Manitoba Public Health Information Management System

Report User Guide

MB2705

Syphilis Follow-up Serology Report - Excel

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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, Single client identifiable data	=	Includes client identifiers of an individual client
Line level, Multi client identifiable data	=	Includes client identifiers of a list of multiple clients

Table of Contents

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).

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 Regional level. This means users who have access to this report can only "view" data for their own region or organization. Users can only see investigations they are authorized to see based on their logged in organization.

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 syphilis serology follow-up report is to summarize investigation, treatment and lab result information for syphilis investigations to help identify gaps in testing and support monitoring patient response to treatment.

2.1. Populations Included in the Report

Report will only include investigations the user is authorized to see based on investigation organization assignment and the users logged in organization.

Report will only include the client's latest syphilis or congenital syphilis investigation that matches the user selected parameters.

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 the following organizations to help identify gaps in testing and support monitoring client response to treatment, ensuring timely syphilis follow up.

This report will be available to:

- Manitoba Health:
- Regional Health Authorities
- First Nations Health Providers

Note:
The purpose of this report is to flag investigations for review. However, not all information relevant to the case investigation is displayed on the report. Users will need to review flagged investigations directly in PHIMS for additional information and context.

For example:

- This report will display the most recent case investigation for syphilis/congenital syphilis. The syphilis history field will display all prior syphilis investigations. Users are recommended to review prior investigations, particularly if close to the current investigation, as relevant information may be attached to other investigations.
- There may be some laboratory results that are not included in certain flags or displayed (e.g. CSF VDRL, cancelled tests, tests from other jurisdictions that do not align with routine syphilis testing in Manitoba). The laboratory summary in PHIMS should be reviewed for reference.

3. Selecting the Report Parameters

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

This is 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 **MB2705-Syphilis Follow-up Serology - Excel** *hyperlink*
- Enter **one** or **both** of the following
    - **Date Reported From** to **Date Reported To** (required if no Latest Result Date From/To entered).
    - **Latest Result Date From** to **Latest Result Date To** (required if no Date Reported From/To entered). Filters investigations based on the latest lab entered date on the investigation. Standard PHIMS Format: yyyy-mmm-dd.
- Select the required **Disease(s)** i.e. Syphilis or Syphilis, congenital (required).
- Select the **Classification** (e.g. Case – Lab Confirmed) (required). Filters investigations based on the classification code. Only investigations with case classifications will be included on the report. Report will exclude deceased clients.
    - Consider excluding "not a case" classification for syphilis.
- Select the **Investigator Provider Organization** (required). Users will only be able to select parent (at the level directly below Manitoba Health) organizations that have active workgroups.
- Select the **Investigator Organization** (optional). Limited to those Jurisdictional Organizations included in the tree of Organizations for the logged-on organization that have active workgroups.
- Select the **Disease** (Syphilis, Syphilis, congenital) (optional). This parameter functions in tandem with the below Disease stage. The below parameter should also be completed if this filter is used.
- Select the **Disease Stage** (optional). Filters investigations based on the stage. If you want the report to include cases that have not been staged, the [blank] variable must be selected. For example, if you want cases with Primary and missing stage to be shown both Primary, and [blank] would need to be selected.
- Select the **Workgroup** (optional). Users will only be able to select the workgroup(s) they have access to based on their logged-in organization.
- Select the **Investigator** (optional). Users will only be able to select the investigators(s) they have access to based on their logged-in organization.
- Select the **Include Primary Organization at 30 days**. The default is No (required). If yes selected, it will also display investigations based on the provider/investigator org selected above that align with the case's primary investigation organization at 30 days.

- Select the **Display Only if Latest Result Missing**. The default is No (required). If yes selected, the report will only display investigations when there are no serology results for the latest scheduled date. Note that this will include investigations up to 30 days before the scheduled date.
    - i.e. Only display cases that are missing results or have results due in the next 30 days
    - It is important to note that this based on the date the report is generated (when looking at previously generated reports).
- Select the **Display Client Identifiable Data**. The default is No (required). If yes selected, report output will also display First and Last Name, PHIN and gender.
- Click **Generate Report Now**.

