

# Partner Services Staff Guide to PS Web

## General Guidelines

Data entry into Partner Services Web will be used to facilitate two-way communication between HIV surveillance and local partner services delivery. Surveillance staff will initiate new index cases (those with a positive test result) using the case report form and will assign cases to local health department STI/HIV supervisors on PS Web. New cases are due back to surveillance 45 days after assignment with completed information based on partner services contact.

In general, partner services staff should fill in all available information in the appropriate fields, going through each data entry tab. To save data, always click submit when finished with any pleat. You can view a printable report for review when a new case is assigned to you or to check for completeness before submitting a case to a supervisor or the state.

**When completing client information, use “not asked” to indicate questions that were not asked, “refused” to indicate that the client refused, and “don’t know” to indicate that the client has responded “don’t know”. Blank data will be considered “not asked.”**

## Accessing PS Web

Receiving log-in credentials to PS Web requires certification training in Michigan as well as SAMS e-authentication approval through the CDC. Contact Christine Convery ([converyc@michigan.gov](mailto:converyc@michigan.gov)) to begin that process if you have not already received a username or to request a change in user level or access.

To access Partner Services Web after the SAMS e-authentication approval the following is needed:

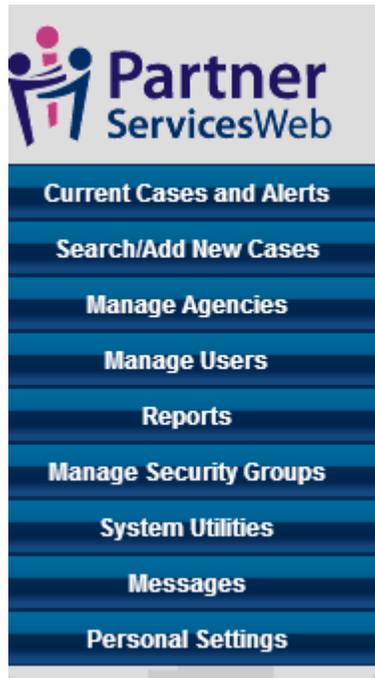
- High speed Internet Connection
- Browser (Internet Explorer, Mozilla Firefox, Google Chrome, or Safari for Apple) – a recent version
- Java Version 6 (Displays as 1.6) or higher
- Adobe Flash Version 10.2 or higher

Note: The Partner services Web is a web-based system through the Center for Disease Control & Prevention which requires two (2) factor authentication to adhere to the CDC security guidelines. The Google Authenticator is a free software that generates random codes and does not require internet connection or cellphone minutes for use. The Google Authenticator requires installation on a mobile device (smartphone or iPad) with Wi-Fi access. Once the Google Authenticator is downloaded/installed on a smartphone or iPad, the Wi-Fi can be turned off. You will need a code every time you log into Partner Services Web, but it will be a different code each time. Alternately, you can opt to have the code texted to your cell phone or given audibly by an automated call to your desk phone.

You can log-in to Michigan PS Web at <https://mi-ps.lutherconsulting.com>.

## Current Cases and Alerts

After logging on, select “Current Cases and Alerts” from the left side menu to view cases assigned to you or your jurisdiction.



Items in your case load will appear in order of due date. The status column indicates whether a case is due or past due to be submitted to your supervisor or the state.

**Partner Services Current Cases**

Showing

Upcoming Due  Past Due

**Filter By**

First Name:  PS Worker:   Partner  
Last Name:  Due Date:   Index  
State Number:

Status	Last N...	First N...	Assign...	Due D... 1 ▲	State ...	Role	PS Worker	
Past Due						Index	Roach, Mary	  
Past Due						Partner	Roach, Mary	  
Due						Index	Roach, Mary	  
Due						Index	Spreitzer, Todd	  
Due						Index	Hight, April	  

Cases marked  \*Active are high priority. These include cases of pregnant women, acute infections, co-infections, and clients who are unaware of their HIV status. Next to each case in your queue, you can click to access case view , person view , or security . Person view is used for data entry.

## Overview

Select person view to reach the overview tab. Here, you can see the client's name or update if there is a mis-spelling. Note that aliases are not entered here, only corrections if a name is truly incorrect.

You can also "View PS Report" to see a summary of all data and comments entered on the open case.

"View Contact Report" shows all contacts made or attempted by PS staff.

"View Notes Report" aggregates all notes entered in comments fields throughout data entry.

