

Manitoba Public Health Information Management System

Report User Guide

MB2701D

Investigation Redirect (Org Assignment Change) Report

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Definitions for Report User Guides:

- a. "Authorized Organization" means an organization (an RHA, an organization supporting First Nations communities, 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 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.
- e. The "Agreement" refers to Information Sharing Agreement (ISA) signed between the respective organization(s) or community of the reader and Manitoba Health.

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

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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 (e.g. Sexually Transmitted and Blood-borne 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 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 Regional level. This means users who have access to this report can only “view” data for their own regions or organization. This report security is also based on the encounter group access of the logged in user. This means this report will only display investigation information for diseases included in the encounter groups.

The report includes data at the level of the individual but does not contains personal health information; only displays Client ID.

1.3. Permitted Disclosures

- Disclosure of the investigation information is permitted within your respective authorized organization.
- The Government of Canada’s Authorized Users may, in accordance with the terms of the Agreement, disclose the above information to First Nations communities they are supporting.
- Disclosures to the public or outside of your respective authorized organization are not permitted unless specifically dictated by the Agreement.

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:

- Users may only run this report for their designated Health Region or Authorized Organization.
- The data is intended to be used by public health providers for case and contact management 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.

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 the Investigation Redirect Report is to identify investigations with changes to the investigator organization assignments that are not easily identified on the intake reports (Investigation Search and Lab Reports). This report will make it easier to identify cases that have been assigned to another region or community.

2.1. Populations Included in the Report

Report will only include investigations the user is authorized to see based on organization assignment and the users logged in organization.

All regional health authorities (RHAs) within Manitoba are defined by geographic boundaries. However, the First Nations Intuit Health Branch (FNIHB) region is not geographically contained (ie. the case numbers on this report reflect cases that are provincially distributed, not just those within the geographic boundaries of a single RHA).

2.2. Recommended Uses for this Report

This report will be used to identify investigations with assignment changes to the organizations to help monitor for Quality Assurance process.

The report will be available to

- Manitoba Health
- Regional Health Organizations
- First Nations Health Providers

3. Selecting the Report Parameters

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

This is a statistical report under Case: Manitoba Reports

- Ensure the contact investigation is in context,
- Click **Reporting & Analysis > Reports** (LHN) or the **Reporting** tile on the dashboard
- Open the "Case Report Folder" by expanding the collapsible panel
- Select **MB2701D Investigation Redirect (Org Assignment Change)** *hyperlink*
- Enter the **Investigator End Date From** to **Investigator End Date To** (required). Investigator End Date from and Investigator End Date To will be used to filter which investigator organization assignment changes to include on the report based on assignment end date.
- Select the **Encounter Group** (required). Encounter group is the grouping of disease(s) based on the characteristics of the disease and other factors i.e. STBBI, CD etc. Limited to Encounter Groups accessible by Logged-on role.
- Select the **Classification Group** (required). The classification group of an investigation. I.e. case or contact. Report will not include deleted investigations.
- Select the **Investigator Provider Organization** (required). Users will only be able to select parent (at the level directly below Manitoba Health) organizations that have active workgroups. Limited to those Jurisdictional Organizations included in the tree of Organizations for the logged-on organization.
- Select the **Investigator Organization** (optional). Limited to those Investigator Organizations included in the tree of Organizations for the logged-on organization that have active workgroups.
- Select the **Encounter Group** (optional). Encounter group is the grouping of disease(s) based on the characteristics of the disease and other factors i.e. STBBI, CD etc. Limited to Encounter Groups accessible by Logged-on role.
- Select the **Disease** (optional). Filtered by the Encounter Group. In the event of an investigation with multiple diseases, the report will only display the selected disease(s). Must be in the same encounter group (same disease can exist in more than one encounter group; encounter group selection should match for report filtering).
- Click **Generate Report Now**.

