



# Investigations:

## Provider Form Investigation Mgmt for PH Regions

### Page 1

QRC

#### Points to Remember:

- The Provider Form Investigation is created to capture case and contact information, including treatment, gathered from non-Public Health sources (e.g., primary care physicians); in most cases, the form will be faxed to MHSU for entry in PHIMS, but can be entered by region staff per regional workflow if fax is received directly from the Provider
- The Provider Form IQE page allows for a more seamless and integrated workflow for entering and viewing investigation information
- All medications on the Provider Form Investigation are entered by the MB Health Surveillance Unit into the Provider Form Investigation unless defined otherwise by regional workflows; Non-standard or missing treatment information cannot be entered by MHSU
- **Note that provider form investigations will auto close in 60 days. It is recommended that regions leave these investigations open for eventual auto close** to allow duplicate, updated, or new provider forms received by MHSU to be added to an open Provider Form Investigation. If closed, MHSU will create a new Provider Form Investigation for other forms received.
- **If there is a Syphilis Case investigation, Medications must be transcribed from the Provider Form investigation into the Syphilis Case investigation if they are not already entered. For Syphilis Contact investigations, or other Disease (Case or Contact) investigations (e.g., Chlamydia, Gonorrhea, etc.), medications would be transcribed at the investigator's discretion (not a requirement).**
- All medications will remain on the Provider Form Investigation as part of the client's overall treatment record
- \*On assignment to regions/updates to existing investigations, the Provider Form Investigation disposition will be set to 'Pending' if no contacts have been identified (i.e., Medications only), or 'Hold for contact follow-up' if contacts have been identified; if Contacts identified and the client is currently a Case, review the Provider Form document for further information. Investigations with Disposition of 'Hold for contact follow-up' should be reviewed prior to those with a 'Pending' disposition. In cases where MHSU is unable to enter the treatments, the Provider Form Investigation will have a disposition of 'Unable to complete'.
- \*\*The Provider Form may be received/entered when there is already an investigation created; in those situations, a review of information is required on both/any related investigations
- \*\*\*If there is an existing investigation, Contacts identified on the Provider Form document would be reconciled/updated only if the existing investigation is a Case investigation (i.e. Contacts of contacts would not be transcribed to the existing investigation); if Contacts do not need to be added, proceed to Medications review and updating steps
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#### Medication Points to Remember:

- +If the Provider is not found, select 'Use Other Provider' and add free text details in comments box
- ++Treatment Effective date will carry over to eChart; this date should represent the date the treatment was administered or provided to the client
- +++**If there are duplicate medication entries on the Provider Form Investigation(s) AND the Other Investigation(s), the Provider Form Investigation Course Completed field MUST be changed.** There should be only 1 entry of a Medication that is not set to a 'Course Completed-Duplicate Record'. Setting the Course Complete value in the Provider Form Investigation to 'Duplicate Record' will remove it from eChart and prevent duplicate medications appearing in the client's eChart record.



