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) 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:

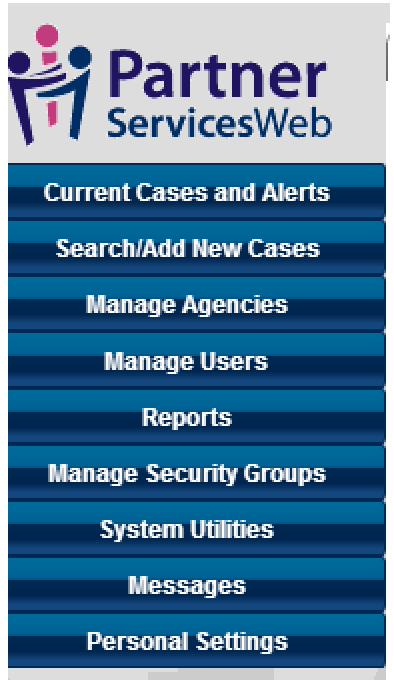
- High speed Internet Connection
- Browser (Internet Explorer, Mozilla Firefox, Google Chrome, or Safari for Apple) – a recent version
- Java Version 6 (Displays as 1.6) or higher
- Adobe Flash Version 10.2 or higher

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.

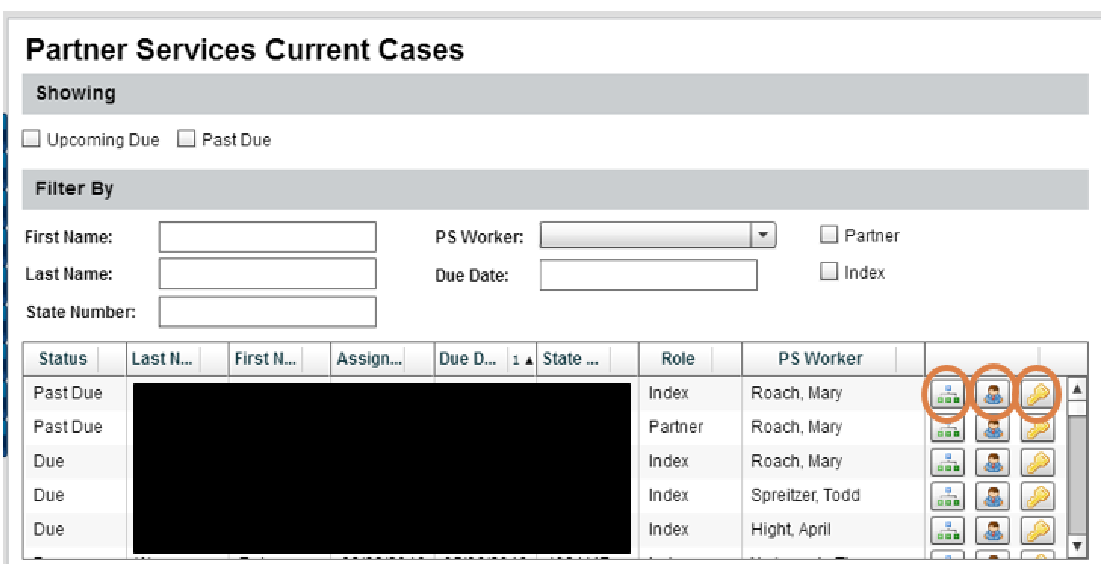
You can log-in to Michigan PS Web at https://mi-ps.lutherconsulting.com.

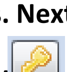
Current Cases and Alerts

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.



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.

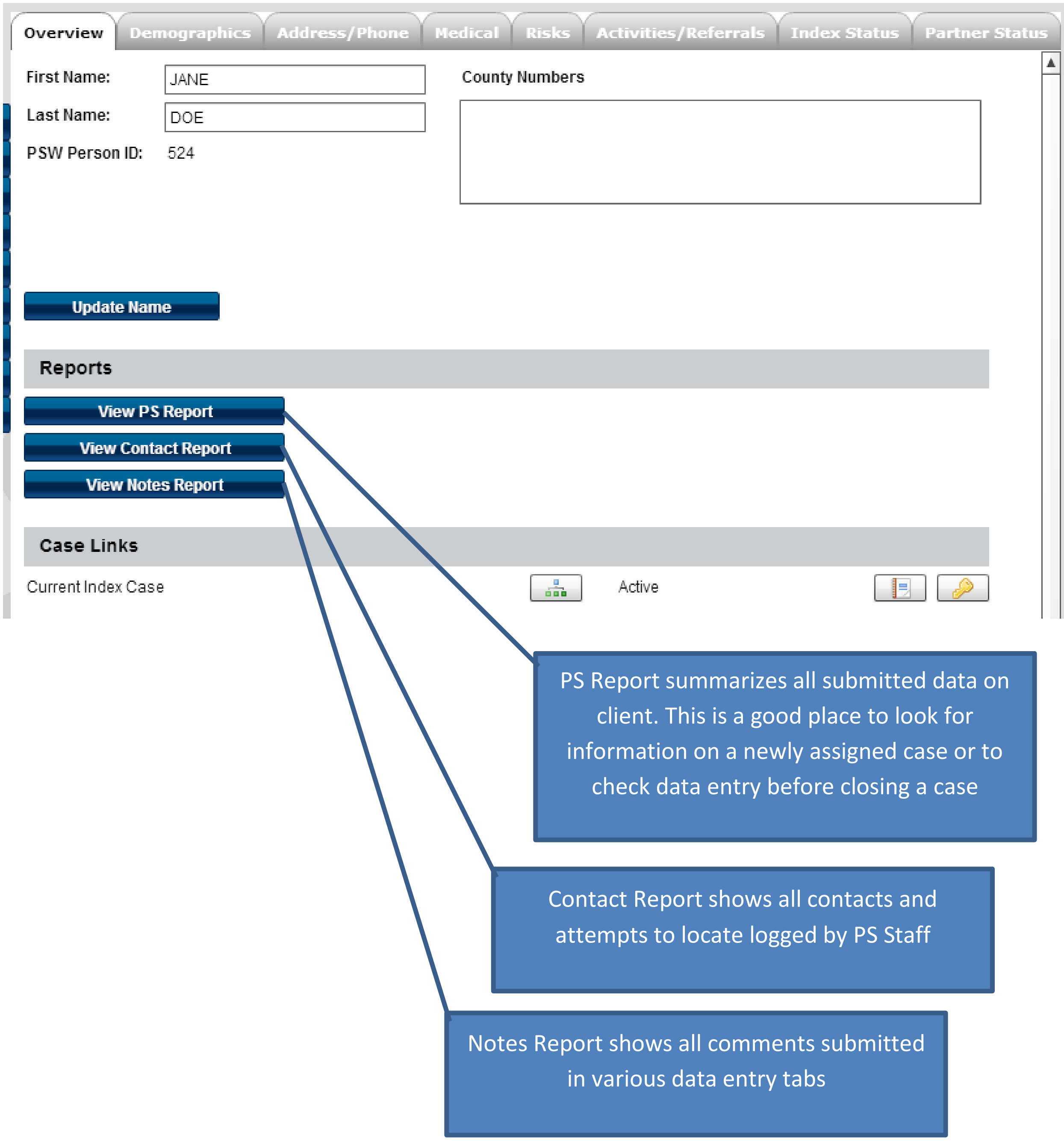
Overview

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.

