UT-NEDSS User's Manual

Updated 5/11/2011
Utah Department of Health

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General Instructions – Accessing UT-NEDSS/TriSano

The UT-NEDSS/TriSano system is designed to work with either Internet Explorer version 7.0 or above OR with Mozilla Firefox version 2.0 or above. If you are using older versions of Internet Explorer or Mozilla Firefox, UT-NDESS/TriSano will not display properly.

If your agency's IT department permits the use of Mozilla Firefox, you may want to install it on your computer (a free download at http://www.mozilla.com/en-US/firefox/). The UT-NEDSS/TriSano software functions better with Mozilla Firefox than with Internet Explorer. However, if your agency's IT department does not permit the use of Mozilla Firefox, Internet Explorer 7.0 or higher will work just fine with UT-NEDSS/TriSano.

When accessing the UT-NEDSS web site, your web browser may indicate that the secure connection has failed or that there is a problem with the security certificate. If you see this message, accept the offer of the certificate (even though it says that it is not recommended).

1. Go to https://health.utah.gov/utnedss/
2. Use your UMD username and password to login. Your UMD login is the same username and password you use to login to UNIS.
3. If you do not have a UMD login or you have forgotten your username/password follow the instructions below titled "Create UT-NEDSS Login Account" or "Recover UT-NEDSS Login Information".

Create UT-NEDSS Login Account

1. Go to https://health.utah.gov/utnedss/
2. Click on "Register Here" under the "Don't have a Utah-ID?" box, located at the top left side of the screen.
3. Fill out all required fields.
4. Click the "Create" button located at the bottom, left part of screen.
5. Follow additional given instructions to finish creating your UT-NEDSS login account.
6. After your account has been created, contact JoDee Baker at UDOH (538-6191) and she will grant you access to the system.

Recover UT-NEDSS Login Information

1. Go to https://health.utah.gov/utnedss/
2. Click on "Recover Account" under the "Forgot your password?" box, located on the left side of the screen.
3. When you set up your Utah-ID account you provided a security question. Please provide the correct answer to the security question.
   After you have given the correct response to your security question, an email containing a recovery code will be sent to your email address that is associated with your Utah-ID account.

4. Go to your email account, open the email sent to you from the “UtahID Service”.
5. Click on the “Continue Recovery Link” provided in the “UtahID Service” email.
   a. This will automatically open up a web browser.
6. Proceed to enter in the “Recovery Code” provided in the email.
7. Enter in a new Utah-ID password.
8. Login into UT-NEDSS using your new password.

To access this document, go to http://health.utah.gov/nedss. The UT-NEDSS support documents are located in the “UT-NEDSS User’s Resources” section.

Quick Start for Entering a New Case

- Go to: https://health.utah.gov/utnedss/
- Click on “**NEW CMR**” function in the menu tab bar at the top of the screen.
- A new screen will appear with a reminder that states, “Before creating a new morbidity event, please search for the person in question.” Enter the name and/or birth date of the case you entering. You may find that:
  - **The event you're trying to create already exists (patient and disease have already been entered).** In this case, you can either do nothing or edit the existing event. To view a record, click on “Show” under “CMR Actions”; to edit an existing case, click “Edit.”
  - **The person in question is already in the system for a different disease or event.** In this case, you can start a new CMR with that person's information by clicking on the “Create and edit CMR using this person” link. This creates a new CMR for the patient. Some of the fields in the new CMR (for example: demographic information) will automatically be completed based on information taken from the previous CMR.
  - **The person in question is not in the system.** If the person you were looking for was not listed in the search results, select “Start a CMR with the criteria you searched on” under any search results that were returned.

Once you have established a CMR:

- In the “**Demographic**” tab, fill out the “**Last Name**” field.
- Next move to the “**Clinical**” tab.
  - In the “**Clinical**” tab, select the disease from the drop-down menu in the “**Disease**” field. Make sure that the disease you have selected is correct, because after you select the disease and click on the “**Save & Continue**” button or the “**Save & Exit**” button, questions that are specific to that disease are loaded onto the electronic form. (If you need to change the disease name, see “Changing Event Disease”).
- After saving the CMR (see “Saving work”, below) After entering the disease name and selecting “Save & Continue” or “Save & Exit”, you may proceed to enter data into the CMR tab-by-tab. As you enter data, the “**Save & Continue**” button saves what you have

entered, while keeping you in "**Edit**" mode and keeping your place in the investigation form. You must be in "Edit" mode to edit the event.

- Route case (see further instructions under "Routing.")

Saving work

- Pressing the "**enter**" key to save your work will move you to the "Show" mode from the "Edit" mode. It is not advised to use the "enter" key to save your work, use the "Save & Continue" or "Save & Exit" button to save work. It is recommended and a good practice to save information after completing each tab and moving on to the next tab.
    - **Important note** – depending on the disease you select, additional questions will appear under the different tabs of the CMR. The additional questions are disease specific and will only appear on the CMR once the disease has been selected and the **"Save & Continue"** or **"Save & Exit"** button has been clicked**.**
- The "**Save & Exit**" button saves your work and takes you to the "**Show**" mode. You must be in "Show" mode to route an event.

CMR Instructions, Tab by Tab

Demographic Tab

Name

- Enter in the person's last name, first name and middle name (if available).
    - The "**Last name**" field is required (fields shaded in light orange are required to be filled out in order to save the CMR).
    - **A.K.A** field will appear on STD specific disease events.

Address

- Enter in the person's residential address.
    - **Street number & Street name** - put the house number only in the **Street number** field and the remaining part of the street address in the **Street Name** field.
        - Example: if the address is *12 West 200 South* - then *12* goes in the ***Street number*** field and *West 200 South* goes in the **Street name** field.
        - Spell out addresses completely – for example use 12 West 200 South, not 12 W. 200 S.
        - NOTE: If the address provided is a PO Box, enter the PO Box in the "Street Name" field. Leave the "Street number" field blank.
    - **Unit number** – if the residence is an apartment unit of a multi-family housing complex or office building, put the unit, suite, or apartment number in this field.
    - **City** – put the city in this field (spell the entire city name out, for example use Salt Lake City not SLC.
    - **State** – select from the drop-down menu.

    - **County** – select from the drop-down menu.
    - **Zip Code** – enter in the five-digit zip code.

Age

- You no longer need to calculate age. Just put in the birth date and the program will calculate it for you automatically. You will not see the calculation until you hit either "Save & Continue" or "Save & Exit" button at the top of the screen.
- When entering dates, you can use mm/dd/yy or mm/dd/yyyy or mm-dd-yy or mm-dd-yyyy or you can write out the date (January 1, 2009). However, you CANNOT enter dates without // or --. For example if you type March 3, 2003 as 03032003, the system will not recognize that as a date. You will receive an error message stating "Date of birth is not a valid date."
    - You can also use the calendar icon ( ) to enter the date.
    - Once you click on "Save & Continue" the date will automatically be reformatted to appear in the following format - January 01, 2009.