Overview Demographics Address/Phone Medical Risks Activities/Referrals Index Status Partner Status

First Name: JANE County Numbers

Last Name: DOE

PSW Person ID: 524

Update Name

Reports

View PS Report

View Contact Report

View Notes Report

Case Links

Current Index Case Active

PS Report summarizes all submitted data on client. This is a good place to look for information on a newly assigned case or to check data entry before closing a case

Contact Report shows all contacts and attempts to locate logged by PS Staff

Notes Report shows all comments submitted in various data entry tabs

## Demographics

Surveillance staff will complete all available demographics when creating an index case in PS Web based on the case report form.

When working on partner services for a case, please collect and record additional demographic information in this section. Use the date of contact to complete “Demographics As Of” field and check all information entered before clicking “Update Demographics”. Note that Country of Birth auto-populates to USA, but should be changed to unknown unless specifically known.

The screenshot shows the 'Demographics - Less Changeable' section of the PS Web interface. It includes fields for Client DOB (11/11/1991), Client Age (24), Height, Current Gender (Female), Assigned Sex at Birth (Female), Race (Black/African American and Native Hawaiian/Pacific Islander are selected), Primary Language, English Speaking, Country of Birth (United States of America), Current Status (Alive), Date of Death, Place of Death, Jurisdiction URN, Demographics As Of (02/02/2016), and Worker ID (Convery, Christine). A 'View/Edit Hx' button is visible next to the DOB field, and an 'Update Demographics' button is at the bottom.

Additional demographics are entered in the “Changeable” pleat. This information includes marital status and physical description and should be completed by PS staff after contact. Pregnancy can be noted here and weeks pregnant filled in if available. Surveillance staff will use “Unique Characteristics” to describe priority if necessary and PS Staff should not edit this field.

The screenshot shows the 'Demographics - Changeable' section of the PS Web interface. It includes fields for Demographics as of, Worker ID (Convery, Christine), Size/Build, Hair, Complexion, Marital Status, Unique Characteristics, Pregnant, Weeks Pregnant, Place of Employment, and Hours of Employment. A blue callout bubble points to the Marital Status dropdown menu, containing the text: "Note that options do not include single. If single, select 'Never Married'". An 'Update Demographics' button is at the bottom.

## Address/Phone

Contact information from the case report form will be entered by surveillance when the index case is created. When multiple addresses or phone numbers are available, comments section will be used to indicate to partner services staff to “see additional”. Select “View/Edit Hx” to see all entered addresses and details including residence type.

The screenshot shows the 'Address History' form. It includes fields for Address 1 (321 Sad Blvd), Address 2 (Apt. 123), City (Southfield), State (Michigan), County (OAKLAND), Zip (48076), and Census Tract. There are also checkboxes for Residence at Diagnosis, a dropdown for Address Type, a dropdown for Worker ID (Convery, Christine), and a text field for Comments. A 'Submit Address' button is at the bottom left. A green 'View/Edit Hx' button is at the top right. A blue callout box with a pointer to the 'View/Edit Hx' button contains the text: 'Click to view all addresses including address type and comments'.

Aliases can be entered on the Phone/Alias pleat. These allow searching by any of the entered aliases when the name listed in Overview is not the only name used by the client. Partner services staff should review and update all information in this tab.

The screenshot shows the 'Address/Phone' tab with the 'Phone/Alias History' section expanded. It features two columns of input fields. The left column has 'New Phone' (with a masked input), 'New Phone Note', 'Worker ID' (Convery, Christine), and a 'Submit Phone' button. The right column has 'New Alias', 'New Alias Note', 'Worker ID' (Convery, Christine), and a 'Submit Alias' button. Below these are two rows of existing phone entries. The first row shows 'Phone: (313)-123-4567', 'Phone Note', and a 'Delete Comment' field containing 'see additional phone #' with a 'Delete' button. The second row shows 'Phone: (313)-456-7890', 'Phone Note', and a 'Delete Comment' field containing 'mobile phone' with a 'Delete' button.

## Medical

This tab contains information about HIV diagnosis, testing and treatment history, lab tests, and referrals made by partner services staff. Surveillance will enter information here, but it is critical that PS staff complete these data pleats with all available information for testing and treatment history.

**HIV Tests and History:** Only the confirmed HIV Status, provider, and date will be filled out by surveillance. PS staff should complete the top 4 fields by indicating whether the client has had a previous *negative* HIV test and when. Self-Reported HIV Status is the result of this previous HIV test and should be negative for all new diagnoses and left blank for all clients with no testing history.