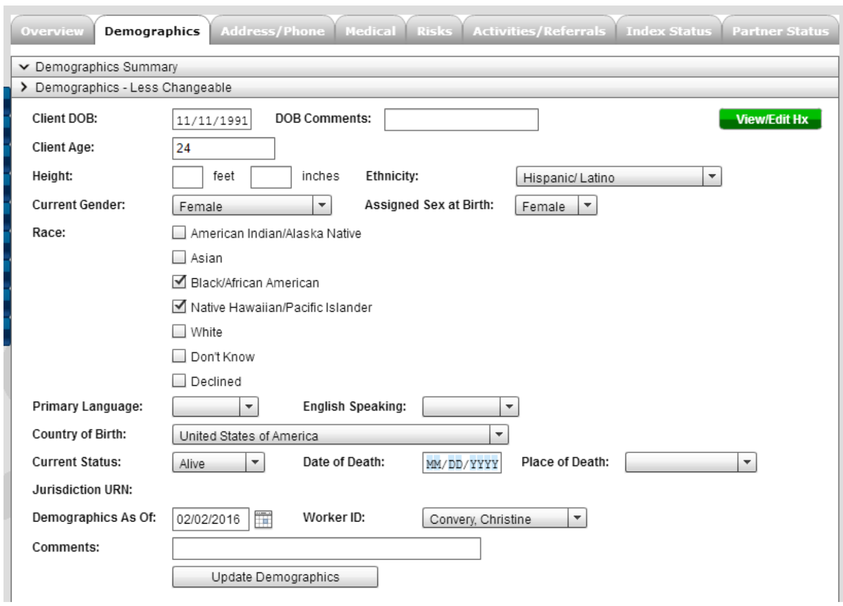
"View Notes Report" aggregates all notes entered in comments fields throughout data entry.



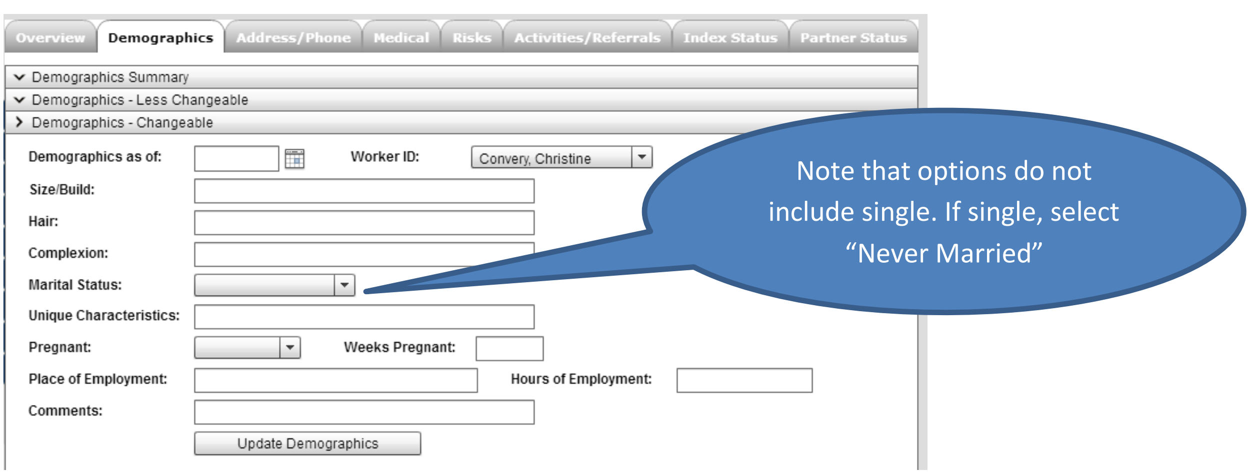
Demographics

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.

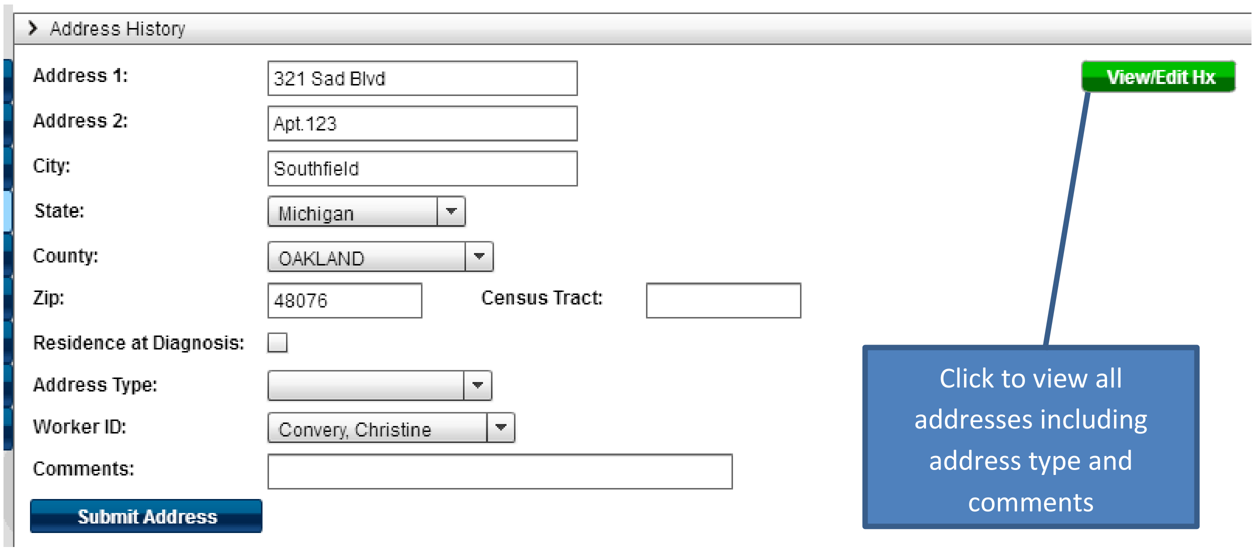


Additional demographics are entered in the "Changeable" pleat. This information includes marital status and physical description and should be completed by PS staff after contact. Pregnancy can be noted here and weeks pregnant filled in if available. Surveillance staff will use "Unique Characteristics"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

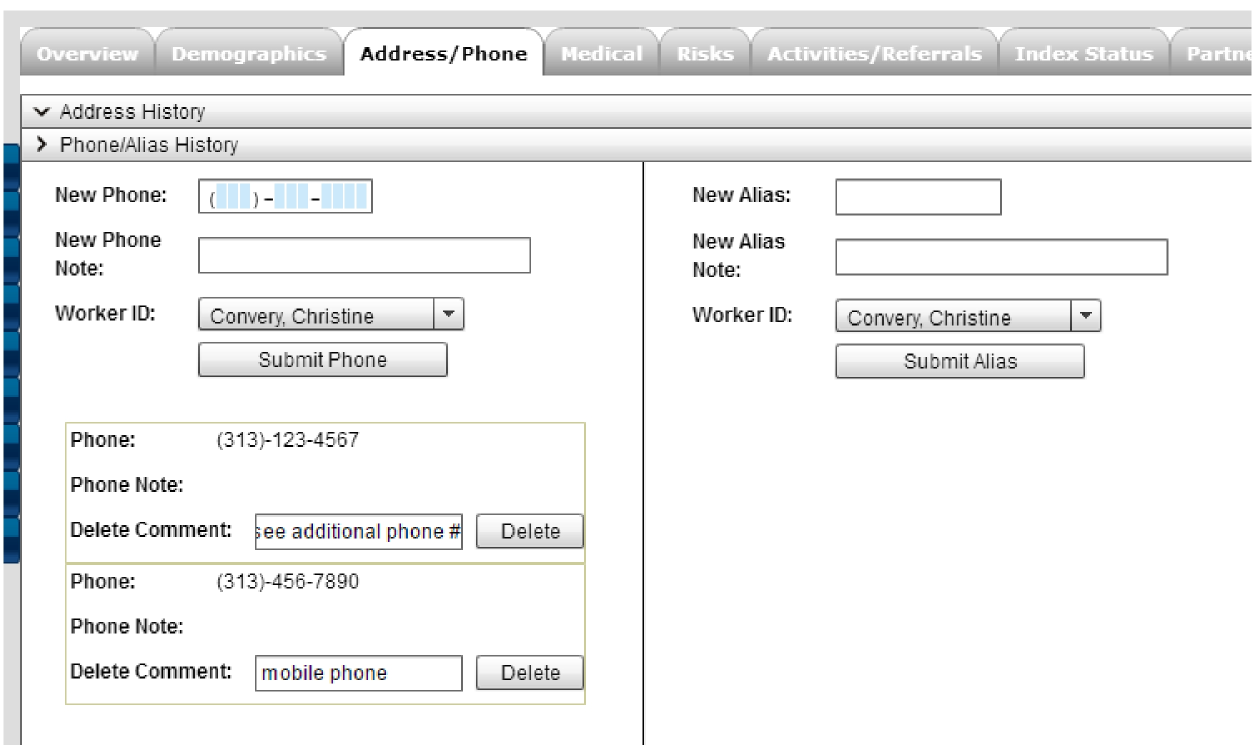


Address/Phone

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.



