

Manitoba Public Health Information Management System

Report User Guide

MB4120B

Lab Workload Report

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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

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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 (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 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 users logged in organization level. This means that users who have access to this report can only "view" data at or below their logged in org. The report includes data at the level of the individual and contains a line list of lab results based on entry date and assignment to regions. Client information includes the PHIMS subject ID, which is unique to PHIMS, as well as a date of birth and gender. Optionally, users can choose to display First Name, Last Name and Personal Health Information Number (PHIN) Although only limited personal health information is displayed, results displayed may identify individuals. As a result, the number of users who have access to this report is limited to Public Health users who require access to this information to fulfill functions under the *Public Health Act*.

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:

- Ensuring the report is run only for their designated Health Region.
- Ensuring the data is 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.
- Ensuring 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 the lab workload report is to support the review of new lab results entered in PHIMS and prioritize the assignment of them to investigations (new or existing) and subsequent assignment to an investigator (Public Health practitioner).

2.1. Populations Included in the Report

The **Lab Workload Report** provides a line list of all lab results entered by date in PHIMS, based on the organizational workgroup assigned to the lab and the organization assigned to the investigation that the lab is pertinent to. Users will only be able to select lab results that have been assigned to their organization or lower in the organizational tree.

This report will be used by:

- Manitoba Health, Seniors and Active Living to:
 - Identify positive lab results that have not yet been assigned to an investigation.
 - Identify and manage the assignment of lab results to regions.
 - Identify any data quality issues associated with user entered labs.
- Regions to:
 - Identify lab results that have been assigned to the region for review.
 - Ensure all labs assigned to the region for review have been assigned to an investigation and investigator.
 - Identify what Public Health Unit/PHN the lab should be assigned to for investigation.



Note to user

- Consider defining a role-based routine business cycle to run these reports to ensure lab result referrals are managed in a timely way. E.g. for referral management, regions and Manitoba Health, Seniors and Active Living may wish to run this report two to three times daily. For surveillance purposes and quality management, this report may be run weekly.

3. Selecting the Report Parameters

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

For date parameters, users can use the calendar date picker to select the dates, or type the numeric date in the data entry fields.

For multi-select lists, the  (select all) button is defaulted and allows users to quickly select all items in the pick list. If users only want choose certain items, they need to highlight the items and select  .

Selecting the Correct Parameters to get the Needed Output

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

This is a statistical report under Case: Manitoba Reports

- Click **Reporting & Analysis > Report** (LHN) or the **Reporting** tile on the dashboard.
- Open the **Case Report Folder** by expanding the collapsible panel
- Select **MB4120-Lab Workload** *hyperlink*
- Enter the **Date Entered From** and **To** (required).
- 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.
- Select the **Disease** (optional). Users will only be able to select diseases associated with encounter group(s) they have access to base on their logged-in role.
- Select the **Investigator Organization** (required). Users will only be able to select their organization or lower than the logged in organization. Results will display all labs assigned to the investigator organization selected based on the organization assigned to either the laboratory result or the associated investigation, including all types of investigators (e.g. primary, secondary). Lab results that have not been linked to an investigation AND have not been assigned a Lab investigator organization will be considered 'unassigned' and will be visible to all users. Unassigned will be part of the multi-select list.
- Select the **Filter Results by User**. Defaults to 'No'. If user selects 'Yes', only labs that have been entered by the logged in user will display. This is for users who enter labs to confirm correct lab entry (MHSU).
- Select the **Display Client Identifiable Data**. The default is "No", which only displays client ID, gender, DOB. If "Yes" is selected, the PHIN, First Name, and Last Name are also displayed
- Click **Generate Report Now**

Parameter Definitions:

