Manitoba Public Health Information Management System

Report User Guide

MB23400
Investigation Summary 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 Manitoba level. This means users who have access to this report can "view" data for all regions. 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 and contains personal health information.

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 Summary report is to consolidate investigation information from either a contact or case investigation into a pdf document that can be shared with health care providers that don't have access to PHIMS.

The contact investigation summary includes contact and source case information and a summary of client investigation history. A key design feature is the report does not include source case information that directly identifies the source client to protect the source case client's privacy.

The case investigation summary report includes most of the same information as the contact summary, but is also tailored to include additional information needed for case follow-up. It provides a more detailed disease summary, case exposure information (optionally including contacts) and an optional summary of lab information.

2.1. Populations Included in the Report

The **Investigation Summary report** provides an individual investigation summary for the specified investigation (contact or case investigation). The report will return results of investigations for all contacts and cases, regardless of their region of residence.

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 by:
- Manitoba Health:
  - To refer contacts or cases to out of province health authorities.
- Regional Health Authorities and First Nations Health Providers:
  - To refer identified contacts or cases to region of residence for follow-up.

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 **MB23400-Investigation Summary** *hyperlink*

- **Investigation ID** (required) will default to the investigation in context

- **Include PHIMS History** (required) will default to 'No.' Select 'Yes' to include any investigation history for diseases within the same encounter group

- Enter **Report Date Received From and To** (optional) only include investigation history for specified dates. If no dates entered, and 'Include PHIMS history' is set to 'Yes', all investigation history contained in the system will display

- **Include Notes (required)** will default to 'No.' Select 'Yes' to display all notes for the selected investigation

- Enter **Note Date From and To** (optional) to only include notes for specified dates. If no dates entered, and 'Include Notes' is set to 'Yes', all notes for the selected investigation will display.

- **Include Labs (required)** will default to 'No.' Select 'Yes' to display labs associated with the investigation.Enter **Lab Result Date From and To** (optional) to only include labs for specified dates. If no dates entered, and 'Include Labs' is set to 'Yes', all labs associated to the investigation will display.

- **Include Exposure & Contact Details** (required) will default to 'No'. Select 'Yes' to include any exposure and contact details associated to the investigation.

- Click **Generate Report Now**.

Parameter Definitions:

Parameter Name	Data Type	Description	Validation
Investigation ID	Number	Investigation ID of selected investigation. Defaults to investigation currently in context.	Required
Include PHIMS History	Drop list	Determines whether the client's investigation history is included in the report. Will only include history from the same encounter group. Options are Yes or No. The default is No.	Required

Reported Date (Received) From & To	Date	Used to filter the client investigation history based on the earliest reported date. If dates are provided, include all disease investigations recorded within the same encounter group as the investigation for which the report is being run where the earliest report date (received) is on or within the provided dates will display. When no dates are entered, all recorded historical disease investigations included within the same encounter group as the investigation for which the report is being run will display.	Optional
Include Notes	Drop list	Determines whether the notes associated with the investigation are included in the report. Options are Yes and No. The default is No.	Required
Note Date From & To	Date	Used to filter to only include notes for specified dates. If no dates entered, and 'Include Notes' is set to 'Yes', all notes entered for the investigation in context will display.	Optional
Include Labs	Drop list	Determines whether labs associated with the investigation are included in the report. Options are Yes or No. The default is 'No.'	Required
Lab Result Date From & To	Date	Used to filter to only include labs for specified dates. If no dates entered, and 'Include Labs' is set to 'Yes', all labs associated to the investigation will display.	Optional

Include Exposure & Contact Details	Drop list	Determines whether exposure & contact details associated to the investigation are included in the report	Required

4. Report Output

Generated fields are different if a Contact Investigation ID or a Case Investigation ID is used. Respective summary tables are below.

4.1. Contact Investigation Summary

Field Name	Description
Personal Information	
Name	Client name from the contact investigation.
PHIN	Personal Health Information Number
Gender	Contact client's gender.
Date of Birth	Contact client's date of birth. YYYY-Mon-DD.
Preferred Phone Number	Contact client's preferred phone number
Official Registry Address	Contact client's Registry Address
MHSU Address	Contact client's MHSU address
Additional ID Type Description	Name or description of the Contact Client's additional ID type
Additional ID Value	Contact Client's additional id value.
Investigation Infomation	
Investigation ID	Unique investigation identifier from contact investigation.
Report Date (Received)	The earliest reported date on the investigation. YYYY-Mon-DD.
Disposition	Investigation disposition.
Status	Investigation status
Primary Organization	Primary investigator organization
Investigator	Primary Investigator for the investigation.
Address at time of Initial Investigation	Address associated to the contact investigation. Includes inactive addresses.
Disease Summary	
Disease	Disease from the Contact Client's investigation
Classification	Disease classification of the Contact client investigation
Classification Date	Disease classification date. YYYY-Mon-DD.
Source Case Details – Repeated for each source case disease	
Source Case Investigation ID	Investigation id from the source case investigation if one exists.
Disease	Disease from the source case investigation.
Stage	Disease stage from latest disease event.

