



Manitoba Public Health Information Management System

Report User Guide

MB23000
Unknown Contacts

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| 2025-01-15 | V. Gerry | 1.0 | Report was modified as part of project work to support both regional and PHU level reporting. |

Definitions for Report User Guides:

- a. "Authorized Organization" means an organization (an RHA, an organization supporting First Nations communities, or other organizations) with whom Manitoba has entered into an information Sharing 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 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 the 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 , <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 (e.g. Sexually Transmitted and Blood-borne Infections, Communicable Diseases, and Tuberculosis).

In Manitoba, investigations module users have access to all investigations in encounter groups assigned to the role of 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 Manitoba level. This means that users who have access to this report can "view" data for all reported unknown contacts. The report includes data at the level of the individual and contains a line list of Transmission events (TE) from investigations based on encounter group access. Client information includes the Source case investigation ID, free text of the unknown contact Name/Description, Contact Info and contact details. No other identifying information is included on the report.

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 which require access to this information to fulfill their functions under the *Public Health Act*.

1.3 Permitted Disclosures

- Disclosure of the aggregate number of investigations based on the investigator organization assigned to the case 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

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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 management and surveillance 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 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 **Unknown Contacts Report** is to support contact investigation. Unknown contacts are individuals identified in case investigations who can be described enough to be potentially located, but their actual identity is unknown. Unknown contacts do not have enough known information to find or create them as clients in PHIMS. Their description is contained within a transmission event in the case investigation. When an unknown client's identity is confirmed, they should be "converted to client" within PHIMS, which means that the transmission event is linked to a client in PHIMS and a contact investigation is automatically created.

This report is required to:

- Ensure that unknown contacts entered into the system are able to be found, identified and 'converted to client' when possible.
- To identify transmission events with unknown contacts that have been referred
 to another Investigator Organization (when the unknown contact is thought to
 reside in a different organization than the source case), and allow users to search
 for transmission events with unknown contacts that have been assigned to them.

2.1 Populations Included in the Report

The **Unknown Contacts Report** provides a line list of all transmission events (TE) with unknown contact information entered in PHIMS based on the source case reported date and the TE organization and workgroup. Users will be able to select results that have been assigned to any or all organizations.

All regional health authorities (RHAs) within Manitoba are defined by geographic boundaries. However, the First Nations Inuit 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:

- Regions, Manitoba Health and First Nations Health Providers
 - To ensure that contacts entered as unknown are 'converted to client' where possible.
 - To allow referral of unknown contacts to regions for follow up if necessary.
 - To allow users to search for transmission events with unknown contacts assigned to them.
 - To facilitate social network analysis

Note to user

 Consider defining a role-based routine business cycle to run these reports to identify any contacts that may be 'converted to client' or to identify any similarities between unknown contacts.

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 get the Needed Output

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

This is an operational 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 <u>MB23000-Unknown Contacts</u> hyperlink
- Enter the **Source Case Reported Date Start date** and **End date** (required).
- Enter the Investigation Status (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(s)** (required). Users will only be able to select diseases from the encounter groups they have access to base on their logged-in role.
- Select the TE Provider Organization(s) (optional) if desired.
 - Provider Organization assigned to the TE. If no Provider Organization was selected for the TE, it will be 'unassigned'. If an organization is selected as a filter, unassigned TEs will not display.
 - Unassigned TEs will only display if no filter is applied or if 'unassigned' is selected as a filter.
- Select the **TE Responsible Organization(s)** (optional) if desired.
 - Populates when TE Provider Orgnization is selected.
- Select the **TE Workgroup(s)** (optional).
- Select the **TE User** (optional).
- Enter the **TE Assigned Date From and TE Assigned Date To** (optional).
- Select the **Unknown Contact Disposition** (optional).
- Click Generate Report Now.