Parameter Definitions:

Parameter Name	Data Type	Description/Notes	Validation
Date Reported From	Date	The earliest investigation reported date to appear on the report.	Required*
Date Reported To	Date	The latest investigation reported date to appear on the report.	Required*
Latest Result Date From	Date	Filters investigations based on the latest lab entered date on the investigation.	Required*
Latest Result Date To	Date	Filters investigations based on the latest lab entered date on the investigation.	Required*
Disease	Multi-select List		Required
Classification	Multi-select List	This report only includes case investigations.	Required
Investigator Provider Organization	Multi-select List	Investigator Provider Organizations assigned to the Investigation to include on the report. Limited to Investigator Provider organization accessible by Logged-on role.	Required
Investigator Organization	Multi-select List	Organization assigned to the Investigation. Limited to Investigator organization accessible by Logged-on role.	Optional
Disease	Multi-select List	Select syphilis and/or congenital syphilis. Also used to filter Disease Stage (Below).	Optional
Disease Stage	Multi-select List	Filters investigations based on the stage, including blank.	Optional
Workgroup	Multi-select List	Filters based on workgroup assigned to the Investigation. Limited to Workgroups accessible by Logged-on role.	Optional
Investigator	Multi-select List	Filter investigations based on current active primary Investigator.	Optional
Include Primary Organization at 30 days	Drop list	If yes selected, report will also display investigations based on the logged in user investigation organization and tree of organizations if the primary investigation organization at 30 days is the Provider/Investigator organization selected.	Required
Display Only if Latest Result Missing	Drop list	If yes selected, only display investigations when there are no serology results for the scheduled date that is most recent to (before) the date the report is generated. This will show investigations up to 30 dates before the scheduled date.	Required
Display Client Identifiable Data	Drop list	If yes selected, report output will display First and Last Name, PHIN and gender.	Required

4. Report Output

Reminder: Please expand the column size in the report to see all visible values to help mitigate the chance of potentially missing data.

Field Name	Description
Priority	Priority as entered in PHIMS. (Low, medium, high).
Reported Date	Earliest investigation reported date. Format will be standard PHIMS date format of yyyy-mmm-dd.
Investigation ID	PHIMS Investigation ID.
Disease	Report will only include syphilis and congenital syphilis investigations.
Disease Site(s)	Concatenated list of disease sites.
Current Stage	Latest Disease Stage.
Initial Stage Created Date	Initial stage created date.
Stage History (current investigation)	Concatenated list of historical disease stages followed by date of creation • Individual stage string format will be [stage] [yyyyy-mmm-dd] • Will be ordered in chronological order with oldest entries first.
Classification Code	Latest Classification Code. (e.g. lab confirmed) • The report will only include Case investigations.
Classification Date	Latest Classification Date. Format will be standard PHIMS format of yyyy-Mon-dd.
Disposition	Current Investigation Disposition.
Disposition Date	Date of current investigation disposition. Format will be standard PHIMS format of yyyy-mmm-dd.
Provider Organization	Display Name of the provider organization associated with the active primary Investigator Organization.
Investigator Organization	Display Name of the active Primary investigator organization.
Secondary Organization(s)	A concatenated string of the Display Name of all non-primary investigator organization(s). Format will be [display name] (investigator type).
Primary Investigator Organization at 30 Days	The display name of the primary investigator organization assigned 30 days after the investigation was created. Will display current latest organization if not older than 30 days.
Status	Current Investigation Status. (e.g. OPEN, CLOSED or Transferred).
Status Date	Current investigation status date. Format will be standard PHIMS format of yyyy-mmm-dd.
Investigator Name	Current active primary Investigator. Name will be presented as [Last Name], [First name].
Assigned Date	Date the current primary investigator was assigned to the investigation. Format will be standard PHIMS format of yyyy-mmm-dd.

