COVID-19 Clinical Workflow for PHIMS – Cheat Sheet

IQE = Investigation Quick Entry
LHN = Left Hand Navigation
AE = Acquisition Exposure
TE = Transmission Exposure

Prior to starting case investigation, click on Subject Summary to see any other open investigations and close any open contact investigations by changing the disposition to "contact turned case" and close. Review any available notes for case that may be indicated by yellow warning triangle in top left corner.

1) Update primary investigator and assign coordinator

2) Verify/update demographic information

3) Enter ethnicity

4) Enter signs and symptoms (full feature hyperlink for symptoms not included in IQE)

5) Enter risk factors
** If sensitive occupation identified, must **also** be populated under Disease Details of IQE
** If Outbreak Associated, must enter Outbreak/Cluster code under risk factors. Additionally, must be added to Disease Summary:
LHN > Investigation Details > Disease Summary > Update > Add Provincial Outbreak Code > Save

6) Add interventions
→ App (follow appropriate disposition and outcome per case forms)
→ Isolation (**End date cannot be added in IQE**. You must use the hyperlink to full features to end date isolation)
→ Status Assessment

7) Add Acquisition and Transmission Exposures
** Do not link AE to a known case!! This creates a TE under their case investigation that was not documented by the original case investigator and alters their case investigation. Document details under Exposure Location Name (ex: Visit with brother, known positive case)
** Document all details of exposure under Exposure Location Name (max character limit 225). This information will be visible in the factory table on the investigation summary and exposure summary pages.

8) Add contacts to TE
** You can search for the clients ahead of time using LHN to identify if they already have contact or case investigations present.

For contacts **without open case or contact investigations:**
→ Add as a known contact via client search with PHIN or other identifiers
→ Assign the disposition of follow-up by call-centre

For contacts with an open **contact investigation:**
→ Write down the Investigation ID for their contact investigation.
Navigate to TE of your case > Known contact search > Select Investigation > Search > Search by the contact investigation ID previously identified.

For contacts with an open **case investigation:**
** DO NOT link by Case Investigation ID
→ Add as a known contact via regular client search.
→ Assign the disposition of previously infected/treated/immunized and close

Helpful tips:
You can add family members all at once by searching by MFRN
You can continue to search for individuals and select and return (which creates a list of known contacts) and then click "add" to create a contact investigation for all of them at once.

9) Add clinical notes
** Ensure case investigation is in context while authoring notes

10) Change case disposition to "follow-up by call centre"

11) Update contacts
Exposure Summary > TE > Click on + in factory table to see drop down of all known contacts > Click on first contact's ID hyperlink number > This will bring you to the AE in their contact investigation
** Scroll down and end date the acquisition event according to the dates given by the case
** Add intervention (requires start and end date in order for call centre to follow-up for ADM)
** Document under Notes
** Ensure disposition is appropriate for follow-up plan (follow-up by call centre, etc)

Repeat 11) for all contacts