Parameter Definitions:

| Parameter Name | Data Type | Description | Validation |
|---------------------------------|-------------------|--|------------|
| Source case Reported date Start | Date | Date range based on date the source case was reported to Manitoba Health. | Required |
| Source case Reported date End | Date | Date range based on date the source case was reported to Manitoba Health. | Required |
| Investigation Status | Multi-select List | Investigation status of source case: Open, Closed or Transferred | 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 | Limited to the Diseases contained in the Encounter Groups accessible by Loggedon role | Required |
| TE Provider Organization(s) | Multi-select List | Provider Organization assigned to the TE. If no Provider Organization was selected for the TE, it will be 'unassigned'. If an organization is selected as a filter, unassigned TEs will not display. Unassigned TEs will only display if no filter is applied or if 'unassigned' is selected as a filter. | Optional |
| TE Responsible Organization | Multi-select List | Responsible Organization assigned to the TE. If no Responsible Organization was selected for the TE, it will be 'unassigned'. If an organization is selected as a filter, unassigned TEs will not display. Unassigned TEs will only display if no filter is applied or if 'unassigned' is selected as a filter | Optional |
| TE Workgroup User | Multi-select List | TE Workgroup assigned to the TE. | Optional |
| TE User | Multi-select List | Users displayed will be filtered by the Selected TE Workgroup. | Optional |
| TE Assigned Date From | Date | Date range based on the Workgroup Assignment Note: Unassigned transmission (null assigned dates) events will display in report results with or without date filter | Optional |
| TE Assigned Date To | Date | Date range based on the Workgroup Assignment Note: Unassigned transmission (null assigned dates) events will display in report results with or without date filter | Optional |
| Unknown Contact Disposition | Multi-select List | Disposition assigned to the Unknown Contact | Optional |

4 Report Output

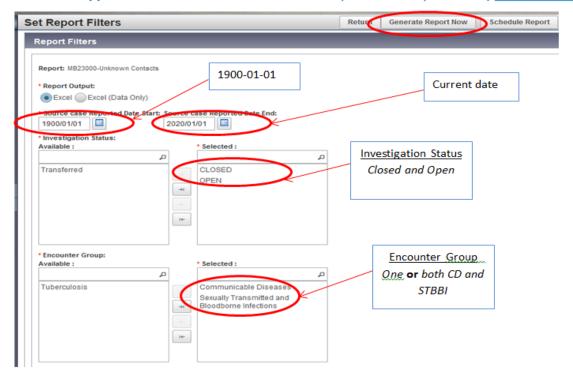
| Field Name | Description |
|------------------------------|--|
| Source Case Investigation ID | Unique Investigation identifier |
| Source Investigator Org | Investigator organization of source case |
| Investigation Status | Investigation status of the source case: Open or Closed. Transferred is a secure PHIMS code (cannot be deleted), however, it cannot be selected from within the application so should never display in the report output |
| Encounter Group | Encounter group associated with the source case investigation |
| Disease | Disease listed on the investigation. Each disease on the investigation will list as a separate row on this report |
| Reported Date | Date the source case investigation was reported to Manitoba Health [Report Date (Received) on Create Investigation] |
| Transmission Event ID | Unique Transmission Event identifier |
| Exposure Name | Mandatory free text of Exposure description |
| Assigned date | Date the Transmission Event was assigned. If not assigned, will be blank |
| TE Provider Organization | Current Provider Organization of TE |
| TE Responsible Organization | Responsible Organizational Unit within TE |
| TE Investigator Workgroup | Workgroup that was assigned to the Transmission Event. Workgroups are filtered by the Organization of the logged in user at the time the TE was created. They are not linked to the TE Responsible Organizational Unit. |
| TE Investigator | TE Investigator assigned to the TE. TE Investigators are filtered by the TE Investigator Workgroup filter. |
| Contact Name/Description | Free text entries as recorded in PHIMS |
| Contact Info | Free text entries as recorded in PHIMS |
| Contact Details | Free text entries as recorded in PHIMS |
| Contact Disposition | Unknown Contact Disposition selected within PHIMS |
| Contact Disposition Details | Free text entries as recorded in PHIMS |