# Investigations:

## Provider Form Investigation Mgmt for PH Regions

### Page 2

QRC

#### Decision Points to Remember:

1. If there is a Primary Investigator assigned to the Disease Investigation, assign the Provider Form Investigation to the Primary Investigator for follow-up.
  2. Within 14 days of receiving a new STBBI Case Investigation, regional Public Health should contact the testing practitioner (by fax if possible) to request that they complete the Provider Report Form if not already received: [https://www.gov.mb.ca/health/publichealth/surveillance/docs/mhsu\\_6781.pdf](https://www.gov.mb.ca/health/publichealth/surveillance/docs/mhsu_6781.pdf)
  3. If the Provider Form Investigation Disposition is set to 'Pending', there are no contacts; if the Disposition is set to 'Hold for contact follow up', and there is a Case investigation, the Provider Form Document must be reviewed for contacts, and any new Contacts added to the Case Investigation per regional processes. Disposition of 'Unable to complete' indicates that MHSU could not enter the STI treatments on the Investigation
  4. If there is a Provider Form Investigation, and no other investigations, the Provider Form can be closed.
  5. The most comprehensive view of Medications is done at the client level; with no investigation in context, clicking on Medications Summary tab on the LHN will provide a view of all medications from all investigations
- 3. When there is a Clinical (i.e., Public Health created) Investigation (either existing, or one that comes after the Provider Form has been created), the Medications MUST be reviewed for possible updates.** If there is a Syphilis Case investigation, Medications MUST be transcribed from the Provider Form investigation into the Syphilis Case investigation if they are not already entered. For Syphilis Contact investigations, or other Disease (Case or Contact) investigations (e.g., Chlamydia, Gonorrhea, etc.), medications would be transcribed at the clinician's discretion (NOT a requirement).
4. If no update is required (i.e., medications exist in only the Provider Form Investigation but do not have to be transcribed to the other investigation), NO changes are required for the Provider Form Investigation.
- 6. If there are duplicate medication entries on the Provider Form Investigation(s) AND the Other Investigation(s), the Provider Form Investigation Course Completed field MUST be changed.** There should be only 1 entry of a Medication that is not set to a 'Course Completed-Duplicate Record'. Setting the Course Complete value in the Provider Form Investigation to 'Duplicate Record' will remove it from eChart and prevent duplicate medications appearing in the client's eChart record. Once the Provider Form Investigation Course Completed field has been changed, ALL Medication updates occur in the Public Health investigation.
- ^^The Case or Contact Disease Investigation should be populated with the best information relevant to the investigation. If information on the Provider Form conflicts with more relevant, current, accurate, and fulsome information obtained from other assessments, it does not need to be entered into the Disease Investigation. A clinical note is recommended to address the discrepancy.

