

## PHIMS Data Entry for COVID-19 Case Investigations

[The Case Investigation Form User Guide](#) will provide you with further details on the parameters of how to complete the form and enter into PHIMS

### Section I - Case Identification:

Confirm Case's identity

Address and Contact Information (*Boxes 1-14 on form*)

- Collect the CURRENT address and contact number for the client and update in the client's demographics
  - **Breadcrumbs:** Subject > Client Details > Client Demographics > Under Address click Add > Select Address Type (MHSU) > Add address information > Select the updated address as "preferred" > Under Telephone Numbers click Add > Select Number Type

Racial Ethnic Identity (*Boxes 15 – 17 on form*)

- Once the case's identity is confirmed, use the provided script for the racial/ethnic identity conversation. This is a required step, but response is voluntary
  - See [COVID-19 Script for Racial, Ethnic, Indigenous Identity: Collection of Identifiers](#) and [Training video](#)
- Indigenous Identity should be further identified (First Nation: Status or non-Status, Metis, Inuit). This is a required step, but response is voluntary
  - **Breadcrumbs:** *Investigation Quick Entry* > Scroll down to *Client Details* > Add Indigenous Identity, First Nation Status, Ethnicity, Ethnicity Reported By > Save
  - **Breadcrumbs (full feature):** *Subject* > *Client Details* > *Client Demographics* > Personal Information > Add Indigenous Identity, First Nation Status, Ethnicity, Ethnicity Reported By > Save

Interpreter (*Box 18 on form*)

- Add to "Client Details > Client Demographics > Languages" section in PHIMS, so this information is accessible to all PHIMS users

### Section II – Investigation Information:

Investigation Disposition (*Box 19 on form*)

- This refers to the overall disposition of the contact investigation and should be changed from "Pending" upon receipt from MHSU, to "Follow up performed by region"
- Once investigation entry is complete, update disposition as appropriate (follow up by call centre, etc.
- On completion of Investigation, set to "Follow up complete" prior to closing case
  - **Breadcrumbs:** Investigation > Investigation Details > Investigation Information > Set Disposition > Select appropriate Date > Save

Responsible Organization and Other Organizations Involved (*Box 20 & 21 on form*)

- **Breadcrumbs:** *Investigation Details* > *Responsible Org/Investigator*

### Section III –Infection Information:

#### Staging

- Disease classification will be entered (by MHSU) (*Boxes 22 & 23 on form*)
- Staging must be determined by the investigator (*Box 24 on form*); travel acquired, close contact of case, or unknown acquisition. Where the case could have acquired the infection in the 14 days prior to symptom onset or 14 days prior to date of test if asymptomatic. Review dates beginning with most recent and working back through the 14 days from symptom onset to help the case recall their activity
  - **Breadcrumbs:** *Investigation > Investigation Details > Disease Summary > Scroll down and click Update > Scroll down to and select appropriate option from Staging drop down > Save*

### Section IV - Signs and Symptoms:

- Select “symptomatic” OR “asymptomatic”, set response to “yes”, choose as “onset symptom” and add date of initial day of symptom onset (*Box 25 on form*)
- Enter specific symptoms and dates (*Box 26 on form*)
- Remember to update the symptoms with end dates, if applicable
  - **Breadcrumbs:** Signs and Symptoms > Scroll down to list of presets > Select applicable Symptom box (one at a time) > Update > Add Present Yes, Onset date, Recovery date (as appropriate) > Add > Save
  - **Breadcrumbs:** Investigation Quick Entry > Scroll down to Signs and Symptoms > Select Symptom > Add Response, Onset Symptom, Onset Date (for all symptoms) > Save
- Unlisted symptoms, such as poor sense of smell or taste, fatigue etc, should be added, if not in preset
  - **Breadcrumbs:** Investigation > Signs & Symptoms > scroll through list of available options or use “other” and type in text box > Add > Save

