

iPHIS User Guide

Client Demographics Module



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Public Health Ontario

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Introduction

This User Guide outlines the standardized data entry procedures of demographic information for clients.

Please note that fields marked with “M” are system mandatory fields, while those marked with “R” are required for provincial surveillance.

Note: Sections and fields that are not system mandatory or required for surveillance purposes (i.e., not marked “M” or “R”) in this User Guide are considered optional and may be entered at the discretion of the Public Health Unit (PHU). Some fields may become system mandatory (M) and require completion to save when users enter information in optional sections. Most optional fields are not described in this document.

Online training available:

An e-learning module for entering [Client Demographics](#) in iPHIS is available on Adobe Connect. You may also access iPHIS User Guides through your PHU’s Problem Resolution Coordinators (PRC)/Designated Trainers (DT) or from Adobe Connect.

Contact the Public Health Solutions Service Desk at 1-866-272-2794 or 416-327-3512 or email PublicHealthSolutions@ontario.ca for technical issues related to iPHIS or to request an Adobe Connect account.

Client Search

You must perform a thorough province-wide **Client Search** prior to entering a new client in iPHIS, which will prevent duplicate clients from being created. Leave the **Health Unit** field blank in order to complete a province-wide Client Search. Entering *fewer* data elements on the **Client Search** screen results in a broader search and increases the probability of finding the client of interest if they already exist in iPHIS. The information that is returned in the search results will help you determine if you have the correct client. Possible data elements to include are:

- Health Number (HN)
- Last Name
- First Name
- Birth Date
- Home Address
- Alias
- Phone Number

Wildcard Search

Try widening the search by removing data elements or adding wildcards to the search parameters if the first search does not return any results.

Searches can be broadened by entering a wildcard parameter during a search. Use wildcards in your search if:

- The client's name is incomplete
- The user is unsure how to spell the client's name
- The client's name contains spaces, dashes or apostrophes

There are four different ways to enter wildcards in a search depending on where the percentage sign is placed:

- %smith returns all entries that end with "smith," for example, Blacksmith, Goldsmith, Smith
- smith% returns all entries that begin with "smith," for example, Smith, Smithee
- smith%man returns all entries that begin with "smith" and end with "man." **Note:** This option is useful when unsure of spelling.
- %smith% returns all entries that contain "smith," for example, Blacksmith, Goldsmith, Smith, Smithee

Please refer to the most recent version of the Duplicate Client Management Handbook, available through your PHU's PRCs/DTs for further guidance on appropriate search methods.

Alias Search

As a best practice, always check the box **Include Aliases in Search** when using a first name as a search term. Always consider entering in aliases when creating clients, as this field can be useful when finding clients and to reduce the number of duplicate client records created in iPHIS.

Steps:

1. Enter your search criteria.
2. Click the **Include Aliases in Search** checkbox.

Note: Alias searches only apply to the **First Name** field. As best practice, enter all common names as **Aliases** because aliases are searchable in iPHIS.

Soundex Search

This technique is used if you want iPHIS to search for items that sound like the criteria you are entering, for example, Smith and Smythe. Using the Soundex search will increase the amount of time it takes to display the search results.

Steps:

1. Enter your search criteria.
2. Click the **Soundex Search** checkbox.

Creating a New Client

1.0 Client Info

Steps:

1. Click the **Add Client** button if the client of interest is not found after performing a thorough Client Search. The **Demographics Detail** screen displays.
2. Enter the information specified in [Table 1](#).
3. Click on the **Save** button. The screen will refresh after saving.

Client Information Quick List – Mandatory and Required Data Fields

- (M) Health Unit (HU)
- (R) Branch
- (M) Last Name
- (M) First Name
- (M) Birth Date
- (M) Gender
- (R) Origin (TB only)

Table 1: Entering Client Information

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Name	Data Entry Information	Dropdown Values
O	HN Assigning Authority	“ONTARIO” must be selected if Health Number (HN) is available. Leave this field blank if HN is not available.	
O	HN	OHIP Health Number – Enter if known. Enter Health Card Number if available (10 digits only, no version code).	
O	Sensitive	PHO does not currently use this field for provincial surveillance. Use at discretion of the health unit.	
O	Validated	This field only displays if the user has appropriate roles and permissions. Select it	

