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## ***Regional Guidelines for General CD QA – Cases and Contacts***

### ***CD Unit***

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**Purpose:** To identify new labs, refer out to Community Areas for investigation, ensure timely and appropriate case and contact management, and review and close investigations when public health follow up is complete.

**Plan:**

1. Run reports daily to capture new & transferred cases/contacts requiring follow up.
2. Assign investigations/labs to Churchill as required.
3. Referral to CA for PHN follow up
4. Ensure cases have been assigned within 2 hrs of referral to CA.
5. Review/addition of pertinent information by CDC on selected cases only (PHN to close files per selves).

**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.

## CD Unit Admin Responsibilities:

### Lab Workload Report

1. Run Lab Workload report daily @ 0800h, 1100h, 1400h with filter settings per Appendix A below, User Guide [lab-workload-report-mb4120b-ug.pdf \(phimsmb.ca\)](#) / QRC [Lab Workload MB4120B](#).
  - i. Will require a report for all General CDs and another under encounter group STBBI to capture new Hep B
  - ii. Under Communicable Disease encounter group, select “add all” for Diseases
  - iii. Filter/sort excel spreadsheet for investigations with a disposition of *pending*
2. Assign CD – Churchill and primary investigator **Katie Crawford** to all Churchill related investigations.
3. Assign appropriate CDC in the role of Coordinator for all new cases.
4. Assign appropriate CA clerk in clerk role per QRC [Responsible Organization/Investigator – Case and/or Known Contact](#)
5. Update case disposition to *follow up performed by region*.
6. Follow internal process to notify CDC of **URGENT** CDs as noted in [Clinical Notification of Reportable Diseases and Conditions \(gov.mb.ca\)](#)

### Investigation Search Report

1. Run Investigation Search report daily @ 0800h, 1100h, 1400h, and 1530 h with filter settings per Appendix B below, User Guide [investigation-search-mb2701c-ug.pdf \(phimsmb.ca\)](#) / QRCs [Investigation Search – Investigator Assigned MB2701C](#) and [Investigation Search – Investigator Assigned MB2701C](#).
  - i. Will require a report for all General CDs and another under encounter group STBBI to capture new Hep B
  - ii. Under Communicable Disease encounter group, select “add all” for Diseases
  - iii. Filter/sort spreadsheet for investigations *unassigned in primary role*
  - iv. Filter/sort spreadsheet for investigations with all disposition of *pending referral out of region*
2. Resolve unassigned cases and contacts
  - i. Cases: does it have a clerk role assigned?  
Yes → Follow up with CA clerk  
No → Ensure CDC is assigned, no further action required
  - ii. Contacts: Search investigation history to determine who created the contact investigation. Was it a WRHA PHN?  
Yes → Assign to them and send email reminder  
No → Follow up with CDC for guidance

3. Resolve cases/contacts being referred out of region
  - i. Is this an investigation being referred **TO** WRHA?  
Yes → Assign to appropriate CA clerk/CDC  
No → No further action required

### Unknown Contact Search Report

1. Run Unknown Contact Search report daily @ 0800h with filter settings per Appendix C below, User Guide [investigation-search-mb2701c-ug.pdf \(phimsmb.ca\)](#) / QRC [Unknown Contact MB23000](#).
2. Resolve **UNASSIGNED** unknown contacts
  - i. Does the TE belong to an investigation assigned to WRHA PHN?  
Yes → Assign responsible PHN to TE with unknown contacts and send email reminder  
No → Follow up with CDC for guidance

### CD Coordinator Responsibilities:

1. Run Investigation Search Report **daily @ 0830h, 1130h, 1430h (or a variation thereof)** with filter settings **using own Investigator name** as per Appendix D below, 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. Review new cases at CD Unit’s discretion.
3. Review cases (\*i.e. urgent/flagged) at CD Unit’s discretion during an investigation and/or following closure.
4. *Optional: Use of Interventions for Workload Management*



Interventions for  
Workload Manager

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## Appendix A

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### General CDs (Communicable Disease Encounter Group)

#### MB4120B - Lab Workload

The purpose of the lab results report is to support the review of new lab results entered in Panorama and prioritize the assignment of them to investigate.