### Section V - Risk Factor Information:

- Outbreak Associated (*Box 27 on form*)
  - Enter Outbreak/Special Investigation/Cluster Code, according to PHIMS Entry for Outbreaks/Special Investigations/Clusters
  - Refer to [PHIMS Entry for Outbreaks/Special Investigation/Clusters](#)
- Sensitive Environment/Occupation (*Box 34 on form*)
  - See the case form for notable “occupations”; other includes school setting, or any congregate setting
  - MUST enter all other occupations in the free text field
  - **It is important to note that ‘student’ (at a school) is an available occupation and is required to be entered along with the school/district information: this is entered in subject; client details; occupation/education**
- Underlying Illness (*box 35 on form*); certain conditions pose a higher risk for severe disease
- Select “**No**” for all risk factors that do not apply; **Do not** leave risk factors blank
  - **Breadcrumbs (full feature):** Risk Factors > Select Risk Factor > Update > Onset Symptom, Onset Date (for all symptoms) > Save > Select Risk Factor > Update, etc (These need to added one at a time if done from here)
  - **Breadcrumbs:** *Investigation Quick Entry > Scroll down to Risk Factors > Select Risk Factors > Add for each symptoms the Response, Additional Information, Frequency, Effective Dates From and To (as appropriate) > Click Set Response > Click Save*

## Section VI - Acquisition Exposures: (Incubation Period)

- Definition: This is the period of time, 14 days prior to symptom onset where the case may have acquired COVID or 14 days prior to test date, if asymptomatic
- List any travel out of Province, Country, or Region/city if applicable
- Community Contact refers to household contact (members who live in the same home), and/or close non-household contact (i.e. workplace, gathering, visit to or from friends/family, child's sleepover...etc.)
- The Instructions for COVID Case investigations are very clear and should be referenced when obtaining and entering acquisition exposures
- It is very important to complete Exposure Start & End Date
- Complete Travel Related Acquisition Event details (i.e.; flights, cruise etc.) in the table on the form and add to PHIMS in the same place as all other AE and TE; Investigation > Exposure Summary > Create AE/TE > Include details of travel in Exposure Location Name (max character limit 225). \*\* Create separate AE/TE for each portion of travel (ie: flight to, hotel stay, flight home, etc)

## Section VII - Interventions

### Intervention:

- Isolation; subtype may be
  - Home isolation: client isolates at their home address
  - Self-Isolation (other location): client is isolating at an alternative location (AIA hotel), or other arrangement, family cabin for example.
  - Facility isolation: client is being isolated in hospital, Long Term Care facility or Personal Care Home for example
  - It is important to identify the reason for hospitalization. If the client is in hospital for isolation only or due to delivery of a child, then "Self-Isolation" should be chosen. "Facility isolation" is meant to reflect those who's health status declined enough to require hospitalization, OR those who live in LTC/PCH.
- Enter Isolation intervention start date (the date they started to isolate) and end date (10 days from symptom onset, or test date if asymptomatic, for cases).
- The intervention(s) disposition and outcome should be changed to "in progress" and "pending" for the duration of the intervention(s)
- Change intervention(s) disposition and outcome to "completed" once complete.
  - **Breadcrumbs:** Treatment and Interventions > Intervention Summary > Click Isolation type > Click Add Preset > Add Intervention Disposition (In progress/Completed), Outcome (Pending/Completed), Start date (Today), End Date (10 days from symptom onset or asymptomatic swab), Next follow up date, Provider, Comments (click Add) > Save
- Address for "self-isolation" must be entered as temporary address into PHIMS client demographics
  - **Breadcrumbs:** Subject > Client Details > Client Demographics > Under Address click Add > Select Address Type (Temporary) > Add address information and set Effective From and Effective To

### Status Assessment:

- Status Assessment-this is located within intervention
  - Enter the isolation type and start/end dates
  - Enter any changes to client status (hospitalization, for example) and start/end dates-this can be entered in both isolation intervention and status assessment
  - Enter status assessment "recovered" when case has been deemed recovered

- **Breadcrumbs:** Treatment and Interventions > Intervention Summary > Click Status Assessment type (Hospitalization, Recovered, Fatal, etc) > Click Add Preset > Add Outcome (Pending/Completed), Start date (Today), End Date (as appropriate), Provider, Comments (click Add) > Save

**COVID-19 Alert App** (*Box 46-47 on the form*)

- Chart interventions using appropriate disposition and outcome as indicated on case form.
  - **Breadcrumbs:** Treatment and Interventions > Intervention Summary > Create Intervention > Intervention Type > App