Race and ethnicity data

- The ethnicity field has been moved ahead of the race field on purpose. Studies have shown that reporting will be more accurate and more complete when ethnicity is asked before race.
- The race drop down box looks odd because it is always open. This is so that you can select more than one race. Use the Ctrl key and mouse click to add a second race.

Clinical Tab

- **Important note** – depending on the disease you select, additional questions will appear under the different tabs of the CMR. The additional questions are disease specific and will only appear on the CMR once the disease has been selected and the **"Save & Continue**" or **"Save & Exit**" button has been clicked**.**

Change disease associated with CMR

- If for whatever reason you need to change the disease name associated with an event…you can do that by going to the clinical tab and select the new disease and click "Save & Continue".
- Next you will need to go to the "Investigation" tab and click on the "Add/Remove forms for this event" function.
- If you would like to remove the disease form associated with the previous disease for the case event, you can do so by clicking the "**REMOVE FROM EVENT**" check box, located at the right of the screen and then clicking on the "**Remove Forms**" button, located on the left side of the screen. (**Warning**: if you remove a form from the disease event, you will lose any data associated with the form.)
    - NOTE: you do not have to remove the previous disease form. You can have more than one disease form tied to an event…but by having more than one disease form tied to an event, you will have two sets of disease specific questions that appear in the different tabs.

- To add the new disease form, scroll through the list. Click in the "**ADD TO EVENT**" check box, for the disease form you would like to add. Then click the "**Add Forms**" button, located at the bottom of the list of disease forms, on the left side of the screen.
- At the top you should now see the disease forms tied to the case event.
- Click either the "**Show**" or "**Edit**" functions (located in red text at the top right of page) to return to the tabs section of the CMR.
- You will need to fill out the new disease specific questions under each tab.

Treatments

Additional treatment data can be entered in a text box located under the treatment field.

Pregnancy field

- The pregnancy field is located on the same line as the death data.
- **Show** versus **Edit mode**
- If you are in "Edit" mode a link to go to "Show" mode is at the upper left hand corner of the screen. If you are in "Show" mode, the link to "Edit" is at the upper left hand corner of the screen.

Laboratory Tab

- **Lab field** – enter in the name of the lab where the test was run (e.g. ARUP or Unified State Laboratories: Public Health).
    - If the laboratory you are entering is already in the system it will appear as you type, if you see the laboratory name scroll down and select it.
- **Test type field** – select the test type from the options. If the test-type you are looking for is not in the list of options click on the "More choices…" option and a more comprehensive list of test type will become available.
- **Organism field** – select the organism from the options. If the organism is not listed, click on the "More choices…" option and a list of all organism types will become available.
- **Test result field** – the "Test result" field is a drop-down list of which to select from. The actual test result indicated on the laboratory results that come from the laboratory may not exactly match the items listed in the drop-down listing. Do your best to select the most appropriate or best-fitting item from the drop-down listing.
- **Result value field** – the "Result value" field is used for inputting the quantitative results (most often this will be a numeric value). Only put the quantitative or numeric results in this field. Use the "Units" field to input the units used to measure the result (e.g. if the lab result is for a serological test the lab result may show a number such as 1.2 or 5 ug/ml, use the Result value field to enter in the 1.2 and use the Unit field to enter in the ug/ml).
- **Units field** – the Units field is used for entering the units of measurement that the Result value is in (e.g. if the lab result is for a serological test the lab result may show a number such as 1.2 or 5 ug/ml, use the Result value field to enter in the 1.2 and use the Unit field to enter in the ug/ml).

- **Reference range field** – (this field is optional) if the lab result has a range (such as a positive or negative range) you can put the range shown on the lab result into this field.
- **Test status field** – use the Test status field is a drop-down list. This field is used to indicate the status of the test result. Select one of the following from the list (Pending, Preliminary, or Final) or leave it blank.
- **Specimen source field** – use the Specimen source field to indicate the type of specimen used for the lab test. This is a drop-down listing. Select the specimen from the listing.
- **Collection date field** – use the Collection date field to enter in the collection date of specimen. Either enter the date in manually (mm/dd/yyyy) or use the calendar icon to select the date.
- **Lab test date field** – use the Lab test date field to enter in the date the lab test was conducted. Either enter the date in manually (mm/dd/yyyy) or use the calendar icon to select the date.
- **Specimen sent to state lab? field** – use the Specimen sent to state lab? field to indicate whether or not specimen was sent to the Unified State Laboratory: Public Health. This is a drop-down list with the following options: Unknown, Yes, or No.
- **Comment field** – use the comment field to add any comments regarding the lab test and/or results.
- **Add a new lab result to this lab function** – this function is used to add an additional lab result to an existing lab test result. Just click the Add a new lab result to this lab function and a new lab result will appear. The Lab will remain the same for all additional lab results that are added.
- **Add a new lab function** – this function is used to add a new lab to the CMR in the Laboratory tab. This function is different from the "Add a new lab result to this lab" in that you will use this feature to add a new lab test.
- **Remove lab (with results) check box function** – the Remove check box function is used to remove an unneeded lab test or incorrectly entered lab test. The "Remove" check box is located just to the right of the Lab field and will only appear after the laboratory information has been saved by clicking "Save & Continue" or "Save & Exit".
  - To remove the lab (with results), click the "Remove lab (with results)" check box. This will place a green check mark (√) in the box. But to actually remove the la b (with results), click the "Save & Continue" or "Save & Exit" button.
- **Remove check box** – the Remove check box is found directly under the left side of the Comment box of the lab result. It is used to remove any unwanted lab results. Only the lab result directly above the Remove check box will be removed.
  - To remove the lab result, click the "Remove" check box. This will place a green check mark (√) in the box. But to actually remove the lab result, click the "Save & Continue" or "Save & Exit" button.
- **Encounter - specific Labs section** – this section is located at the bottom of Laboratory tab and will show laboratory information for any encounters that has been entered. To edit laboratory information for Encounter-specific Labs, go into the Encounters tabs and click on the "Edit Encounter" function. This will open a list of tabs for the encounter which includes the following: Encounter, Clinical, Lab, Investigation, and Notes tabs. Click on the Lab tab to enter in laboratory information for an encounter.

Use the following table as an example of the types of data that should be entered into the fields in the Lab section of the CMR. (Note: test information will go into the first two fields while test results go into the second two fields)

For more complete (disease specific) information of what should be included in the fields in the Laboratory tab section go to http://health.utah.gov/nedss/ and click on the link titled "Disease Specific Laboratory Table" located in the UT-NEDSS User's Resources section.

