
Regional Guidelines for General CD QA – Cases and Contacts

Community Area

Purpose: To identify new investigations, assign to a PHN within 2 hours of receipt (*or sooner, as directed by CD Unit) and ensure timely and appropriate case and contact follow up and-

For the assigned PHN to identify their existing investigations, to review and ensure appropriate case and contact follow-up has occurred and data is appropriately entered into the relevant PHIMS tabs prior to closure.

Plan:

1. Run reports daily to capture new cases and contacts requiring follow up.
2. Assign PHN in primary role within 2 hours of receipt (*or sooner, as directed by CD Unit).
3. Case investigation as per Provincial protocol.
4. Assign Investigator to all TE with unknown contacts.
5. PHN consults to CDC: once all other avenues have been explored, a complicated case presents or case/contact requires a Medical Officer of Health consult.
6. Ensure cases and contacts closed within 28 days (exception is for Hep B).
7. Assigned PHN to also run report weekly in an effort to review existing case and contact investigations, ensure appropriate follow-up has occurred, and PHIMS data entries are completed.

Definitions:

Open Cases and Contacts: Case and contact investigations with a status of Open; investigations that are currently under investigation, review, or follow-up by PHN.

Closed Cases and Contacts: Case and contact investigations with a status of Closed; investigations that have met criteria for closure and have been updated and closed per QRC **Close an Investigation** .

Criteria for closure: Case and contact investigations should be closed when public health follow-up is complete or all attempts to contact have been exhausted. Cases should be completed and closed within 28 days of receipt, with exception for Hepatitis B cases/contacts.

CA Admin Responsibilities:

Investigation Search Report

1. Run Investigation Search report daily @ 0900h, 1200h, 1500h with filter settings per Appendix A **using own investigator name**- User Guide [investigation-search-mb2701c-ug.pdf \(phimsmb.ca\)](#) / QRC **Investigation Search – Investigator Assigned MB2701C** .
 - i. Will require both Communicable Disease and STBBI encounter groups (to capture Hep B)
 - ii. Under Disease Available, select “add all” for Diseases
2. Assign PHN as primary to all cases/contacts. (*for STBBI co-infections, refer to WRHA’s Hepatitis B Operational Guidelines: <https://professionals.wrha.mb.ca/old/extranet/publichealth/files/hep-b-operational-guidelines.pdf> to determine General Program PHN as Primary or Secondary Role.
3. End date clerk role.
4. Update disposition to *follow up in progress*.
5. Follow internal process for notifying PHN of new investigation requiring follow up (*verbal notification, i.e. phone call versus solely an email)

PHN Responsibilities:

1. Run Investigation Search Report daily @ 0930h, 1230h, and 1530h (or a variation thereof) with filter settings per Appendix A below **using own Investigator name**- User Guide [investigation-search-mb2701c-ug.pdf \(phimsmb.ca\)](#) / QRC **Investigation Search – Investigator Assigned MB2701C** .
 - i. Will require both Communicable Disease and STBBI encounter groups (to capture Hep B)
 - ii. Under Disease Available, select “add all” for Diseases
2. Run Unknown Contact Search Report daily @ 0930h with filter settings per Appendix B below- User Guide [unknown-contact-report-mb23000-ug.pdf \(phimsmb.ca\)](#) / QRC **Unknown Contact MB23000** .
3. Review for new and existing/open cases/contacts requiring follow up, review, and PHIMS data entries completion.
4. Update site/presentation, staging, classification, classification date as required per QRC **Disease Summary** (this may occur at the time of receipt of the investigation and/or during the course of the investigation).

PHN Responsibilities continued:

5. Assign TE investigator to all TEs with unknown contacts.
6. PHN consults to CDC: once all other avenues have been explored, a complicated case presents or case/contact requires a Medical Officer of Health consult.
7. Pre-set Interventions and Risk Factors- may need to create/add when not available as a pre-set.
8. Ensure completion of investigation per Provincial protocol **within 28 days** (exception is for Hep B).
9. Update the Disposition as per QRCs [Investigation Information QRC \(phimsmb.ca\)](#) / [Close-an-Investigation-QRC \(phimsmb.ca\)](#) .
10. *Optional: Use of Interventions for Workload Management*
[Interventions for Workload Management](#) (Insite)

Appendix A

MB2701C - Investigation Search	
This report is used to search for and list any investigation the user is authorized to see.	
Date Generated: 2021/09/13 11:20:10 am	
Report Parameters:	
Date Reported:	1900-Jan-01 through 2021-Sep-13
Encounter Group:	Communicable Diseases, Sexually Transmitted and Bloodborne Infections
Investigation Status:	OPEN
Classification Group:	Case, Contact
Investigation Organization:	Winnipeg Health (including Churchill)
Assigned Date:	No Filter
Investigator:	Kim, Danielle
Disease:	AIDS, Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis, Chancr
Investigator Assignment:	All
Display Client Identifiable Data:	Yes
Exclude Investigations With Lab Results:	No
User Organization:	Winnipeg Health (including Churchill)

Investigation Status can be changed to include Open, Closed, and/or Transferred.

Assigned Date From: and To: Date parameters for the time period you want to search.

Report Filters

Report: MB2701C-Investigation Search


* Report Output:

Excel

* Date Reported From:

1900/01/01 

* Date Reported To:

2021/09/16 

* Encounter Group:

Available :

Outbreak Response
Tuberculosis



* Selected :

Communicable Diseases
Sexually Transmitted and
Bloodborne Infections

* Investigation Status:

Available :

CLOSED
Transferred



* Selected :

OPEN

* Classification Group:

Available :



* Selected :

Case
Contact

	→	Winnipeg Health (including Churchill)
	→	
	→	
	←	

Workgroup:

Available :

CD-Churchill VCC Case Investigators
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→
→
→
←

Selected :

CD-Winnipeg Health STBBI-Winnipeg Health

Investigator:

Available :

<input type="text"/> Abrar, Shalina Achurch, Pam Adams, Corinne Alexander, Crysta-Elise Allard, Melanie Ammazzini, Isabella Anderson, Alexandra Arbez-Koga, Pauline

→
→
→
←

Selected :

Kim, Danielle

Assigned Date From:

yyyy/mm/dd	📅
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Assigned Date To:

yyyy/mm/dd	📅
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Encounter Group:

Available :

Outbreak Response Tuberculosis

→
→
→
←

Selected :

Communicable Diseases Sexually Transmitted and Bloodborne Infections

Appendix B

Assigned Date From: and To: Date parameters for the time period you want to search. (A quality check could include a larger date range in the assigned date range field).

MB23000-Unknown Contacts	
This report list unknown contacts of transmission events and their associated dispositions and descriptions.	
Date Generated: 2021/09/14 11:00:13 am	
Report Parameters:	
Source Case Reported Date:	01-Jan-1900 to 14-Sep-2021
Source Case Investigation Status:	OPEN
Source Case Disease:	AIDS, Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis, Chancro
TE Responsible Organization:	Winnipeg Health (including Churchill)
TE Workgroup User:	Kim, Danielle
TE Assigned Date:	No Filter
Contact Disposition:	Other - see Notes, Pending, Follow up in progress
User Organization:	Winnipeg Health (including Churchill)