Classification	Classification group and code from latest disease event.
Report Date (Received)	Earliest reported date from the source investigation. YYYY-Mon-DD.
Etiologic Agent	Lowest level etiologic Agent from latest disease event.
Further Differentiation	Further Differentiation text from latest disease event.
Disease Sites	Concatenated list of selected disease sites from the latest disease event.
Investigation History in PHIMS – *description included to clarify the scope of the investigation history section, including encounter group and date range filter as applicable.*	
Investigation ID	Investigation id of the historical investigation(s).
Disease	Disease from the disease event on the historical investigation(s).
Report Date (Received)	The disease event reported date from the historical investigation(s). YYYY-Mon-DD.
Classification	Classification group and code from the historical investigation(s).
Disposition	Investigation Disposition from the historical investigation(s).
Exposure Summary	
Acquisition Event(s) -	
Exposure Start Date	Exposure start date from the source case transmission event. YYYY-Mon-DD.
Exposure End Date	Exposure end date from the source case transmission event. YYYY-Mon-DD.
Location Name	Exposure location from the source case transmission event. **Displays when user selects to include exposure details.**
Setting Type	Exposure setting type from the source case transmission event. **Displays when user selects to include exposure details.**
Exposure Address	Exposure location address from the source case transmission event. **Displays when user selects to include exposure details.**
Setting	AE exposure setting. **Displays when user selects to include exposure details.**
Mode/Nature of Transmission	Mode of transmission from source case transmission event. Followed by each Nature of transmission value on a new line denoted by an arrow (>). **Displays when user selects to include exposure details.**
Risk Factors (only includes risk factors pertinent to the investigation)	
Risk Factor	Risk factor description.
Reported Date	Risk factor reported date. YYYY-Mon.DD.
Start Date	Risk factor start date. YYYY-Mon.DD.
End Date	Risk factor end date. YYYY-Mon.DD.
Signs and Symptoms	
Sign or Symptom	Sign or symptom text from the contact investigation. Only include when response is 'Yes'.
Onset Date	Onset date time. YYYY-Mon-DD. hh 24:min
Recovery Date	Recover date time. YYYY-Mon-DD. hh 24:min
Reported By	Reported by text.
Interventions	
Type	Intervention type description from the contact investigation.
Sub-Type	Intervention subtype description
Start Date	Intervention start date. YYYY-Mon-DD.

End Date	Intervention end date. YYYY-Mon-DD.
Disposition	Intervention disposition description
Outcome	Intervention outcome description
Prescriptions (only includes prescriptions associated to the investigation)	
Drug	Name of the drug from the contact investigation.
Dosage	Dosage description.
Frequency	Drug administration frequency.
Rx Effective From Date	Prescription start date. YYYY-Mon-DD.
Duration	Prescription duration description.
Course Completed	Indicates the course was completed.
Notes (only includes notes associated to the investigation)	
Note Date	Date from the note on the contact investigation. YYYY-Mon-DD.
Note Type	Note type description.
Subject Line	Subject line text.
Note Text	Note text

4.2. Case Investigation Summary

Field Name	Description
Personal Information	
Name	Client name from the contact investigation.
PHIN	Personal Health Information Number
Gender	Case's gender.
Date of Birth	Case's date of birth. YYYY-Mon-DD.
Preferred Phone Number	Case's preferred phone number
Official Registry Address	Case's Official Registry Address
MHSU Address	Case's MHSU address
Additional ID Type Description	Name or description of the Case's additional ID type
Additional ID Value	Case's additional id value.
Investigation Information	
Investigation ID	Unique investigation identifier from case investigation.
Report Date (Received)	The earliest reported date on the investigation. YYYY-Mm-DD.
Disposition	Investigation disposition.
Status	Investigation status.
Primary Organization	Current Primary investigator organization
Investigator	Primary Investigator for the investigation.
Address at time of Initial Investigation	Address associated to the case investigation. Includes inactive addresses.
Sensitive Environment/Occupation	Sensitive Environment/Occupation

