Contact Investigation - Assigning/Transferring to another SK Organization		**Name of Activity:** Contact Investigation - Assigning/Transferring responsibility of Contact investigation to a different Organization (Org) within SK **Role performing Activity:**	
Panorama – IOM WORK STANDARD	**Location:**	**Department:**	
	Document Owner:		
	Date Prepared: May 15, 2018	**Last Revision:** Feb 2022	**Date Approved:**

Contact name received in one Org (Organization = former RHA or First Nations) (follow-up may or may not have begun) and now responsibility is being assigned/transferred to a different Org within SK.

	Essential Tasks:
NEW	**NOTE: Minimum standard;** **1. Contact investigation is created in Panorama for HIV, Syphilis and Heb B contacts** **2. Risk Factor – contact to a known case** **3. Close investigation** Follow-up work may be recorded in Panorama investigation, but is not required. Purpose = To communicate disease and date client was named as a contact for other orgs where the client may present for service. To document each exposure for future client service.
1.	Update client demographics, including JORG and address
2.	**Assigning – when a contact is received that is the responsibility of another Org:** ➢ The Org who initially receives the contact to HIV, Syphilis or Acute HepB will create the investigation with the appropriate responsible Org identified (See **Policy** – Contact Investigation in Panorama), (See – Create Investigation – IOM - WS) o **Note: select disposition as Pending.** ***New Org must change from Pending to another disposition once investigation is accepted/received.*** ➢ Send notification to appropriate Org – (See Fax Notification of CD Investigation – Share Point)
3.	**Transferring – when an contact investigation is identified to be the responsibility of a different JOrg after follow-up has begun:** Set Client in context **Update Client Demographics** **LHN > SUBJECT > CLIENT DETAILS > UPDATE CLIENT** ➢ Type in new "Health Region Organization" (if applicable) o This refers to where the client is currently residing ➢ Click on "Add" Button to enter new telephone and address as needed o Click on "Apply" Button ➢ Click on "Add" Button to enter new address as needed o Click on "Apply" Button o Click on "Set as Preferred" Button – if applicable If the Client is no longer residing at an address: ➢ Click on radio button beside address no longer residing at – If applicable o Click on "Update" Button o Enter in date client no longer effectively resides at that location o Click on "Apply" Button Click on "Save" Button

<table>
<tr><td>3.</td><td>LHN > INVESTIGATION > SUBJECT SUMMARY

➢ Click on Investigation ID hyperlink of investigation to be transferred
    o This will put the investigation into context</td></tr>
<tr><td>4.</td><td>LHN > INVESTIGATION > INVESTIGATION DETAILS > RESP. ORG/INVESTIGATOR
Responsible / Organization Investigator screen will open

To add a new/additional Responsible Organization:
➢ Select receiving Responsible Organization from drop down list
➢ Select Responsible Organization Workgroup from drop down list – “Workgroup”
➢ Select Responsible Organization Date
    o NOTE: This will be the date the new responsible organization is assigned
➢ Click on “Add Organization” Button
➢ Scroll down to bottom of page

To end date original (transferring) primary investigator:
➢ Select radio button beside current primary investigator
➢ Click on “Update” button
➢ Select end date for original investigator organization under “Investigator” Heading
➢ Click on “Apply Update” Button</td></tr>
<tr><td>4.</td><td>To Add Primary Investigator Type to receiving Organization:
➢ Scroll to “Investigator” Heading
➢ Select new Investigator Type from drop down list as “Primary”
➢ Select Investigator Organization name of new primary investigator from drop down list
➢ Select Investigator Workgroup from drop down – “Workgroup”
➢ Investigator Name from drop down list – DO NOT USE
➢ Select Assigned date
    o NOTE: This is the date the new responsible organization is assigned

➢ Click on “ADD” Button
➢ Click on “SAVE” Button

NOTE: There must always be a primary investigator assigned to a contact investigation, therefore the end date of one will be the same as the assigned date of the next (ie. can’t be the day before).</td></tr>
<tr><td>6</td><td>Send FAX Notification to new responsible ORG
➢ See FAX Notification of CD Investigation within SaskatchewanHealthAuthority

NOTE: Change the disposition to pending when transfering responsibility. See Contact investigation – updating – IOM WS

NOTE: When the new Org accepts responsibility, they must change the disposition – this will allow searches for investigations with pending as a disposition providing a audit to ensure the transfer was received.</td></tr>
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