Coinfection(s)	Concatenated string of diseases for case investigations that have an earliest reported date that is within 30 days of this investigation's reported date.
Syphilis History	Indicates the client has multiple syphilis investigations. Presentation will be a concatenated string of the syphilis investigation's earliest reported date when a client has more than one syphilis investigation. • Must include classification/stage/report date. • Only include syphilis investigations with any classification code except Not a Case, • Format will be the standard PHIMS format of yyyy-mmm-dd • Will exclude the investigation included on the report. • **This report will display the most recent case investigation for syphilis/congenital syphilis. Users are recommended to review prior investigations, particularly if close to the current investigation, as relevant information may be attached to other investigations.** Note: The Syphilis History field is essential to review in the report.
Indicators and Flags	
Test Reason Pregnant	Display 'Yes' if the requisition specimen description on any result received in the last 12 months (12 months from report run date) includes the word pregnant or prenatal. For example, Reason for Testing: Pregnant or Reason for Testing: Pregnant, other.
Pregnant Risk Factor	'Display 'Yes' if the client includes a Pregnant (specify EDC) risk factor that meets the requirements below. • Consider any Pregnant (specify EDC) risk factor (response = yes) associated to the client regardless of investigation assignment. • Data set will include the latest Pregnant (specify EDC) risk factor that was created
Pregnant RF Info	First 50 characters of the Additional information text from the most recently created "Pregnant (specify EDC)" risk factor that meets the criteria outlined above.
Current Lab SDL is PH	Display an 'X' if the ordering SDL of the earliest latest lab on this investigation is a public health office.
New Provider or Facility	Display an 'X' if the most current ordering provider or ordering service delivery location have has never been on a requisition associated to this investigation before. Note this check does not include "other" providers.
HIV Investigation	Display an 'X' if there is an HIV disease event associated to this investigation or any other investigation on this client.
4x Rise in Dils	Flags investigations when dils are increasing significantly. Investigations must have at least 6 months between monitoring start date and the latest result date.

	Set to X when the latest result dils are >= 4x higher than the lowest dil count on any syphilis lab from any investigation on the client that has a result date on or after 30 days before the monitoring start date. A 0 to 2 dils is considered a 4x increase. CMIA Positive results are considered 0 dils. VDRL CSF results will be excluded from this flag. • If a client does not have testing done at the time of treatment, it can affect the relevance of the "4x rise in Dils" flag • Note that when RPR is cancelled, only CMIA is reported. This may inadvertently flag 4x rise in dils if next serology has both CMIA and dils reported.
No Change in Dils	Flags investigations when dils are unchanged or rising (2 fold drop in dils is considered unchanged). Set to X when the latest syphilis result from any investigation on the client has >= 16 dils and the latest dils * 2 is higher or equal to the dils on the result that meets the following criteria: • Latest result that was received between the monitoring start date minus 30 days and the monitoring start date. • If there are no pre-monitoring results, then use the first result received after monitoring start date. The results must be at least 6 months apart. This flag will exclude VDRL CSF results.
No Current Result	Display the earliest scheduled date that has no serology result and is after the most recent serology result (or monitoring start date). Flag will be set up to 30 days before the scheduled date.
Summary	
Latest Result Date	Date of the most recent lab result for this investigation. Standard PHIMS format: yyyy-mmm-dd.
Latest Result	
Treatment Summary	Concatenated string of treatments. Individual treatment string will include Drug, Duration, Unit, and Tx Prescribed/Authorized Date. o Example: Benzathine Penicillin G - 1 Days - (2020-Nov-13) Will only include treatments used for syphilis and congenital syphilis • Penicillin G benzathine IM (could range between 1-3 doses) • Ceftriaxone 1g IV or IM daily for 10 days • Doxycycline 100 mg PO BID for 14-28 days • Crystalline penicillin G 50,000 units/kg/dose IV – for congenital syphilis Treatment string will not include treatments with the following Course Completed values: • Client Discontinued • Duplicate Record • Entered in Error