Test type	Organism	Test result or Result Value	Units	Reference Range	Test Status
Typing	S. Anatum	UTJAGX01.014			final
Culture	Salmonella species	Presumptive Positive			
Culture		Positive/Reactive			
Antibody signal/cutoff	Hepatitis C	4,000,000	ug/m	< 50	
Surface Antigen	Hep B virus	Positive/Reactive			

Contacts Tab

- Entering in contacts is a multi-step process. To enter in contacts follow the below steps:
  - Answer the first two questions by clicking on the correct response.
  - The "search" option can be used to search for existing people in the system and make them a contact to a case. If the person does not exist in the system, you will need to enter them as a contact manually.
  - In "Edit" mode, enter in the name (last and first), disposition, contact type, and phone information for all contacts. Use the "Add a contact" function to add additional contacts.
  - After entering in the contact's information, click on "Save & Continue".
    - This saves the contact(s) and brings up a three new features listed just to the right of the contact (A "Remove" checkbox, a "Show Contact" feature and an "Edit Contact" feature).
  - Use "Edit Contact" to add additional information for the contact.
  - The "Edit Contact" feature will bring up a set of tabs (Demographic, Clinical, Lab, Epidemiology, Investigation, and Notes). Fill out each of these tabs with the information available for the contact. The information to be filled out in the tabs is for the contact and not the original case patient.
  - Use the "Copy From Original Patient" button if the contact is a household contact and has the same street address. This function will automatically fill in street address information.
    - NOTE: The tabs for a Contact are similar to the tabs for the original case patient (Parent Patient) and are filled out in a similar manner.

- In the upper left corner of the screen the name of the contact is shown. In the upper right corner of the page the name of the original case "Parent Patient" is shown. To go back to the CMR tabs for the original patient, just click on the "Parent Patient" link, which is shown as the original patients' name in red text.

Promote a Contact to a Morbidity Event (CMR)

- To convert a contact to its own morbidity event, click on the contact and view the contact in the "show mode".
- In show mode you will see a "**Promote to CMR**" function (located along the top right portion of the screen) in red text.
- Click on "Promote to CMR"…this will bring up a pop up box that asks "Are you sure?" Click yes. This will create a CMR or morbidity event for this contact.

Encounters Tab

- This tab will mostly be used for local health department investigators doing case management.
- The "Encounters Tab" is for the investigator completing the investigation and allows the investigator to track when and where a case has had encounters with public health.
    - **Investigator field** - this field will automatically auto-fill with the investigators name that is completing the CMR. If you need to change the name of the Investigator, click on the down arrow and scroll through the list to select.
    - **Encounter date field –** enter in the date of encounter.
    - **Location field –** use the drop down list to select the location of where the public health encounter occurred.
    - **Description field –** this is a free text field which allows the investigation to give a more detailed description of the encounter event.
- More than one encounter event can be added to the CMR. To add additional encounters click "Add an encounter".
- Click "Save & Continue".
- Once an encounter event has been saved three new features will appear to the right of the Encounter event. (a "Remove" check box, a Show Encounter function, and "Edit encounter event" function). These three features allow the encounter event to be deleted, viewed and edited.
- To add information to the Encounter event click the "Edit Encounter" function. This will bring up the following additional tabs that can be used to add information to the encounter event:
    - **Encounter tab –** this displays the original information entered into the encounter event (investigator, date, location, description).
    - **Clinical tab –** this allows you to enter in any treatment information. Any clinical information entered in here will also show up in the main Clinical tab under "Treatments".

- **Laboratory tab** – this allows you to enter in any laboratory information. Any laboratory information entered in here will also show up in the main Laboratory tab under "Encounter-specific Labs".
- **Investigation tab** – this allows you to attach forms to the encounter.
    - LHDs can create and use their own specific forms for this section. However, only UTNEDSS users with "administration" rights can create a form. If your LHD does not have an individual with the needed rights to create a form…you can contact the Bureau of Epidemiology at the UDOH for help.
- **Notes tab** – this allows you to add any additional notes to the encounter.

- **Encounter Notes section** – this section automatically creates a time stamp and person stamp of when and by whom the encounter was created.

Epidemiological Tab

- This tab contains fields that gather epidemiological information. There are three sections in this tab: Contact Oriented, Place Exposures and Other. Additional fields in this tab will appear depending on responses provided in certain fields or based upon the disease.
    - **Contact Oriented section**
    - In this section there are seven items to complete. Five of the fields are drop-down menus (**Food handler**, **Healthcare worker**, **Group living**, **Day care association** and **Attends school**). There are three possible responses to select from: Yes, No, and Unknown. If "Yes" is selected an additional set of questions will appear. The other two items in this section are the "Occupation" field (a free text field) and a set of checkboxes.
    - **Place Exposures section**
    - In this section there are set of initial questions for place exposures. There are three possible choices to select from to answer the questions (Yes, No, Unknown). When answering "Yes" to some of the questions, additional items may appear.
        - **Search for an existing place field** - use this field to search for an existing place that may already exist in the system. Do this by typing name of the place into the "Search for an existing place" field (e.g. McDonalds).
        - If the place already exists in the system, it will appear. Select the correct place from the list of items that appeared. Click the "Save & Continue button. This will automatically fill in name and address of the place. The "Date of exposure" will still need to be entered.
        - If the place does not exist in the system, enter it in manually.
            - Place type – select the appropriate place type from the listing.
            - Name – type in the name of the place
            - Date of exposure – enter in the date of exposure
            - Enter in the address of the place: Street number, Street name, Unit number, City, State, County, Zip code.

        - Click on "Save & Continue"
    - After saving the CMR, more place information can be added using the three tabs (Place, Investigation and Notes).
        - **Place tab** – the place tab includes the following editable information fields: Date of exposure, place address, Latitude, Longitude, phone and email address.
            - **Latitude and Longitude** – to add the latitude and longitude information, use the "Look Up Address" option located directly below the Latitude and Longitude fields. By clicking on "Look Up Address" this verifies the address of the place event.
                - Use the **Update Coordinates** option to insert the latitude and longitude coordinates into the Latitude and Longitude fields.
            - **Show Map** option – with the latitude and longitude coordinates in the system, the Show Map option can be used to show a Google map of the place event.
        - **Investigation tab** – in the Investigation tab any specific investigation questionnaires/forms can be added to the place event.
        - **Notes tab** – the Notes tab automatically keeps a log of place event notes (administrative notes) and also contains a free text field in which any other notes can be added to the place event.
    - **Add a place exposure** – to add an additional place exposure, click on the "Add a place exposure" option and follow the steps above.
    - **Show Map of Places** – once the latitude and longitude coordinates are entered in to each place event, the Show Map of Places option can be used to display a Google map of all place events for the CMR.
- **Other section** – the "Other" section is used to input other data regarding the place event.
    - **Imported from** – this is a drop-down menu, select where the case was likely to have gotten ill, if the case became infected within the state select "**Utah**" from the drop-down menu.
    - **Risk factors** – type in a brief explanation of other risks that may be associated with the case's illness.
    - **Risk factors notes** – included more detailed notes about each risk factor entered.
    - **Other data 1 and Other data 2 fields** – the other data 1 and 2 fields are located at the bottom of the epidemiological tab and can be used to help a LHD further categorize an event.