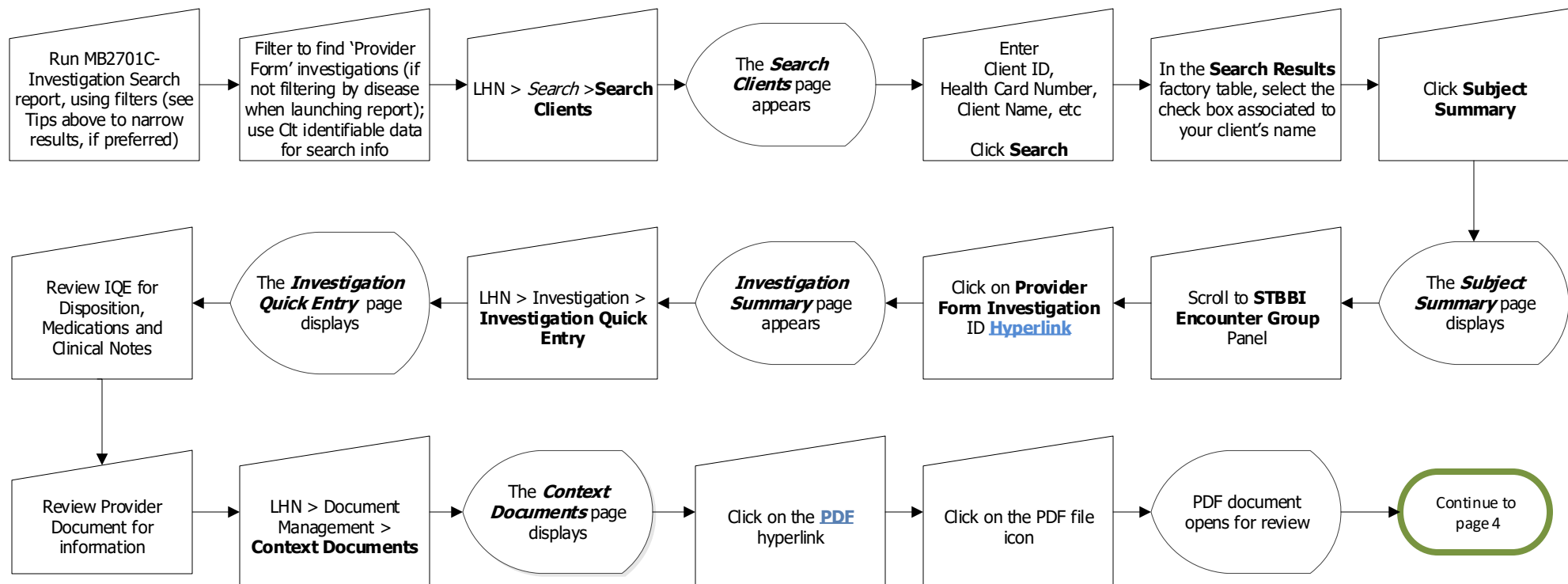


# Investigations:

## Provider Form Investigation Mgmt for PH Regions – Viewing Investigation Page 3

QRC

**TIP: To Filter Investigation Search report, use the following values to narrow search to Provider Form Investigations and initiate workflow: STBBI Encounter Group, Open Status, Case Classification, Your Region, Disease 'Provider Form', and Yes to 'Display Client Identifiable Data'**