	• Prescriber Discontinued Include all relevant treatments (**from any investigation**) that have a treatment date on or after 3 months prior to the earliest reported date of the investigation being reported on. Exact duplicates will be removed.
Monitoring Start Date	Format will be standard PHIMS format of yyyy-Mon-dd. When the disease is syphilis, monitoring start date will be the latest Tx Prescribed date from treatments that match the rules described above (treatment summary) or the earliest reported date if there are no treatments. Treatments can be on any of the client's investigations. When the disease is congenital syphilis, the monitoring start date will be the date of birth. In the unlikely event that an investigation has both diseases, the monitoring start date will default to client's date of birth.
First Result	Concatenated string of information from the first lab result on the investigation (earliest result date). • Individual result string will include Result Type, Interpreted Result, Result Date • Lab result string will be formatted as follows: o [Result Name] [Interpreted Result] ([Result Date]) o Result date will be formatted in standard yyyy-Mon-dd See detailed rules for result inclusion in the Lab Result String section below VDRL CSF results will be excluded from this field.
Highest Result	Concatenated string of information with the highest dils result. • Individual result string will include Result Type, Interpreted Result, Result Date • Lab result string will be formatted as follows: o [Result Name] [Interpreted Result] ([Result Date]) Result date will be formatted in standard yyyy-Mon-dd See detailed rules for result inclusion in the Lab Result String section below.
Results & Schedule Dates	
Schedule Dates for 3, 6, 12, 18 and 24 month serology results is calculated based on the Monitoring Start Date, which is the latest Treatment Prescribed date or the earliest reported date if there are no treatments. The recommended schedule for monitoring serology varies based on stage and other factors (e.g. pregnancy, HIV) and may be more or less frequent (see section 4.2 Schedule Dates)	
<3 Months	List of 3 latest lab results that are received before 3 months after the monitoring start date.
3 Month Schedule Date	yyyy-Mon-dd
3 -<6 Months	List of lab results that are received between the start of month 3 and the end of month 5.
6 Month Schedule Date	yyyy-Mon-dd

6 -<12 Months	List of lab results that are received between the start of month 6 and the end of month 11.
12 Month Schedule Date	yyyy-Mon-dd
12 -<18 Months	List of lab results that are received between the start of month 12 and the end of month 17.
18 Month Schedule Date	yyyy-Mon-dd
18 -<24 Months	List of lab results that are received between the start of month 18 and the end of month 23.
24 Month Schedule Date	yyyy-Mon-dd
24+ Months	List of lab results that are received after the end of month 23.
Latest Investigation Note	Displays the most recent Clinical Note recorded for the investigation – displays the subject and first 100 characters. If the entire note is too long to be displayed, a visual indicator of "…" will appear notifying the user they will need to view the note in the application.
Client ID	Client ID in PHIMS
Date of Birth	Client's date of birth. format: yyyy-mmm-dd.
PHIN (optionally included column)	Personal Health Identification Number. Only displays if Display Client Identifiable Data=yes.
Client First Name (optionally included column)	Client's first name. Only displays if Display Client Identifiable Data=yes.
Client Last Name (optionally included column)	Client's last name. Only displays if Display Client Identifiable Data=yes.
Gender (optionally included column)	Gender as listed in PHIMS. Only displays if Display Client Identifiable Data=yes.

4.1. Results Section – Result Buckets

Concatenated string of result information that will be presented in the appropriate "result bucket".

