

Manitoba Public Health Information Management System

Report User Guide

MB60000

Reminder Recall List

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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 Immunization in PHIMS

In Manitoba, Authorized Users (“users”) of the immunization module have access to immunization records for all Manitobans. This was decided as a result of a number of considerations, including:

- Clients can receive immunization services at service delivery locations other than their default public health office, either within or outside their home health region
- School age clients may attend schools outside their home region where immunization services are delivered
- Cases and outbreaks of vaccine preventable diseases also cross regional boundaries and may involve multiple public health provider organizations.

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.

The report includes data at the level of the individual and contains a line list of personal and personal health information. The reminder recall list contains:

- Client Name
- Address
- PHIN/MHSC#
- Date of Birth
- Age
- Gender
- Associated PH Office
- School information (if it exists)
- Client Status (active/inactive)
- May also include: antigens and their forecast status (due, overdue, up-to date)

1.3. Permitted Disclosures

- Disclosure limited to contacting individual to remind re immunization / or invite to a PH clinic
- Authorized Users of Authorized Organizations (RHAs, First Nations and FNIHB) may disclose the minimum amount of relevant information necessary to providers of health-care so as to work cooperatively and without obstruction for timely and efficient information sharing for public health service delivery. For example, cooperating on reviewing reminder recall reports to confirm location of and communication to clients.

Note re Permitted Disclosures - In general, 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 Reports to a FN Authorized User.

1.4. Data Stewardship

Users who have access to this report are responsible for the following:

- Users can only run this report for their designated service delivery location within their Health Region, or on a need to know basis.
- Clients are filtered by their Service Delivery Location. Only Service Delivery Locations of Public Health organizations in the user's data access org are available in the parameter selection and report results.
- The data is used to support public health interventions.
- Data is not to be used to communicate immunization "coverage", nor is the data to be made available to the public.
- Users ensure that all data is managed securely and appropriately according to organizational guidelines, especially as it relates to the management of personal health information.

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 **Reminder Recall List** extract contains information on clients for given service delivery locations (analogous to public health office) based on their forecast status for the specified antigen(s). The client's service delivery location is determined based on the client address from the Manitoba Health Registry, which maps to a "preferred" SDL (based on the postal code to SDL mapping).

The report is generated based on a reminder/recall date, forecast status by antigen, and service delivery location (public health office).

The data produced within the **Reminder Recall List** are based on active and inactive clients within PHIMS. Clients with an inactive, deceased status will be excluded from the report.

2.1. Population Included in the Report

The populations included in this report are:

- All clients associated to an SDL based on the postal code of their registered address.
- Active and inactive clients (with the exception of deceased clients).

Note: For clients with a disclosure directive:

- The only details presented on clients with a disclosure directive will be the client PHIN (all other data fields will be blank).
- PHIN alone will be sufficient to provide enough information to allow for client follow-up if clinically important. The provider could access the individual client file following the PHIMS Disclosure Directive Guideline to document a disclosure directive override.

2.2. Recommended uses for this report

The **Reminder Recall List may be produced for a number of reasons:**

- A general call out to provide public health interventions. Examples:
 - Reminder to obtain school entry immunizations (for a particular age group).
 - Invitation to a public health service opportunity (health fair, community immunization clinic).
- Clients missing immunizations - a method to routinely access a list of clients to remind them they are missing selected immunizations.
- Communicable disease case/outbreak – generate a list of clients where there may be a requirement to follow-up under the public health act.

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 Generate the Required Output

You can generate this report from the “**Reports**” section in PHIMS.

This is a statistical report under **Immunization: Operational Reports**

- Click **Reporting & Analysis > Reporting** (LHN) or the **Reporting** tile on the dash board.
- Open the Immunization Report Folder by expanding the collapsible panel
- Scroll down to the Operational Reports and select ***MB60000-Reminder Recall List*** *hyperlink*
- Select the **Reminder/Recall Date** (required) (must be today or in the future)
- Select **Forecast Status** (required)
- Select the **Service Delivery Location(s)** (required)
- Select filters that are optional
 - **Antigen**
 - **Date of Birth From: - Date of Birth To:**
 - **Gender**
- Select **Client Status** (required)
- Select **Show Antigen Detail** (Yes or No) (required)
- Click **Generate Report Now**