5 Report is assigned to the following User Roles:

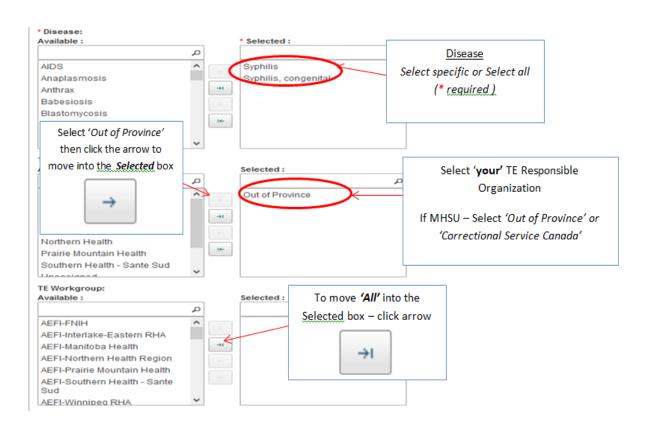
- MB_CDI_MBHEALTH_SURVEILLANCE
- MB_CDI_PUBLIC_HEALTH_NURSE_MANAGER
- MB_CDI_EPI_ANALYST
- MB_CDI_PUBLIC_HEALTH_COORDINATOR_AND_EPI_DOCUMENTATION
- MB_CDI_PUBLIC_HEALTH_NURSE_AND_DATA_ENTRY_CLERK
- MB_CDI_DATA_ENTRY_SPECIALIST_CLOSE
- MB_CDI_PUBLIC_HEALTH_REGIONAL_NURSE
- MB_CDI_PUBLIC_HEALTH_CLERK
- MB_CDI_PUBLIC_HEALTH_NURSE_CLOSE

6 Report Description

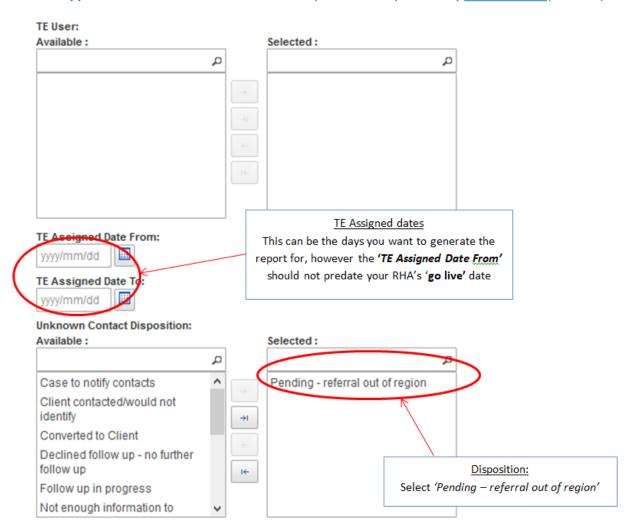
Report Output: The report will be generated in Microsoft Excel



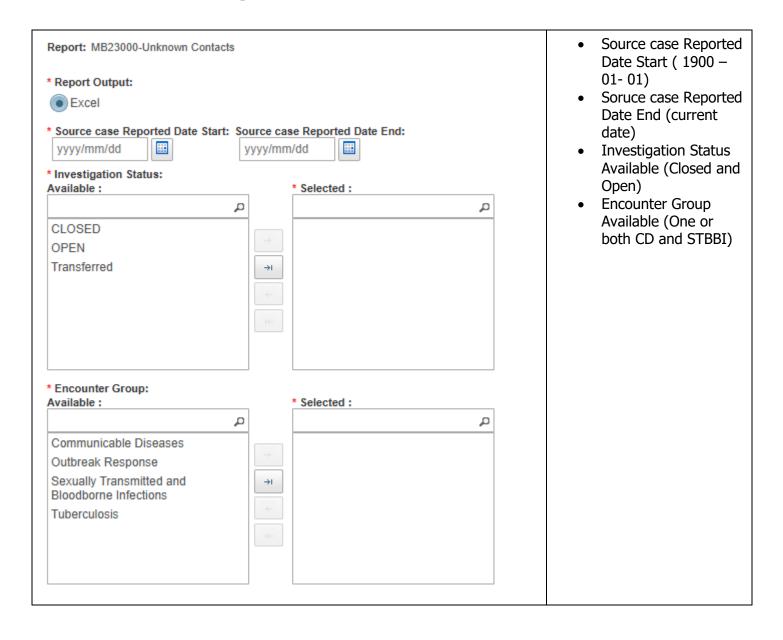
Appendix A: Generate Unknown Contacts Report to Identify to Identify New Referrals

