

## Lyme disease Case Management Tool Companion Guide

### Purpose

The purpose of this case management tool companion guide is to provide instructions on how to use the standardized Ontario Lyme disease case management tool and to explain the rationale for each section.

This tool was developed by a working group which consisted of members from public health units (PHUs), the Public Health Agency of Canada (PHAC) and Public Health Ontario (PHO). The investigation tool is designed for administration by telephone; however, PHUs can also use it for in-person investigation.

The purposes of the investigation tool are as follows:

- 1) Identify the location of the exposure
- 2) Case and contact management
- 3) Provide case counselling
- 4) Assist with disease management
- 5) Obtain required data elements under the *Health Protection and Promotion Act* (HPPA) pertaining to the case
- 6) Facilitate documentation of the investigation

### Standardized Questionnaire Sections

#### Legend

There are five symbols in the standardized questionnaires (Table 1).

**Table 1: Symbols used in the Standardized Questionnaires**

Symbol	Description
— — —	Sections needs to be completed with the case
◆	Information mandatory in iPHIS
◆◆	Information required in iPHIS
⊘	Field contains personal health information. Caution is required when sharing this information.
<i>Italics</i>	Instructions to the investigator. Not to be read to cases

## General

At the bottom of each page, there is a section for documenting the investigator's initials and designation. This is to fulfill the College of Nurses of Ontario (CNO) Practice Standard (2008) for documentation.

## Cover Sheet

This section is for identification of the case and allows for updates to the case's contact information and demographics, if needed.

Both section 1 and section 2 can be generated by iPHIS after the case has been created in iPHIS (at the discretion of the PHU). Each PHU will need to set up their template in iPHIS for the auto-generated page. If a PHU requires assistance in creating this auto-generated cover sheet, please contact the iPHIS help desk at [iphissupport.moh@ontario.ca](mailto:iphissupport.moh@ontario.ca) or at 1-866-272-2794/ 416-327-3512. Alternatively, PHUs can use page 1 of the investigation tool and complete both sections manually.

## Verification of Client's Identity & Notice of Collection

This section is for verification of the case's identity before disclosing personal health information. Please check off with an (X) which of the data elements (date of birth, postal code, or physician) was used to verify the case's identity. It is up to the PHU's discretion if they want to use one, two or all three of the data elements.

## Notice of Collection

Please consult with local privacy and legal counsel about PHU-specific Notice of Collection requirements under PHIPA s. 16. Insert Notice of Collection, as necessary.

## Record of File

This section is for documenting when the case's file is transferred within a PHU or between PHUs. The fields for signature, initial and designation are designed to fulfill the documentation requirements outlined by the CNO's Practice Standard (2008).

The first row in the table refers to investigation start date as required by iPHIS. The remaining rows refer to assignment date to a different investigator. The assignment date is auto-generated by iPHIS on date of the data entry.

## Call Log Details

The start time of the interview is recorded for documentation purposes and can be used for both outgoing and incoming calls.

## Case Details

This is a summary of the iPHIS Case Details screen, including the Case Classification and Disposition fields. Please note that additional aetiological agents have been added.

The priority of the case is set at the discretion of individual PHU as per the draft iPHIS User Guide Outbreak Module: Enteric Disease Cases (Sept 2012).

## Human Lab Testing Information

This is a summary of the lab testing results.

## Tick Lab Results

Summary of results if the client had a tick attached and if it was sent for identification and testing.

## Signs and Symptoms

Symptoms are used to establish the onset date, so the incubation period can be identified to facilitate identifying potential location exposures during the incubation period. Please mark (X) in one of the five options available: yes, no, don't know, not asked, or refused. Do not leave the response blank as it is unclear if this refers to no, don't know, not asked or refused.

The PHU investigator is not expected to have an onset or a recovery date for each symptom. A minimum of one onset and one recovery date are required.

## Medical Risk Factors

The risk factor section is from iPHIS and includes the standard medical risk factors

## Hospitalizations & Treatment

This section is taken from iPHIS. Please complete all mandatory and required fields as indicated.

## Interventions

This section is taken from iPHIS. Please complete all mandatory and required fields as indicated.

## Complications

This section is taken from iPHIS. Please complete all mandatory and required fields as indicated.

## Preliminary Questions

This section marks the beginning of trying to identify where the client may have come into contact with a tick and what activities they might have been doing. Please ask where specifically they may have been exposed to a tick and record a park, landmark or city name. The information in this section will then be used to either link to a provincial canned exposure or create a new exposure.

## Behavioural Social Factors

These are behavioural social risk factors that are specific to Lyme disease. Two additional behavioural social risk factors have been added. Please try to specify details as to what activities the person was doing when they were exposed to ticks ie. hiking, camping, hunting, etc.

## Exposures – Linked to provincial canned exposure

This section is where you can link to provincial canned exposure(s) for the client's tick exposure. We have created provincial canned exposures for the endemic/risk areas, frequently reported locations and the most frequently reported States in the United States. The Ontario canned exposures all lay within Lyme disease risk areas. **When**

using the canned exposure do not make any changes or add any notes as this will change it for all cases that have linked to that canned exposure.

## Creating a New Exposure

This section should be used if the location of exposure does not match a provincial canned exposure or one that already exists. When creating a new exposure please make sure that you are using the correct spelling for the park, landmark or city. Please try to provide an accurate street address if available if not at a minimum provide the city. If the exposure you have created is within a different health unit please send an iPHIS referral to that health unit with the exposure ID so that they are aware of the exposure in their jurisdiction. If you are trying to assess if the new exposure lies within one of Ontario's risk areas please refer to Public Health Ontario's website for an updated Lyme disease risk map.

## Outcome

This section is taken from iPHIS. Please complete all mandatory and required fields as indicated. In particular, public health units should ensure they report fatal outcomes.

## Thank you

This section is a reminder to thank the case for sharing their information and to notify them of the possibility of a re-interview if needed.

## Progress Notes

Please use this section at your discretion. The section 'Mailed out to case as needed' summarizes the information that was sent to the case. The date field is included to meet the CNO's requirements and marks the conclusion of the case investigation.

## Feedback

For feedback or questions regarding the Standardized Investigation Tool, please contact the Enteric, Zoonotic, and Vector Borne Diseases Unit at Public Health Ontario at [ezvbd@oahpp.ca](mailto:ezvbd@oahpp.ca).