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.

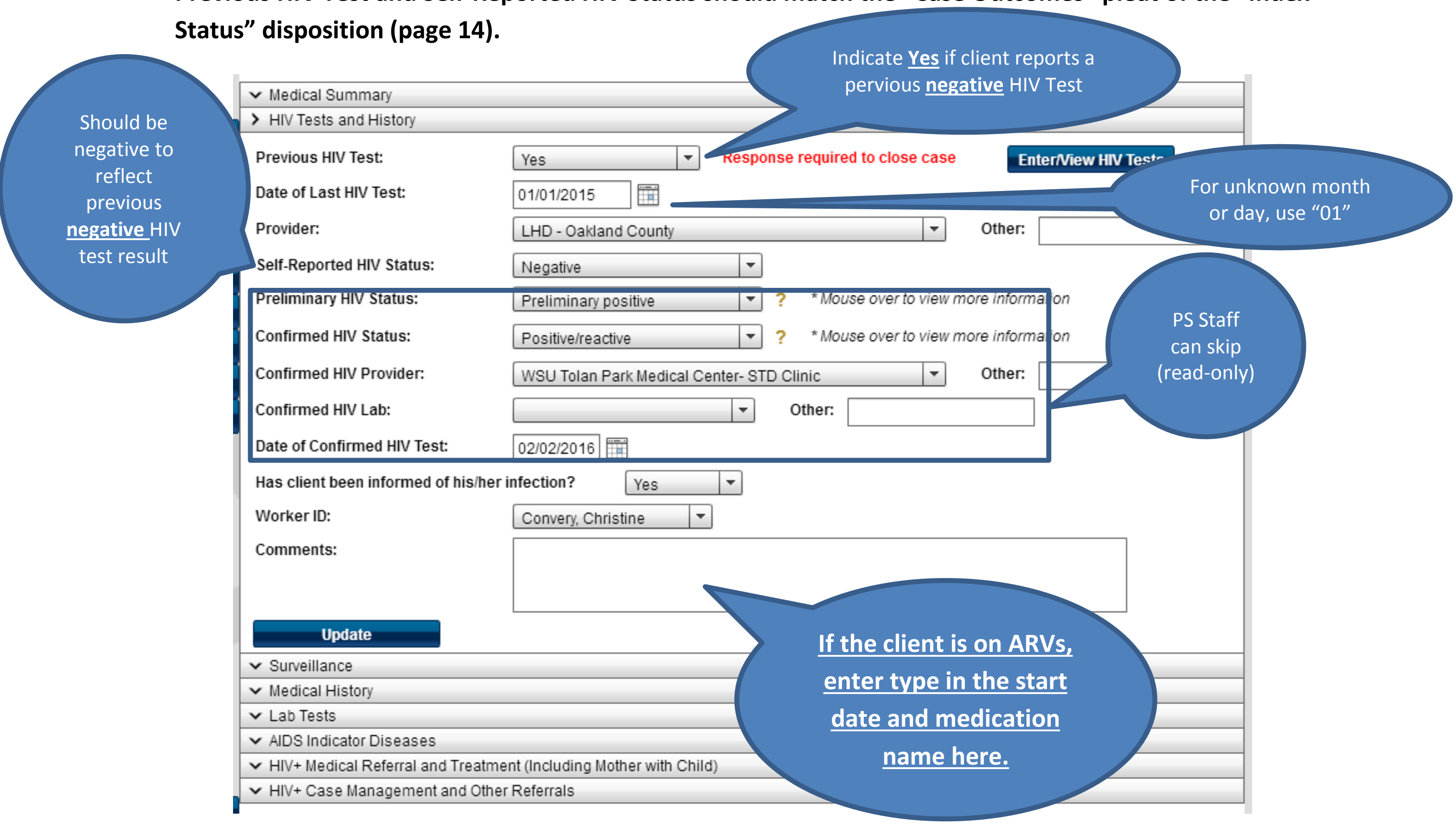


Medical

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.

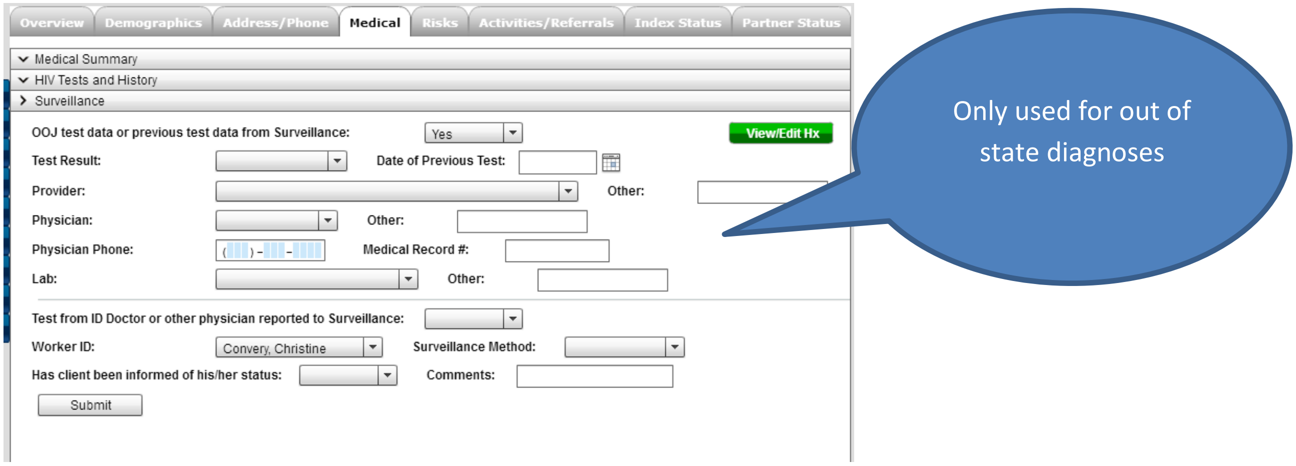
<u>HIV Tests and History</u>: Only the confirmed HIV Status, provider, and date will be filled out by surveillance. PS staff should complete the top 4 fields by indicating whether the client has had a previous *negative* HIV test and when. Self-Reported HIV Status is the result of this previous HIV test 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).