M/R/O	Name	Data Entry Information	Dropdown Values
		to validate the identity of the client if this field is visible.	
M	HU	The health unit where the client currently resides, as outlined in Bulletin #13 – Transferring Client Responsibility .	All PHUs in Ontario and MOHLTC – PHD (0).
R	Branch	Choose the branch office at the health unit responsible for case management.	
M	Last Name/ First Name	<p>Enter the current full legal last (family/surname) name and first (given) name of the client, as opposed to any truncated or altered version.</p> <p>Use the legal last name/first name as noted on the client’s health card, birth certificate, immigration document or passport. If the health unit does not have access to these documents, enter</p> <ol style="list-style-type: none"> 1. the last name/first name on the laboratory slip, or 2. the last name/first name provided by the client. <p>Note: Record all names into the First Name field so they are searchable with a wildcard (%) search when it is unclear if a client’s first name includes two or more separate segments OR they have provided their first and middle names.</p> <p>Note: All truncated, altered, common or previous names the individual may be known by should be documented as aliases. Always consider entering in aliases when creating clients, as this field can be useful when finding clients and to reduce the number of duplicate client records created in iPHIS.</p> <p>Note: If the client has a legally-registered</p>	

M/R/O	Name	Data Entry Information	Dropdown Values
		<p>single name, enter the single legal name in the First Name field. Enter “NOLASTNAME” in the Last Name field. Enter “NOFIRSTNAME” in the First Name field for clients without a legally registered first name (such as newborns). Do <u>not</u> include spaces and use upper case letters.</p> <p>Note: Enter anonymous clients in the following format:</p> <ol style="list-style-type: none"> 1. Last Name entered as the Ontario Provincial Lab Slip Number 2. First Name entered as “Missing” 3. Therefore, the entry would appear as: 19C123456, Missing <p>For TB Only: Enter “ANIMAL” as the last name if the client is an animal. Enter the type of animal as the first name (e.g., “ELK”). Enter a number after the type of animal (e.g., “ELK 2”) if this type of animal already exists in the system.</p>	
	O	<p>Second Name</p> <p>Only enter if the middle name is clearly identified as such, as opposed to two first names.</p>	
	O	<p>Common Name</p> <p>Enter the name the client is commonly referred as.</p> <p>Note: Searches cannot be done on this field. Create this name as an alias as well to allow this name to be viewed easily.</p>	
	M	<p>Birth Date</p> <p>Enter the date of birth of the client (YYYY-MM-DD).</p> <p>Enter the value “1111-01-01” in this field if the year, month and day on which the client was born is unknown. Enter “YYYY-MM-01” if the year and month are known, but not the day. Enter “YYYY-01-01” if the year is</p>	

M/R/O	Name	Data Entry Information	Dropdown Values
		known, but not the month and day. For TB Only: Enter the date of incidence of TB as the Birth Date if the client is an animal.	
<input type="radio"/>	Accurate	Check this box if the Birth Date entered is known to be accurate. Ensure that the Accurate checkbox is not selected if the year, month or day on which the client was born is unknown.	
<input type="radio"/>	Birth Year	Enter the official or approximate year the client was born. The Birth Year field would only typically be used in situations where a month and date of birth are not available. Note: The system automatically creates a Birth Date using the year entered and setting the month and date to 01-01 if a birth year is entered.	
<input type="radio"/>	Marital Status	Enter if known.	
<input type="radio"/>	Date of Death	Enter if applicable. Note: Clients that have been recorded as deceased appear with an asterisk beside their name in the header.	
<input type="radio"/>	Birth Province (if born in Canada)	Select as appropriate if known.	
M	Gender	Select appropriate value. <i>This data field is currently under review.</i>	MALE FEMALE TRANSGENDER A person who self-identifies as transgender. OTHER Select if the client self-identifies as a gender other

M/R/O	Name	Data Entry Information	Dropdown Values
			<p>than male, female or transgender.</p> <p>UNKNOWN</p> <p>Select if the gender of the client is unknown at the time of client entry or if the client chooses not to disclose gender.</p>
R	Origin	<p>This field is required for TB only.</p> <p>Choose as appropriate.</p> <p>This applies to clients or contacts of clients with specific diseases of public health significance (e.g., tuberculosis).</p> <p>Please refer to disease specific user guides.</p> <p><i>The dropdown values for this field are currently under review.</i></p>	<p>NON-ABORIGINAL BORN IN CANADA</p> <p>BORN OUTSIDE OF CANADA</p> <p>REGISTERED STATUS INDIAN</p> <p>MÉTIS</p> <p>INUIT</p> <p>OTHER ABORIGINAL-SPECIFY</p> <p>ORIGIN UNKNOWN</p>
O	Inactive Reason	<p>Leave blank – exception below.</p> <p>For TB only: Use 1111-01-01 if arrival date is UNKNOWN. Estimate year if year is known. Note that this is not possible if the Active box is selected, which is the system default. You must keep the Active box selected to indicate that the client is active in iPHIS.</p> <p>See Arrived Date Data Entry Information in the Immigration and Other screen for further details.</p>	
O	Active	Automatically checked to indicate that client is active in iPHIS.	
O	Inactive Date	PHO does not currently use this field for provincial surveillance. Use at discretion of	

M/R/O	Name	Data Entry Information	Dropdown Values
		the health unit.	
O	Client Email Address	Enter if known and consent has been given.	
O	Consent to use of Email	Check if client consented to use of email.	

