

# Manitoba Public Health Information Management System

## Report User Guide

**MB4120C**

### Surveillance Management 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
<b>Aggregate</b> , no identifiable data	=	Summary data with no client identifiers
<b>Aggregate</b> , 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
<b>Line Level</b> , <u>Single client</u> identifiable data	=	Includes client identifiers of an individual client
<b>Line level</b> , <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 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 communicable 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 generate 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. 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. No other identifying information is included on the report.

Since results displayed may identify individuals, the number of users who have access to this report is limited to a very small set of users.

## 1.3. Permitted Disclosures

- No disclosure permitted

**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 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.
- The data is intended to be used by Public Health providers and the surveillance unit for establishing and monitoring performance metrics for the Surveillance unit. No disclosure of information 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 Surveillance Management report is to establish performance metrics for the Surveillance Unit to inform and support a) training; b) continuous quality improvement; c) workload management and d) establishment of service guidelines to inform public health responsiveness (at front end of surveillance cycle).

### 2.1. Populations Included in the Report

The **Surveillance Management Report** provides a line list of all lab results entered in PHIMS based on the recorded date and the organizational workgroup the lab was assigned to. Users will only be able to select lab results that have been assigned to their organization or lower in the organizational tree.

### 2.2. Recommended Uses for this Report

This report will be used by:

- Manitoba Health:
  - To monitor the number of laboratory results processed by the Surveillance Unit and/or Rapid Process Automation (bots) to inform baseline measures of productivity, training and continuous quality improvement
  - To establish service guidelines around time from receipt of lab report to creation of an investigation in PHIMS

### 3. Selecting the Report Parameters

When generating 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 a statistical report under Case: Manitoba Reports

- Click **Reporting & Analysis > Reports** (LHN) or the **Reporting** tile on the dashboard.
- Open the **Case** report folder by expanding the collapsible panel
- Select **MB4120-Surveillance Management**
- 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**. 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. Labs that have not been associated to an investigation will have display an organization of 'unassigned'.
- Select the **Display Priority Inbox**. The default is '**No**'.
- 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	Optional

Investigator Organization	Multi-select List	Users will only be able to select their organization or lower than the logged in organization. All investigator organizational types apply (e.g. primary, secondary). Lab results that have not been linked to an investigation will be visible to all users if unassigned is selected. Unassigned will be part of the multi-select list.	Required
Display Priority Inbox	Drop list	No or Yes defaults to 'No'.	Required

## 4. Report Output

Field Name	Description
Entered Date	(YYYY-Mmm-DD HH:MM)
User	Will display user who entered lab (eg. Surveillance unit clerk or BOT). Will display user's first and last name.
Result ID	Unique lab result identifier
Result Name	Lab test name
Interpreted Result	Lab test result
Result Value/Units	Lab test result value/units
Result Description	Lab test result description
Encounter Group	Encounter group associated to lab result
Disease	Disease associated to lab result
Etiologic Agent	PHIMS can record multiple levels (e.g. 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 Status	Result status (e.g. Final, preliminary, etc.).
Result Date	Date of result (YYYY-Mmm-DD).
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 Reported Date (Received)	Date the investigation was reported/received to Manitoba Health (YYYY-Mmm-DD).
Investigation Status	Open, Closed and Transferred. No investigations can have a status of Transferred.
Status Date	Date associated with status change from open to closed and from closed to open
Disposition	Will display the most current disposition on the investigation
Disposition Date	Date associated with current disposition
Investigators	Concatenated field displaying all assigned organizations, workgroups and investigators. Organization, workgroup, user and investigator type

	will display as entered.    will separate entries if more than one organization or investigator assigned.
Subject ID	Unique client identifier. Can be used to search for client in PHIMS.
Ordering Provider	Provider that ordered the lab test.
Ordering SDL	Clinic or facility 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
Specimen Description	Specimen description. Used to document the reason for test (e.g. prenatal, diagnostic, etc.).
Lab Accession No	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".
Resulting Lab	Laboratory reporting the result
Priority Inbox	Priority inbox lab test/result assigned to

## 5. Report is assigned to the following roles

- MB CDI MEDICAL OFFICER
- MB CDI EPI ANALYST

## 6. Report Description

**Report Output:** The report will be generated in Microsoft Excel

**Data Source:** Operational data from the PHIMS Database



## 7. Sample Report

### MB4120C - Surveillance Management

The purpose of this report is to establish performance metrics for the Surveillance Unit to inform and support a) training; b) continuous quality improvement; c) workload

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

Date Generated: 2024-Jul-16 11:59.14

<b>Report Parameters:</b>				
Date Lab Entered:	2024-Jan-01 through 2024-Jul-16			
Encounter Group:	Communicable Diseases, Outbreak Response, Sexually Transmitted and Bloodborne Infections, Tuberculosis			
Disease:	No Filter			
Investigator Organization:	Winnipeg Health (including Churchill)			
Display Priority Inbox:	Yes			

Entered Date	User	Result ID	Result Name	Interpreted Result
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