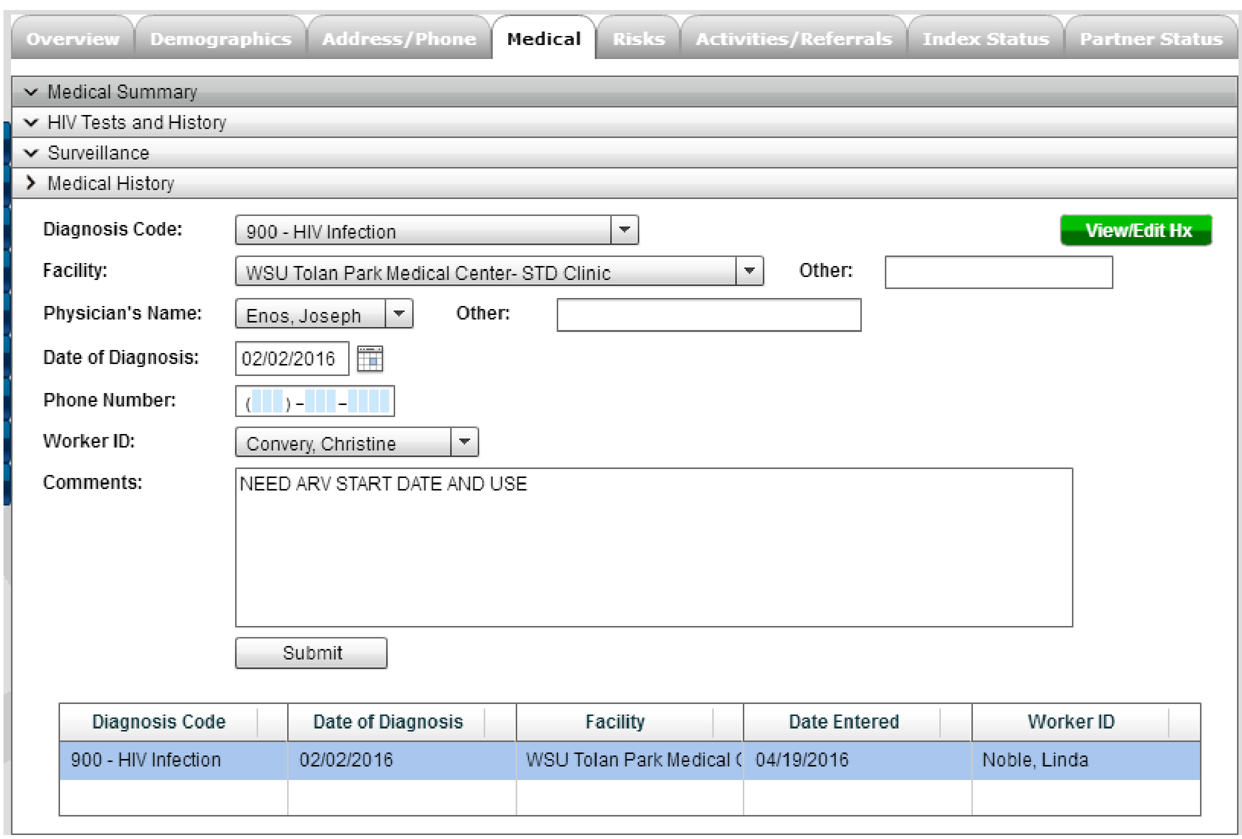
For identified partners who undergo HIV Testing, the Enter/View HIV Tests button will bring up a drop down menu of test types and allow you to enter negative results. If a partner tests as a confirmed positive, this should be completed in the "Confirmed HIV Status" field, and the partner will be made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

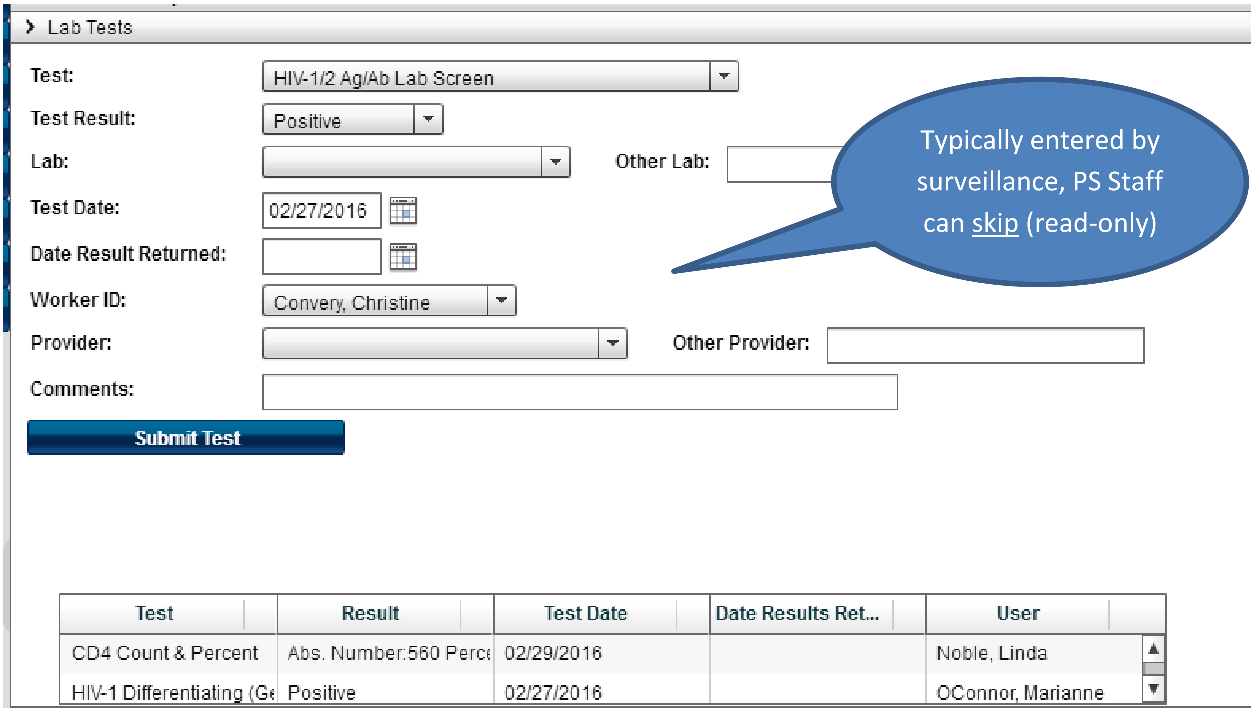


__Medical History:__ **HIV diagnosis date will be entered by surveillance staff. When applicable, AIDS diagnosis will be entered, also.**

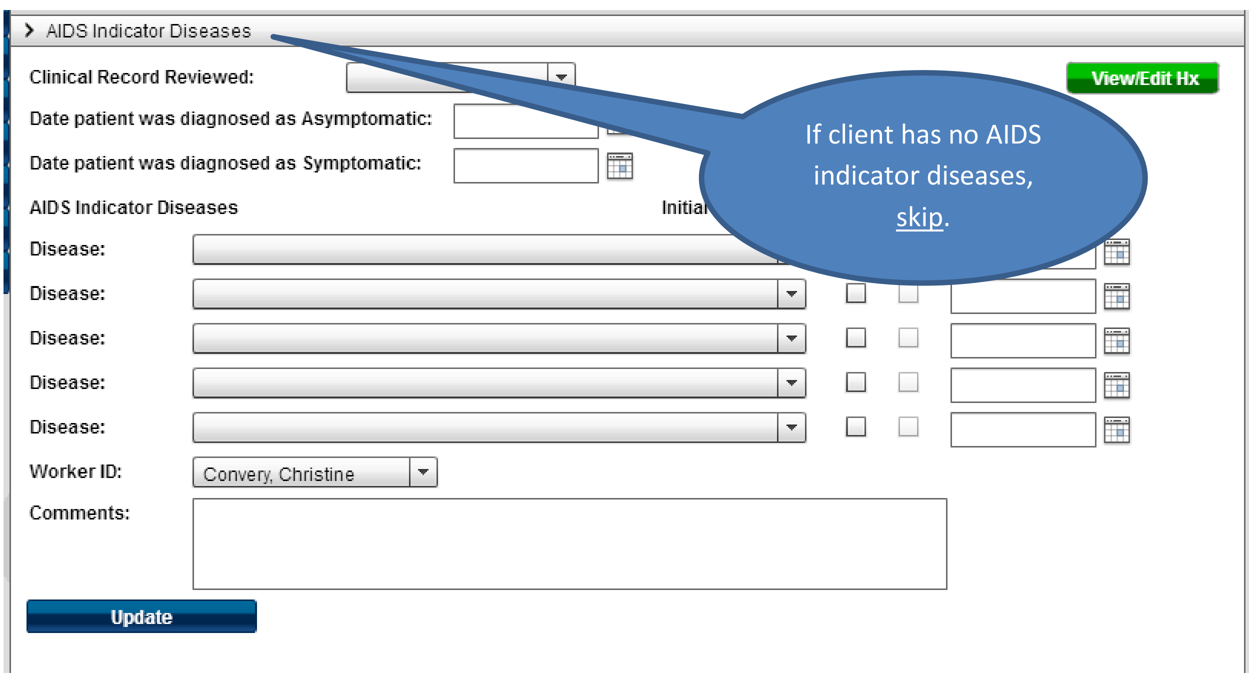
Partner services staff is responsible for asking clients and submitting information on antiretroviral use including start date. This can be entered as a comment here or in HIV Tests and History. When applicable, PS staff will also use this section to indicate AIDS diagnosis or co-infections.