2.0 Immigration and Other

The following fields are **required for TB clients only**. This screen is only relevant for clients who are immigrants to Canada and are under investigation or medical surveillance for certain diseases of public health significance. Please refer to disease specific user guides for further guidance.

Steps:

1. Click on the (+) sign beside **Immigration and Other** to enter applicable immigration information for clients born outside of Canada.
2. Enter the information specified in [Table 2](#).
3. Click **Save**.

Table 2: Entering Immigration Information

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
R	Immigration File Number	Enter for TB Medical Surveillance clients only.	Enter client's Unique Client Identifier (UCI) provided by IRCC (with no hyphens). Example: 1112345678. Enter the Immigration Medical Exam (IME) number from the IMM0535B form if UCI is unavailable. Do <u>not</u> enter any other number in this box.
R	Birth Country (if born outside Canada)	Select client's country of birth. Note: Enter Serbia and Montenegro for both Kosovo and the Federal Republic of Yugoslavia. Use United Kingdom for England. For N and S Korea, look under North and South in drop down list as opposed to Korea,	Select the country and UNKNOWN values as appropriate.

M/R/O	Field Name	Data Entry Information	Dropdown Values
		North and Korea, South. Use Burma for Myanmar.	
R	Father's Country of Birth	Enter if known. This is especially important if a client has been placed on medical surveillance and is under 15 years of age.	Select the country and UNKNOWN values as appropriate.
R	Mother's Country of Birth	Enter if known. This is especially important if a client has been placed on medical surveillance and is under 15 years of age.	Select the country and UNKNOWN values as appropriate.
O	TB Number	Leave blank.	
R	Arrived Date	<p>If arrival date is known, choose exact date of arrival OR year of arrival if only year is known. Check the Accurate checkbox if the exact date of arrival is known. Do <u>not</u> check the Accurate checkbox if only the year is known.</p> <p>Complete the following steps to record an unknown immigration Arrived Date on the Client Details screen if arrival date is unknown and the client is Active:</p> <ol style="list-style-type: none"> 1. Enter "ARRIVED DATE UNKNOWN" in the Client Email Address field. 2. Select the Consent to use email checkbox. <p>Enter an unknown immigration Arrived Date as "1111-01-01" in the Inactive Reason field on the Client Details screen if arrival date is unknown and the client is not Active.</p>	
R	Country Emigrated From	<p>Enter if known.</p> <p>Select UNKNOWN if the country is not known.</p>	
R	Country Last Resided	<p>Enter if known.</p> <p>Select UNKNOWN if the country is not known.</p>	

M/R/O	Field Name	Data Entry Information	Dropdown Values
R	Country Last Resided – Mother	Enter if known. This is especially important if a client has been placed on medical surveillance and is under 15 years of age. Select UNKNOWN if the country is not known.	
R	Country Last Resided – Father	Enter if known. This is especially important if a client has been placed on medical surveillance and is under 15 years of age. Select UNKNOWN if the country is not known.	
R	Current Immigration Status	Select appropriate value. <i>The dropdown value definitions for this field are currently under review.</i>	CANADIAN CITIZEN PERMANENT RESIDENT – ECONOMIC PERMANENT RESIDENT – FAMILY PERMANENT RESIDENT – REFUGEE (ASYLUM SEEKERS) PERMANENT RESIDENT – REFUGEE (OVERSEAS) TEMPORARY RESIDENT – STUDENT TEMPORARY RESIDENT – WORKER TEMPORARY RESIDENT – VISITOR TEMPORARY RESIDENT - OTHER OTHER – SPECIFY Select if all others do <u>not</u> apply. UNKNOWN

M/R/O	Field Name	Data Entry Information	Dropdown Values
			Select if current status is unknown.
R	Immigration Status at Time of Arrival into Canada	Select appropriate value.	<p>CANADIAN CITIZEN</p> <p>PERMANENT RESIDENT – ECONOMIC</p> <p>PERMANENT RESIDENT – FAMILY</p> <p>PERMANENT RESIDENT – REFUGEE (ASYLUM SEEKERS)</p> <p>PERMANENT RESIDENT – REFUGEE (OVERSEAS)</p> <p>TEMPORARY RESIDENT – STUDENT</p> <p>TEMPORARY RESIDENT – WORKER</p> <p>TEMPORARY RESIDENT – VISITOR</p> <p>TEMPORARY RESIDENT - OTHER</p> <p>OTHER – SPECIFY</p> <p>Select if all others do <u>not</u> apply.</p> <p>UNKNOWN</p> <p>Select if current status is unknown.</p>
R	Date Reported for Surveillance	<p>Use only for TB IMM Medical Surveillance clients (see TB User Guide, Section II).</p> <p>The date of first contact between health unit and client.</p>	

2.1 First Nations

Steps:

1. Click on the (+) sign beside **First Nations** to enter applicable information for clients with First Nations status.
2. Enter the information specified in [Table 3](#).
3. Click on the **Save** button.