**VIII - Transmission Exposures- Settings**

- Transmission Exposures: Contact Tracing
  - Period of communicability is 48 hours prior to symptom onset date, and until 10 days from symptom onset, or until day of last unprotected exposure (ie; before full PPE was used - noted as start date of isolation in box 43 on form), as long as the case has clinically improved and is afebrile
  - Transmission Exposure settings: Travel and Community Contact, similar to acquisition exposure
- Example:
  - TE #1: Travel; Maple Bus Lines, Winnipeg to Thompson (date, time)
  - TE #2: Community Contact; Household; partner, child, child
  - TE #3: Community Contact; Close non-household; Birthday party- adults x6, children x10
  - TE #4: Community Contact; Close non-household; Workplace- co-worker x 1
    - Household contact should only be referred to as those who live with the case full-time
    - Start and end dates and time periods for exposures
- Special considerations for SCHOOL/DAYCARE FACILITY cases
  - The facility should be documented as a transmission event (# of known close contacts linked) and possibly an acquisition event if the facility is considered a possible exposure for the case
  - Physical distance, cohort numbers, masks, ect. should be documented “sensitive environment/occupation” details
- **Breadcrumbs:** *Investigation > Exposure Summary > Create Transmission Event*
  - New window opens. Use initials for contact. Complete all required areas and *Save*. Then scroll down and drop *Known Contact Search > Client > Search > Select and Return > Add*. Select Northern > CD-Northern > Investigator > Select *Other* (type: Named as Contact) > Choose Surveillance Form > Date Received > Update > Save
- Complete Travel Related Acquisition Event details (i.e.; flights, cruise etc.) in the table on the form and add to PHIMS in the same place as all other AE and TE; Investigation > Exposure Summary > Create AE/TE > Include details of travel in Exposure Location Name (max character limit 225). \*\* Create separate AE/TE for each portion of travel (ie: flight to, hotel stay, flight home, etc)
  - All events & flight details need to be accurate; this is where MHSAL retrieves information for posting to the public

## Outcomes

### How to Enter an Investigation Outcome (See QRC-7.19n)

- PHIMS Left Hand Navigation (LHN) > Investigation > Outcomes
- Case investigations require Intervention and Investigation Outcomes to report the client's death or recovery from COVID-19:
  - **Intervention Outcome:** reflects the outcome of the particular intervention. For the Status Assessment intervention, select either "Recovered" or "Fatal" as the intervention sub-type.
    - When Case has been admitted to hospital, update disposition as "Hold for treatment completion" and enter Status Assessment as "Hospitalized" intervention.
    - Case Disposition to ensure ADM goes to appropriate provider (*Box 57 on the form*):
      - Community Area (CA): indicate "follow-up performed by region" and add CA next to that
      - COVID-19 PH Contact Centre: indicate "follow-up performed by Call Centre"
        - Call Centre staff document daily calls as a follow-up to the *Isolation* intervention using the "Add Follow Up" function.
        - Call Centre Nurses will enter the Intervention Outcome for the *Isolation* intervention when closing the contact investigation
      - **Breadcrumbs:** Investigation > Outcomes > Select Outcome type from drop down > Select Date > Add Outcome > Save
      - The "Pending – referred back to region for follow up" investigation disposition can be used by the Call Centre when Call Centre staff determine that a client needs to be followed up by the region and to flag an investigation that is being sent back from one region to another (useful for shared COVID files).
  - **Investigation Outcome:** reflects the overall outcome of the client's Case investigation.
    - Investigation outcomes must be updated as changes occur, or when the case is deemed recovered (i.e. investigation disposition; status assess, investigation status) e.g.; current status should be changed to "recovered", once ADM has been completed and case has recovered
    - The province will continue to report cases as active until the investigation outcome is changed to Recovered
- To ensure that every case is followed through to the end, the last entered Status Assessment Intervention Outcome and the Investigation Outcome should match at the end of an investigation. **Regional users are encouraged to enter a fatality in the Investigation Outcomes section as soon as possible.** Manitoba Health will view the fatal outcome as part of the case review and enter it if not already recorded.