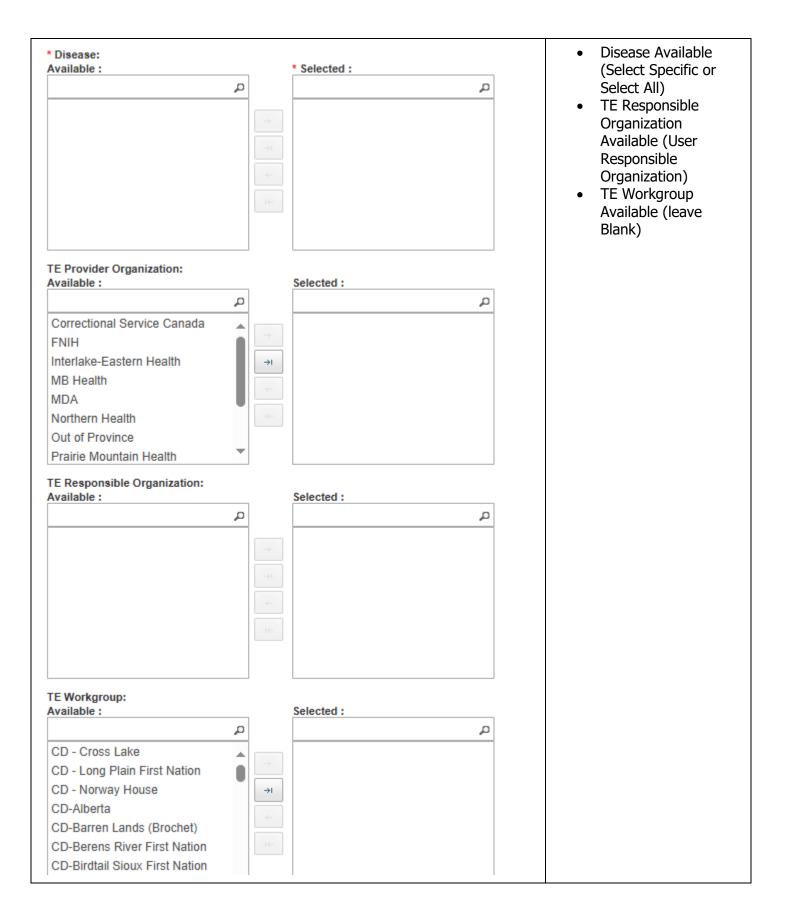


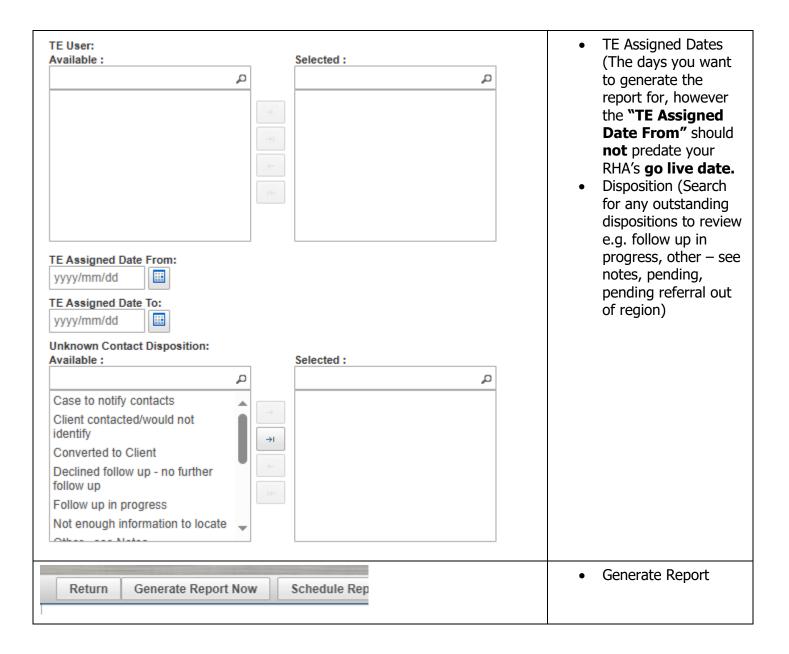
Appendix A: Generate Unknown Contacts Report to Identify to Identify New Referrals (continue)



Appendix B: Generate Unknown Contacts Report to Review Regional Workload







Appendix C: Generate Unknown Contacts Report for Public Health Nurse Workload