Table 3: Entering First Nations Information

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
O	DIAND Number	Leave this field blank Note: The DIAND number should NEVER be used.	
O	Status	Select appropriate value.	ON RESERVE MOST OF TIME – YES ON RESERVE MOST OF TIME – NO ON RESERVE MOST OF TIME – DON'T KNOW ON RESERVE MOST OF TIME – NOT APPLICABLE
O	Community	Choose as appropriate.	
O	Band	Choose as appropriate.	
O	Health Centre	Choose as appropriate.	
O	Zone	Choose as appropriate.	

3.0 Addr/Tel

Steps:

1. Select the **Addr/Tel** tab to enter information on Addresses and Telecommunications for the client.
2. Select the **New Address** button in order to enter an address for the client. Enter the information specified in [Table 4](#).
3. Click **Save**.

Address Information Quick List – Mandatory and Required Data Fields

- (M) Type
- (R) Primary Indicator
- (M) Effective From
- (R) Effective To
- (M) City
- (M) Province
- (M) Country
- (R) Postal Code

Table 4: Entering Address information for a client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	Type	<p>A client may have several addresses on file. The address type specifies what kind of address each is.</p> <p>Selection of Dropdown Value that best fits client’s address is at the PHUs discretion. Selection criteria may be determined based on local needs.</p>	<p>HOME</p> <p>The address of the client's current primary place of residence (where the client spends the majority of time).</p> <p>3RD PARTY MAILING</p> <p>An alternate address to which a client wishes all correspondence to be sent.</p> <p>BUSINESS</p> <p>The address of the client's place of employment.</p> <p>COMBINED RES. AND MAILING</p> <p>MAILING</p> <p>The postal address at which the client wishes to receive correspondence.</p> <p>NO FIXED ADDRESS</p> <p>The client does not have a primary home or mailing address. This field may be used to indicate homeless clients who do <u>not</u> consistently use a particular shelter.</p> <p>OTHER (SPECIFY)</p> <p>If the client's address type does not match any address type. Specify in the</p>

M/R/O	Field Name	Data Entry Information	Dropdown Values
			<p>Comments data field.</p> <p>TEMPORARY</p> <p>A temporary address of the client. This may be a seasonal place of residence (i.e., a winter or summer residence), a stay in a hospital, a homeless client who is staying at a particular shelter or a temporary residence prior to moving to a permanent residence. The Effective From field is particularly important for this case, as the system takes this into account when generating client letters and mailings.</p>
R	Primary Indicator	Check this box for the address considered to be the primary address for the client. Only addresses with this box checked will show up in Cognos Reports.	
M	Effective From	Enter the date when the client address became or will become effective. The effective date(s) are especially useful in the event that the client has advised the health unit of an impending move and/or temporary address. The Effective From date becomes the date the client is entered into the system if a primary or permanent address is entered.	
R (when an address changes)	Effective To	Enter the date the PHU is notified of a new client address. This date will therefore be the Effective From in a NEW address listing. Note: This field is required whenever an address changes.	

M/R/O	Field Name	Data Entry Information	Dropdown Values
		Note: Create a new address and indicate in the street address textbox the country or province where the person is moving to if a client has moved out of the province.	
O	Facility Name	Enter if applicable (e.g., name of hospital).	
O	Street Number	Enter the number of the client's residence on the street. It may be alpha-numeric (e.g., 10A or RR#3). 911 codes, a numeric location indicator for rural addresses may also be recorded here.	
O	Street Name	Enter the official name of the street.	
O	Street Type	Select the official term used to identify the type of thoroughfare (Street, Road, Crescent, etc.).	
O	Street Direction	Enter if applicable.	
O	Unit Number	Enter if applicable (e.g., apartment number).	
M	City	Select the name of the locality, city, town, village, etc. associated with the client's address. Select the country where client resides and then select "OUT OF PROVINCE" from City drop list if the client resides outside of Canada.	
O	Municipality	Enter if available.	
M	Province	Select the name of the province or territory where the address is located.	Default value: ONTARIO
M	Country	Select the name of the country where the address is located.	Default value: CANADA