Reporting Tab

- This tab is used for gathering information about the reporting agency. There are three sections to this tab: Reporting Agency information, Reporter information, and Reported Dates information.
  - Reporting Agency section –
    - **Search for a reporting agency** – enter in the name of the agency that first reported this disease case to public health. Reporting agencies could include: laboratory, doctor office, LHD, UDOH, etc.
      - If the reporting agency has been entered into the system previously, the agency's name will appear as the person entering the data begins typing it in. There is no need to use the "Add a new reporting agency" option if the reporting agency is already in the system. Doing so will create duplicate information in the system.
      - If the reporting agency being entered does not appear, click on "Add a new reporting agency" function and complete the fields.
        - **Reporting agency** – enter in the name of the reporting agency.
        - **Agency Type** – to select agency type click on the box next to the appropriate option in the list.
  - Reporter section –
    - **Reporter last name** – if available, type in the last name of the person that first reported case to public health. Type "Unknown" if not known and you have a first name. This is a required field, so it cannot be left blank.
    - **Reporter fist name** – if available type in the first name of the person that first reported case to public health..
    - **Area code** – type in the 3-digit area code of the phone number of the person that first reported case to public health (if available).
    - **Phone number** – type in the phone number of the person that first reported case to public health (if available).
    - **Extension** – if applicable type in the phone number extension of the person that first reported the case to public health.
  - Reported Dates section –
    - **Results reported to clinician date** – enter in the date when results of case were reported to clinician. This can be done manually or by using the calendar icon to select the date.
    - **Date first reported to public health** – (please do not leave this field blank) enter in the date when results of case were first reported to public health. This can be done manually or by using the calendar icon to select the date.

Investigation Tab

- If you click on the Investigation tab in "edit" view, you may see the following information: *"No investigation forms are configured for this event and/or disease."* This is normal. Your CMR was still entered correctly.
    - For many of the infectious diseases there will be no data fields shown in the "**Investigation**" tab. If this is the case for the CMR you are entering, just proceed to the next tab to continue filling out the CMR. However, if additional tabs and data fields do appear when you click on the "**Investigation**" tab, you will need to fill out these fields.
        - The fields may be check boxes, radio buttons, date fields, data fields, etc., please respond to the as many of the questions as possible in the investigation tab.

Notes Tab

Adding New notes

- In "Edit" mode open the "Notes" tab.
    - Type your note into the "**New notes**" text box.
    - If the note is an "administrative note" click the "Is admin" box to mark it as an administrative note. If you do not click the "Is admin" box, the note by default will be categorized as a clinical note.
    - When you are done writing the note click on "**Save & Continue**" to save the note.
        - This places your note up in "**Earlier notes**" section and it automatically stamps your note with your name and date & time that note was created.

      NOTE: A note that has been saved is permanent…it cannot be deleted. However, you can strike through the note to indicate that it is no longer valid.
        - To strike through the note click the "**Strike Through**" box located to the left of the note.
    - To add another note, type in the text box, and then click on "**Save & Continue**" to save the new note.

Sorting/Viewing Notes

- You can sort notes by three different views: All, Administrative, and Clinical.
    - NOTE: Tasks are automatically saved in the Notes tab.

Automatic Notes

- After any edits have been made to a previously saved CMR, you will notice in the "Notes" tab a section titled "Edited event", this feature shows the name (person who made the edit), date, and time that any edits or changes were made to the CMR. This section is automatically updated and will show once the CMR has been saved.

Administrative Tab

- The record number is located in the administrative tab.

- This tab contains a reference for the CMR for the following: Record number, MMWR year, MMWR week and Date record created.
  - Case / Outbreak –
    - **LHD case status** – (for LHD use only) select from the drop-down menu case status.
    - **UDOH case status** – (for UDOH use only) select from the drop-down menu case status.
    - **Outbreak associated** – select from the drop-down menu whether or not the case is associated with a known outbreak.
    - **Outbreak** – (for UDOH use only) enter in the outbreak name assigned to the outbreak (NOTE: to assign an outbreak name to a case, please contact the disease specific epidemiologist at the UDOH and work with them on assigning an outbreak name. This will ensure that outbreak naming convention format remains consistent).
  - Auditing / Investigation – This option is for Local Health Department use only. This is specific to certain health departments.
    - **Event name** – used by certain LHDs
    - **Acuity** – used by certain LHDs

"How To" Listing (Attachments, Search, Events, Print, Export, Tasks)

Search / more on creating CMRs

To conduct a search, use the "SEARCH" function located in the green bar along the top right of the screen.

- The search page gives you three initial criteria you can use to search on (Full-text name, Starts-with first name, and Starts-with last name.
  - You have the option to "hide" or "show" the other search criteria..
  - If your search does not return the results you were looking for…click the "Start over" button to clear the previous search results and select a new set of criteria to conduct the new search.
    - NOTE: If you wish to deselect previously selected criteria, hold down the "Ctrl" key while mouse clicking on the item you would like to deselect.
  - You can also clear a previous search by clicking on the "SEARCH" function at the top of the screen.
- Search Results:
  - A person with multiple disease events will be listed once in the search results, with a list of all disease events associated with that person indented. Each indented disease event is a separate event.
- Click on the appropriate function (edit, show, or create and edit CMR using this person) located to the right of the screen next to each event to proceed.

- Selecting "**edit**" will open up the event in edit mode. This allows you to change and edit event information.
- Selecting "**show**" will open up the event in show mode. You cannot edit from show mode.
- **If no event exists** for the case you search for, you can create a new CMR by using the "**No match, start a new CMR**" (located at the bottom of the screen). This will bring up a blank CMR for you to begin entering in a new event.
- If the person exists in the system, but the existing case is for a different event than what you are entering, you can use the "**Create and edit CMR using this person**" function.
  - This will create a new event for the patient and copy over demographic information.