Date Generated: 2021-Sep-08 09:51:48

##### Report Parameters:

Date Lab Entered:	2021-Sep-07 through 2021-Sep-08
Encounter Group:	Communicable Diseases
Disease:	Active tuberculosis, AIDS, Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis, Chancroid, Chlamydia infection, Viral hemorrhagic fever, Viral hemorrhagic fever, Crimean-Congo, Viral hemorrhagic fever, Ebola, Viral hemorrhagic fever
Investigator Organization:	Winnipeg Health (including Churchill)
User Organization:	Winnipeg Health (including Churchill)
Filter Results by User:	No
Display Client Identifiable Data:	Yes

**Set Report Filters** [Return] [Generate Report Now] [Schedule Report] [Reset] [Print] [Help]

**Report Filters**

Report: MB4120B-Lab Workload

- Report Output:**  Excel
- Date Entered From:** 2021/09/07
- Date Entered To:** 2021/09/08
- Encounter Group:**
  - Available: Outbreak Response, Sexually Transmitted and Bloodborne Infections, Tuberculosis
  - Selected: Communicable Diseases
- Disease:**
  - Available: Active tuberculosis, AIDS, Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis
  - Selected: (Empty)
  - Buttons: Add All
- Investigator Organization:**
  - Available: (Empty)
  - Selected: (Empty)

## Hepatitis B (STBBI Encounter Group)

### MB4120B - Lab Workload

The purpose of the lab results report is to support the review of new lab results entered in Panorama and prioritize the assignment of them to inv

Date Generated: 2021-Sep-08 10:05.04

#### Report Parameters:

Date Lab Entered:	2021-Sep-07 through 2021-Sep-08
Encounter Group:	Sexually Transmitted and Bloodborne Infections
Disease:	Hepatitis B
Investigator Organization:	Winnipeg Health (including Churchill)
User Organization:	Winnipeg Health (including Churchill)
Filter Results by User:	No
Display Client Identifiable Data:	Yes

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## Appendix B

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## General CDs (Communicable Disease Encounter Group)

### MB2701C - Investigation Search

This report is used to search for and list any investigation the user is authorized to see.

Date Generated: 2021/09/08 10:09:35 am

#### Report Parameters:

Date Reported:	1900-Jan-01 through 2021-Sep-08
Encounter Group:	Communicable Diseases
Investigation Status:	OPEN
Classification Group:	Contact, Case
Investigation Organization:	Winnipeg Health (including Churchill)
Assigned Date:	No Filter
Investigator:	No Filter
Disease:	Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis,
Investigator Assignment:	All
Display Client Identifiable Data:	No
Exclude Investigations With Lab Results:	No
User Organization:	Winnipeg Health (including Churchill)

**Set Report Filters**

Ammazzini, Isabella  
Anderson, Alexandra  
Arbez-Koga, Pauline

**Assigned Date From:**  
yyyy/mm/dd

**Assigned Date To:**  
yyyy/mm/dd

**Encounter Group:**

**Available :**

Outbreak Response  
Sexually Transmitted and Bloodborne Infections  
Tuberculosis

**Selected :**

Communicable Diseases

**Disease:**

**Available :**

Anaplasmosis  
Anthrax  
Babesiosis  
Blastomycosis  
Botulism  
Brucellosis  
Campylobacteriosis  
Cholera

**Selected :**

\* **Investigator Assignment:**  
All

\* **Display Client Identifiable Data:**  
No

\* **Exclude Investigations With Lab Results:**  
No

## Hepatitis B (STBI Encounter Group)

<b>MB2701C - Investigation Search</b>	
This report is used to search for and list any investigation the user is authorized to see.	
Date Generated: 2021/09/08 10:28:04 am	
<b>Report Parameters:</b>	
Date Reported:	1900-Jan-01 through 2021-Sep-08
Encounter Group:	Sexually Transmitted and Bloodborne Infections
Investigation Status:	OPEN
Classification Group:	Contact, Case
Investigation Organization:	Winnipeg Health (including Churchill)
Assigned Date:	No Filter
Investigator:	No Filter
Disease:	Hepatitis B
Investigator Assignment:	All
Display Client Identifiable Data:	Yes
Exclude Investigations With Lab Results:	No
User Organization:	Winnipeg Health (including Churchill)