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	Postal Code	<p>Enter appropriate value.</p> <p>Determine the postal code by entering the address in Canada Post's postal code lookup tool if the postal code is unknown, but the client address is known.</p> <p>Enter "111111" in the postal code field in order to save the other client address data on this screen if neither the postal code nor address is known.</p> <p>Enter "111111" if the client's address is outside of Ontario. See Appendix 2 for more details.</p> <p>Enter "XXXXXX" to signify that the client be included in future data cleaning reports if the client's postal code is known, but is a newer postal code that cannot be saved until updates in iPHIS recognizes it as a valid postal code. See Appendix 2 for more details.</p>	
O	Ward	Leave blank unless known.	
O	Census Tract	Leave blank unless known.	
O	UTM	Leave blank unless known.	
O	Comments	Add if applicable.	

3.1 Telecommunications

Steps:

1. Select the **Addr/Tel** tab in order to enter a new telephone number.
2. Click on the **New Telephone** button.
3. Enter the information specified in [Table 5](#).
4. Click **Save**.

Table 5: Entering Telecommunication information for a client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
O	Type	Select appropriate value. Select HOME/RESIDENTIAL for clients residing in an institution.	HOME/RESIDENTIAL Select this option for clients who reside within an institution. BUSINESS CELL FAX OTHER (SPECIFY) There is no field in which to specify this information. PAGER TELETYPE This is commonly known as TTY.
O	Shared By	PHO does not currently use this field for provincial surveillance. Use at discretion of the health unit.	
O	Area Code	Enter area code associated with the phone number. Verify that the area code is correct	

M/R/O	Field Name	Data Entry Information	Dropdown Values
		if this field auto-populates.	
<input type="radio"/>	Number	<p>Enter telephone number in the format consistent with your PHUs practice. Phone numbers can be entered in one of three formats:</p> <ol style="list-style-type: none"> 1. 555-5555 2. 555 5555 3. 5555555 <p>Note: Apply the wildcard search strategy (e.g., 555%5555) to obtain results regardless of data entry format to avoid the creation of duplicate clients when conducting a client search using phone numbers.</p>	
<input type="radio"/>	Local	Enter an extension number if necessary.	
<input type="radio"/>	Effective From	Date client calls or date telephone number is confirmed by client.	
<input type="radio"/>	Effective To	Enter if applicable.	
<input type="radio"/>	Comments	Include the institution name within this section if the client lives within an institution. Add other comments if applicable.	

4.0 Travel

Entering travel information in the **Travel** screen of the demographics module is at the client level and not specific to an instance of disease.

Entering travel information at the client level is most useful for clients with a TB episode or an STD encounter. For instance, it is important to record recent travel history (occurring within the previous two years) for clients with a suspect/active TB case. This travel tab can also be completed to record travel history during the client's period of infectivity.

Travel information may also be captured under the **Exposures** and/or **Risk Factors** screens for travel associated with one instance of an Outbreak Module (OM) or Communicable Disease module disease (refer to disease or disease-group user guides for additional guidance on entering case travel history).

Note: Enter estimates in the **From** and **To** fields and note that the dates are estimates in the **Comments** field if travel dates are unknown. Enter YYYY-01-01 in the **From** and **To** fields if only the year of travel is known.

Note: Enter all appropriate travel histories if the client has traveled outside of Canada more than once.

Steps:

1. Select the **Travel** tab to enter travel information for the client. Enter the information specified in [Table 6](#).
2. Select the **New Travel Location** button from the **Recent Travel** screen.

Travel Information Quick List – Mandatory and Required Data Fields

- (M) Country
- (M) From
- (M) Category
- (M) To

Table 6: Entering Travel Information for the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	Country	Select the country to which the client travelled.	
M	Category	Select appropriate category from pick list.	
M	From	Enter Start Date of Travel.	
M	To	Enter End Date of Travel.	
O	Area	Free text field – specify area within country visited.	
O	Comments	Use as appropriate. Note: Enter all case-level information in the disease-specific module. For example, details on a travel exposure within the incubation period of a disease.	

5.0 Aliases

This screen can be used to record alternate names (aliases) for the client, such as a maiden name, previous name or adopted name.

A client may also have an alias if he or she has changed their name after marriage, separation or divorce or if they have legally changed their name. Clients may also have other names by which they are known that make it easier to communicate, such as nicknames, abbreviations, and street names.

Always select the “Include Aliases in Search” option to search for alternate names when searching for clients on the Client Search screen. As a best practice, include previous client IDs from merged clients as an alias.