Create a new CMR

Note: *it is very important to ALWAYS check to see if a record has already been started before entering any new data. Failure to complete to do so will create duplicate records in the database. See "Event Search" or "People Search" for instructions on how to search for an existing record.*

- Creating a new CMR:
  - At the top right of the screen click on "**New CMR**" (or when in the Events listing view you can click on "Create New Morbidity Report" button at the top right of the screen).
  - In the "**Demographics**" tab of the CMR enter the last name and first name in the corresponding fields.
  - Click on the "**Clinical**" tab at the top of the screen and select the patient's disease from the drop-down menu.
    - You must first select a disease and save ("Save & Continue" or "Save & Exit") the CMR before entering in additional information. Additional disease specific questions are only added to the CMR after the disease has been selected and the CMR has been saved.
  - Click the "**Save & Exit**" button at the top right of the screen.
  - A message will appear in the upper left hand side of the screen "CMR was successfully created".
  - Note: There is no need to fill out all the data fields before you create the CMR. Creating the CMR pulls up additional questions for each disease. The most expedient process is to put in limited information (name and disease), then save the CMR. Once you have done this you can proceed to add the rest of the information.

Create new CMR from existing CMR

This function can either be used to create a new event for this patient that is completely unrelated to the CMR being copied or that is closely related to the existing CMR.

- To create a new CMR from an existing CMR, find the CMR and open it up in the "show" mode.

- Click on the "**Create a new event from this one**" function. This brings up a box that allows you to do what is called a "Shallow" copy of the existing CMR or a "Deep" copy of the existing CMR.
- **Shallow Copy –** creates a new CMR for the patient that is completely unrelated to the existing CMR.
    - Only demographic information is copied over to the new CMR.
- **Deep Copy –** creates a new CMR for the patient that is related to the existing CMR.
    - Allows you to copy over demographic information as well as any of the following:
        - Clinical information without disease
        - Labs and lab results
        - Reporting information
        - Disease forms and answers
        - Notes

Create and edit CMR using this person

This function is used when you do a search for a CMR and the person you are searching for is listed in the system, but the event for which the person is listed is for a different disease event.

- Click on the "Create and edit CMR using this person" function. This will create a new disease event for this person.
- The demographic information is copied over to the new event. You will have to add the correct disease and other CMR information.

Add Attachment

UT-NEDSS allows the user to attach a file to the CMR. The following attachment categories are provided as part of a drop-down menu: correspondence, lab result, letter, x-ray.

- To attach a file to a CMR, open up the CMR in "show mode".
- Click the "Add Attachment" function (in red text – located just below the patients' name.
- Use the "File" field to locate and attach the desired file.
- Use the "Category" field to select an appropriate category for the file to be attached.
- Click the "Create" button to attach the file to the CMR.
    - NOTE: there is a size limit on attached files, so if you get an error message, it may be due to the fact that the file you are attempting to attach is too large.
- The attached file now appears under the "Existing Attachments" section.
- To open an attached file…locate it in the "Existing Attachments" section and click on "open" in red text, located on the right.
- To delete an attached file, click on "Delete" function for the attachment you want to delete.

NOTE: All attached files also appear in the "NOTES" Tab.

EVENTS Listing

This link takes you to a listing of all of the CMR's that you have the rights to see. The "Change View" tab can give you the ability to sort the documents.

Sort EVENTS Listing

You have the ability to sort the view or the order in which the CMR's are listed in the EVENTS listing.

- Sort by **Patient Name** – click on the "PATIENT NAME" heading at the top of the CMRS listing. This will sort the CMR's alphabetically.
- Sort by **Disease** - click on the "DISEASE" heading at the top of the CMRS listing. This will sort the CMR's alphabetically by disease.
- Sort by **Jurisdiction** - click on the "JURISDICTION" heading at the top of the CMRS listing. This will sort the CMR's alphabetically by jurisdiction.
- Short by **Case Status** - click on the "STATUS" heading at the top of the CMRS listing. This will sort the CMR's by case status.

Change View of EVENTS Listing

- To customize your view of the CMR's listed in the EVENTS listing use the "Change View" option.
    - Go to the EVENTS Listing.
    - In the EVENTS listing, at the top left of the screen, you will find in red text a "Change View" option.
    - Click on "Change View".
        - This opens up a "Change View" box with the following listings: "Event Investigation Status", "Queues", "Investigators", and "Diseases".
    - You can custom select which "Event Investigation Statuses", "Queues", "Investigators", and "Diseases" appear in your EVENTS listing by selecting from within each listing those items you want to appear.
    - To select multiple items, mouse click while holding down the "Ctrl" key.
    - If you want the system to remember your view each time you login, click the "Set as default view" box (located in the lower left corner of the "Change View" box).
    - Click the "Change View" button.
    - The EVENTS listing will now display only those CMR's that you have selected in the "Change View" box.
    - Items per page listed – you can select to view 25, 50, 75, or 100 cases from the drop-down box.

Contact Event vs. Morbidity Event

In the "EVENTS" listing you will notice that cases are categorized as either a *Contact Event* or *Morbidity Event.* A Contact Event is a case in which the patient is a contact to another event. A Morbidity Event is the actual case.

Promoting a Contact Event to a Morbidity Event

If a contact becomes an actual disease case, it is possible to promote a contact event to a morbidity event. To do this, find the contact event you would like to promote to a morbidity event in the EVENTS listing. Once you find contact event you want, click on it and view it in "Show" mode. From "Show" mode click on the "Promote to CMR" option. This will bring up a pop-up box that confirms you want to make the contact event a morbidity event by asking "Are you sure", click "yes". This promotes the contact event to its own morbidity event.

Once promoted to a morbidity event, the event will no longer be a "contact event", but the epidemiological link to original CMR for whom the case was a contact (or Parent CMR), is maintained. In the "Contacts" tab of the promoted morbidity event, a section called "Parent CMR" is created that shows who the promoted morbidity event is a contact of. The epidemiological link is also maintained in the "Parent CMR" under the "Contacts" tab in a section titled "CMR Contacts".

Using Bookmarks to Customize Your Views and Searches

Currently UT-NEDSS limits you to only one custom view at a time using the "Change View" option in the EVENTS listing. You may find it convenient to have more than one custom view of the EVENTS listing or may even want to save previously searched criteria when using the "Search. Below are steps for <u>bookmarking custom views using the Change View option in the EVENTS listing</u> and for <u>bookmarking search criteria using SEARCH</u>.

Bookmarking a custom view of the EVENTS listing

- Select all the elements you want in your view (see steps in the previous section titled "Change View of EVENTS Listing").
- Click the red "Change View" option at the top of the screen.
- Using your web browser's bookmark option, bookmark the page.
    - Give the new bookmark a name that will reflect your custom view settings.
- To access the bookmarked view again, just go to your web browser's bookmark listing and open up the correct bookmark.
- Any new cases entered in to the system will automatically be updated when accessing the saved bookmark.
- Repeat this process for setting up additional default/custom EVENTS listing views.