Testing history is required to close a case, and should be used to determine client disposition when closing. *If a case cannot be located, select "Not Asked" for Previous HIV Test.* Whatever you input in Previous HIV Test and Self-Reported HIV Status should match the "Case Outcomes" pleat of the "Index Status" disposition (page 14).

The screenshot shows a web form titled "HIV Tests and History" with the following fields and callouts:

- Previous HIV Test:** A dropdown menu set to "Yes". Callout: "Indicate Yes if client reports a previous negative HIV Test". A red note below says "Response required to close case".
- Date of Last HIV Test:** A date field with "01/01/2015" and a calendar icon. Callout: "For unknown month or day, use '01'".
- Provider:** A dropdown menu set to "LHD - Oakland County".
- Self-Reported HIV Status:** A dropdown menu set to "Negative".
- Preliminary HIV Status:** A dropdown menu set to "Preliminary positive". Callout: "PS Staff can skip (read-only)".
- Confirmed HIV Status:** A dropdown menu set to "Positive/reactive".
- Confirmed HIV Provider:** A dropdown menu set to "WSU Tolan Park Medical Center- STD Clinic".
- Confirmed HIV Lab:** A dropdown menu.
- Date of Confirmed HIV Test:** A date field with "02/02/2016" and a calendar icon.
- Has client been informed of his/her infection?:** A dropdown menu set to "Yes".
- Worker ID:** A dropdown menu set to "Convery, Christine".
- Comments:** A large text area.
- Update:** A blue button.

Additional callouts include:

- On the left: "Should be negative to reflect previous negative HIV test result" pointing to the Self-Reported HIV Status field.
- At the bottom: "If the client is on ARVs, enter type in the start date and medication name here." pointing to the bottom navigation tabs.

For identified partners who undergo HIV Testing, the [Enter/View HIV Tests](#) button will bring up a drop down menu of test types and allow you to enter negative results. If a partner tests as a confirmed positive, this should be completed in the "Confirmed HIV Status" field, and the partner will be made an index case by surveillance staff.

**Surveillance:** For most index cases, this can be skipped, but for out of state diagnoses, surveillance will use this space to communicate the location and time of the original diagnosis.

Only used for out of state diagnoses

**Medical History:** HIV diagnosis date will be entered by surveillance staff. When applicable, AIDS diagnosis will be entered, also.

Partner services staff is responsible for asking clients and submitting information on antiretroviral use including start date. This can be entered as a comment here or in HIV Tests and History. When applicable, PS staff will also use this section to indicate AIDS diagnosis or co-infections.

Diagnosis Code	Date of Diagnosis	Facility	Date Entered	Worker ID
900 - HIV Infection	02/02/2016	WSU Tolan Park Medical C	04/19/2016	Noble, Linda

**Lab Tests:** Surveillance will complete all lab tests available at the time of the case report form. If PS Staff has additional lab results, enter them here with test type and result. PS Staff typically can skip.

> Lab Tests

Test: HIV-1/2 Ag/Ab Lab Screen

Test Result: Positive

Lab:  Other Lab:

Test Date: 02/27/2016

Date Result Returned:

Worker ID: Convery, Christine

Provider:  Other Provider:

Comments:

**Submit Test**

Test	Result	Test Date	Date Results Ret...	User
CD4 Count & Percent	Abs. Number:560 Perc...	02/29/2016		Noble, Linda
HIV-1 Differentiating (G...	Positive	02/27/2016		OConnor, Marianne

Typically entered by surveillance, PS Staff can skip (read-only)

**AIDS Indicator Diseases:** Use this section to record any opportunistic infections. PS Staff typically can skip.

> AIDS Indicator Diseases

Clinical Record Reviewed:  **View/Edit Hx**

Date patient was diagnosed as Asymptomatic:

Date patient was diagnosed as Symptomatic:

AIDS Indicator Diseases

Disease:  Initial:

Disease:

Disease:

Disease:

Disease:

Worker ID: Convery, Christine

Comments:

**Update**

If client has no AIDS indicator diseases, skip.

**HIV+ Referral and Treatment:** PS Staff should complete information about medical care and physician including the date care started. If the client is not in medical care, indicate “No”; if not asked, indicate “Not Asked”.