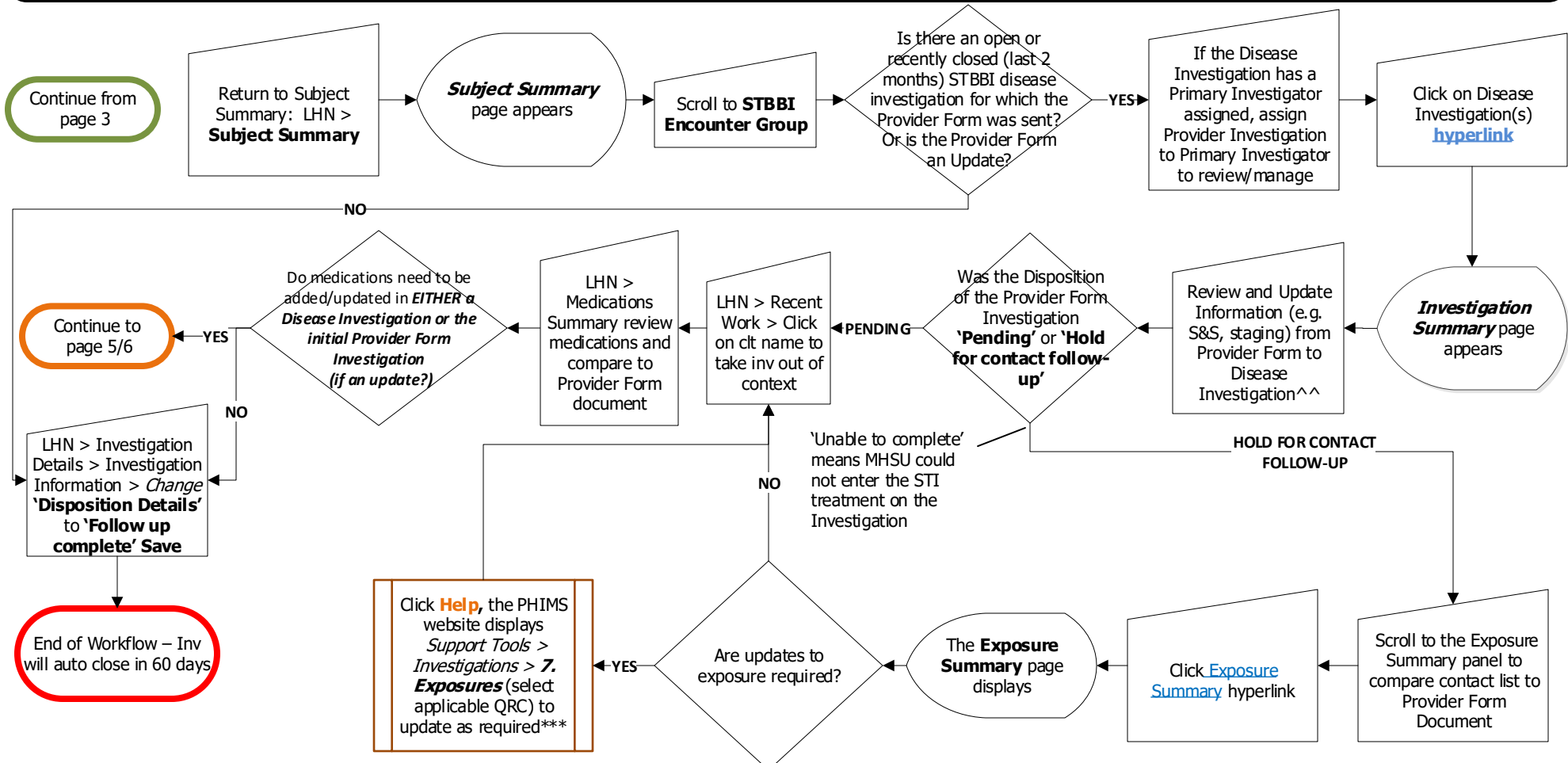




# Investigations: Provider Form Investigation Mgmt Managing Investigations Page 4

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Please review 'Medication Points to Remember on p. 1 and 'Decision Points to Remember' on p.2 of QRC when completing this workflow



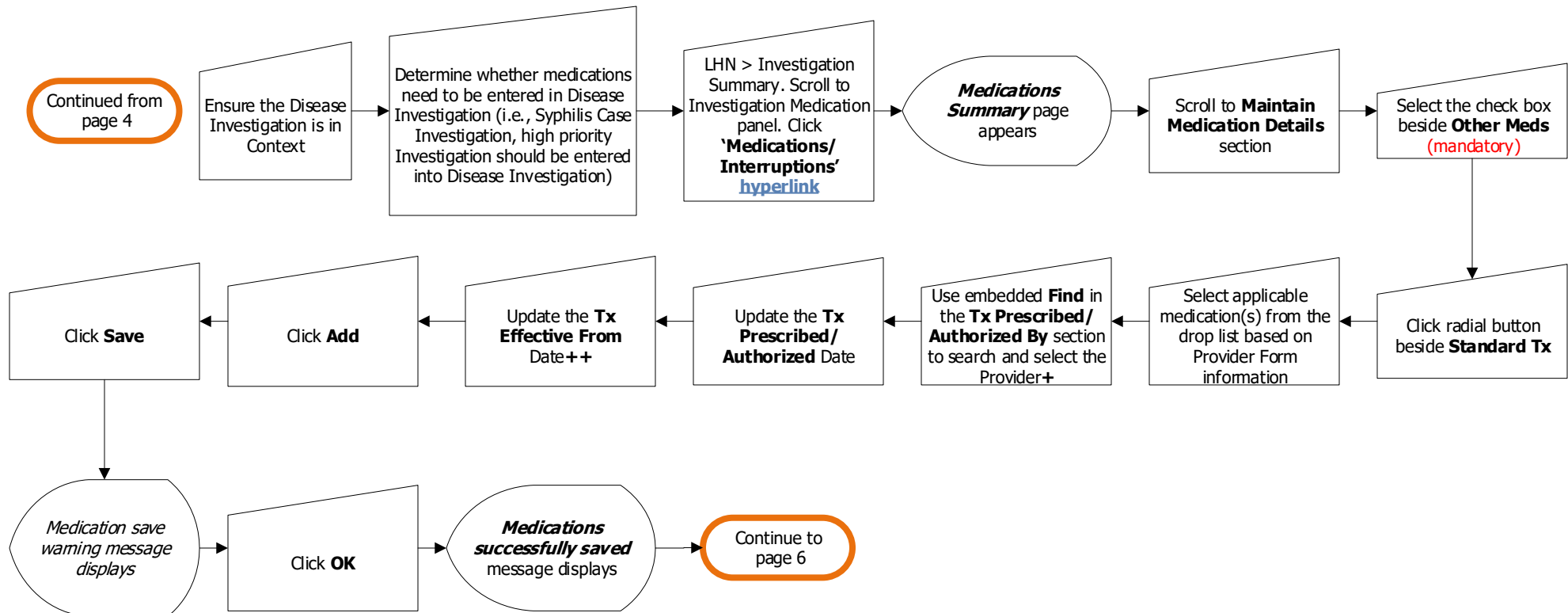
Note that provider form investigations will auto close in 60 days. It is recommended that regions leave these investigations open for eventual auto close to allow duplicate, updated, or new provider forms received by MHSU to be added to an open Provider Form Investigation. If closed, MHSU will create a new Provider Form Investigation for other forms received.



