

## CD Investigation Checklist

- This is a basic guide. Nursing assessment and judgement will be required as you work through each step of each individual CD as per the Manitoba Health Communicable Disease Protocol.
- The PHN is ultimately responsible for the investigation, documentation and reporting of the Communicable Disease in a timely manner.
- The PHN will advise the CD Coordinator by email when the investigation is complete .

General Process for all CD Referrals		
Receive referral	Review Manitoba Health protocol for the specific CD <a href="http://www.gov.mb.ca/health/publichealth/cdc/protocol/index.html">http://www.gov.mb.ca/health/publichealth/cdc/protocol/index.html</a> - Pay special attention to the “Key Investigations for Public Health” in the protocol	<input type="checkbox"/>
	Is there a questionnaire on Insite for this particular CD? <a href="http://www.wrha.mb.ca/extranet/publichealth/services-communicable-disease.php">http://www.wrha.mb.ca/extranet/publichealth/services-communicable-disease.php</a> If so print it off. It is intended as a tool to gather the information for the investigation. Fax to CD Unit ( 204-940-2690) when completed. The details must still be documented in iPHIS.	<input type="checkbox"/>
	Contact the testing practitioner to advise of the result. <ul style="list-style-type: none"> <li>• Is the client aware of the diagnosis?</li> <li>• Will the testing practitioner be following up with the client?</li> <li>• Advise that PHN will be following up with the client directly.</li> </ul>	<input type="checkbox"/>
	Contact the client - Home visit, phone call, office meeting <ul style="list-style-type: none"> <li>• Advise of result</li> <li>• Obtain clinical symptoms and history</li> </ul>	<input type="checkbox"/>
Case Management	<ul style="list-style-type: none"> <li>• Interview the client</li> <li>• Refer to <i>Management of Case</i> in MH CD Protocol</li> </ul>	<input type="checkbox"/>
Incubation Period	<ul style="list-style-type: none"> <li>• Refer to <i>Incubation Period</i> ( Exposure period) as per MH protocol</li> <li>• In relation to the mode of transmission obtain information of possible exposures during the incubation period</li> <li>• Any exposure in the incubation period should be noted in iPHIS under the exposure tab</li> </ul>	<input type="checkbox"/>
Communicability	<ul style="list-style-type: none"> <li>• Refer to <i>Period of Communicability</i> in the MH CD protocol</li> <li>• Is the client still communicable?</li> <li>• If so what are the recommendations if still communicable?</li> <li>• If period of communicability is over is there any further recommendations for the client?</li> <li>• Add this information into the Comm/Inc tab in iPHIS</li> </ul>	<input type="checkbox"/>
Exposures	<ul style="list-style-type: none"> <li>• List all exposures within incubation period of the CD that are relevant to the specific CD</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Each exposure should be added individually with specific dates</li> </ul>	<input type="checkbox"/>
Contacts:	In relation to the mode of transmission, exposure period and communicability who would be defined as contacts?	<input type="checkbox"/>
	Household contacts should ALWAYS be considered	<input type="checkbox"/>

	Other significant contacts? eg sexual, travel	<input type="checkbox"/>
	Are any contacts symptomatic? If so, do they meet a case definition of a case as per the MH protocol?	<input type="checkbox"/>
	Obtain names, DOB and PHIN #'s of contacts	<input type="checkbox"/>
	What sort of follow-up needs to occur with the contacts. Refer to <i>Management of Contacts</i> in the MH CD protocol.?	<input type="checkbox"/>
	Contacts must be entered in the contact tab in iPHIS. Refer to iPHIS Tips for PHN's # 9 <a href="http://www.wrha.mb.ca/extranet/publichealth/files/IPHISQRG.pdf">http://www.wrha.mb.ca/extranet/publichealth/files/IPHISQRG.pdf</a> for adding contacts.	<input type="checkbox"/>
	Documentation of assessment and intervention for contacts should be added in the comments section for each contact. Remember to date and sign each entry as it is a free text field.	<input type="checkbox"/>
	Indicate for each contact "open", "closed-treated" etc from the dropdown list under "Status", whatever is most applicable.. NEVER USE "SUCCESSFUL CLOSED" OR "UNSUCCESSFUL CLOSED".	<input type="checkbox"/>
Notes:	Document each interaction as a separate note in the Notes tab in iPHIS using <b>DARP</b> format	<input type="checkbox"/>
	Ensure investigation and documentation includes details of the <i>Key Investigations for Public Health</i> as outlined in the MH CD Protocols.	<input type="checkbox"/>
	If there is a questionnaire for that specific CD ensure that ALL information gathered on the form is documented in iPHIS in the appropriate tabs and notes. The questionnaires are intended as a tool to gather information.	<input type="checkbox"/>
In addition for: Vaccine preventable diseases	Check Panorama for immunization records of client and document in iPHIS. If eligible for any immunization, discuss and recommend options to obtain immunization, including contacts (ie: for Invasive Pneumococcal Disease if the case is eligible for the Pneumo vaccine they can be provided it, even though they have had the disease)	<input type="checkbox"/>
	Consider immunization status of contacts ( if applicable)	<input type="checkbox"/>
	Immunization status of contacts should be documented in the Contacts tab, comments section for each contact.	<input type="checkbox"/>
In addition for: Enteric Illnesses	Are they in a high risk occupation/setting that may require exclusion and/ or test of cure	<input type="checkbox"/>
	Are any contacts symptomatic? Do they meet a case definition? Will they require exclusion or f/u? *Note: All contacts symptomatic and asymptomatic should identified and added under the case	<input type="checkbox"/>
	Does the protocol advise testing or follow-up of asymptomatic contacts that work in a high risk occupation?	<input type="checkbox"/>