Parameter Definitions:

Parameter Name	Data Type	Description	Validation
Investigator End Date From	Date	Will be used to filter which investigator organization assignment changes to include on the report based on assignment end date.	Required
Investigator End Date To	Date		Required
Encounter Group	Multi-select List	Encounter group is the grouping of disease(s) based on the characteristics of the disease and other factors i.e. STBBI , CD etc. Limited to Encounter Groups accessible by Logged-on role.	Required
Classification Group	Multi-select List	The classification group of an investigation. I.e. case or contact.	Required
Investigator Provider Organization	Multi-select List	Regional level investigator organization filter which will search the entire regional organization tree. Limited to those Jurisdictional Organizations included in the tree of Organizations for the users logged on organizations that have active workgroups.	Required
Investigator Organization	Multi-select List	Limited to those Investigator Organizations included in the tree of Organizations for the users logged on organizations that have active workgroups.	Optional
Encounter Group	Multi-select List	Encounter group is the grouping of disease(s) based on the characteristics of the disease and other factors i.e. STBBI , CD etc. Limited to Encounter Groups accessible by Logged-on role.	Optional
Disease	Multi-select List	Filtered by Encounter Group. In the event of an investigation with multiple diseases, the report will only display the selected disease(s). Must be in the same encounter group (same disease can exist in more than one encounter group; encounter group selection should match for report filtering).	Optional

4. Investigation Assignment Filtering

The investigator organization assignment end date will be the main indicator of which investigations should be included on the report. An investigation will be included on the report when a **primary investigator organization assignment is end dated**.

There are three high level redirect scenarios included on the report.

1. Primary investigator assignment at the regional level or PHU within the region is end dated, transferring an investigation out of the region.
For example,:
 - a. From IERHA to FNIH.
 - b. From Pinaymootang First Nation PHU to IERHA.
2. Primary investigator assignment at the PHU level (community) is changed, transferring an investigation from one PHU to another within the region.
For example:
 - a. From Pinaymootang First Nation PHU to FNIH.
 - b. From Pinaymootang First Nation PHU to Little Grand Rapids PHU.
3. Primary investigator assignment changes, transferring an investigation into the region. Primary investigator assignment is end dated and another RHA or PHU within another RHA is assigned as primary investigator.
For example:
 - a. From Winnipeg Health to FNIH.
 - b. From IERHA to Pinaymootang First Nation PHU.

Please note that changes to any secondary investigator assignments will not be included on the report because these organizations are in a supportive role to the investigation.

5. Report Output

Field Name	Description
Client ID	Display the unique client identifier. Numeric.
Investigation ID	Display the unique investigation identifier. Numeric. If there are multiple diseases or investigator organizations changes, multiple rows will display with the same investigation ID.
Reported Date	Earliest investigation reported date. Format will be standard PHIMS date format of yyyy-mmm-dd.
Encounter Group	Encounter group of investigations. i.e. STBBI , CDI etc.
Disease	Disease(s) selected. If there is more than one disease on an investigation, only one row will display corresponding to the disease selected. If all diseases on the investigation are selected, the report will display one row per disease.
Classification Group	The classification group of an investigation. i.e. case or contact.
Classification Code	Latest classification code e.g. Lab Confirmed.
Classification Date	Latest classification date. Format will be standard PHIMS date format of yyyy-mmm-dd.
Disposition	Current investigation disposition.
Disposition Date	Current Investigation disposition date. Format will be standard PHIMS date format of yyyy-mmm-dd.
Inactive Investigator Organization Assignment	
Primary Investigator Organization	The Display Name of the Primary investigator organization that was end dated.
End Date	End date of the investigator organization(s). Format will be standard PHIMS format of yyyy-mmm-dd.
Active Investigator Organization Assignment	
Primary Investigator Organization	The Display Name of the active Primary investigator organization.
Other Investigator Organization(s)	A concatenated string of the Display Name of all active non-primary investigator organizations . Format will be [display name] (investigator type).
Primary Investigator Organization at 30 days	Display the assigned investigator organization based on either: <ul style="list-style-type: none"> The primary investigator organization at 30 days The most recent primary investigator organization (if less than 30 days)
Investigation Status	Include investigation status, i.e. OPEN, CLOSED or Transferred.
Status Date	Date of current investigation status. Format will be standard PHIMS date format of yyyy-mmm-dd.

6. Report is assigned to the following **User Roles**:

- MB_CDI_MEDICAL_OFFICER
- MB_CDI_EPI_ANALYST
- MB_CDI_PUBLIC HEALTH_COORDINATOR _AND_EPI_DOCUMENTATION

7. Report Description

Report Output: The report will be generated in Microsoft Excel.