Parameter Definitions

Parameter Name	Data Type	Description	Validation
Reminder/Recall Date	Date	Must be today or in the future	Required
Forecast Status	Multi-select List	The client’s status with respect to this immunization at the selected Reminder Recall date <ul style="list-style-type: none">• Due• Eligible• Not Forecasted• Overdue• Up to Date Note: Users are never to select “not forecasted” alone if an antigen is not selected, as this will include all clients in the registry.	Required
Service Delivery Location	Multi-select List	The client’s public health office based on their registered address.	Required

Antigen	Multi-select List	The name of the antigen that the client is being forecasted for. Note: For some diseases, there may be more than one antigen if there are different strengths or formulations of the vaccine. E.g. diphtheria, pneumococcal. Multiple antigens can be selected – the data will be summarized for all selected. If you want the antigen detail to be displayed, select show antigen detail – yes.	Optional
Date of Birth From	Date		Optional
Date of Birth To	Date		Optional
Gender	Multi-select List	Client's Gender	Optional
Client Status	Drop List	Active Clients Only All Clients	Required
Show Antigen Detail	Drop List	No – the forecast status by antigen will not be displayed. Yes - List of Antigen forecast status will be displayed. If multiple antigens are selected, there will be one row for each antigen (multiple rows per client).	Required

4. Report is assigned to the following User Roles

- MB CDI MEDICAL OFFICER
- MB EPI ANALYST / MB CDI EPI ANALYST
- MB EPI ADMIN
- MB CDI MB HEALTH SURVEILLANCE
- MB CDI PUBLIC HEALTH NURSE MANAGER
- MB CDI PUBLIC HEALTH NURSE

5. Report Description

Report Output: The report will be generated as a Formatted MS Excel Spread sheet

Data Source: Replicated data from the PHIMS Reporting Database (replicates every few minutes)

Report Data fields

#	Field Name	Description
1	Report Title	Reminder/Recall List
2	Static Text	Detailed client list based on forecast status at the specified reminder/recall date. <ul style="list-style-type: none"> The provider organization is determined from the client's service delivery location marked as preferred Note: "preferred" service delivery location is generated from client registry using the postal code to SDL mapping.
3	Date Generated	The date (and time) the report was generated YYYY-MMM-DD
Report Parameters		
4	Reminder/Recall Date	The reminder/recall date used to determine forecast status of antigens for the clients. YYYY-Mmm-DD
5	Forecast Status	The client's forecast status.
6	Service Delivery Location	The client's public health office based on their registered address.
7	Antigen	The name of the antigen that the client was forecasted for.
8	Date of Birth	The client's date of birth. If [Date of Birth From] and [Date of Birth To] parameters are both specified: YYYY-Mmm-DD through YYYY-Mmm-DD If [Date of Birth From] parameter is specified, the following will be displayed: On or after YYYY-Mmm-DD If [Date of Birth To] parameter is specified, the following will be displayed: On or before YYYY-Mmm-DD
9	Gender	The client's gender.
10	Client Status	Whether or not to show active clients only or all clients on the report.
11	Show Antigen Detail	Whether or not to show antigen detail on the report.
Details		
12	Provider Organization	The parent organization, of the organization associated to the client's preferred SDL, at the level directly below MB Health. If the Provider Organization cannot be determined, this field will show <i>Unspecified</i>
13	Service Delivery	The name of the client's public health office based on their client

	Location	registry address.
14	School	The name of the school that the client is assigned to, as recorded on the student record in the Occupation/Language screen, if present.
15	School Year	The most recent school year that the client is assigned to, as recorded on the student record in the Occupation/Language screen.
16	Grade	The grade the client is assigned to, as recorded on the student record in the Occupation/Language screen.
17	First Name	The client's first name.
18	Middle Name	The client's middle name.
19	Last Name	The client's last name.
20	PHIN	The client's Manitoba personal health information number.
21	Family Reg Number	The client's family registration number.
22	Client Status	The status of the client.
23	Inactive Date	The date the client was set inactive. YYYY-Mmm-DD
24	Gender	The client's gender.
25	DOB	The client's date of birth. YYYY-Mmm-DD
26	Age (Years)	The client's age in years.
27	Age (Months)	The number of months since the client's last birthday.
28	Address	The client's latest official registry address. This includes Unit No., Street No., Street Name, Street Type, Street Direction, P.O. Box, STN, RPO, and/or Rural Route.
29	City	The name of the city based on the client's latest official registry address.
30	Province	The name of the province based on the client's latest official registry address.
31	Postal Code	The postal code based on the client's latest official registry address.
32	Phone Number	The client's phone number marked as preferred.
	Client Warning	If there is an active Client Warning then this field will be "Y", otherwise blank
33	Forecast Status	The client's forecast status for the specified antigen. This column will only show on the extract when [Show Antigen Detail] parameter = Yes
34	Antigen	The name of the antigen that was forecasted for the client. This column will only show on the extract when [Show Antigen Detail] parameter = Yes