Customize view by bookmarking a "SEARCH"

- Click on the "SEARCH" located in the top right-hand corner of your screen.
- Enter the criteria you would like to search for into the data fields.
    - Complete only those fields you want to search for in the database.
- Press the "Submit Query" button to conduct the search.
- Using your web browser's bookmark option, bookmark the results of your search.
    - Give the bookmark a name that reflects your search.
- To access the bookmarked search again, just go to your web browser's bookmark listing and open up the correct bookmark.
- Any new cases entered in to the system will automatically be updated when accessing the saved bookmark.

- Repeat this process for setting up additional custom searches.

Print a CMR:

You can print a CMR from two different views.

Print CMR from "Show" mode

- Go to the "Show" mode of the CMR.
- Click on the "Print" (shown in red text at the top left area of the screen right under the patient's name).
- A Print options box will appear. Select which sections or tabs of the CMR you would like to print. To print the entire CMR, select "All".
- Click the Print button.
- This will bring up a printable version of the CMR.
- Proceed to print by selecting the print option from the file menu at the top of the web browser.

Print CMR from the EVENTS listing

- While in the viewing the EVENTS listing, scroll the mouse curser over the CMR you would like to print and click on the "Print" option.
- Follow the steps above for printing.

NOTE: the name and record number will appear at the top of each printed page of the CMR.

Exporting CMRs to a Spreadsheet (csv file)

- You can choose to export a single CMR to a spreadsheet or all CMR's in the EVENTS listing or in a SEARCH listing.

Exporting a single CMR

(NOTE - You can export a single CMR either from the "Show" mode of the CMR you would like to export or from a listing of CMRs.)

- In "Show" mode, click on the "Export to CSV" option in red text at the top of the screen just below the patient's name. In the CMRS listing move the mouse curser over the name of the case you would like to export and click on the "Export to CSV" for that case.
- This brings up an "Export" box in which you can select to include repeating events in your export: (click to select what you want to be included in your export):
  - Contacts
  - Lab Results
  - Treatments
  - Place Exposures
  - Additional Options
    - You can choose to have the short column names included in the export (instead of showing the entire column name, e.g. "patient_address_state", the short column names option will show only "State").

        - You can also choose whether to have your results exported as "Code" or as "Description" (e.g. Code for male/female would be a 1 or 2, where Description would show the word "male" or "female").
- Once you have selected what you would like to have included in your export, click on the "Export" button.
- A pop-up window appears that shows the CMR will be exported to an Excel file by default. Click "OK" and the CMR is exported to an Excel (csv file).

Exporting multiple CMR's using SEARCH

- You can export multiple CMRs after conducting a Search. **This is preferred to exporting multiple CMRs from the EVENTS listing.**
- After conducting a Search, click on the "Export All to CSV" option in red text.
- This brings up an "Export" box in which you can select to include repeating events in your export: (click to select what you want to be included in your export):
    - Contacts
    - Lab Results
    - Treatments
    - Place Exposures
    - Additional Options
        - You can choose to have the short column names included in the export (instead of showing the entire column name, e.g. "patient_address_state", the short column names option will show only "State").
        - You can also choose whether to have your results exported as "Code" or as "Description" (e.g. Code for male/female would be a 1 or 2, where Description would show the word "male" or "female").
- Once you have selected what you would like to have included in your export, click on the "Export" button.
- A pop-up window appears that shows the CMR will be exported to an Excel file by default. Click "OK" and the CMR is exported to an Excel (csv file).
- **NOTE: There is a 500 CMR limit to export.** For exports requiring more than 500 CMR's, submit a request to nedss@utah.gov or the export can be split into two or more different categories (example: by gender, by reported date, etc.) so that the total number of CMR's to be exported at one time will be less than 500 records.

Exporting multiple CMRs from the EVENTS listing

- From the Events listing go to the top right of screen and click on the "Export All to CSV" option in red text.
- This brings up an "Export" box in which you can select to include repeating events in your export: (click to select what you want to be included in your export):
    - Contacts
    - Lab Results
    - Treatments
    - Place Exposures
    - Additional Options
        - You can choose to have the short column names included in the export (instead of showing the entire column name, e.g.

"patient_address_state", the short column names option will show only "State").
    - You can also choose whether to have your results exported as "Code" or as "Description" (e.g. Code for male/female would be a 1 or 2, where Description would show the word "male" or "female").
- Once you have selected what you would like to have included in your export, click on the "Export" button.
- A pop-up window appears that shows the CMR will be exported to an Excel file by default. Click "OK" and the CMR is exported to an Excel (csv file).
- Once you have selected what you would like to have included in your export, click on the "Export" button.
- A pop-up window appears that show the CMR will be exported to an Excel file by default. Click "OK" and the CMR is exported to an Excel (csv file).

Tasks

Add a task

This feature is more of an individual case management tool in which an investigator can assign himself/herself a task that needs to be completed on a case investigation. However, this feature can be used within a local jurisdiction to assign tasks to another investigator within the same jurisdiction, in such situations where one investigator has agreed to cover for another investigator.

- To add a task for associated with an event, find the disease event and in "Show" mode, click on the "Add Task" function.
- The "**Add Task**" option allows you to add tasks that are associated with and event. Tasks can be assigned a priority level and can be set up as repeating tasks.
- To **create a new task** associated with an event, click on the "EVENTS" link (top right of screen). Scroll through the list of CMRs and find the CMR you need to add the task to. Click the "Add Task" link (located below the patients name in red text).
    - **Name field** – this is a free text field in which you can give a name to the task.
    - **Description field** – this is a free text field in which you can provide a more detailed description of the task.
    - **Category field** – this is a drop down menu used to categorize the task into one of the following: Appointment, Call Back, or Treatment.
    - **Priority field** – this is a drop down menu used to assign a priority to the task (Low, Medium, or High).
    - **Due date field** – this field allows you select a completion date or due date for the task.
    - **Repeat field** – this is a drop down menu that allows you to assign a task as a repeat task that must be completed on a daily, weekly, monthly, or yearly basis.
    - **Until field** – this field is associated directly with the "Repeat" field. Use the calendar to select a future date, to specify the length of time the task will continue to be a repeating task.
    - **User field** – this is a drop down menu in which you select the Investigator/UT-NEDSS user the task will be assigned to. In most cases this will be you.

    - **Create button** – use this button to create the task.

Viewing and editing tasks

To view any pending tasks that may be assigned to you, click on the "TriSano" logo (located in the upper left part of the screen). This brings up a listing of all task assigned for which you are responsible to complete. The tasks list will also appear first thing as a user logs into the UT-NEDSS system.