Steps:

1. Click on the **Aliases** tab.
2. Enter the information outlined in [Table 7](#).
3. Click **Add**.

Alias Information Quick List – Mandatory and Required Data Fields

- (M) Type

Table 7: Entering Alias Information for the Client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
O	Last Name	Enter the client’s alternate last name.	
O	First Name	Enter the client’s alternate first name.	
O	Effective From	Enter the date from which the alternate name is in use, if applicable.	
O	Effective To	Enter the date to which the alternate name	

M/R/O	Field Name	Data Entry Information	Dropdown Values
		is in use, if applicable.	
M	Type	Select the type of alternate name. Note: Type of alternate name selected does not affect searchability.	ALIAS ALSO KNOWN AS FORMER/PREVIOUS LEGAL NAME LEGAL ALIAS LEGAL NAME STREET NAME

6.0 Allergies

Entering information in this screen is **optional**. Only enter allergies that are relevant to the management of the case/contact. For instance, allergy information should be included for a client if there is a known drug allergy and it is relevant to the administration of public health services. Allergy information can be entered here or within the disease record. Allergy information will appear across all modules, regardless of the module it was entered in.

Steps:

1. Click on the **Allergies** tab.
2. Enter the information outlined in [Table 8](#).
3. Click **Add**.

Allergy Information Quick List – Mandatory and Required Data Fields

- (M) Allergen/Drug
- (M) Adverse Event Details
- (M) Severity

Table 8: Entering allergy information for the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	Allergen/Drug	Enter the name of the allergen or drug to which the client has had a reaction.	
M	Adverse Event Details	Enter the specific details of the reaction.	
M	Severity	Select appropriate value.	Severe Moderate Mild
O	Date Reported	Enter the date the adverse reaction took	

M/R/O	Field Name	Data Entry Information	Dropdown Values
		place.	
○	Accurate	Check if the Date Reported is the actual date of the adverse reaction. Do <u>not</u> check this box if the Date Reported is an approximation.	
○	Medically Verified	Check if the adverse reaction was observed by a medical professional.	

7.0 Notes

Notes entered in this screen are visible to all iPHIS users with access to the Demographics module. **Only enter client level information in the Demographics notes. Personal Health Information must not be entered in the client notes. Use only for non-disease specific information.** If you are entering important demographic information in a note, consider putting it as a low priority alert. **Disease-specific notes should be entered in the relevant case record for the client.** The Notes function in iPHIS does not allow changes or deletions. Client Notes are not extractable in Cognos Report Studio.

Steps:

1. Click on the **Notes** tab.
2. Click on the **Create New Note** button.
3. Enter the information outlined in [Table 9](#).
4. Click **Save**.

Notes Quick List – Mandatory and Required Data Fields

- (M) Note Date and Time
- (M) Note

Table 9: Entering a note for the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/OR/O	Field Name	Data Entry Information	Dropdown Values
M	Note Date and Time	Auto-populates with the date and time associated with the note. Update if required.	
M	Note	Enter the note details. Ensure that no disease-specific information is entered here. Only client specific information should be entered, as Demographics notes are visible to all iPHIS users with access to the Demographics module.	
O	Client Comments	Enter any additional information related to the client not captured in the note.	
N/A	Created By	Auto-populates with the name of the user logged in.	
N/A	Created Date	Auto-populates with the current date once the record is saved.	

8.0 Employment

Entering information in this screen is **optional**. Relevant employment information for a client or employment history relevant to the investigation may be entered here. Note that sensitive occupation details can be entered within the Outbreak Management case and contact record. Employment information is not extractable in Cognos Report Studio.

Steps:

1. Click on the **Employment** tab.
2. Click on the **New Employment** button.
3. Enter the information outlined in [Table 10](#).
4. Click **Save**.

Employment Information Quick List – Mandatory and Required Data Fields

- (M) Occupation

Table 10: Entering employment information for the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	Occupation	Select the client's occupation.	
O	Employer Name	Enter the name of the client's employer.	
O	Work Address	Enter the address of the client's employer.	
O	Estimated Start Date	Enter the date the client began work at that location.	
O	Estimated End Date	Enter the date the client terminated work at that location, if applicable.	
O	Area Code	Enter the area code of the client's work phone number.	

M/R/O	Field Name	Data Entry Information	Dropdown Values
O	Work Phone	Enter the client's work phone number.	
O	Population at Risk Type	Specify the type of public health risk the client may experience at work.	
O	# of Years at Occupation	Enter the number of years the client has worked in that occupation.	
O	Comments	Enter any additional information related to the client's employment.	

9.0 Languages

Entering information in this screen is **optional**. Information about the client’s spoken or written languages can be entered here. Indicate if an interpreter is required to communicate with the client. Users can record as many languages as necessary to facilitate communication.