Pregnant women will be marked high priority by surveillance if pregnancy is known from the case report form. Additionally, the pregnancy can be noted in “changeable demographics” and will create additional options in this section for mother with child referrals.

The screenshot shows the 'HIV+ Medical Referral and Treatment (Including Mother with Child)' section of a web form. A blue callout bubble points to the 'Already in medical care at time of interview:' dropdown menu, which is currently set to 'Yes'. The bubble contains the text: 'Complete this section based on client contact and self-report'. Other fields include: 'Age at HIV Diagnosis:' (24), 'Facility:' (HFH - SATL NORTHWEST DET), 'Physician:' (Other (specify) - Dr. Smith), 'Date Initiated Care:' (02/08/2016), and 'Worker ID:' (Convery, Christine). A green 'View/Edit Hx' button is visible in the top right, and a blue 'Update' button is at the bottom left.

**HIV+ Case Management and Other Referrals:** PS Staff can record here all referrals made to case management agencies. If the facility is not available in the drop down menu, type it in to the “Other Facility” field. Include dates and referral outcome and any additional comments.

The screenshot shows the 'HIV+ Case Management and Other Referrals' section of a web form. A blue callout bubble points to the 'Referral Outcome:' dropdown menu, which is currently set to 'Confirmed - Accessed service'. The bubble contains the text: 'Case cannot be closed to state with pending outcome'. Other fields include: 'Has this client been referred to HIV Case management?' (Yes), 'If yes, where?' (CHAG), 'Other Facility:' (empty), 'Date of Referral:' (02/02/2016), 'Date of Follow Up:' (05/06/2016), 'HIV Case Manager:' (Kim Brown), and 'Comments:' (empty). A green 'View/Edit Hx' button is in the top right, a grey 'Submit' button is at the bottom left, and a grey 'Manage Referrals' button is at the bottom center.

## Risks

Risk information from the case report form will be entered in comments fields to notify partner services staff, but complete risk profiles should be completed for all clients.

**Sexual/IDU Risks:** Complete as indicated. For Index patients, select “Contact as:” -> “Index”. For partners, select “Partner.” Click “Update Risk Profile” when finished.

Date Collected:  Recall period (months):  Worker ID:  [View/Edit Hx](#)

Risk Profile Status:  Risks Identified  Not Asked  Declined  No Risks Identified

CDC Risks:

- Vaginal/Anal Sex w/Male
- Vaginal/Anal Sex w/Female
- Vaginal/Anal Sex w/Transgender
- Oral Sex w/Male
- Oral Sex w/Female
- Oral Sex w/Transgender
- IDU
- Share Inj. Drug Equipment

Additional Risks by Gender of each Partner: ?

M	E	I	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Exchange sex for drugs/money/or something they needed
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	While intoxicated and/or high on drugs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With person who is an IDU
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With person who is HIV positive
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With person of unknown HIV status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With person who exchanges sex for drugs/money
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With person who is an MSM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With anonymous partner
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	With person who has hemophilia or tranfusion/transplant recipient
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Without using a condom
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Not asked
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Declined to answer
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No additional risk information specified

Other Risks:

- Cocaine  Incarceration
- Crack  Assault
- Heroin  Partner of IDU
- Methamphetamines  ED Medications
- Nitrates/Poppers  STD/Other

Contact as:  Comments:

Last Risk Profile Entered: None Entered [Update Risk Profile](#)

Surveillance staff will communicate risk through comments; PS Staff completes the rest of this form

**Medical/Occupational/Other Risks:** for clients with occupational or medical risks, complete this section. For most cases this can be skipped by PS Staff.

Date Risk Info Collected:  [View/Edit Hx](#)

Risk Profile Status:

- Client completed risk profile
- Client was not asked about risk factors
- Client was asked, but no risk was identified
- Client declined to discuss risk factors

Recall Period (Months):

Receive clotting factor for hemophilia/coagulation disorder:

- Factor VIII (Hemophilia A)  Factor IX (Hemophilia B)  Other

Receive a transfusion or blood/blood components (other than clotting factor)?

First Transfusion Date:  Last Transfusion Date:

Receive a transplant of tissue/organs or artificial insemination:

Work in a health care or clinical laboratory setting:

Occupation:  Facility:

Dates Worked:

If less than 13 years of age at time of first antibody test, mother with HIV/AIDS:

Worker ID:

Comments:

[Update Risk Profile](#)

Only complete this section if source of HIV infection appears to be medical

## Activities/Referrals

**Activities:** Record all client contact or attempted contact here. Partner Services will be evaluated based on the number of clients located and interviewed based on information reported here. In the comments section document the dates and types of contacts made or attempted. The State PS Program recommends that three (3) contacts be made for clients and/or partners. Note: A variety of contact methods should be made before the case is closed.

