Manitoba Public Health Information Management System

Report User Guide

MB2405

Investigation Intervention

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Document Author:	Manitoba PHIMS – Support Team

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2022-06-21	R. Desrosiers	0.05	Updated MB Health logo, Update to 4.4.5 version

Definitions for Report User Guides:

a. “Authorized Organization” means an organization (an RHA, a First Nation, or other organization) with whom Manitoba has entered into an agreement in order to facilitate access to PHIMS;
b. "Authorized User" means an employee, agent or contractor of an Authorized Organization (the employer) permitted to access to PHIMS.
c. “Service Delivery Location” (SDL) means a public health office or a Community Health Centre
d. “User Role” means the specific role or roles to which an Authorized User is assigned and which prescribes what Information the Authorized User is permitted to access, use and disclose.

Data Type		Explanation
Aggregate, no identifiable data	=	Summary data with no client identifiers
Aggregate, no identifiable data, but possible small population sensitivity or Provider / Org Sensitivity	=	Summary data with no client identifiers However there are sensitivities in the data where small numbers could identify clients, communities or providers
Line Level, <u>Single client</u> identifiable data	=	Includes client identifiers of an individual client
Line level, <u>Multi client</u> identifiable data	=	Includes client identifiers of a list of multiple clients

Table of Contents

1. Background

1.1. Data Access Scope for Investigations in PHIMS

Access to individual client case investigations within the investigation module in PHIMS is based on permissions for specific encounter groups (Sexually Transmitted and Bloodborne Infections, Communicable Diseases, and Tuberculosis).

In Manitoba, Authorized Users ("users") of the investigations module have access to all investigations in encounter groups assigned to the role of the logged in user for all PHIMS clients. This was decided as a result of a number of considerations, including:

- Clients can receive services at service delivery locations other than their default public health office, either within or outside their home health region.
- Cases and outbreaks of vaccine preventable diseases also cross regional boundaries and may involve multiple public health provider organizations.
- It is important to be aware of all concurrent or previous investigations for a client within an encounter group, regardless of which organization is responsible for the investigation.

However, for some reports with access to line-level client data, users may only run reports for investigations associated with their organization.

1.2. Privacy/Data Sensitivity

This report is set at the Region level. This means that users who have access to this report can only "view" data from their own regions. The report includes line level data and contains an investigation ID and Subject ID. The report optionally includes the client's First Name, Last Name, Date of Birth and Gender.

1.3. Permitted Disclosures

- No disclosure permitted

Note re Permitted Disclosures - In general, Standard Reports in PHIMS have been designed for internal use for day to day public health and health service delivery, limited to Authorized Users of Authorized Organizations. Authorized Users may only disclose information from the report that relates to their Designated Health Region. For First Nation Authorized Organizations - sites that have entered into a Bridging Service ISA - an Authorized User (of the Bridging Organization) generating the reports may provide Standard Reports to a FN Authorized User.

1.4. Data Stewardship

Users who have access to this report should have some background in report generation and basic epidemiology, and are responsible for the following:

- The data is intended to be used by public health providers for case management and surveillance only. No disclosure of information to non-PHIMS users or non-Public Health providers is permitted.
- Users ensure data is managed securely and appropriately according to organizational guidelines especially when the report(s) identifies small populations or providers.

Users who have access to this report will be subject to PHIMS audits documenting which user generated the report and on what date.

2. Purpose

The purpose of this report is to allow users to search and produce a line list of all investigation interventions during a specified timeframe. It will be used for case and contact management. It can be used to search for assigned investigation interventions. In PHIMS, it is not possible to search for future dated investigation interventions – only those that have a current or past date. This report is required to ensure that investigators have a way to diarize work and be able to plan their work schedule. This report will also allow investigators assign tasks to other team members without having to 'reassign' or add investigators to the investigation. This report is required to ensure that all intervention follow ups entered into the system can be found and planned for.

2.1. Populations Included in the Report

The **Investigation Intervention Report** provides a line list of all Investigation interventions entered in PHIMS based on the reported date and the organizational workgroup the investigation was assigned to, as well as the organizational workgroup the intervention was assigned to. Users will only be able to select investigation interventions that have been assigned to their organization or lower in the organizational tree. All investigation types assigned to the user's organization will be included in the report.

2.2. Recommended Uses for this Report

The Investigations Search report will be used by:

- Regions and Manitoba Health
  - Workload - To identify investigations with future dated interventions that require attention.
  - To monitor upcoming workload.
  - To identify outstanding investigation interventions that have not yet been completed.
- Coordinators
  - To manage investigation interventions and workload within their region, or those being co-managed in another region.
- Public Health staff (nurses, clerks, doctors searching for investigation interventions assigned to them.

Note to user

- Consider defining a role-based routine business cycle to run these reports to identify any investigation interventions that have not been completed.

3. Selecting the Report Parameters

When running a report, you must select specific parameters. Some parameters are required and some are optional.

Selecting the Correct Parameters to get the Needed Output

You can generate this report from the "Standard Reports" section in PHIMS.

