Contact Management

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Introduction

Contact information on a variety of professionals, agencies and groups is required for effective program delivery, public health emergency communications and targeted area identification (using Geographic Information Systems). A set of approved agency databases of contact information are maintained for use by all health unit programs and services. Programs and services rely upon accurate and complete contact information.

Purpose

To ensure SMDHU maintains current and accurate contact information of community partners, stakeholders, and relevant parties to ensure timely and effective communications for emergency response and program delivery.

Legislative Authority

Ontario Public Health Standards: Requirements for Programs, Services, and Accountability (OPHS), under the Health Protection and Promotion Act (HPPA):

1. The Ministry of Health's *Emergency Management Guidelines (2018*), under the OPHS, requires that each board of health maintain 24/7 notification protocols for communications with board of health staff, community partners, and governmental bodies, including the ministry, for receiving, notifying, and responding to reports of an emergency or disruption, a potential health hazard, or a reportable or communicable disease including institutional and hospital outbreaks. Additionally, each board of health must identify and maintain a range of communication modes to ensure the dissemination of timely information

2. The Ministry of Health's *Population Health Assessment and Surveillance Protocol (2018)*, under the OPHS requires that the board of health use population health assessment and surveillance data and other information to identify options, set priorities, and implement decisions for action, including but not limited to launching timely investigations and responses to adverse exposures, potential or confirmed communicable disease outbreaks, non-communicable disease clusters, and emerging public health issues.

Policy Definitions and Interpretation

Data Dictionary: repository of information regarding each contact category and includes detailed information about the business data, such as standard definitions of data elements, their meanings, and allowable values and formats.

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Agency Database: approved systems for maintaining agency contact data:
- Microsoft Outlook
- Hedgehog Inspection Database
- Panorama

RAVE: Emergency Notification Software used to send public health notices to health care and community partners who have a legitimate need to receive the notice.

Data Audit: checking and updating where necessary, approved agency databases for new contacts or contacts requiring revisions or deletion.

Data Quality Checks: identifying missing information and formatting issues which may impact on the rapid use of contact data for emergency management purposes.

Policy

Contact information is collected for specific purposes with the understanding that it will not be used for purposes other than initially intended. Contact information is not shared with the public or other agencies. If a partner agency requests contact data, it would only be released under a freedom of information (FOI) request

The health unit will maintain approved agency databases as required by the Ontario Public Health Standards: Requirements for Programs, Services, and Accountability for the purpose of notification and communication to community partners, stakeholders, and relevant parties along with timely action. If the health unit is a shared custodian of information with a partner agency, it must be described clearly which agency owns or can use the contact information in a Memorandum of Understanding.

Procedures

A. Agency Category Directory Management (Outlook, Hedgehog, Panorama)

A Master list of contact categories (e.g., Physician, Veterinarian, Resource Centers, Politicians, Library, and Information Centres) that support programs across the agency is maintained by the Administrative Coordinator in Program Foundations and Finance.

The contact directory will include consistent and relevant information for each category including a mandatory core set of data:

- First Name Last Name
- Position Title
- Organization Name
- Organization Physical Address (Street Name, Street Number, Unit Number, Postal Code)
- Phone Number
- Email Address

Programs can collect additional information if required for business or program delivery purposes and note in their data dictionary.

B. Agency Contact Directory Maintenance

A List of Program Assistants who have responsibility for contact categories along with the location of the data (Outlook, Hedgehog etc.) and the last audit date will be maintained by department Administrative Coordinator via the Master list.

A Program Assistant and/or Data Management Assistant will be assigned by the Department Vice President to maintain specific contact categories. This responsibility includes:

- Maintaining a data dictionary for the mandatory core set of data plus any additional information collected on each category.

- Conducting an annual comprehensive review / audit of their respective contact categories including research on *new* contacts. Audits to be complete by September 30 each year and once complete, the Administrative Coordinator of their respective department will be informed for tracking purposes. Contact information will be compared against other relevant directories i.e., College of Physicians and Surgeons (CPSO), Ontario College of Pharmacists and community partners i.e., City of Barrie.

- When auditing Agency Databases ensure any additions, deletions, and modifications made within the agency database are also reflected in the RAVE software where applicable.

  o Deletion or Modification of contact information – the Program Assistant /Data Management Assistant can make the changes directly in the RAVE software if they have access, if not, they can advise Administrative Coordinator Program Foundations and Finance to action the change.

  o New Contact – the Program Assistant /Data Management Assistant will direct new Health Care or Community contacts to complete the Public Health Alert Registration or complete the form on their behalf.

- When multiple changes are required in a source contact database the Program Foundations and Finance Administrative Coordinator will provide the RAVE Excel upload template for the Program Assistant/Data Management Assistant to populate.

C. RAVE Mass Notification Software

Administrative Coordinator Program Foundations and Finance will:

Documentation

1. Maintain a list of agency contact categories that are housed in the RAVE software and their original data sources: internal (Outlook, Hedgehog, Panorama,) or via the self-registered Public Health Alert form on the SMDHU website
2. Maintain a list of SMDHU Staff access and permissions to RAVE software

Data Management

1. Additions to RAVE
   - Upload, on a weekly basis, Public Health Alert registrations received via the SMDHU self-registration form into the RAVE database.

2. Deletion from RAVE:
   - Delete contacts from RAVE software upon email notification from Program Assistants / Data Management Assistants

Audit

1. Download, on a quarterly basis, the *failed* Public Health Alert email report, and forward to the appropriate Program Assistant/Data Management Assistant for further investigation.
2. Download, on an annual basis, all RAVE contact data on August 1 and forward data to appropriate Program Assistants/Data Management Assistant to ensure the source database matches the RAVE database

Data Access

1. Program Foundations and Finance Administrative Coordinator will weekly download RAVE data and save in secure network file. Program Foundations and Finance Administrative Coordinator can provide RAVE data in an Excel format upon request from Programs.

D. Data Quality checks

- The Population Health Assessment, Surveillance and Evaluation Team (PHASE), Program Foundations and Finance Department is responsible for conducting data quality checks on the contact data housed in the approved agency databases. Data quality checks will be conducted every 6 months.

- Data correction reports will be provided to the appropriate Program Assistant /Data Management Assistant (as identified by department management) for correction. Program Assistant /Data Management Assistant will have one month from receipt of data correction report to correct errors.

Reference

Emergency Management Guidelines, 2018

Population Health Assessment and Surveillance Protocol, 2018

Related Forms
N/A

Related Policies

Broadcast Emailing – Using RAVE Software

Final Approval Signature: _____

Review/Revision History:
September 2010 Policy re-numbered, previous number C1.015
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