Each contact date needs to be submitted separately to document

Date	Description	Worker ID	Contact Ty...	Time	Mileage	Disposition

**Referrals:** For all referrals made on a particular date, fill in date, select referrals, and submit.

Go Back

Referral Date:

Referrals:

- Syphilis Testing
- Herpes Testing
- Immunizations
- HIV confirmatory test
- HIV prevention counseling
- STD screening and treatment
- Viral Hepatitis screening and treatment
- Tuberculosis testing
- Syringe exchange services
- Reproductive health services
- Prenatal care
- IDU Risk Reduction Services
- Substance abuse services
- General medical care

## Index Status

The Administrative Data and Case Assignment pleats are used by surveillance staff to update index cases and assign out new cases.

**Partner Elicitation:** For each index cases, partner elicitation pleat should be completed. If the client refuses partner services, select “Refused” from the drop-down menu. Otherwise indicate whether the client claimed a number of partners, no partners, or did not know about partners.

Partner Elicitation

Date Partners Elicited: 01/14/2016 Recall Period (months): 24

Number of Partners:   
 Submit   
 Claimed Number   
 Unknown   
 Refused   
 None claimed

Double click on name to add partner

Total Named Partners: 0

Add New Partner

Partners can be added and linked to a case by clicking “Add A New Partner” and first searching for the name in the existing data base. If the partner is new to PS Web, select “Add a NEW \_\_\_ as partner” and enter basic information. Partners can then be accessed in person view and their follow-up information completed, including testing history and new HIV test results.

Name/Alias Search

Name/Alias: jane State Number: 111111

Unique Characteristics: County:   
 Date Of Birth: Status:  Index  Partner   
 Phone Number:  Located   
 Address:   
 Clear All Fields   
 Search

Search Results

PSW ID	First Name	Last Name	Status	Alias	Date of Birth	State Num
524	JANE	DOE	I		11/11/1991	111111

Add Partner

Perform a search to enable button

Add a NEW DOE, JANE as partner

## Partner Status

For partner cases or indexes who are also partners, administrative data and closing options appear. Before closing a partner case to the supervisor or the state, indicate the partner disposition, select “Submit Partner” to save information, and then “Close to Supervisor” to submit the case for review.

1 - Previous Positive	<b>Disposition Definitions:</b> 1 – Identified as previous HIV pos. already reported to surveillance 2 – Report previous negative test & test with PS as new positive 3 – Report previous negative test & test with PS as negative 4 – Report previous negative test but do not re-test 5 – Report no previous test & test as new positive 6 – Report no previous test & test as negative 7 – Report no previous test & do not test with PS G – Partners with no contact information H – Partners with unsuccessful contact attempts J – Partners who are contacted but refuse PS K – Partners who need re-assignment to proper county
1 - Previous Positive	
2 - Previous Negative, New Positive	
3 - Previous Negative, Still Negative	
4 - Previous Negative, Not Re-tested	
5 - Not Previously Tested, New Positive	
6 - Not Previously Tested, New Negative	
7 - Not Previously Tested, Not Tested Now	
G - Insufficient Information to Begin Investigation	
H - Unable to Locate	
J - Located, Refused Counseling and/or Testing	
K - Located, Refused Counseling and/or Testing	

For OOJ partners (disposition K) – complete address tab in data entry and submit the partner to the correct jurisdiction after contacting their PS worker and documenting as below:

In/Out Jurisdiction:

OOJ: Called By:  OJ ID:  Date Contacted:

Called To:  OOJ Notes:

