Manitoba Public Health Information Management System

Report User Guide

MB2701C
Investigation Search

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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 organizations) with whom Manitoba has entered into an Information Sharing 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 the 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 investigation's 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 several 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 region or organization. The report includes data at the level of the individual investigation and contains an investigation ID. No other identifying information is included on the report.

1.3. Permitted Disclosures

- Disclosure of the aggregate number of investigations based on the investigator organization assigned to the case 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 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

This report is required to search and produce a line list of all investigations during a specified timeframe. It will be used for case management and surveillance purposes. It can be used to search for unassigned and assigned investigations. In PHIMS, it is not possible to search for 'unassigned' investigations via the user interface – only those that have been assigned. This report is required to ensure that all investigations entered into the system by Manitoba Health are assigned to region and user for follow-up. In some instances, an investigation may have more than one Investigator Organization. This report also needs to identify investigations with multiple Investigator Organizations where any or all of the Investigator Organizations do not have an identified investigator.

This report also includes Outbreak ID as an optional parameter. When populated, output data will differ slightly, as it lists the investigations identified and linked to an Outbreak. It will be used by public health staff that do not have access to the Outbreak module (e.g., nurses and clerks) or by any staff that need a line list of all investigations identified and linked to an Outbreak.

2.1. Populations Included in the Report

The **Investigation Search Report** provides a line list of all Investigations entered in PHIMS Based on the reported date and the organizational workgroup the investigation was assigned to. Users will only be able to select investigations 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.

All regional health authorities (RHAs) within Manitoba are defined by geographic boundaries. However, the First Nations Inuit Health Branch (FNIHB) region is not geographically contained (i.e. 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

The Investigations Search report will be used by:

- Regions and Manitoba Health
  - Workload - To identify investigations that have not been assigned to an Investigator
  - To monitor new referrals.
  - To identify the state of investigations over a particular timeframe. May be used frequently in an outbreak situation or to identify a suspected outbreak situation.
- First Nations Health Providers
  - Same functions as above with the additional option of community level reporting as needed.
- Coordinators
  - To manage investigations within their region, or those being co-managed in another region.
- Public Health Nurses
  - To search for investigations assigned to them.

As this report may extract a large amount of information users should consider scheduling a report whenever possible to avoid time out

Consider defining a role-based routine business cycle to run these reports to identify any investigations that have not been assigned to an investigator
E.g. Regions and Manitoba Health, First Nations Health Providers, Seniors and Active Living may wish to run this report daily.

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** (LHN) or the **Reporting** tile on the dashboard.

- Open the Case Report Folder by expanding the collapsible panel

- Select **MB2701C-Investigation Search** hyperlink

- Enter the **Outbreak ID** if wanting to search investigations tied to specific Outbreak; do not enter Date Reported From/To or you will generate an error in the report (required if no Date Reported From/To entered)

- Enter the **Date Reported Date From** and **Date Reported To** (required if no Outbreak ID entered)

- 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 **Investigator Provider Organization** (required). This parameter will allow an additional level of detail at the community level. For regions, the Investigator Provider Organization and Investigator Organization will be the same.

- Select the **Investigator Organization** (optional) if desired. Users will only be able to select the organization(s) they have access to base on their logged-in organization.

- 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.

- Select the **Investigator** (optional) if desired. Users will only be able to select the investigators(s) they have access to base on their logged-in organization.

- Enter the **Assigned Date From** and **Assigned Date To** (optional)

- Select **Encounter Group** (optional) Users will only be able to select encounter groups from those they have access to base on their logged in role. Selection of the encounter group will filter list of diseases that will appear in Disease list. If no encounter group(s) are selected, no specific disease can be selected and all diseases from the initial encounter group selection will display in the report.

- Select the **Disease(s)** optional. Users will only be able to select diseases from the encounter groups they have access to base on their logged-in role.

- Select the **Investigator Assignment** (required- defaults to All).

- Select **Display Client Identifiable Data** (required – defaults to No).

- Select **Exclude Investigations with Lab Results** (required – defaults to No).