# Investigations: Provider Form Investigation Mgmt Reconciling Medications in Disease Investigation Page 5

QRC

Use this page if an addition of medication information is required for the Disease Investigation; if it is not required, proceed directly to p. 6  
Please review 'Medication Points to Remember on p. 1 and 'Decision Points to Remember' on p.2 of QRC when completing this workflow



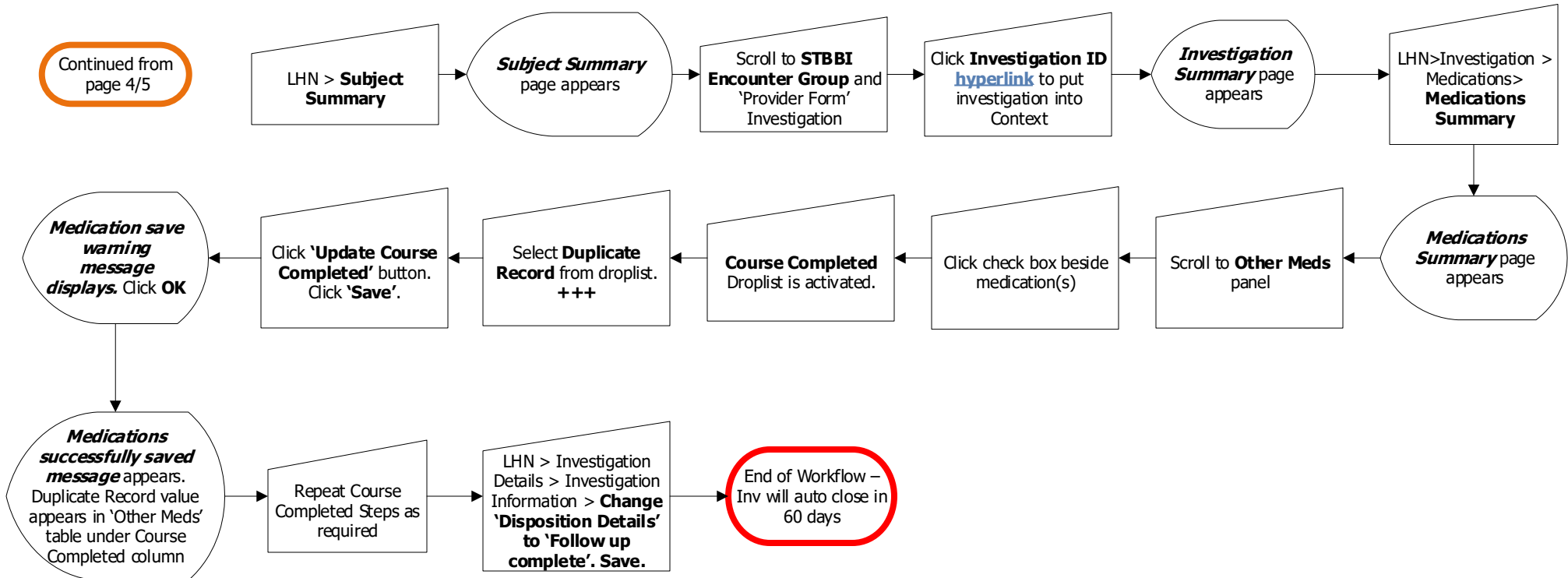


# Investigations:

## Provider Form Investigation Mgmt for PH Regions-Medication Course Completed in Provider Form Investigation Page 6

QRC

Use this page if an update of medication information is required for the Provider Form Investigation; if medications need to be added to the Disease Investigation, go to p. 5 first. Please review 'Medication Points to Remember on p. 1 and 'Decision Points to Remember' on p.2 of QRC when completing this workflow



Note that provider form investigations will auto close in 60 days. It is recommended that regions leave these investigations open for eventual auto close to allow duplicate, updated, or new provider forms received by MHSU to be added to an open Provider Form Investigation. If closed, MHSU will create a new Provider Form Investigation for other forms received.