## PHIMS Data Entry for COVID-19 Contact Investigations

### Section I - Case Identification:

#### Racial Ethnic Identity

- Once the contact's identity is confirmed, use the provided script for the racial/ethnic identity conversation. This is a required step, but response is voluntary
- Indigenous Identity should be further identified (First Nation: Status or non-Status, Metis, Inuit). This is a required step, but response is voluntary
  - **Breadcrumbs:** *Investigation Quick Entry* > Scroll down to *Client Details* > Add Indigenous Identity, First Nation Status, Ethnicity, Ethnicity Reported By > Save
  - **Breadcrumbs (full feature):** *Subject* > *Client Details* > *Client Demographics* > Personal Information > Add Indigenous Identity, First Nation Status, Ethnicity, Ethnicity Reported By > Save

#### Interpreter (*Box 18 on form*)

- For contacts that require an interpreter, add to "Client Details > Client Demographics > Languages" section in PHIMS, so the information is accessible to all PHIMS users

#### Address and Contact Information

- Collect the CURRENT address and contact number for the client and update in the client's demographics, including all information is accurate for out of province/out of region
  - **Breadcrumbs:** *Subject* > *Client Details* > *Client Demographics* > Under Address click *Add* > Select *Address Type* (MHSU) > Add address information > Select the updated address as "preferred" > Under Telephone Numbers click *Add* > Select *Number Type*

#### Disposition (*Box 57 on form*)

- Investigation Disposition
  - This refers to the overall disposition of the contact investigation and should be either "Follow up performed by region" or "Follow up performed by call center". Use "Follow up complete" when investigation is completed and all information is entered
    - **Breadcrumbs:** *Investigation* > *Investigation Details* > *Investigation Information* > Set Disposition > Select appropriate Date > Save

#### Signs and Symptoms

- Signs and Symptoms
  - Select "symptomatic" OR "asymptomatic", set response to "yes", choose as "onset symptom" and add date of initial day of symptom onset (OR today's date for asymptomatic);
  - Enter specific symptoms and dates
  - Remember to update the symptoms with end dates, if applicable
- **Breadcrumbs:** *Investigation Quick Entry* > Scroll down to *Signs and Symptoms* > Select *Symptom* > Add Response, Onset Symptom, Onset Date (for all symptoms) > Save
- **Breadcrumbs (full feature):** *Signs and Symptoms* > Scroll down to list of presets > Select applicable Symptom box (one at a time) > Update > Add Present Yes, Onset date, Recovery date (as appropriate) > Add > Save

#### Risk Factors

- Sensitive Environment (Occupation)
  - See the case from for notable "occupations"; other includes school setting, or any congregate setting
  - Enter all other occupations in the free text field
  - **It is important to note that 'student' (at a school) is an available occupation and is required to be entered along with the school/district information: this is entered in subject; client details; occupation/education**

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- **Breadcrumbs:** *Investigation Quick Entry* > Scroll down to *Risk Factors* > Select *Risk Factors* > Add Response, Additional Information, Frequency, Effective Dates From and To (as appropriate) > Click *Set Response* > Click *Save*
- **Breadcrumbs (full feature):** Risk Factors > Select Risk Factor > Update > Add Response, Additional Information, effective to and from as appropriate > Save > Select Risk Factor > Update, etc (these need to added one at a time)

### Acquisition Exposures

- Acquisition Exposures (how the contact was exposed to COVID-19)
  - This step should be created in the case's investigation and linked to a specific transmission event (when/where the case potentially transmitted the virus to the contact)
  - Ensure exposure start and end dates are complete
  - Community Contact refers to household contact (members who live in the same home), and/or close non-household contact (i.e. workplace, gathering, visit to or from friends/family, child's sleepover...etc.)
  - Reference the Instructions for contact investigations and QRC's for clear details

### Interventions (*Box 57 on form*)

- Interventions
  - Isolation; subtype may be
    - Home isolation: client isolates at their home address
    - Self-Isolation: client is isolating at an alternative location (AIA hotel), or other arrangement, family cabin for example.
    - Facility isolation: client is being isolated in hospital, Long Term Care facility or Personal Care Home for example
    - **It is important to identify the reason for hospitalization.** If the client is in hospital for isolation only or due to delivery of a child, then "Self-Isolation" should be chosen. "Facility isolation" is meant to reflect those who's health status has declined enough to require hospitalization, OR those who live in LTC/PCH.
  - Enter Isolation intervention start date (the date they started to isolate) and end date (14 days from last close contact with case, for contacts) (*Box 58 on form*)
  - The intervention(s) disposition and outcome should be changed to "in progress" and "pending" for the duration of the intervention(s) (*Box 57 on form*)
  - Change intervention(s) disposition and outcome to "completed" once complete.
    - **Breadcrumbs:** *Investigation* > *Treatment and Interventions* > *Intervention Summary* > Click *Isolation* type radio > Click *Add Preset* > Add Intervention Disposition (In progress/Completed), Outcome (Pending/Completed), Start date (Today), End Date (14 days after last exposure), Next follow up date, Provider, Comments (click *Add*) > *Save*
    - To Follow up Intervention: In Intervention summary, scroll to Interventions and click hyperlink on intervention name to open and update an intervention
  - Address for "self-isolation" must be entered as temporary address into PHIMS client demographics
    - **Breadcrumbs:** *Subject* > *Client Details* > *Client Demographics* > Under Address click *Add* > Select *Address Type* (Temporary) > Add address information and set *Effective From* and *Effective To*