- Click **Generate Report Now**

Parameter Definitions:

Parameter Name	Data Type	Description	Validation
Outbreak ID	Free Text	ID of Outbreak	Optional*
Date Reported From	Date	Date range based on date the case or contact was reported to Manitoba Health.	Required*
Date Reported To	Date	Date range based on date the case or contact was reported to Manitoba Health.	Required*
Encounter Group	Multi-select List	Limited to Encounter Groups accessible by Logged-on role	Required
Investigation Status	Multi-select List	Open, Closed or Transferred	Required
Classification Group	Multi-select List	Case or Contact	Required
Investigator Provider Organization	Multi-select List	Investigator Provider Organization assigned to the Investigation.	Required
Investigator Organization	Multi-select List	Organization assigned to the Investigation. Limited to Investigator organization accessible by Logged-on role	Optional
Workgroup	Multi-select List	Workgroup assigned to the Investigation. Limited to Workgroups accessible by Logged-on role.	Optional
Investigator	Multi-select List	Investigator assigned to the Investigation. Filtered by workgroup selected.	Optional
Assigned Date From	Date	Date range based on date the organization selected was assigned the investigation.	Optional
Assigned Date To	Date	Date range based on date the organization selected was assigned the investigation.	Optional
Encounter Group	Multi-select List	Limited to diseases accessible by Logged-on role.	Optional
Disease	Multi-select List	Limited to the Diseases contained in the selected Encounter Groups	Optional

Investigator Assignment	Drop List	Defaults to All Can filter by 'Assigned' (An Investigator has been assigned) or 'Unassigned' (an Investigator has not been assigned)	Required
Display Client Identifiable Data	Drop list	Defaults to No. If yes selected, report output will display First and Last Name, and PHIN.	Required
Exclude Investigations with Lab Results	Drop list	Defaults to No. If yes selected, report output will display only investigations that do not have associated laboratory results. Assists with identifying new clinical referrals.	Required

4. Report Output

Generated fields are different if Outbreak ID variant or Date reported variant are used.

Field Name	Description	No OB ID	OB ID
Priority	Identifies if a priority was set for the investigation.	x	
Outbreak ID	ID of Outbreak chosen in Parameter if chosen		x
Reported Date	Date the investigation was reported to Manitoba Health [Report Date (Received) on Create Investigation]	x	x
Investigation ID	Unique Investigation identifier	x	x
Encounter Group	Encounter group associated with the investigation	x	x
Disease	Disease listed on the investigation. Each disease on the investigation will list as a separate row on this report	x	x
Etiologic Agent	Etiologic agent for the disease displayed	x	x
Further Differentiation	Additional information related to the causative agent entered in a text field in PHIMS. Includes additional levels of Etiologic agents such as subtypes or serogroups, and epi markers such as WGA, MLVA, etc.	x	x
Provincial Outbreak Code	Provincial outbreak code for the disease displayed	x	x
OICC Code	OICC code for the disease displayed	x	x
WGS Pattern	WGS pattern for the disease displayed	x	x
WGS Cluster	WGS cluster for the disease displayed	x	x
Disease Site(s)	String of sites selected for the disease	x	x
Current Disease Stage	Current disease stage entered (e.g. primary, secondary), excluding "null", "unknown", or "undetermined"	x	x
Initial Stage Created Date	Date of Initial Stage Created Date	x	x
Test Reason Pregnant	Display 'yes' if any lab result for the client on any investigation includes 'prenatal' or 'pregnant' in text in the 12 months prior to the current date the report is run (ie. not just the most recent result – any result; and could be on any investigation or at the client level).	x	
Pregnant Risk Factor	Display "yes" and concatenate first 100 characters of the additional information (eg. EDC information) if a pregnancy risk factor is included in the client profile for any investigation within the past 12 months (from the current date the report is run) that has a response of 'Yes'. If more than risk factor meets the criteria, the one created most recently will be used for the report.	x	
Classification Group	Specifies whether a case investigation or a contact investigation	x	x

Classification Code	Specifies the type of case or contact e.g. lab confirmed, person under investigation	x	x
Classification Date	Date the investigation was classified.	x	x
Investigation Disposition	Disposition of the investigation	x	x
Disposition Date	Date the disposition was assigned	x	x
Provider Organization	Regional Level organization associated to assigned investigator organization.	x	x
Investigation Organization	Investigator Organization(s) that have been assigned to the investigation. More than one investigator organization may be assigned to an investigation. Each investigator organization will display on a separate row. Only investigations assigned to the logged in organization (or lower in the tree) of the user will be displayed	x	x
Investigation Workgroup	Workgroup assigned to the Investigation. Limited to Workgroups accessible by Logged-on role.	x	
Investigation Status	Status of Open or Closed. Transferred is a secured PHIMS code (cannot be deleted), however, it cannot be selected from within the application so should never display in the report output.	x	x
Status Date	Date associated with status change from open to closed and from closed to open.	x	x
Earliest Symptom Onset	Date Yyyy-MMM-DD		x
Symptom(s)	Concatenated list of entered symptoms, separated by a double pipe (||)		x
Latest Outcome Date	Date Yyyy-MMM-DD		x
Latest Outcome	String of latest outcome value		x
Earliest AE Date	Date Yyyy-MMM-DD Format		x
AE Setting	Concatenated list of AE settings, separated by a double pipe (||)		x
AE Count	Numerical count of AE events		x
TE Count	Numerical count of TE events		x