- The "**Change filter**" option is located at the top left part of screen just below the green TriSano bar. This function allows you to filter through your tasks for the following:
    - Show tasks for the last X days
    - Show tasks for the next X days
    - By disease
    - By name of individual assigned the task
    - By LHD jurisdiction
    - By tasks status
    - By any combination of the above options.
    - NOTE: Leaving a field blank shows all tasks in that section.
- From the Events Tasks listing you can edit the disease event or edit the task by clicking on the "Edit event" or "Edit task" functions, located in red text along the right edge of the screen.
- Any previously entered tasks associated with a CMR will appear in the "**Existing Tasks**" section, located directly below the "**New Task**" entry section.
    - Existing tasks can be sorted by any of the following: Due Date, Name, Description, Category, Priority, Assigned To, and Status fields.
    - **Status of task** – in the status column there is a drop-down menu that can be used to assign a status to a task (Pending, Complete, Not Applicable).
    - **Edit Task** – located directly below the task status drop-down, is used to make changes or edits to the assigned task.
    - **Edit Event** – this allows the investigator/UT-NEDSS user to make any edits or changes to the CMR event that may be necessary based on the completion of a task.

Data Entry – Conventions

General data entry information

- All data entered into UT-NEDSS needs to be entered using Proper Case (example: John Doe not john doe or JOHN DOE).
- Fields shaded in light orange are **required fields**.
- If a field is shaded in light yellow it means that if that field is filled out, other fields within that tab must be completed before you can "Save & Continue".
- Move from place to place using the "**tab**" key.

Entering dates

- **Calendar icon–** The calendar icon is there to assist you with dates. You do not have to use it. You can input the dates manually.
- To enter **dates**, you may use mm/dd/yy or mm/dd/yyyy or mm-dd-yy or mm-dd-yyyy or Month dd, yyyy.
- You CANNOT enter dates without // or --. For example, if you type March 3, 2003 as 03032003, you will receive an error message when you attempt to save the record, alerting you that the date entered "is not a valid date".
- The dates available / important to the case may vary by disease; for every case, please enter ALL available date information. **Onset date** – is the date in which symptoms started. For many diseases, this date is used to identify the infectious period, or develop epidemic curves. It is a very important field and should always be completed if possible.

Entering phone numbers

- You do not have to put the hyphen in the **phone number**. For example, rather than type 555-1212, you just type 5551212 and the program will automatically add the hyphen.

Garbage cans and remove buttons

- When fields are repeating (they say "add another field"), click on the remove button to remove the data from that field.

Deleting a CMR

Only duplicate cases should be deleted. When deleting a CMR you are actually doing what is considered a "soft delete". This means that the CMR can still be seen listed in the EVENTS listing, but it is "grayed out" (deleted cases appearing in the EVENTS listing will be shown as strike mark through the case's name). Deleted records will not be exported to CDC or to the IBIS Query Module.

To delete a CMR follow the steps below (a CMR can be deleted from either the "Show" mode or from the EVENTS listing):

1. To delete a CMR from "Show" mode, view the CMR in the "Show" mode and click on the "Delete" function listed in red text directly above the CMR tabs.
2. To delete a CMR from the EVENTS listing, click on EVENTS, find the CMR you would like to delete and click on the "Delete" function shown directly under case's name.
3. When deleting a CMR a pop up window will appear to confirm that you want to delete the CMR. Click "Yes" if you want to delete the CMR. Click "No" if do not want to delete the CMR. After the CMR has been deleted the CMR will still appear as "grayed out" in the EVENTS listing and the "Delete" function no longer appears.
4. You are still able to view data from a deleted CMR by clicking on the CMR in "Show" mode.

NOTE: Do not delete a CMR just because it is determined not to be a case. For a CMR that is determined to be not a case, select "not a case" from the drop-down menu under LHD case status or UDOH case status in the Administrative tab and route it as you would any other completed CMR. Feel free to enter a note in the notes tab indicating why the case was determined to be not a case. Both deleted cases and cases marked as "not a case" should be routed on to the UDOH. This will clear the case from your list.

LHD information (reviewer, investigator, etc.)

- This is automatically entered into the program. You do not need to manually enter any of this information.

Entering Animal Rabies Cases

When entering animal rabies cases into UT-NEDSS, only the following fields need to be completed.

Demographic Tab:
Last name: Animal Type (e.g. Bat, Dog, etc.)
First name: Animal Species (e.g. Silver hair, Mexican Free-tail, etc.)
County:
Human exposure:
Name of individual who submitted animal to animal control:
Name of owner of animal (if different than submitter):

Clinical Tab:
Disease: Rabies, animal

Laboratory Tab:
Test Type: Stain
Specify Test Detail: FRA
Test Result: NA
Reference Range: leave blank
Interpretation: Positive or Negative
Specimen Source: Brain tissue
Lab Test Date:
Specimen sent to UPHL: Yes

Contact Tab:
Name: Bite Victim name
Click "Save and Continue"
Click "edit contact event" to enter contact info (e.g. PEP information, etc.)

Brief note field

- From the CMRS listing, under the status column there is a "Brief note" field. Any note entered into the "Brief note" field will only be saved after clicking on one he "Action required" (directly under the Brief note field).

Routing CMR Events

An individual's ability to route a case depends on their assigned roles in the system. A case can be routed to a certain queue and/or an investigator depending on how it is set up with your LHD. Not all individuals will be able to conduct each routing step described in the following scenarios. The table below describes routing roles:

	Data Entry Tech	Surveillance Manager	Investigator	LHD Manager	UDOH Manager	Administrator
Create CMR	X	X	X	X		
View CMR	X	X	X	X	X	
Edit CMR	X	X	X	X		
Route to any LHD	X	X	X	X	X	
Accept for LHD		X				
Route to investigator		X				
Accept for investigation			X			
Investigate			X			
Approve event at LHD				X		
Approve event at UDOH					X	
Administer						X

Routing to other jurisdictions

- If you receive a case that belongs to another jurisdiction…don't reject the case, just route it directly to the correct jurisdiction. All roles (data entry, investigator, manager, etc.) have privileges that allow them to do this.
- Only in situations where you do not know the correct jurisdiction for a case should you reject it or route it to "Utah State".
- For out-of-state cases, you can route the case to the "Out of State" option and the UDOH will take care of it.
- **NOTE:** if you would like to retain the rights to view any case that you route on to another jurisdiction, you can select your LHD in the "Also grant access to:" check box.

Routing a Contact

- It is possible to route a contact of a case to another jurisdiction. For example, assume you are investigating a disease case in your jurisdiction, but a contact for the disease case lives in another jurisdiction, you will need to route that contact to the jurisdiction in which the contact resides.