### Referring Contacts in Other Regions/Jurisdictions

- For contacts who reside in other regions or provinces
  - The overall investigation disposition must be either "Pending Referral Out of Region" within Manitoba or "Referred to External Jurisdiction" outside of Manitoba
  - Always contact the individual for notification of exposure and advise isolation

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- Complete applicable documentation as per above; signs and symptoms, risk factors, interventions, CURRENT address and contact number
- Provide verbal notification to the Region or Jurisdiction
- Print and fax a Contact Summary Report for external Jurisdiction, or Region (if not actively using PHIMS)
  - See PHIMS Report User Guide for Contact Summary Report (MB23400)

### To Document Active Monitoring (AM)

- Document call in intervention summary under *Isolation*
  - **Breadcrumbs:** *Treatment and Interventions > Intervention Summary > Click radio button beside Isolation type > Click Add Follow Up > Select Follow up Type (Telephone), Follow up date (Today), Follow up Disposition (Completed), has Symptoms (Yes/No, etc), Provider, Comment (Add temperature and other details, Click Add), Next Follow up date (Tomorrow) > Save*
- Update Signs and Symptom: Add new and end date resolved symptoms as needed
  - **Breadcrumbs:** *Signs and Symptoms > Scroll down to list of presets > Select applicable Symptom box (one at a time) > Update > Add Present Yes, Onset date, Recovery date (as appropriate) > Add > Save*

### To Close an Investigation:

- For Cases Only:
  - ✓ Set Outcome as appropriate (usually will be Recovered)
  - ✓ Set appropriate intervention Status Assessment (Usually will be Status Assessment: Recovered)
- For Everyone
  - ✓ Signs and Symptoms: End date resolved symptoms
  - ✓ Intervention Summary: Complete Interventions (Outcomes and Dispositions to complete)
  - ✓ Investigation Information: Set Investigation Disposition to “Follow up complete”
  - ✓ Investigation Summary: Review Investigation Summary for accuracy (**Breadcrumbs:** *Investigation > Investigation Summary*)
  - ✓ Close Investigation (**Breadcrumbs:** *Investigation > Investigation Details > Close Investigation*)

### When Completing Case and Contact Investigations for Other Regions

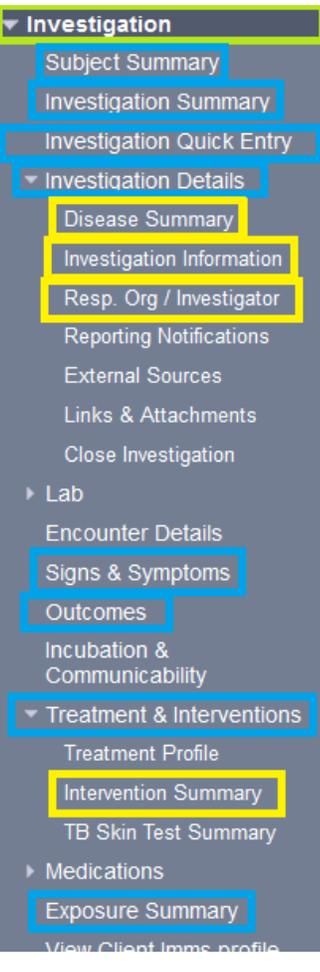
#### Responsible Org/Investigator

- Winnipeg should be listed as the Secondary Investigator Organization
  - Start date is entered as the day assigned/received
  - End date MUST be entered when Winnipeg has completed their follow up with the client/investigation
    - For Case Investigations-after Active Monitoring is complete (standard case, no complications)
    - For Contact Investigations-after client has been notified, advised to isolate/self-monitor, informed of Call Center follow up and all investigation documentation is complete
- Primary Investigator Organization should be the Region of residence
  - An end date is never entered for the Primary
- **Breadcrumbs:** *Investigation > Investigation Details > Resp. Org/Investigator*