Sensitive Occupation	Entered Sensitive Occupation (e.g. food handler)		x
Sensitive Occupation Details	Entered Sensitive Occupation details (e.g. handled contaminated meat products)		x
Investigator Type	An investigation must have only one active 'Primary' investigator type. Additional investigator organizations may be specified as Clerk, Coordinator; Inspector; Nurse; Other; Secondary Each Investigator Type will display in a separate row.	x	
Assigned Date	Most recent date associated with the assignment of an organization, workgroup or investigator	x	
Investigator Name	Name of investigator assigned to an investigation. If not specified will be blank.	x	
Client ID	Unique client identifier.	x	x
Date of Birth	Client's birthdate.	x	x
PHIN	Personal Health Identification Number. Only displays if Display Client Identifiable Data=yes.	x	x
First Name	Client's first name. Only displays if Display Client Identifiable Data=yes.	x	x
Last Name	Client's last name. Only displays if Display Client Identifiable Data=yes.	x	x
Age at time of investigations	Optionally included column Only displays if Display Client Identifiable Data=yes. Age of client at time of investigation in years and months e.g. 17 years, 6 months		x
Gender	Optionally included column Only displays if Display Client Identifiable Data=yes.		x
Address	Displays either the MHSU or the Official Registry (OR) address with the most recent Effective From date. Note: Address types other than MHSU and OR are not included. Report displays real time address data and is current as of the time of report generation. Only displays if Display Client Identifiable Data=yes.	x	
Address Effective From Date	Effective From Date for the MHSU or Official Registry address Only displays if Display Client Identifiable Data=yes.	x	
Phone Number	Client's preferred phone number. Only displays if Display Client Identifiable Data=yes.	x	
Usage	Entered usage of above phone number (e.g. primary home, mobile contact). Only displays if Display Client Identifiable Data=yes.	x	

5. Report is assigned to the following User Roles:

- MB_CDI_MEDICAL_OFFICER
- MB_CDI_EPI_ANALYST
- MB_CDI_PUBLIC_HEALTH_COORDINATOR _AND_EPI_DOCUMENTATION
- MB_CDI_PUBLIC_HEALTH_NURSE_MANAGER
- MB_CDI_PUBLIC_HEALTH_NURSE _AND_DATA_ENTRY_CLERK
- MB_CDI_PUBLIC_HEALTH_CLERK
- MB_CDI_PHUBLIC_HEALTH_NURSE_CLOSE
- MB_CDI_DATA_ENTRY_SPECIALIST_CLOSE
- MB_CDI_PUBLIC_HEALTH_REGIONAL_NURSE

6. Report Description

Report Output: The report will be generated in Microsoft Excel

7. Sample Report

MB2701C - Investigation Search

This report is used to search for and list any investigation the user is authorized to see.

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

Date Generated: 2025/01/14 9:59:43 am

Report Parameters:	
Outbreak ID:	No Filter
Date Reported:	2024-Jan-01 through 2025-Jan-14
Encounter Group:	Communicable Diseases, Outbreak Response, Sexually Transmitted a
Investigation Status:	CLOSED, OPEN, Transferred
Classification Group:	Case, Contact
Investigator Provider Org:	Correctional Service Canada, FNIH, Interlake-Eastern Health, MB Hea
Investigator Organization:	Barren Lands (Brochet) PHU, Berens River First Nation PHU, Birdtail S
Assigned Date:	On or after 2024-Jan-01
Investigator:	Chan, Ray, Deane, Ruth, Desrosiers, Robert, Esteves, Sandra, Gerry,
Disease:	Active tuberculosis, AIDS, Anaplasmosis, Anthrax, Babesiosis, Blaston
Investigator Assignment:	All
Display Client Identifiable Data:	No
Exclude Investigations With Lab Results:	No
User Organization:	MB Health

Appendix A: Generate Investigation Search Report to Identify Unassigned Investigations QRC