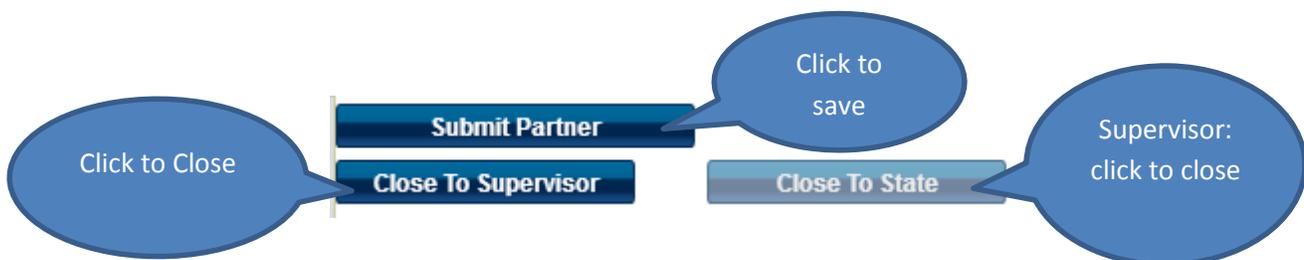
Agency:  Contact:

Phone:  E-mail:

Assigned To:  PS Worker:

Enter any and all notes that will be useful for initiating investigation for newly assigned staff.

When you have finished partner services on a partner case and selected the correct disposition, close out the case by first clicking close to supervisor, then close to state.



## Close to Supervisor/Close to State

When you have finished completing all collected information in PS Web, close the case to your supervisor or to the state (depending on local protocol) for review. All cases will be reviewed by the state for completeness, ensuring that contact attempts were made and, if an interview was completed, required information about testing and ARV use history, risk, and race/ethnicity have been completed for each index.

Index cases can be closed from the Index Status tab. First select the appropriate case outcomes from the drop down menu in the “Case Outcomes” pleat of the “Index Status” tab:

2 - Previous Negative, New Positive	<b>Disposition Definitions:</b> 1 – OOS cases who were previously diagnosed 2 – Cases who answer “Yes” to previous negative HIV test 5 – Cases who answer “No” to previous HIV test G – Cases with no contact information H – Cases with at least 3 unsuccessful contact attempts J – Cases who are contacted but refuse PS K – Cases who need re-assignment to proper county
1 - Previous Positive	
2 - Previous Negative, New Positive	
5 - Not Previously Tested, New Positive	
G - Insufficient Information to Begin Investigation	
H - Unable to Locate	
J - Located, Refused Counseling and/or Testing	
K - Out Of Jurisdiction	

Not that clients who were not interviewed must be marked as a letter code, because previous testing history cannot be assumed.

Submit case disposition, then select “Close to Supervisor” and submit the case to your supervisor.

The screenshot shows the PS Web interface with the following elements:

- Navigation tabs: Overview, Demographics, Address/Phone, Medical, Risks, Activities/Referrals, **Index Status**, Partner Status
- Case Outcomes pleat: Summary, Administrative Data, Case Assignment, Partner Elicitation, Case Outcomes (expanded)
- Disposition: 2 - Previous Negative, New Positive (dropdown)
- Other Disposition: [Empty text box]
- Enrollment Status: Accepted (dropdown)
- Date Case Closed: [Empty date field]
- Buttons: Submit, Close to Supervisor, Close to State

A blue callout bubble points to the "Close to Supervisor" button with the text: "Closing requires no pending referrals. First close to supervisor, then to state"

## Data Entry Check List

All of the following fields should be completed consistently:

	<b>Tab/Pleat</b>	<b>Information</b>
<input type="checkbox"/>	Demographics	Update all less changeable and changeable fields with new information and date
<input type="checkbox"/>	Address/Phone	Add new addresses, phone numbers, and aliases
<input type="checkbox"/>	Medical/HIV Tests and History	Add previous negative HIV Test (Yes/No), date of previous test if Yes, and self-reported results of previous HIV Test (should be negative), and ARV history including start date and medication name
<input type="checkbox"/>	Medical/Medical History	Review diagnosis; add AIDS diagnosis or co-infections when necessary
<input type="checkbox"/>	Medical/ HIV+ Medical Referral and Treatment	Complete “Already in Care” questions for all index cases
<input type="checkbox"/>	Medical/ HIV+ Case Management	Add referral date, facility, and outcome before closing cases
<input type="checkbox"/>	Risks	Complete Sexual/IDU risks for all index cases and medical risks when applicable
<input type="checkbox"/>	Activities/Referrals	Log all contacts (or attempts) and referrals made for either index or partner
<input type="checkbox"/>	Index/Partner elicitation	Fill in the number of named partners and add each partner named by the client
<input type="checkbox"/>	Index/Case Outcomes	Select appropriate disposition (see page 14) and click “Close” when finished with all data entry
<input type="checkbox"/>	Partner Status	Select appropriate disposition (see page 13) and click “Close” when finished with all data entry