<u>Lab Tests:</u> 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.

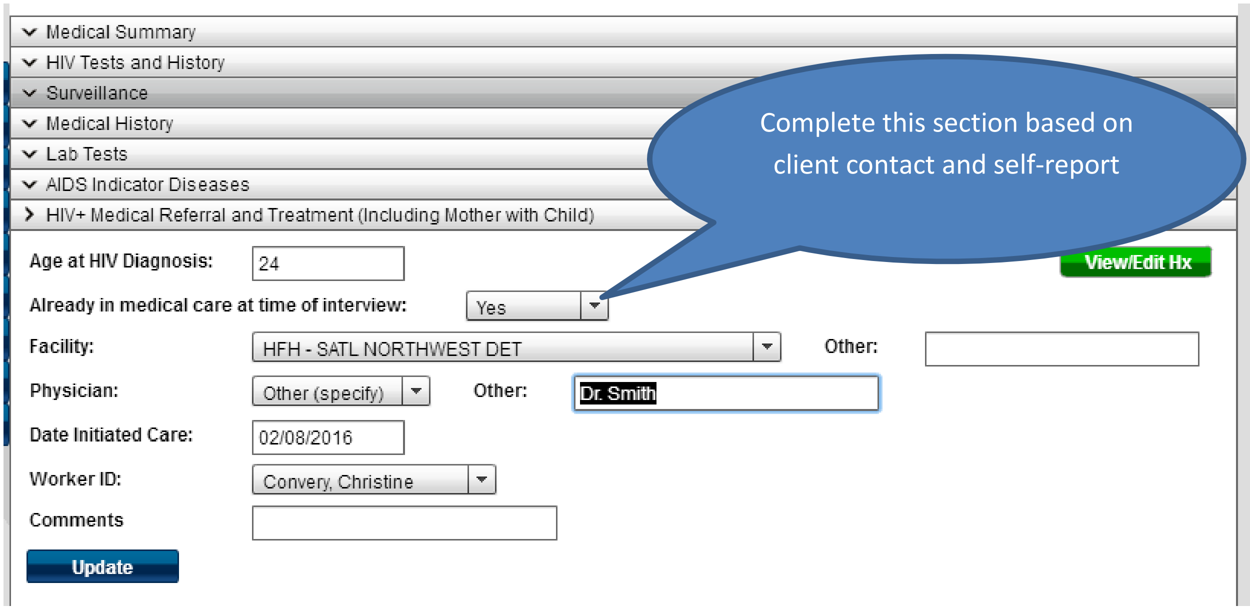


<u>AIDS Indicator Diseases:</u> Use this section to record any opportunistic infections. PS Staff typically can skip.

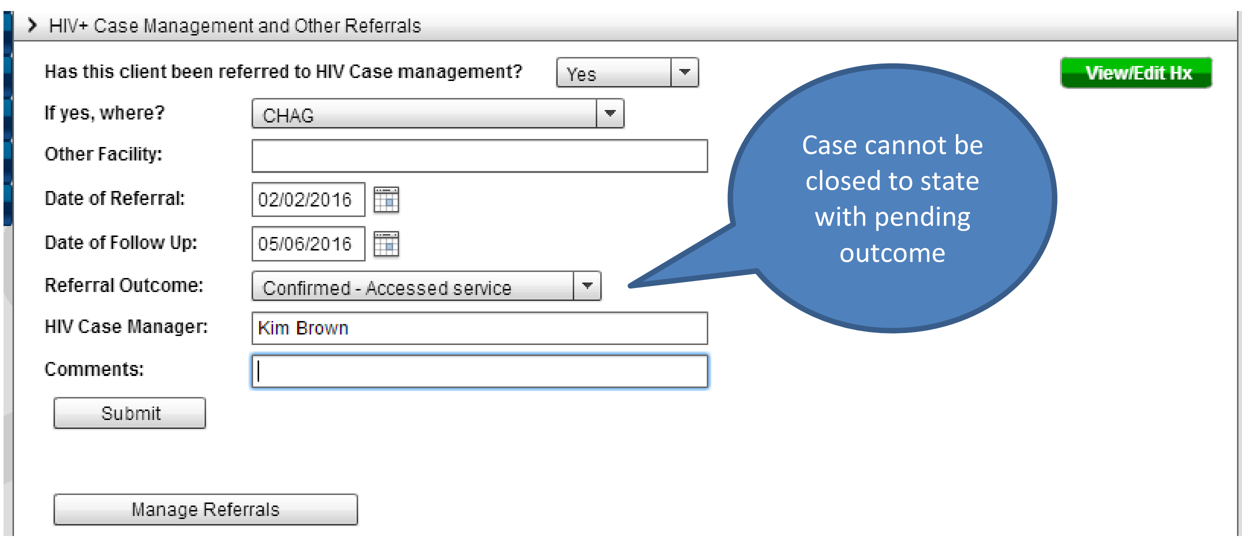


<u>HIV+ Referral and Treatment:</u> PS Staff should complete information about medical care and physician including the date care started. If the client is not in medical care, indicate "No"; if not asked, indicate "Not Asked".

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.



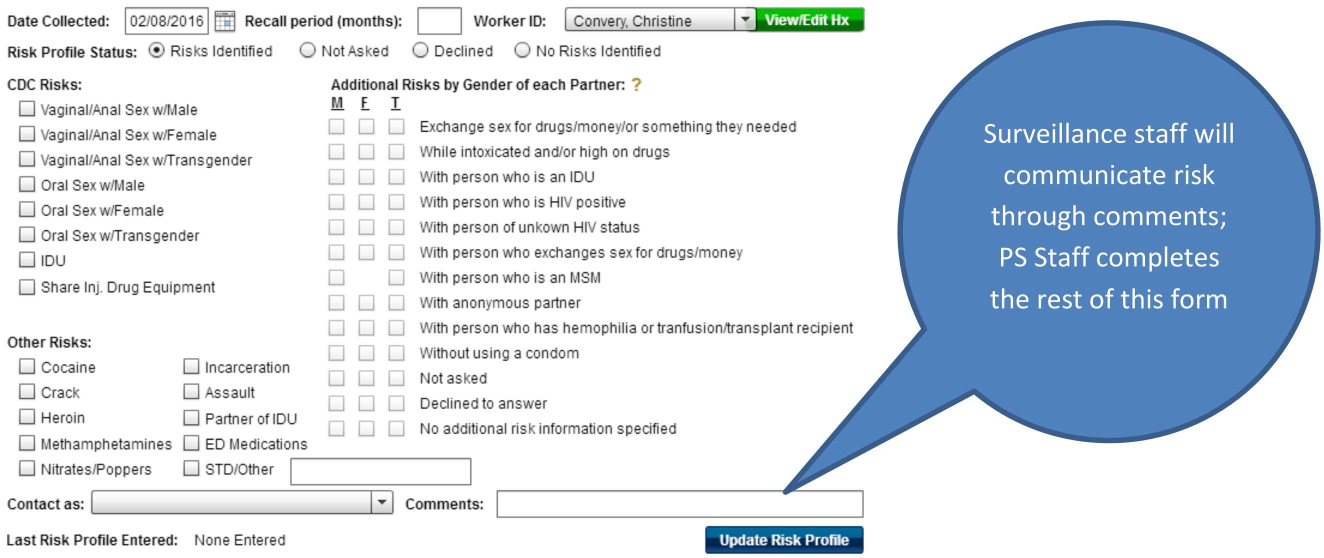
<u>HIV+ Case Management and Other Referrals:</u> PS Staff can record here all referrals made to case management agencies. If the facility is not available in the drop down menu, type it in to the "Other Facility" field. Include dates and referral outcome and any additional comments.