	Itemize the details of each exposure of the case in the exposure tab.. whatever you gather on the questionnaire should be entered into iPHIS.	<input type="checkbox"/>
	Have they had an exposure at an eating establishment during the exposure period? If so complete and fax Appendix 9.4 from the WRHA Enteric Illness manual to the PHI's & CD Coordinator <a href="http://www.wrha.mb.ca/extranet/publichealth/files/app94.doc">http://www.wrha.mb.ca/extranet/publichealth/files/app94.doc</a>	<input type="checkbox"/>
	If they travelled during the exposure period obtain dates of travel, location and name of the facility they stayed. Detailed food history is not required. It is helpful to indicate if they stayed at a resort if they ate only at the resort or off the resort. Were other travelers ill?	<input type="checkbox"/>
	Exposure should be added as "Other misc- Travel/Lived in Endemic Country" and include travel dates	<input type="checkbox"/>
For Hepatitis B cases	Refer to WRHA Hepatitis B Operational Guidelines <a href="http://www.wrha.mb.ca/extranet/publichealth/files/HepBOperationalGuidelinesFinalSeptember2019.pdf">http://www.wrha.mb.ca/extranet/publichealth/files/HepBOperationalGuidelinesFinalSeptember2019.pdf</a>	<input type="checkbox"/>
Hep B contacts	Contacts MUST be added to the contact tab. Search and add them as per iPHIS QRC # 9 <a href="http://www.wrha.mb.ca/extranet/publichealth/files/IPHISQRC.pdf">http://www.wrha.mb.ca/extranet/publichealth/files/IPHISQRC.pdf</a>	<input type="checkbox"/>
	Have contacts been tested and initiated immunization if susceptible?	<input type="checkbox"/>
	Once contacts have been advised to be tested, check e-chart weekly or check in with MD's office for results . Results should be documented in iPHIS	<input type="checkbox"/>
	Documentation for each contact which includes test results from echart and immunizations should be in the comment section for each contact in the Contact tab. <b>Include your interventions and plan.</b> Remember to date and sign each entry as it is a free text field. Example of Hep B susceptible contact: <i>eg. Mar 16, 2018 D) Checked e-chart. Tested Mar 4, 2018 HBsAB negative; HBsAB positive. Interpretation: Hep B Immune. P) No further intervention required. B. Careful RN</i> <i>eg. June 1/19 D) Info as per echart: Tested May 26, 2019 HBsAG- negative; HBsAB negative. Interpretation: Hep B susceptible. P) PHN to f/u with client to ensure client is immunized with HBV. - B. Careful RN.</i> <i>eg. June 26/19 D) Info as per PHIMs: HBV dose#1 May 16, 2019. Client to complete series with MD. P) No further intervention required. - B. Careful RN.</i>	<input type="checkbox"/>
	Contacts can be closed once it is determined they have immunity (HBsAB positive). If they have no immunity (HBsAB negative) follow-up should continue until they have one documented dose of Hep B vaccine and a plan in place to complete the series. Indicate for each contact "open", "closed-treated" etc from the dropdown list under "Status", whatever is most applicable. NEVER USE "SUCCESSFUL	<input type="checkbox"/>