* Report Output: ⦿ Excel **Outbreak Id:** [ ] **Date Reported From:** [yyyy/mm/dd] [📅] **Date Reported To:** [yyyy/mm/dd] [📅]	- Enter Date Reported From (1900-01-01) - Date Reported To (Current Date)
* Encounter Group: **Available :** [🔍] Communicable Diseases Outbreak Response Sexually Transmitted and Bloodborne Infections Tuberculosis → →| ← |← *** Selected :** [🔍] *** Investigation Status:** **Available :** [🔍] CLOSED OPEN Transferred → →| ← |← *** Selected :** [🔍]	- Encounter Group (One or Both CD and STBBI) - Investigation Status (Open)

* Classification Group: Available : Case Contact → | ← |← *** Selected :** *** Investigator Provider Org:** Available : Correctional Service Canada FNIH Interlake-Eastern Health MB Health MDA Northern Health Out of Province Prairie Mountain Health → → | ← |← *** Selected :**	- Classification Group (Case and Contact) - Investigator Provider Organization (Select the applicable Investigator Provider Organization)
Workgroup: Available : CD - Cross Lake CD - Long Plain First Nation CD - Norway House CD-Alberta CD-Barren Lands (Brochet) CD-Berens River First Nation CD-Birdtail Sioux First Nation CD-Black River First Nation → → | ← |← Selected :	- Workgroup Available (Select All to select ALL click arrow)

Investigator:

Available :

Selected :

Assigned Date From:

yyyy/mm/dd

Assigned Date To:

yyyy/mm/dd

Encounter Group:

Available :

- Communicable Diseases
- Outbreak Response
- Sexually Transmitted and Bloodborne Infections
- Tuberculosis

Selected :

- Assigned Date From (RHA "go live date")
- Assigned Date To (Current Date)

Disease: **Available :** 🔍 [text area] → →I ← I← **Selected :** 🔍 [text area] *** Investigator Assignment:** Unassigned ▼ *** Display Client Identifiable Data:** Yes ▼ *** Exclude Investigations With Lab Results:** No ▼	- Investigator Assignment (Unassigned) - Display Client Identifiable Data (Yes)
[Return] [Generate Report Now] [Schedule Report] [Reset]	- Generate Report Now

Appendix B: Generate Investigation Search Report to Identify All Assigned Investigations by Investigator QRC

* Report Output: ◉ Excel Outbreak Id: [ ] Date Reported From: [yyyy/mm/dd] [📅] Date Reported To: [yyyy/mm/dd] [📅]	- Enter Date Reported From (1900-01-01) - Date Reported To (Current Date)
* Encounter Group: **Available :** [🔍] Communicable Diseases Outbreak Response Sexually Transmitted and Bloodborne Infections Tuberculosis → →| ← |← * Selected : [🔍] * Investigation Status: **Available :** [🔍] CLOSED OPEN Transferred → →| ← |← * Selected : [🔍]	- Encounter Group (One or Both CD and STBBI) - Investigation Status (Open, Closed, Transferred)

* Classification Group: Available : Case Contact *** Investigator Provider Org:** Available : Correctional Service Canada FNIH Interlake-Eastern Health MB Health MDA Northern Health Out of Province Prairie Mountain Health * Selected :	- Classification Group (Case and Contact) - Investigator Provider Organization (Select your Investigator Provider Organization)
Workgroup: Available : CD - Cross Lake CD - Long Plain First Nation CD - Norway House CD-Alberta CD-Barren Lands (Brochet) CD-Berens River First Nation CD-Birdtail Sioux First Nation CD-Black River First Nation Selected :	- Workgroup Available (Select your workgroup)

Investigator:

Available :

🔍

Selected :

🔍

Assigned Date From:

yyyy/mm/dd

Assigned Date To:

yyyy/mm/dd

Encounter Group:

Available :

🔍

Communicable Diseases

Outbreak Response

Sexually Transmitted and Bloodborne Infections

Tuberculosis

Selected :

🔍

- Select you as Investigator
- Leave dates as blank

Disease: Available : [search box] [→] [→|] [←] [|←] Selected : [search box] * **Investigator Assignment:** All [▼] * **Display Client Identifiable Data:** Yes [▼] * **Exclude Investigations With Lab Results:** No [▼]	- Investigator Assignment (All) - Display Client Identifiable Data (Yes)
[Return] [Generate Report Now] [Schedule Report] [Reset]	- Generate Report Now