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## Appendix C

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### General CDs (Communicable Disease Encounter Group)

#### MB23000-Unknown Contacts

This report list unknown contacts of transmission events and their associated dispositions and descriptions.

Date Generated: 2021/09/08 11:01:23 am

#### Report Parameters:

Source Case Reported Date:	01-Jan-1900 to 08-Sep-2021
Source Case Investigation Status:	OPEN
Source Case Disease:	Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis, Cholera, Clostridium difficile
TE Responsible Organization:	Winnipeg Health (including Churchill)
TE Workgroup User:	No Filter
TE Assigned Date:	No Filter
Contact Disposition:	Other - see Notes, Pending, Follow up in progress
User Organization:	Winnipeg Health (including Churchill)

The screenshot shows the 'Set Report Filters' window with the following configurations:

- Encounter Group:** Available: Outbreak Response, Sexually Transmitted and Bloodborne Infections, Tuberculosis. Selected: Communicable Diseases.
- Disease:** Available: Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis, Cholera. Selected: (Empty). An 'Add All' button is present.
- TE Responsible Organization:** Available: Correctional Service Canada, FNIH, Interlake-Eastern Health, MB Health, Northern Health, Out of Province, Prairie Mountain Health, Southern Health - Sante Sud. Selected: Winnipeg Health (including Churchill).
- TE Workgroup:** Available: CD-Alberta, CD-British Columbia, CD-Churchill, CD-Correctional Service Canada. Selected: CD-Winnipeg Health.

## Hepatitis B (STBBI Encounter Group)

### MB23000-Unknown Contacts

This report list unknown contacts of transmission events and their associated dispositions and descriptions.

Date Generated: 2021/09/08 11:06:20 am

#### Report Parameters:

Source Case Reported Date:	01-Jan-1900 to 08-Sep-2021
Source Case Investigation Status:	OPEN
Source Case Disease:	Hepatitis B
TE Responsible Organization:	Winnipeg Health (including Churchill)
TE Workgroup User:	No Filter
TE Assigned Date:	No Filter
Contact Disposition:	Other - see Notes, Pending, Follow up in progress
User Organization:	Winnipeg Health (including Churchill)

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## Appendix D

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## General CDs (Communicable Disease Encounter Group)

### MB2701C - Investigation Search

This report is used to search for and list any investigation the user is authorized to see.

Date Generated: 2021/09/08 11:15:55 am

#### Report Parameters:

Date Reported:	1900-Jan-01 through 2021-Sep-08
Encounter Group:	Communicable Diseases
Investigation Status:	OPEN
Classification Group:	Case, Contact
Investigation Organization:	Winnipeg Health (including Churchill)
Assigned Date:	No Filter
Investigator:	Kim, Danielle
Disease:	Anaplasmosis, Anthrax, Babesiosis, Blastomycosis, Botulism, Brucellosis, Campylobacteriosis, Cholera, Clostridium
Investigator Assignment:	All
Display Client Identifiable Data:	Yes
Exclude Investigations With Lab Results:	No
User Organization:	Winnipeg Health (including Churchill)



## Hepatitis B (STBBI Encounter Group)

### MB2701C - Investigation Search

This report is used to search for and list any investigation the user is authorized to see.

Date Generated: 2021/09/08 1:53:45 pm

#### Report Parameters:

Date Reported:	1900-Jan-01 through 2021-Sep-08
Encounter Group:	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:	Hepatitis B
Investigator Assignment:	All
Display Client Identifiable Data:	Yes
Exclude Investigations With Lab Results:	No
User Organization:	Winnipeg Health (including Churchill)