Parameter Name	Data Type	Description	Validation
Date Entered From	Date	Date range based on date lab entered into PHIMS	Required
Date Entered To	Date	Date range based on date lab entered into PHIMS	Required
Encounter Group	Multi-select List	Users will only be able to select the encounter group(s) they have access to base on their logged-in role.	Required
Disease	Multi-Select List	Users will only be able to select the diseases that they have access to base on their logged in role If no disease is selected, all labs for diseases associated with selected encounter group will be returned. If diseases are found in more than one encounter group (e.g. Hep B, C are in both STBBI and CD encounter group), the disease displayed will correspond to the encounter group used when the lab was created. E.g. if Hep B lab was created within the CD encounter group, it will not display if only STBBI encounter group is selected	Optional
Investigator Organization	Multi-select List	Users will only be able to select their organization or lower than the logged in organization. Investigator organizations assigned to an individual lab and investigator organizations of all types (e.g. primary, secondary) assigned to a pertinent investigation apply. Lab results that have not been linked to an investigation AND have not been assigned a Lab investigator organization will be considered 'unassigned' and will be visible to all users. Unassigned will be part of the multi-select list.	Required
Filter Results by User	Check box	No or Yes defaults to 'No'. Used only by users who enter labs to confirm correct lab entry	Required
Display Client Identifiable Date	Drop list	No or Yes defaults to 'No'.	Required

4. Report Output

Field Name	Description
Date Lab entered	(YYYY-Mmm-DD HH:MM)
Result Date	Date of result (YYYY-Mmm-DD).
Investigation Reported Date (Received)	Date the investigation was reported/received to Manitoba Health, Seniors and Active Living (YYYY-Mmm-DD). Comparison of the lab entered date, result date and investigation reported date, will allow the user to determine if this result is a brand new result (result date in close proximity to investigation report date) or a repeat result on an existing investigation (result date is in remote proximity to the investigation report date). If there is only a result date, and no investigation report date, then the result has not been made pertinent to an investigation, or the investigation has not been created. This may occur with high volume lower priority diseases (e.g. influenza)
Investigation Workgroup/Investigators	Concatenated field displaying all assigned workgroups and investigators. Workgroup, user and investigator type will display as entered. will separate entries if more than one organization or investigator assigned. If lab was not made pertinent to an investigation, field will be blank.
Lab Workgroup	Displays workgroup assigned when lab was entered. If no workgroup assigned, field will be blank. Lab workgroup assignment will be determined by the most current and active MHSU or Official registry address. The investigation workgroup may differ from the lab workgroup if the client has moved during the interval between the creation of the investigation and the assignment of the lab. This may occur with repeat lab results. The investigation organization and workgroup should be updated by the regional user if necessary.
PHO for Client Lab Addr	Public Health Office as determined by the postal code on the most recent and current MHSU or Official Registry address in PHIMS at the time of report generation . This will be helpful for assignment of labs when the entered date and the result date are in close proximity. However, as the PHO will be based on real time address data, the PHO reported here may not reflect the PHO assigned to the lab, if the date entered parameter does not reflect the current date.
Encounter group	Encounter group associated to lab result
Disease	Disease associated to lab result
Etiologic Agent	PHIMS can record multiple levels (e.g. microorganism, subtype, serogroup, serotype, etc.) to characterize organisms. If more than one level of etiologic agent is recorded, the results will display as a string if recorded on the laboratory result. If the etiologic agent is recorded on the investigation only (not the lab result), it will not display in this report.
Result Name	Lab result name
Interpreted Result	Lab result interpretation
Result Description	Contains reason for testing (e.g. Prenatal, Diagnostic)