Steps:

1. Click on the **Languages** tab.
2. Enter the information outlined in [Table 11](#).
3. Click **Save**.

Language Quick List – Mandatory and Required Data Fields

- (M) Language Spoken

Table 11: Entering languages spoken/read by the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	Language Spoken	Select the language spoken by the client.	
O	Primary/Preferred Language	Check if this language is the client’s preferred language of communication.	
O	Interpreter Required	Check if an interpreter is required when communicating with the client.	
O	Reads Language	Check if the client is able to understand the written form of the language.	

10.0 Alerts

Alerts are intended to notify current or future case managers of information about the client that should be flagged (and can not be entered anywhere else). Ensure that alerts are relevant, use appropriate language and are used for public health purposes only. One example of this is if a client has an aggressive dog at their house. Do not include disease-specific information in an alert.

Steps:

1. Click on the **Alerts** tab.
2. Click on the **New Alert** button.
3. Enter the information outlined in [Table 12](#).
4. Click **Save**.

Alert Quick List – Mandatory and Required Data Fields

- (M) Priority
- (M) Message
- (M) Distribution Type

Table 12: Entering an alert for the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
N/A	Client	Auto-populates with the name of the current client.	
M	Priority	Select the value that indicates the priority of the alert.	LOW Select for the lowest priority level alert. The stoplight indicator in the client header will display as green with an exclamation mark inside it.

M/R/O	Field Name	Data Entry Information	Dropdown Values
M			<p>MEDIUM</p> <p>Select for the second lowest priority level alert. The stoplight indicator in the client header will display as yellow with an exclamation mark inside it.</p> <p>HIGH</p> <p>Select for the second highest priority level alert. The stoplight indicator in the client header will display as red with an exclamation mark inside it.</p> <p>POPUP</p> <p>Select for the highest priority level alert. This alert will pop up on the screen and display every time the client record is selected.</p>
	Distribution Type	Select appropriate value.	<p>CD</p> <p>Select for alert to only display for users with access to the Outbreak module.</p> <p>DEMG</p> <p>Select for alert to only display for users with access to the Demographics module. Ensure that no disease-specific information is entered as part of the alert if this value is selected. Select for alerts indicating that a client is a potential duplicate.</p>

M/R/O	Field Name	Data Entry Information	Dropdown Values			
			<p>DUP <u>Do not use.</u></p> <p>GEN <u>Do not use.</u></p> <p>LAB <u>Do not use.</u></p> <p>MASS <u>Do not use.</u></p> <p>OUT <u>Do not use.</u></p> <p>SCH <u>Do not use.</u></p> <p>STD Select for alert to only display for users with access to the STD module.</p> <p>TB Select for alert to only display for users with access to the TB module.</p>			
			M	Message	Enter the details of the alert.	
			O	Status	Select appropriate radio button.	<p>Open Select for alerts that are to be displayed.</p> <p>Closed Select for alerts that no longer need to be displayed.</p>
			N/A	Created By	Auto-populates with the name of the user logged in at the time of creation.	

M/R/O	Field Name	Data Entry Information	Dropdown Values
N/A	Created Date	Auto-populates with the date the alert was first created.	
N/A	Updated By	Auto-populates with the name of the user logged in when the alert was updated.	
N/A	Updated Date	Auto-populates with the date the alert was updated.	

11.0 Files

Entering information in this screen is **optional**. This screen may be used for specifying the location of physical files (optional) and to record the outcome of duplicate client investigations (required).

Steps

1. Click on the **Files** tab. Click on the **Create New File** button.
2. Enter the information specified in [Table 13](#).
3. Click **Save**.

File Information Quick List – Mandatory and Required Data Fields

- (M) HU
- (M) Program Area

Table 13: Entering File information for the client

Legend: ● M = mandatory field; ● R = required field; ● O = optional field

M/R/O	Field Name	Data Entry Information	Dropdown Values
M	HU	Select the health unit entering the information.	
O	Branch	Select the branch of the health unit entering the information, if applicable.	
M	Program Area	Select appropriate value.	<p>CD Select for files related to the Outbreak module.</p> <p>DEMG Select for files that are client level only.</p> <p>DUP Select if the file has been created to record the results of a duplicate client</p>

M/R/O	Field Name	Data Entry Information	Dropdown Values
			<p>investigation.</p> <p>GEN</p> <p><u>Do not use.</u></p> <p>LAB</p> <p><u>Do not use.</u></p> <p>MASS</p> <p><u>Do not use.</u></p> <p>OUT</p> <p><u>Do not use.</u></p> <p>SCH</p> <p><u>Do not use.</u></p> <p>STD</p> <p>Select for files related to the STD module.</p> <p>TB</p> <p>Select for files related to the TB module.</p>
			○
○	File Type	Select appropriate value.	<p>MICROFICHE</p> <p>Select if the physical file was microfiche.</p> <p>UNKNOWN</p> <p>Select for file types other than microfiche or duplicate client investigation results.</p> <p>DUPLICATE</p> <p>Select if the file has been created to record the results of a duplicate client</p>