#### Interventions

- Isolation
  - Creating the Isolation Intervention
    - Workgroup Organization, Workgroup, Location and User/Provider should be the Organization that will be completing the Active Monitoring
    - For example; if Winnipeg will be completing the AM for the Case, choose Winnipeg Health, CD-Winnipeg Health, Winnipeg Health SDL and your name as User/Provider
    - For example; if the Call Center is going to be completing the AM for the Contact, choose the Primary Organization-choose Winnipeg Health, CD-Winnipeg Health, Winnipeg Health SDL, (user name unknown)
- **Breadcrumbs:** *Investigation > Treatment & Interventions > Intervention Summary > Select Create Intervention*

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1.	<p>* Required Field / Information Requite</p> <p>Specify your Organization, Role and Language preference / Indiquer votre Organisation, rôle et langue préférée</p> <p>* Organization/Organisation: Northern Health</p> <p>* Role/Rôle: MB_CDI_PUBLIC_HEALTH_NURSE_CLOSE</p> <p>* Language/Langue: English</p> <p>Continue/Continuer</p>	Set the Organization, Role and Language as pictured
2.		Set Investigations
3.		<p>Click 'Recent Work' to find cases/contacts/investigations you have recently had open</p> <p>Click 'Search' to drop down search options</p> <p>Choose the search category you want and plug in search criteria. If you're looking for a person that isn't showing up, make sure you <i>click inactive clients, indeterminate clients and use phonetic matches</i>. I've also found people by searching by just birthdays.</p>
4.		<p>Click 'Investigations' to drop down investigation options once investigation in</p> <p><i>Subject Summary</i>: allows you to see any open or closed public health investigations. Click the investigation ID to put the investigation in context.</p> <p><i>Investigation Summary</i>: Review the investigation here</p> <p><i>Investigation Quick Entry</i>: Use this to put in everything except staging (go to Disease Summary for that)</p> <p><i>Investigation Information</i>: Click on this to:</p> <ul style="list-style-type: none"> <li>• Change the disposition</li> <li>• Close the investigation</li> </ul> <p><i>Disease Summary</i>&gt; Update&gt; Staging&gt; Save</p> <p><i>Investigation Information</i> &gt;Disposition (remember to change the date)&gt; Save &gt;Close Investigation&gt; Close Investigation</p> <p><i>Responsible Org/Investigator</i>&gt; Northern&gt; CD Northern&gt; Investigator You can also change investigator type, end date investigators, and modify investigators by clicking the circle beside their name and then clicking 'Update'. Be sure to 'Save' any changes you want to keep.</p> <p><i>Signs and Symptoms</i>&gt; Select from drop down list&gt; Select present 'yes'&gt; Add&gt; Save Signs and symptoms can also be end dated once resolved. This makes finding out about symptoms recovery show up in the 'Investigation Summary'</p> <p><i>Outcomes</i>&gt; Drop down list 'Recovered'&gt; Select date&gt; Add Outcome Do this once client is deemed recovered before closing investigation</p> <p>Treatment and Interventions&gt; Intervention Summary</p> <p><i>Intervention Summary</i>&gt; Create Intervention&gt; Intervention type&gt; Intervention sub-type&gt; Intervention disposition&gt; Outcome&gt; Start date&gt; Save With every new intervention, click 'Intervention Summary' and start over.</p> <p><i>Exposure Summary</i>&gt; Create transmission event&gt; See other Instruction sheet because this is pretty complicated</p>

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<p>5.</p> 	<p>Click '<i>Subject</i>' to drop down client-specific information</p>
	<p>Click '<i>Client Details</i>' to drop down more options</p>
	<p><i>Client Demographics</i>: Use this to add contact information, update address, etc</p>
	<p><i>Risk Factors</i>: Select risk factor&gt; Update&gt; Additional Information (as needed)&gt; Response drop down to 'yes'&gt; Date&gt; Apply&gt; Save once all risk factors are added</p>
	<p><i>Notes</i>: Use this to add Investigation specific notes                  ***Make sure client and investigation are both in context or it will just go under the client***</p>