Sensitive Env/Occ Details	Details of Sensitive Environment/Occupation
Disease Summary	
Disease	Investigation Disease. If a co-infection, will list all applicable diseases separately.
Site(s)	Disease Site(s).
Stage	Current stage.
Classification	Disease classification
Classification Date	Disease classification date. YYYY-Mm-DD.
Etiologic Agent	Etiologic agent
Epi Markers	Table of name/value pairs for all configured EPI markers.
Investigation History – *description included to clarify the scope of the investigation history section, including encounter group and date range filter as applicable.*	
Investigation ID	Investigation id of the historical investigation(s).
Disease	Disease from the disease event on the historical investigation(s).
Report Date (Received)	The disease event reported date from the historical investigation(s). YYYY-Mm-DD.
Classification	Classification group and code from the historical investigation(s).
Disposition	Investigation Disposition from the historical investigation(s).
Exposure Summary	
Transmission Event(s) - *repeated for each TE*	
Exposure Start Date	Exposure start date from the case transmission event. YYYY-Mm-DD.
Exposure End Date	Exposure end date from the case transmission event. YYYY-Mm-DD.
Exposure Name	TE exposure name. **Displays when user selects to include exposure details.**
Location Name	TE exposure location name. **Displays when user selects to include exposure details.**
Setting Type	TE exposure setting type. **Displays when user selects to include exposure details.**
Setting	TE exposure setting. **Displays when user selects to include exposure details.**
TE Responsible Org	
# of Contacts	Count of all TE contacts – known, unknown and anonymous
Contact Count Details Section – Optional section that is displayed when user selects to NOT include exposure details	
Known Contact Count	Number of Known contacts
Unknown Contact Count	Number of Unknown contacts
Anonymous Contact Count	Number of Anonymous contacts
Known Contact Section – information comes from contact investigation (repeats for each known contact). Optional section that is displayed when user selects to include exposure details.	
Contact Investigation ID	Unique identifier for contact investigation. *This field will always display even when user selects to NOT include exposure details.*
Contact Name	Known contact name

Birthdate	Birthdate of Known contact
Gender	Gender of Known contact
Classification	String of disease, classification group and classification code.
Disposition	Disposition of known contact investigation

Unknown Contact Section (repeats for each unknown contact). Optional section that is displayed when user selects to include exposure details.

Unknown Contact Name /Description	Unknown contact's name or description
Contact Info	Unknown contact info
Contact Details	Unknown contact details
Contact Disposition	Unknown contact disposition
Disposition Details	Unknown contact dispositions

Anonymous Contact Section. Optional section that is displayed when user selects to include exposure details.

Anonymous Contact Count	Number of Anonymous contact
Contact Details	Anonymous contact details

Acquisition Event(s) – *repeat for each AE*

Exposure Start Date	Exposure start date from the acquisition event. YYYY-Mm-DD.
Exposure End Date	Exposure end date from the acquisition event. YYYY-Mm-DD.
Exposure Name	AE exposure name. **Displays when user selects to include exposure details.**
Location Name	AE exposure location name. **Displays when user selects to include exposure details.**
Setting Type	AE exposure setting type. **Displays when user selects to include exposure details.**
Setting	AE exposure setting. **Displays when user selects to include exposure details.**
Exposure Address	String of the complete address from the source AE. **Displays when user selects to include exposure details.**

Risk Factors (only includes risk factors pertinent to the investigation)

Risk Factor	Risk factor description.
Reported Date	Risk factor reported date. YYYY-Mm-DD.
Start Date	Risk factor start date. YYYY-Mm-DD.
End Date	Risk factor end date. YYYY-Mm-DD.

Signs and Symptoms

Sign or Symptom	Sign or symptom text from the case investigation. Only include when response is 'Yes'.
Onset Date	Onset date time. YYYY-Mon-DD hh24:min.
Recovery Date	Recover date time. YYYY-Mon-DD hh24:min.
Reported By	Reported by text.