Investigation ID	Investigation ID associated to lab result. Will show as "unassigned" if not associated to an investigation. Can be used to search for an investigation in PHIMS.
Investigation Status	Open, Closed and Transferred. No investigations can have a status of Transferred.
Disposition	Will display the most current disposition on the investigation
Disposition Date	Date associated with current disposition.
Subject ID	Unique client identifier. Can be used to search for client in PHIMS.
Client MHSU or OR Address	The most recent and current MHSU or Official Registry address at the time of report generation . This will be helpful for assignment of labs when the entered date and the result date are in close proximity. However, as based on real time address data, the data reported here may not reflect the address at the time of the lab if the date entered parameter does not reflect the current date.
Address Effective from Date	Effective from Date for the most current and active MHSU or Official Registry address. This date can be used along with the date entered parameter to determine if the reported address was used with the reported lab
PHIN	This column will only appear if 'Display Client Identifiable Data' is set to Yes. PHIN number associated with the client will display. If client does not have a PHIN cell will be blank
First name	This column will only appear if 'Display Client Identifiable Data' is set to Yes. Client's first name will display
Last name	This column will only appear if 'Display Client Identifiable Data' is set to Yes. Client's last name will display
Date of Birth	This column will only appear if 'Display Client Identifiable Data' is set to Yes. Client's date of birth (YYYY-Mmm-DD).
Gender	This column will only appear if 'Display Client Identifiable Data' is set to Yes. Client's gender.
Age at Entered Date	Age of client at date of entry of lab result. Use this column to identify client's that are high risk based on age e.g. infants
Ordering SDL	Clinic or facility that ordered the lab test.
Ordering Provider	Provider that ordered the lab test.
Specimen collection date	Specimen collection date. Will be entered as 1900-Jan-01 if not documented on the lab result (is required for lab quick entry).
Specimen Type/Site	Specimen type and site. Use this column to quantify risk e.g. gonorrhea of the eye
Specimen Description	Specimen description. Used to document the reason for test (e.g. prenatal, diagnostic, etc.), which can also be used quantify risk
Lab Accession number	The unique number assigned by the laboratory for the laboratory result. Different laboratories refer to this number by different names, including "Requisition Number", "Reference Number", or "Lab Number".

5. Report is assigned to the following roles

- MB CDI MBHEALTH SURVEILLANCE
- MB CDI EPI ANALYST
- MB CDI MEDICAL OFFICER
- MB CDI PUBLIC HEALTH NURSE MANAGER
- MB CDI PUBLIC HEALTH COORDINATOR
- MB CDI PUBLIC HEALTH NURSE
- MB CDI PUBLIC HEALTH NURSE CLOSE
- MB CDI PUBLIC HEALTH CLERK
- MB CDI PUBLIC HEALTH NURSE OUTBREAK RESPONSE

6. Report Description

Report Output: The report will be generated in Microsoft Excel

Data Source: Operational data from the PHIMS Database

7. Generate Lab Results Report to Identify or Review New Labs - QRC Sample parameters

Report Filters

Report: MB4120B-Lab Workload

*** Report Output:**
 Excel

*** Date Entered From:**

*** Date Entered To:**

Reflects the date the lab was entered by the MHSU. If current date is selected in both from and to, data returned will be up until the time the report was generated. Users will need to generate the report at the end of the current day or run the report the following day to return all labs entered with in that date parameter

*** Encounter Group:**

<p>Available :</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Communicable Diseases Outbreak Response Sexually Transmitted and Bloodborne Infections Tuberculosis </div>	<input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="↔"/> <input type="button" value="↔"/>	<p>* Selected :</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> (Empty) </div>
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Encounter groups available in the pick list will be based on the encounter groups associated with the users logged in role

Disease:

<p>Available :</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Active tuberculosis AIDS Anaplasmosis Anthrax Babesiosis Blastomycosis Botulism </div>	<input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="↔"/> <input type="button" value="↔"/>	<p>Selected :</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> (Empty) </div>
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If no disease is selected, all labs for diseases associated with selected encounter group will be returned. If diseases are found in more than one encounter group (e.g. Hep B, C are in both STBBI and CD encounter group), the disease displayed will correspond to the encounter group used when the lab was created. E.g. if Hep B lab was created within the CD encounter group, it will not display if only STBBI encounter group is selected

*** Investigator Organization:**

<p>Available :</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> Southern Health - Sante Sud Unassigned </div>	<input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="↔"/> <input type="button" value="↔"/>	<p>* Selected :</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> (Empty) </div>
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Investigator Organizations available will be based on the users logged in organization. For most users that will be one region and 'unassigned'. Unassigned means that the lab was not assigned to an organization and workgroup at lab entry, nor was it made pertinent to an investigation.

*** Filter Results by User:**

Only select yes if user is entering labs to ensure quality data entry

*** Display Client Identifiable Data:**

Only select 'yes' if name, PHIN, Date of birth and gender are required for workload assignment