M/R/O	Field Name	Data Entry Information	Dropdown Values
			investigation.
<input type="radio"/>	Original	Check if the physical file is an original copy.	
<input type="radio"/>	File Location	Select "ARC OFF-SITE" if the physical file has been archived off-site.	ARC OFF-SITE
<input type="radio"/>	Temporary Roll/Accession #	PHO does not currently use this field for provincial surveillance. Use at discretion of the health unit.	
<input type="radio"/>	Roll/Accession #	PHO does not currently use this field for provincial surveillance. Use at discretion of the health unit.	
<input type="radio"/>	Case/Box #	PHO does not currently use this field for provincial surveillance. Use at discretion of the health unit.	
<input type="radio"/>	Project #	PHO does not currently use this field for provincial surveillance. Use at discretion of the health unit.	
<input type="radio"/>	Comments	<p>Enter additional comments related to the physical file.</p> <p>Enter the results here if the file was created to record the results of a duplicate client investigation. Please see the Duplicate Client Management Handbook for further details.</p>	

Appendix 1: Summary of Mandatory (M) and Required (R) Client Demographics Fields

1.0 Case Info ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	HU	5	M	Birth Date	6
R	Branch	5	M	Gender	7
M	Last Name	5	R	Origin (TB only)	8
M	First Name	5			

3.0 Address Information ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	Type	16	M	City	18
R	Primary Indicator	17	M	Province	18
M	Effective From	17	M	Country	18
R	Effective To	17	R	Postal Code	19

4.0 Travel Information ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	Country	22	M	From	23
M	Category	23	M	To	23

5.0 Alias Information ([return to section](#))

M/R	iPHIS field name	Page
M	Type	25

6.0 Allergy Information ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	Allergen/Drug	26	M	Severity	26
M	Adverse Event	26			

7.0 Notes ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	Note Date and Time	28	M	Note	28

8.0 Employment ([return to section](#))

M/R	iPHIS field name	Page
M	Occupation	30

9.0 Languages ([return to section](#))

M/R	iPHIS field name	Page
M	Language Spoken	32

10.0 Alerts ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	Priority	33	M	Message	35
M	Distribution Type	34			

11.0 Files ([return to section](#))

M/R	iPHIS field name	Page	M/R	iPHIS field name	Page
M	HU	37	M	Program Area	37

Appendix 2: Indicating Unknown Postal Codes in iPHIS

Postal code field entry is now mandatory on the **Client Address** screen in iPHIS. Users may enter the values “111111” or “XXXXXX” in the **Postal Code** field to represent unknown postal codes in various situations. The table below provides provincial direction on when each should be used.

The two values are used to differentiate between addresses where there is no applicable postal code or none found to enter (“111111”) and where a postal code may be entered at a later date (“XXXXXX”), thereby allowing addresses with the “111111” postal code to be filtered out of any future data cleaning reports.

Situation	Unknown value to enter in the Postal Code field	Additional information
A client’s postal code is truly unknown	111111	Investigators are unable to determine the postal code for the client, who resides in Ontario.
A client’s postal code is known, but it is a newer postal code that cannot be saved until updates in iPHIS recognizes it as a valid postal code	XXXXXX	<p>Using a different unknown value allows future review of these client address details until a later date, when the client’s actual postal code becomes available for iPHIS entry. Canada Post provides updates to postal code listings on a monthly basis, which are then updated in iPHIS.</p> <p>In the interim, PHUs could consider entering the known postal code in the Comments field on the Client Address screen to expedite future entry.</p>
The client’s address is outside of Ontario	111111	Users must ensure they complete the client’s Province and/or Country fields, as applicable, to allow these unknown values to be filtered out of future data cleaning reports. For these addresses, PHUs who have been doing so may continue to enter postal code, zip code, etc. in the Comments field on the Client Address screen, if known.

Document History

Table 1. History of Revisions

Revision Date	Document Section	Description of Revisions
October 2019	Client Demographics user guide updated.	Updated Client Demographics_v2_2008 04 17 to meet PHO visual identity standards and removed all screenshots. Consolidated relevant data entry guidance published in iPHIS notices and bulletins. Merged Client Demographics user guide with TB Section I_Client Demographics_FINAL_V2.0 user guide.
November 2019	Cover page and various passages of text modified.	Text throughout document revised for grammar following review from PHO Communications. Content/guidance was not changed.

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