Interventions

Type	Intervention type description from the case investigation.
Sub-Type	Intervention subtype description

Start Date	Intervention start date. YYYY-Mm-DD.
End Date	Intervention end date. YYYY-Mm-DD.
Disposition	Intervention disposition description
Outcome	Intervention outcome description
Outcomes	
Outcome	Investigation outcome
Outcome - Other	Other Outcome value if applicable
Outcome Date	Investigation outcome date. YYYY-Mm-DD.
Prescriptions (only includes prescriptions tied to the investigation)	
Drug	Name of the drug from the investigation.
Dosage	Dosage description.
Frequency	Drug administration frequency.
Rx Effective From Date	Prescription start date. YYYY-Mm-DD.
Duration	Prescription duration description.
Course Completed	Indicates the course was completed.
Immunization History Interpretation	
Disease	Disease shown in immunization history interpretation associated with the investigation, one disease per row
Interpretation Date	Date of immunization interpretation for above disease
Interpretation of Immunity	Status of immunity for above disease (i.e. Fully immunized, Unimmunized etc.)
Reason	Display reason selected as basis for disease immunity interpretation.
Immunization Summary	
Antigen	Pertinent antigen **as displayed in quick entry.** Only pertinent vaccinations as related to investigation(s) – may be multiple lines to display. Please see appendix for list of diseases and pertinent antigents as configured.
Number of valid vaccine doses	Number of valid doses for above antigen
Agent/Date of administration	Date of administration of vaccine as well as agent concatenated in HTML
In Context Documents	
Document Title	Title of context document
Document Description	Description of context document. Context documents will need to be printed separately if required.
Effective Date	Effective date of context document
Lab Summary	
Test name	Lab test name
Result Date	Lab test result date. YYYY-Mm-DD.
Ordering SDL	Ordering SDL for lab result
Ordering Provider	Ordering Provider for lab result
Resulting Lab	Name of resulting lab
Specimen Collection	Date of specimen collection
Specimen Type	Type of specimen collection

Specimen Site	Site of specimen collection
Result Name	Lab test result name
Accession Number	Lab accession number
Interpreted Result	Lab interpreted result
Result Value	Lab result value
Etiologic Agent Sensitivities	Default is No. Set to yes if there are one or more agent sensitivity entries.
Result Status	Lab result status
Notes (only includes notes associated to the investigation)	
Note Date	Date from the note on the case investigation. YYYY-Mm-DD.
Note Type	Note type description.
Subject Line	Subject line text.
Note Text	Note text in RTF format.

5. Report is assigned to the following User Roles:

- MB_CDI_MBHEALTH_SURVEILLANCE

- MB_CDI_MEDICAL_OFFICER

- MB_CDI_PUBLIC_HEALTH_NURSE_MANAGER

- MB_CDI_PUBLIC_HEALTH_NURSE _AND_DATA_ENTRY_CLERK

- MB_CDI_PUBLIC_HEALTH_COORDINATOR_AND_EPI_DOCUMENTATION

- MB_CDI_PUBLIC_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 as a PDF

Appendix A - List of Diseases and Pertinent Vaccine Antigents as Configured (Immunization Summary Table)

Disease Name	Vaccine Antigens
Chancroid	Hep A, Hep B, HPV, Monkeypox
Chlamydia	Hep A, Hep B, HPV, Monkeypox
Diphtheria	Diphtheria toxoid low dose, Diphtheria toxoid standard dose
Gonorrhea	Hep A, Hep B, HPV, Monkeypox
Haemophilus influenzae Type B Invasive Disease	Haemophilus influenzae type B antigen
Hepatitis A	Hep A
Hepatitis B	Hep A, Hep B, HPV, Monkeypox
Hepatitis C	Hep A, Hep B, HPV, Monkeypox
Human Immunodeficiency Virus (HIV)	Hep A, Hep B, HPV, Monkeypox
Lymphogranuloma venereum	Hep A, Hep B, HPV, Monkeypox
Measles	Measles
Meningococcal disease, invasive	Men-B, Men grp A, Men grp C, Men W135, Men grp Y, Men polysaccharide grp A, Men polysaccharide grp C, Men polysaccharide grp W135, Men polysaccharide grp Y
Monkeypox	Smallpox
Mumps	Mumps
Pertussis	Pertussis acellular low dose, Pertussis acellular standard dose, Pertussis whole cell
Pneumococcal disease	Pneumo conjugate, Pneumo polysaccharide
Rubella	Rubella
Syphilis	Hep A, Hep B, HPV, Monkeypox
Syphilis, congenital	Hep A, Hep B, HPV, Monkeypox
Typhoid	Typhoid
West Nile Virus	Japanese encephalitis, Yellow fever
Yellow Fever	Yellow fever