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.

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


Date Collected: 02/08/2016 Recall period (months): Worker ID: Convery, Christine View/Edit Hx
Risk Profile Status: Risks Identified | Not Asked | Declined | No Risks Identified

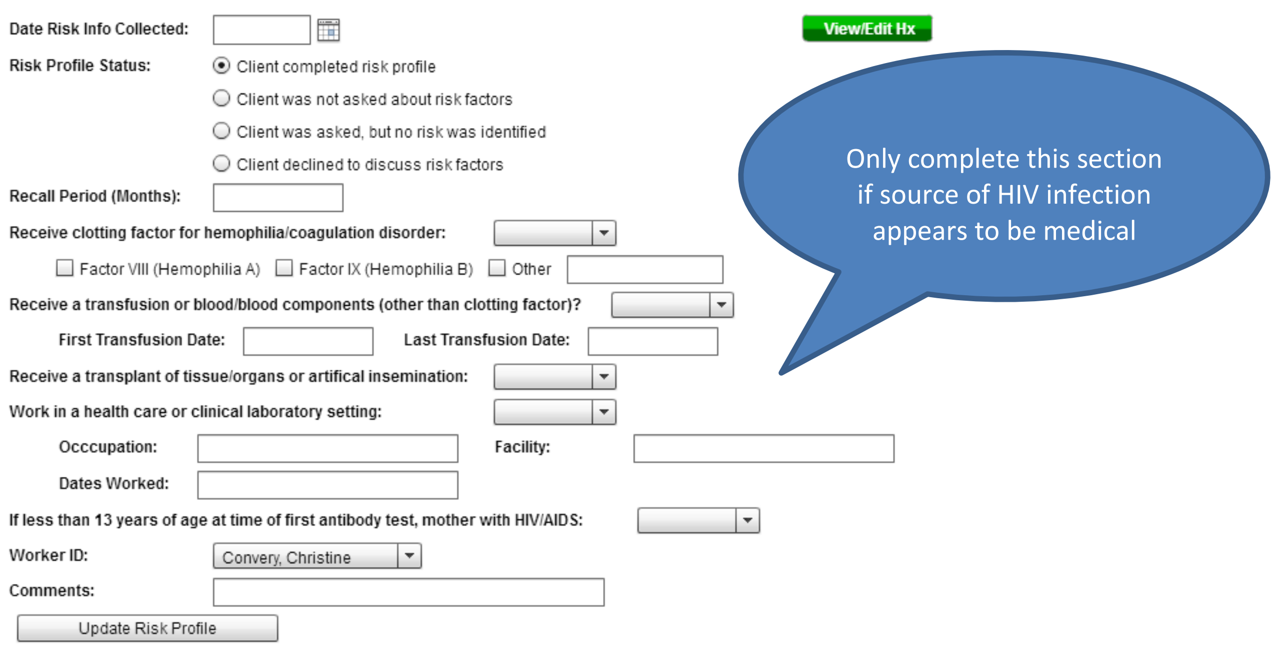
CDC Risks:
- Vaginal/Anal Sex w/Male
- Vaginal/Anal Sex w/Female
- Vaginal/Anal Sex w/Transgender
- Oral Sex w/Male
- Oral Sex w/Female
- Oral Sex w/Transgender
- IDU
- Share Inj. Drug Equipment

Additional Risks by Gender of each Partner: ?
M F T
- Exchange sex for drugs/money/or something they needed
- While intoxicated and/or high on drugs
- With person who is an IDU
- With person who is HIV positive
- With person of unkown HIV status
- With person who exchanges sex for drugs/money
- With person who is an MSM
- With anonymous partner
- With person who has hemophilia or tranfusion/transplant recipient
- Without using a condom
- Not asked
- Declined to answer
- No additional risk information specified

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

Contact as: Comments:
Last Risk Profile Entered: None Entered
Update Risk Profile

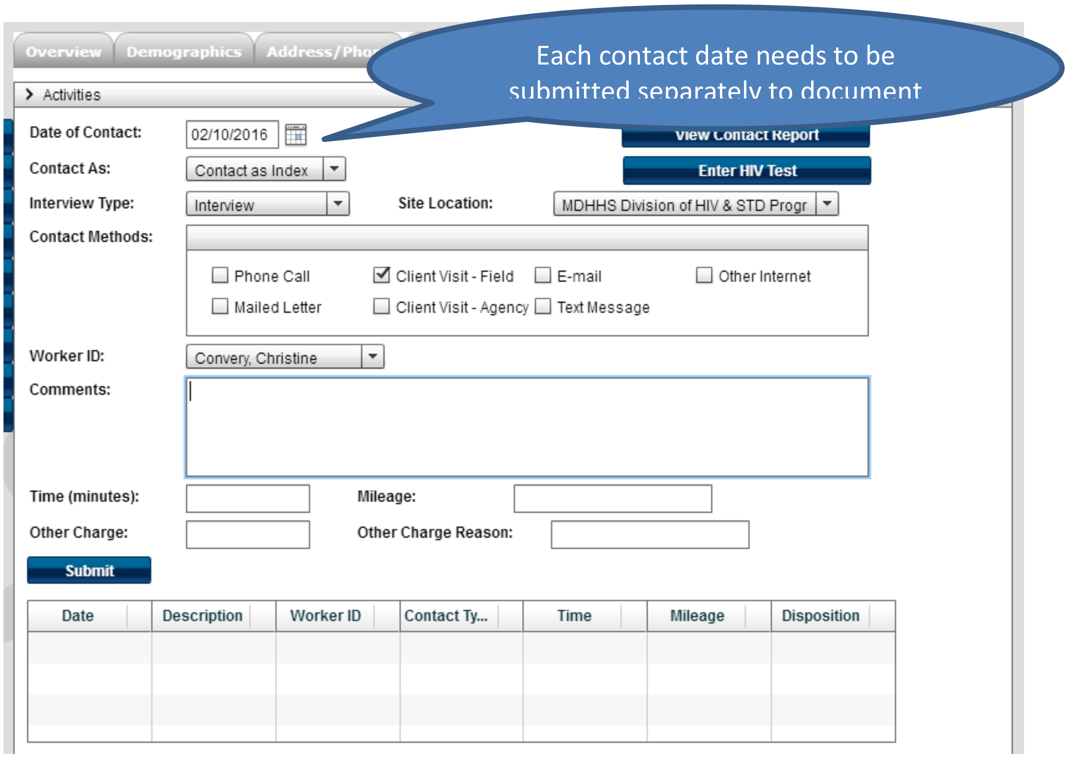
<u>Medical/Occupational/Other Risks:</u> for clients with occupational or medical risks, complete this section. For most cases this can be skipped by PS Staff.


