation Details ↑

Disease	Microorganism	Authority	Classification	Classification Date
COVID-19	Severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2)	Provincial	Contact - Person Under Investigation	2020 Oct 16

* First Reporting Source: Provider Location Other

Other:

* Responsible Organization:

* Responsible Organization Workgroup:

* Investigator Organization:

* Investigator Workgroup:

* Disposition:

* Report Date (Received):

- 5) Click [**Save**]



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Transmission event successfully deleted.

Transmission Event Summary ↑ Hide Transmission Event Summary

1 Transmission Events Found. 6 Contacts Found.

Row Actions: [Copy](#) [Exposure Quick Entry](#) [Multiple TE Entry](#) [Create Transmission Event](#)

	TE ID	Transmission Start	Transmission End	Location Name	Setting Type	Outbreak ID	Invalid
<input type="radio"/>	125	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	Arborsgate School	Public Facilities	-	-

ID	Name	Age	Gender	Acquisition Start	Acquisition End	Classification	Disposition	Invalid
184	Agosti, Alyssa	8 years 7 month(s)	Female	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	COVID-19 Contact - Person Under Invest...	Follow up in progress	-
185	Nash, Norma	8 years 6 month(s)	Female	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	COVID-19 Contact - Person Under Invest...	Follow up in progress	-
186	Nola, Novak	8 years 2 month(s)	Male	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	COVID-19 Contact - Person Under Invest...	Follow up in progress	-
187	Pino, Reeve	8 years 5 month(s)	Male	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	COVID-19 Contact - Person Under Invest...	Follow up in progress	-
188	Underwood, Donald	8 years 4 month(s)	Male	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	COVID-19 Contact - Person Under Invest...	Follow up in progress	-
189	Varley, Ryder	8 years 3 month(s)	Male	2020 Oct 12 00:00 CDT	2020 Oct 14 00:00 CDT	COVID-19 Contact - Person Under Invest...	Follow up in progress	-