	CLOSED” OR “UNSUCCESSFUL CLOSED”.	
	If after 1 month there is no further progress related to case investigation and contact follow-up consult with CD Coordinator to look at optional strategies.	<input type="checkbox"/>
For Hepatitis B Newborn Prophylaxis	Refer to Manitoba Health Hepatitis B Newborn Prophylaxis Protocol <a href="http://www.gov.mb.ca/health/publichealth/cdc/protocol/hepb_newborn.pdf">http://www.gov.mb.ca/health/publichealth/cdc/protocol/hepb_newborn.pdf</a>	<input type="checkbox"/>
	Each newborn that is receiving Hep B PEP will be created in iPHIS as Newborn Hepatitis B Prophylaxis and referred to assigned PHN.	<input type="checkbox"/>
	Confirm the health care provider that will be immunizing the child Advise the CD Admin person of above	<input type="checkbox"/>
	Follow-up and document to ensure all three HBV doses are completed at 0,1 & 6 months of age. Documentation should be completed in the notes of the infants iPHIS case	<input type="checkbox"/>
	Once all three doses are completed and documented, file can be closed. Advise the CD Clerk	<input type="checkbox"/>
Possible Rabies Exposure	Refer to WRHA Clinical Practice Guideline <a href="http://www.wrha.mb.ca/extranet/publichealth/files/CPGAnimalE.pdf">http://www.wrha.mb.ca/extranet/publichealth/files/CPGAnimalE.pdf</a> Manitoba Health Rabies protocol <a href="http://www.gov.mb.ca/health/publichealth/cdc/protocol/rabies_protocol.pdf">http://www.gov.mb.ca/health/publichealth/cdc/protocol/rabies_protocol.pdf</a>	<input type="checkbox"/>
	Documentation occurs in iPHIS Rabies Incident Summary Module <ul style="list-style-type: none"> <li>• General documentation should be in the “Incident” tab, which includes if there was a break in the skin and if prophylaxis is required.</li> <li>• Details of the exposure will go in the “Exposure” tab</li> <li>• Details of the animal will go in the “Animal” tab, which includes description and assessment of the animal, retention method, and was Animal Services notified</li> <li>• <b>Ensure all tabs are filled in and DARP format is used which includes your plan.</b></li> <li>• If the client is receiving rabies PEP document the immunizations in Panorama, not in the Imms tab. It is still important to note in iPHIS that the client is receiving rabies vaccine.</li> </ul>	<input type="checkbox"/>
	Assess for tetanus immunization and f/u as required. If no tetanus has been provided and they are due, facilitate that they receive a tetanus immunization either by self or their HCP.	
<b>BEFORE YOU CLOSE.....</b>		
General CD’s	Have you ensured your name is entered as the user responsible in the case tab?	<input type="checkbox"/>
	Have you addressed and documented the “Key investigations for Public Health for the specific CD protocol” in the notes tab?	<input type="checkbox"/>
	Are all the applicable tabs complete in iPHIS? <ul style="list-style-type: none"> <li>• Signs/Symptoms</li> </ul>	<input type="checkbox"/>

	<ul style="list-style-type: none"> <li>• Comm/Inc</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Exposures: Are all the exposures added individually?</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Contacts: Are contacts entered and “hyper-linked” in the contact tab? <ul style="list-style-type: none"> <li>○ Follow-up of each contact and documentation is completed in comments section? (ie: asymptomatic or symptomatic and include your interventions)</li> <li>○ Have you indicated the status of the contact eg. closed – treated, closed- not treated</li> </ul> </li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Outcome: use if client was in ER or hospitalized or deceased</li> </ul>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Notes: use DARP format. Put in closing note</li> </ul>	<input type="checkbox"/>
	Have you faxed the questionnaire (if there is one) to the CD Unit?	<input type="checkbox"/>
	Have you emailed your CD Coordinator to advise that your investigation and documentation is complete?	<input type="checkbox"/>
Hepatitis B cases	<p>Complete the Manitoba Health, Seniors, &amp; Active Living <i>Hepatitis B and C, HIV, and Syphilis Investigation Case Form</i> and fax to CD Unit  <a href="http://www.wrha.mb.ca/extranet/publichealth/files/HepBForm.pdf">http://www.wrha.mb.ca/extranet/publichealth/files/HepBForm.pdf</a></p> <p>****Make sure the Signature section XIV of the form is signed****</p>	<input type="checkbox"/>
	<p>Is all documentation completed as above Hep B section for case and contacts, including a closing note?</p> <ul style="list-style-type: none"> <li>• <i>Acute</i> Hepatitis B cases: Itemize the details of each exposure of the case in the exposure tab. Information gathered on the Investigation Form should be entered into iPHIS.</li> </ul>	<input type="checkbox"/>
Hepatitis B Newborn prophylaxis	Documented completion of 3 doses of HBV?	<input type="checkbox"/>
Possible Rabies Exposure	Have you dated and signed your name and designation for each entry in iPHIS	<input type="checkbox"/>
	Have you documented your interventions?	<input type="checkbox"/>
	Have you documented a closing note under incident tab?	<input type="checkbox"/>
	Have you completed all the applicable drop down boxes in each tab?	<input type="checkbox"/>