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

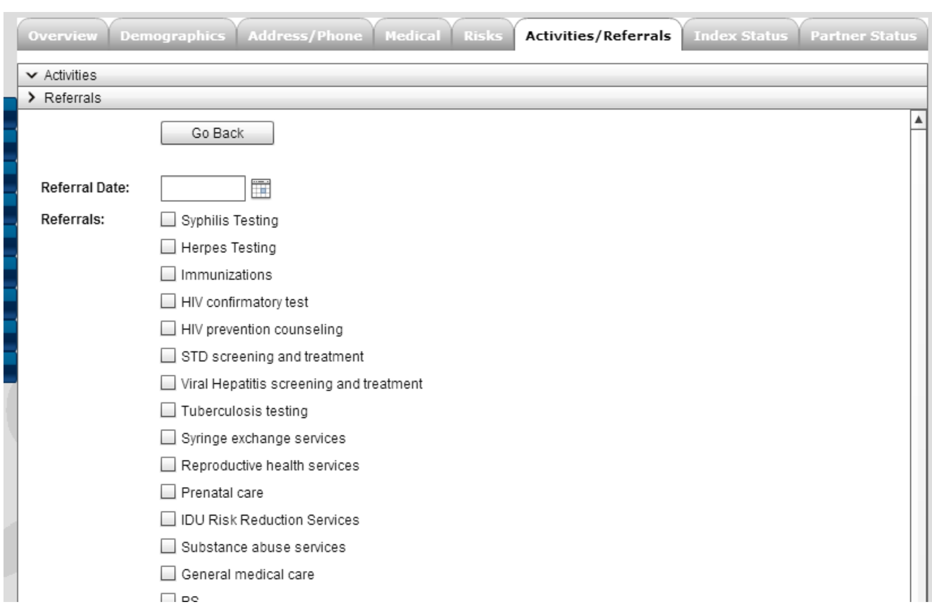
Recall Period (Months):
Receive clotting factor for hemophilia/coagulation disorder:
Factor VIII (Hemophilia A) | Factor IX (Hemophilia B) | Other
Receive a transfusion or blood/blood components (other than clotting factor)?
First Transfusion Date: Last Transfusion Date:
Receive a transplant of tissue/organs or artifical insemination:
Work in a health care or clinical laboratory setting:
Occcupation: Facility:
Dates Worked:
If less than 13 years of age at time of first antibody test, mother with HIV/AIDS:
Worker ID: Convery, Christine
Comments:
Update Risk Profile

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.



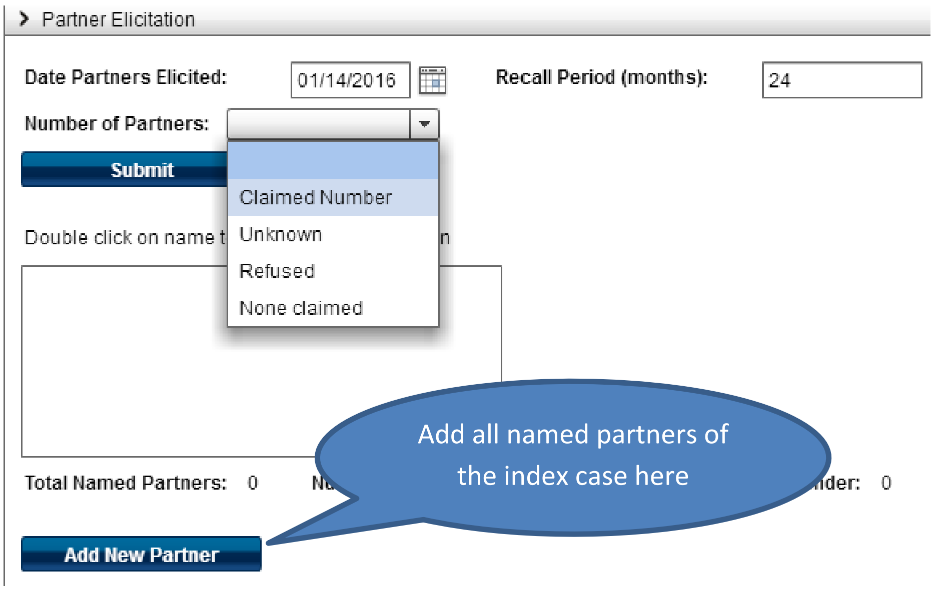
Referrals: For all referrals made on a particular date, fill in date, select referrals, and submit.



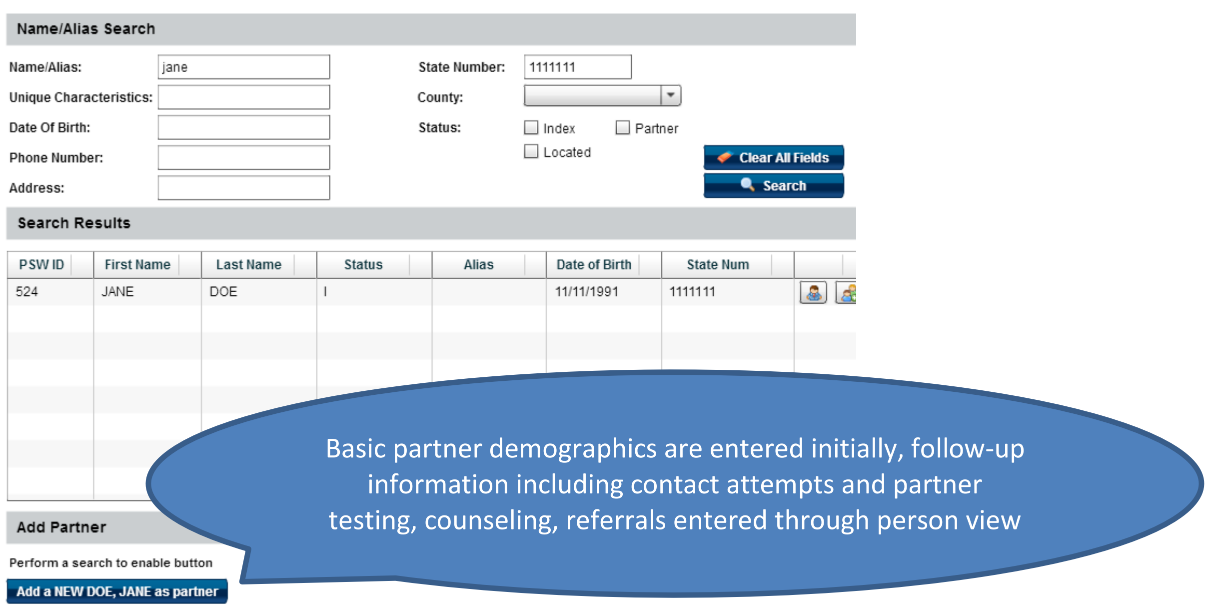
Index Status

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

<u>Partner Elicitation:</u> 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.