This is an operational report under Case: Manitoba Reports

- Click **Reporting & Analysis > Reports** (LHN) or the **Reporting** tile on the dashboard.
- Open the **Case Report Folder** by expanding the collapsible panel.
- Select **MB2405-Investigation Intervention** *hyperlink*
- Enter the **Next Follow up Date From** and **Date Reported To** (optional)
- Enter the **Intervention Start Date From** and **To** (optional)
- Select the **Encounter Group(s)** (required). Users will only be able to select the encounter group(s) they have access to base on their logged-in role.
- Enter the **Investigation Status** (required)
- Select the **Classification Group** (required)
- Select the **Workgroup** (optional) if desired. Users will only be able to select the workgroup(s) they have access to base on their logged-in organization. This workgroup pertains to the workgroup assigned to the *investigation*
- Select the **Investigator** (optional) if desired. Users will only be able to select the investigator(s) they have access to base on their logged-in organization. This investigator is the investigator assigned to the *investigation*. Results should display for any active investigator regardless of investigator type.
- Select the **Workgroup** (optional) if desired. Users will only be able to select the workgroup(s) they have access to base on their logged-in organization. This workgroup pertains to the workgroup assigned to the *intervention.*
- Select the **Intervention User** (optional) if desired. Users will only be able to select the investigator(s) they have access to base on their logged-in organization. This Intervention user is the user assigned to the *intervention*.
- Select **Display Client Identifiable Data** (required – defaults to No).
- Click **Generate Report Now.**

Parameter Definitions:

Parameter Name	Data Type	Required	Description
Next Follow up date	Date Range	Optional	Date added to a specific intervention. Can be a future date.
Intervention date	Date Range	Optional	Date the encounter for the intervention was created. Cannot be a future date
Encounter Group	Multi-select	Optional	Limited to Encounter Groups accessible by Logged-on role
Investigation Status	Multi-select	Mandatory	Open, Closed, Transferred. Transferred is a secured application code that cannot be selected by a user. It cannot, however, be removed from the application.
Classification Group	Multi-select	Mandatory	Case and/or contact
Workgroup	Multi-Select	Optional	Limited to workgroups of Jurisdictional Organizations included in the tree of the Organizations for the users logged-on organization. This workgroup pertains to the workgroup assigned to the investigation.
Investigator	Multi-Select	Optional	Limited to users in the active workgroups of Jurisdictional Organizations included in the tree of Organizations for the users logged-on organization. Results should display for any active investigator regardless of investigator type.
Workgroup	Multi-Select	Optional	Limited to workgroups of Jurisdictional Organizations included in the tree of the Organizations for the users logged-on organization. This workgroup pertains to the workgroup assigned to the intervention.
Intervention User	Multi-Select	Optional	Limited to users in the active workgroups of Jurisdictional Organizations included in the tree of Organizations for the users logged-on organization. This user is assigned to the intervention.
Display Client Identifiable Data	Checkbox (Y/N)	Mandatory	Default to un-checked/No. Client identifiable date includes first and last name, date of birth and gender.

4. Report Output

Field Name	Description
Client First Name	Client’s first name. Only displays if Display Client Identifiable Data=yes.
Client Last Name	Client’s last name. Only displays if Display Client Identifiable Data=yes.
Date of Birth	Client’s birthdate.
Gender	Client’s gender. Will not display gender identity data elements.
Client ID	Unique application generated client identifier.
Investigation ID	Unique application generated Investigation identifier
Client Phone	Client’s preferred phone number
Usage	Client’s preferred phone number type
Disease and Classification	Disease(s) listed on the investigation. Each disease on the investigation will display concatenated with the associated most recent classification.
Primary Investigator	Name of primary investigator assigned to an investigation. If not specified will be blank.
Other Investigators	Name(s) of other investigators. If more than one they will be concatenated. If no other investigators assigned, will be blank
Intervention Details	Description
Intervention Type	Value selected as intervention type
Intervention Sub-type	Value selected as intervention Sub Type
Disposition	Value selected as disposition. If no disposition selected will be blank
Start Date	Date entered as intervention start date
Follow-up Date	Date entered as Next Follow Up Date If no next follow up date entered will be blank
Outcome	Value selected as outcome
Intervention User	User selected and assigned to the intervention. If no user assigned will be blank
Latest intervention Comment	Comments added to the intervention. If no comments added will be blank
Notes	Description
Note Date	Date of the last note that was created and pertinent to the investigation that contains the created intervention. If no notes are pertinent to this investigation will be blank
Note Type	Note type selected when note created. If no notes are pertinent to this investigation will be blank. If no note type selected will be blank
Subject Line	Free text subject line that was entered for last note created. If no notes are pertinent to this investigation will be blank.

5. Report is assigned to the following User Roles

- MB CDI EPI ANALYST
- MB CDI MEDICAL OFFICER
- MB CDI PUBLIC HEALTH COORDINATOR
- MB CDI PUBLIC HEALTH NURSE
- MB CDI PUBLIC HEALTH NURSE CLOSE
- MB CDI PUBLIC HEALTH NURSE MANAGER

6. Report Description

Report Output:	The report will be generated in Microsoft Excel
Data Source:	Operational data from the PHIMS Database

7. Sample Report

MB2405 Investigation Intervention

This extract is used to search for and view investigation intervention information based on the report parameters selected and the data the user is authorized to see. Note that the data is filtered based on the user's role and logged in org.

Confidentiality Notice: *This report may contain* ***confidential*** *personal health information and is intended to be used for internal Public Health program use only. Disclosure of any information in any report may only occur where the disclosure is authorized in the PHIMS Report User Guides. Any unauthorized use, disclosure, retention, storage, destruction or distribution is* ***strictly prohibited***.

Date Generated: 2022-Jun-01 14:51

Report Parameters

Next Follow Up Date From:	2022-Jan-01
Next Follow Up Date To:	2022-Jun-08
Intervention Start Date From:	No Filter
Intervention Start Date To:	No Filter
Encounter Group:	Communicable Diseases, Outbreak Response, Sexually Transmitted and Bloodborne Infections
Investigation Status:	OPEN
Classification Group:	Case, Contact
Investigator:	No Filter
Intervention User:	No Filter
Display Client Identifiable Data:	Yes

First Name	Last Name	Date of Birth	Gender	Client ID	Investigation ID	Client Phone	Usage	Disease