35	Dose Number	The next number in a series of forecasted immunizations given to a client, for the specified antigen, as calculated by the forecaster. This column will only show on the extract when [Show Antigen Detail] parameter = Yes
36	Antigen Due Date	The recommended date for the immunization for the specified antigen. YYYY-Mmm-DD This column will only show on the extract when [Show Antigen Detail] parameter = Yes
38	Date forecast last ran	The date on which the last forecast was run, and at least one agent or antigen was forecasted. YYYY-Mmm-DD This column will only show on the extract when [Show Antigen Detail] parameter = Yes
39	Immunizing Agent	The name of the immunizing agent that was forecasted for the client. For leftover antigen, this field will be blank. This column will only show on the extract when [Show Antigen Detail] parameter = Yes
	Agent Due Date	The recommended date for the immunization for the specified agent. For leftover antigen, this field will be blank. This column will only show on the extract when [Show Antigen Detail] parameter = Yes If Client Data disclosure is refused, this field will be absent and only one row will appear (no antigen detail).

6. Report Data Mapping

Records are filtered by:

1. Client is not marked Inactive or [Client Status] parameter = "All Clients"
2. Client has a "Manitoba Health Card" health card number
3. Client's preferred SDL = [Service Delivery Location] parameter
4. Client's date of birth is on or after the [Date of Birth From] parameter and on or before the [Date of Birth To] parameter
5. Gender of client = [Gender] parameter
6. Client has a forecasted antigen with status = [Forecast Status] parameter, as determined by the date specified in the [Reminder/Recall Date] parameter
7. Forecasted antigen = [Antigen] parameter

In the event that no data is retrieved, a blank report is generated and returned to the user.

If the Reminder/Recall Date parameter is before today, the following message will display on the report:

The Reminder/Recall Date parameter cannot be before today's date.

7. Suggested Work Flows and Examples

Scenarios for how the report should be generated

7.1. List of clients associated with the SDL

Output: a list that can be used for a generic mail out to a set of clients associated with your PHO e.g. used for mail out for public health communication.

Report Filters

- All forecast status
- SDL(s)
- No antigen
- Date of birth parameters (to limit the number on the list)
- Client status – all clients
- Show antigen detail - No

This will generate a list of all clients associated to the PHO regardless of forecast status.

7.2. List with forecasted immunization

Output: a list of all clients and antigen(s) forecast (due and overdue). E.g. use for mail out and planning for immunization event.

Report Filters

- All forecast status
- SDL(s)
- No antigen
- Date of birth parameters (to limit the number on the list)
- Client status - all
- Show antigen detail – Yes

Note below re: “not forecasted”

7.3. Single Antigen Forecast Status

Output: a list of all clients and forecast status for single specified antigen. E.g. use for an outbreak situation or used for vaccine specific catch-up clinic.

- All forecast status or those who are eligible, due, or overdue
- SDL(s)
- Select single antigen
- Date of birth parameters (if desired)
- Show antigen detail - Yes

See note on next page re: “not forecasted”

Note: re “not forecasted”

- If a client is not forecasted for any immunizations or specified antigen, their name will appear on a single line with a forecast status of “not forecasted”.
- This may be because:
 - They are fully immunized – no need for further immunizations.
 - They have a contraindication to the immunization (a documented contraindication will create a “warning” in PHIMS).
 - They are not eligible for the vaccine/antigen due to age or gender.
- Files with “not forecasted” plus a “warning” will need to be reviewed to determine if the “warning” is related to a contraindication to one of the antigens.
- If a client has at least one vaccine forecast when multiple antigens are selected, the “not forecasted” antigen (regardless of reason) will not be presented.