- Relevant lab results will be pulled from **any** investigation on the client.
- Individual result string will include Result Type, Interpreted Result, Result Date
- Results will be separated by the standard || and be sorted in ascending date order
- Lab result string will be formatted as follows:
  - [Result Name] [Interpreted Result] ([Result Date])
  - Result date will be formatted in standard yyyy-mmm-dd
- Example… RPR 64 dils. (2023-Sep-10) || RPR 8 dils. (2023-Oct-11)
- Result Type will be derived based on the Result Name field.

Concept Code	Result Name	Result Type
31147-2	Reagin antibody (RPR) Titer	RPR
50690-7	Reagin antibody (VDRL) Titer	VDRL
31146-4	Reagin antibody (VDRL CSF) Titer	VDRL CSF
Non-Reactive		
20507-0	Reagin antibody (RPR)	RPR
5292-8	Reagin antibody (VDRL)	VDRL
5290-2	Reagin antibody (VDRL CSF)	VDRL CSF

- Include a result string of *"CMIA positive" ([Result Date])* when the requisition only includes a single result and the result name is Final Syphilis Interpretation (concept code XMB461-9).

4.2. Schedule Dates

Please see below for parameters that dictate if schedule date is 'forecasted'

Column Header	Parameters

3 month Schedule Date	Display date value (3 months after monitoring start date) IF ANY OF THE FOLLOWING CONDITIONS ARE TRUE:
	
	• Current stage is ANY of the following
	  ○ primary
	  ○ secondary
	  ○ early latent
	  ○ unknown/undetermined
	  ○ blank
	• If one of the following is true
	  ○ Pregnant risk factor = yes
	  ○ Reason for testing pregnant = "yes"
	• HIV flag = "x"
	• Disease = "congenital syphilis"
	
	Otherwise leave blank

6 month Schedule Date	Display date value (6 months after monitoring start date) IF ANY OF THE FOLLOWING CONDITIONS ARE TRUE:
	
	• Current stage is ANY of the following:
	  ○ primary
	  ○ secondary
	  ○ early latent
	• If one of the following is true
	  ○ Pregnant risk factor = yes
	  ○ Reason for testing pregnant = "yes"
	• HIV flag = "x"
	• Disease = "congenital syphilis"
	
	Otherwise leave blank

12 month Schedule Date	Display date value (12 months after monitoring start date) IF ANY OF THE FOLLOWING CONDITIONS ARE TRUE:
	
	• Current stage is ANY of the following:
	  ○ primary
	  ○ secondary
	  ○ early latent
	  ○ late latent
	  ○ tertiary
	• Disease = congenital syphilis
	• HIV flag = "x"
	• If one of the following is true
	  ○ Pregnant risk factor = yes
	  ○ Reason for testing pregnant = "yes"
	
	Otherwise leave blank

18 month Schedule Date	Display date value (18 months after monitoring start date) IF EITHER OF THE FOLLOWING CONDITIONS ARE TRUE:
	
	• Disease = "congenital syphilis"
	• If one of the following is true
	  ○ Pregnant risk factor = yes
	  ○ Reason for testing pregnant = "x"
	
	Otherwise leave blank

24 month Schedule Date	Display date value (24 months after monitoring start date) IF ANY OF THE FOLLOWING CONDITIONS ARE TRUE:
	
	• Current stage is any of the following:
	  ○ Late latent
	  ○ Tertiary
	• HIV flag = "x"
	• If one of the following is true
	  ○ Pregnant risk factor = yes
	  ○ Reason for testing pregnant = "x"
	
	Otherwise leave blank

5. Report is assigned to the following User Roles:

- MB_CDI_MEDICAL_OFFICER
- MB_CDI_EPI_ANALYST
- MB_CDI_PUBLIC_HEALTH_COORDINATOR_AND_EPI_DOCUMENTATION
- MB_CDI_PUBLIC_HEALTH_NURSE_AND_DATA_ENTRY_CLERK
- MB_CDI_PUBLIC_HEALTH_NURSE_CLOSE

6. Report Description

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