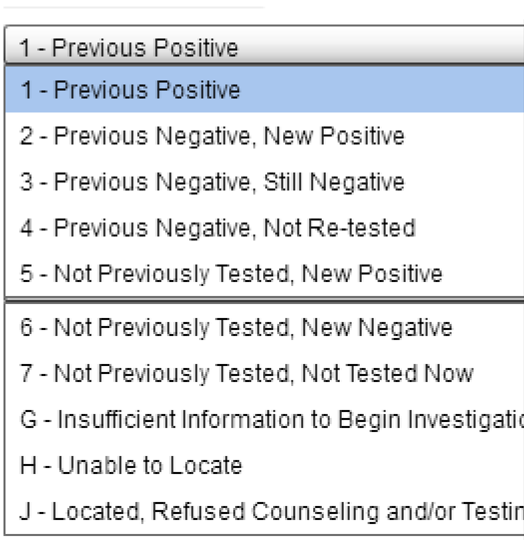


Partners can be added and linked to a case by clicking "Add A New Partner" and first searching for the name in the existing data base. If the partner is new to PS Web, select "Add a NEW __ as partner" and enter basic information. Partners can then be accessed in person view and their follow-up information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



Partner Status

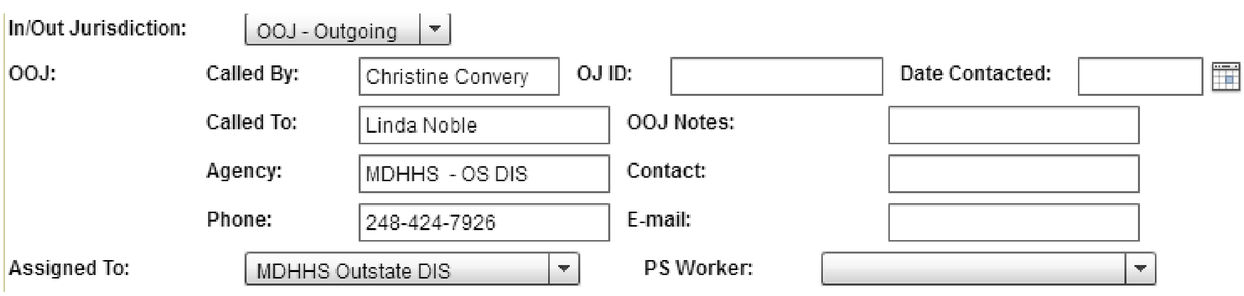
For partner cases or indexes who are also partners, administrative data and closing options appear. Before closing a partner case to the supervisor or the state, indicate the partner disposition, select "Submit Partner" to save information, and then "Close to Supervisor" to submit the case for review.



Disposition Definitions:

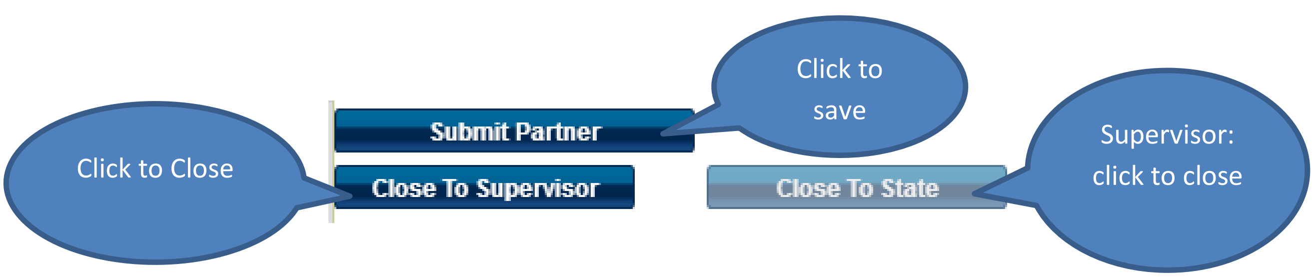
1 – Identified as previous HIV pos. already reported to surveillance
2 – Report previous negative test **&** test with PS as new positive
3 – Report previous negative test **&** test with PS as negative
4 – Report previous negative test but do not re-test
5 – Report no previous test **&** test as new 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

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:



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

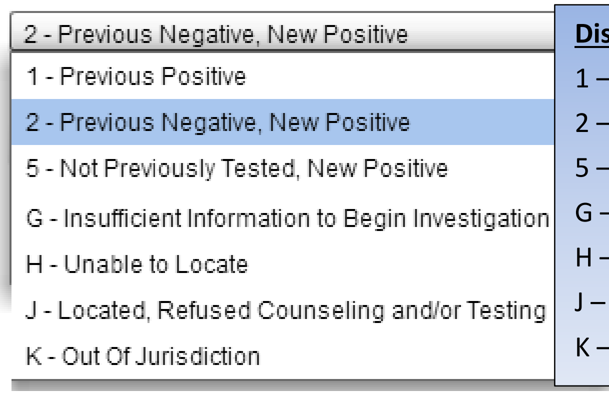
When you have finished partner services on a partner case and selected the correct disposition, close out the case by first clicking close to supervisor, then close to state.



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:

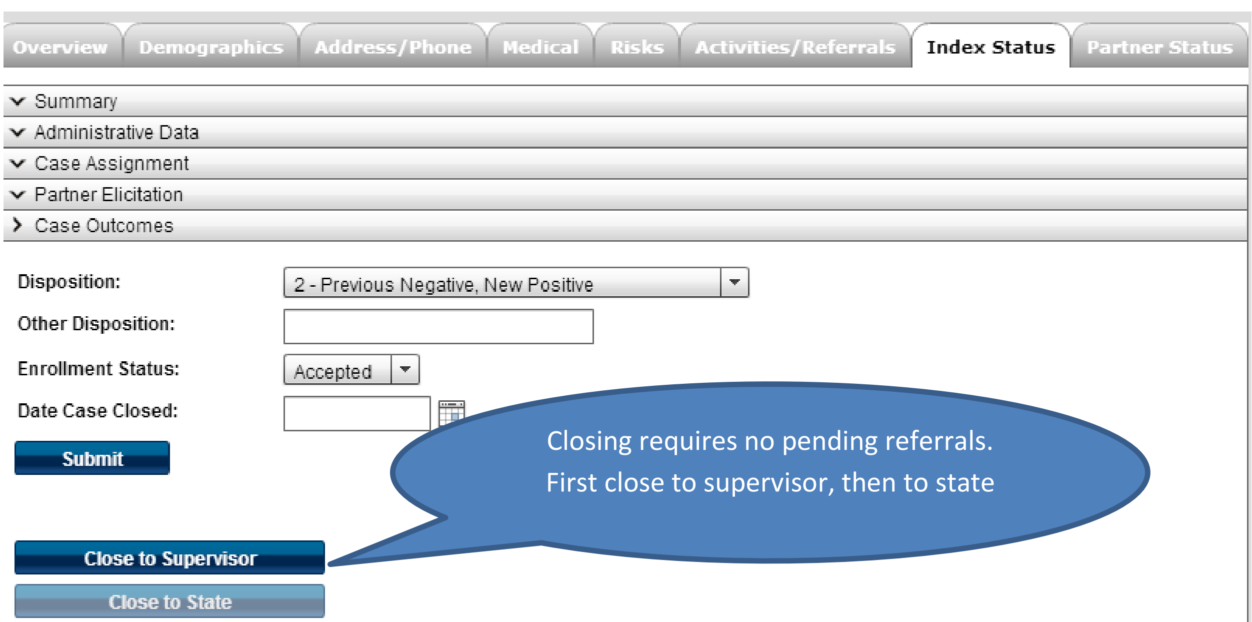


Disposition Definitions:

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

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.



Data Entry Check List

All of the following fields should be completed consistently:

	Tab/Pleat	Information
☐	Demographics	Update all less changeable and changeable fields with new information and date
☐	Address/Phone	Add new addresses, phone numbers, and aliases
☐	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
☐	Medical/Medical History	Review diagnosis; add AIDS diagnosis or co-infections when necessary
☐	Medical/ HIV+ Medical Referral and Treatment	Complete "Already in Care" questions for all index cases
☐	Medical/ HIV+ Case Management	Add referral date, facility, and outcome before closing cases
☐	Risks	Complete Sexual/IDU risks for all index cases and medical risks when applicable
☐	Activities/Referrals	Log all contacts (or attempts) and referrals made for either index or partner
☐	Index/Partner elicitation	Fill in the number of named partners and add each partner named by the client
☐	Index/Case Outcomes	Select appropriate disposition (see page 14) and click "Close" when finished with all data entry
☐	Partner Status	Select appropriate disposition (see page 13) and click "Close" when finished with all data entry