- To route the contact you will first need to view the contact event in the "show" mode. Find the contact from either the original case patient (in the Contacts tab), or you can search for the contact by name using either the "People Search" or "Event Search" option.
- View contact in "show" mode and route the contact as you would route any other case event by clicking on the "Route to Local Health Depts." function, located in red text in the JURISDICTION column.
- **NOTE:** the one major difference with routing a "Contact" Event, is that there is no "State" approval step with routing a contact. By clicking the "Complete And Close" button, the event is moved to a status of closed.

Routing – Special circumstances

- Certain instances exist where you will route a case you are investigation to another jurisdiction (this means that you actually route the case to the other jurisdiction…not just give them access to view the case, while granting your jurisdiction the access to view the case).

Lead Jurisdiction vs. Investigating Jurisdiction

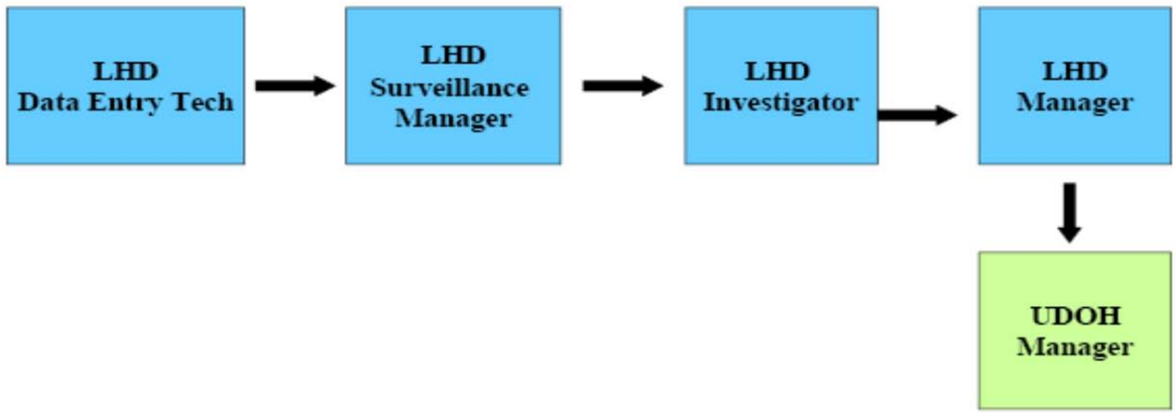
- The lead jurisdiction is the jurisdiction in which a case patient resides. An investigating jurisdiction in most circumstances will be the same as the lead jurisdiction. However, if a case patient is hospitalized in one jurisdiction, and resides in another jurisdiction, the jurisdiction of residence for the case patient becomes the Lead Jurisdiction for that case, while the jurisdiction in which the case patient is hospitalized can and should assist with the investigation they are not the lead jurisdiction.
  - In this instance the investigating jurisdiction (the jurisdiction where the case patient is hospitalized or temporarily staying) routes the case onto the jurisdiction of residence of the case. The investigating jurisdiction should grant their jurisdiction access to view the case so they can continue to assist the Lead Jurisdiction with the investigation.

Rerouting or reopening an event after it has been approved at the local level

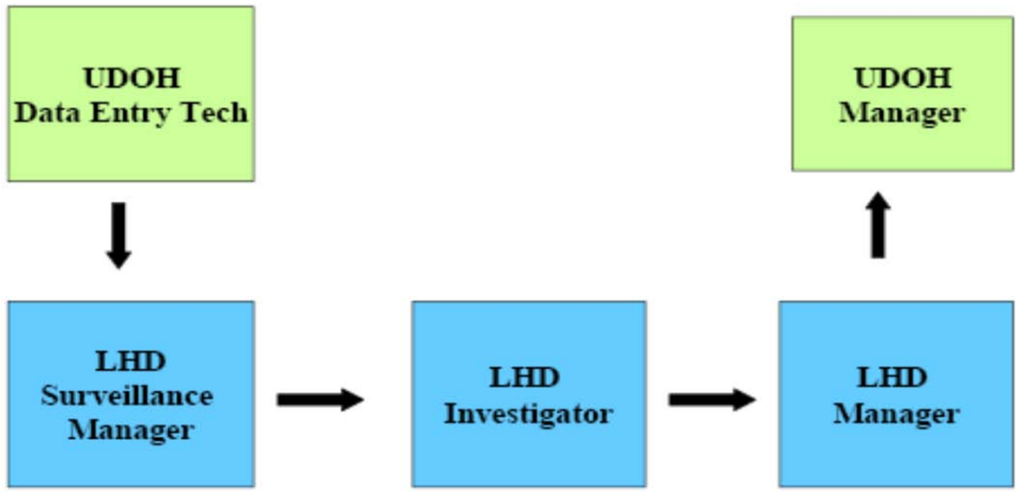
- An Investigator at a LHD has the ability to reopen an event (or pull it back a step) after it has been marked as complete or approved at the local level.
- To do this follow the below steps:
  - Click on the case in the "Show" mode
  - Under the status column you will see a radio button named "**Reopen**", click on the "**Reopen**" button.
  - This allows you to pull the event back a step in the approval process.
  - Once you have made the needed updates/changes to the event. Click on the "Approve" button to move it on through the approval/routing process.

Routing Scenarios

- General Routing will generally occur by one of the following two scenarios:
  - **Scenario 1**: LHD receives initial case report



  - **Scenario 2**: UDOH receives initial case report



All Roles

- To route a case to a Local Health Department you must first be in the "Show" mode of the CMR.
- Locate the "Route to Local Health Depts" link at the top of screen in red text.
- Click on the "Route to Local Health Depts" link.
- A "Route to Local Health Department" box will appear. From the drop-down menu, located next to "Investigating Jurisdiction" select the Local Health Department that will be investigating this case.
  - It is not necessary to check anything under the "Also grant access to" field. However if you would like to grant access to another public jurisdiction to have the ability to view the case, you can do so by clicking in the appropriate box.
- Click the "**Route Event**" button within the "Route to Local Health Depts" box.

- A "Route to Local Health Department" box will appear. From the drop-down menu, located next to "Investigating Jurisdiction" select the Local Health Department that will be investigating this case.
  - It is not necessary to check anything under the "Also grant access to" field. However, if you would like to another jurisdiction to be able to view the case, you may grant access to them by clicking the appropriate box.
- Click the "**Route Event**" button within the "Route to Local Health Depts" box.

Role-Specific routing instructions

Please note, you must be assigned to the UT-NEDSS role listed to perform the actions described in this section. NOTE: before or after receiving or sending a CMR through the routing process you may see the message *"Insufficient privileges to transition this event"*. This message means that the user logged into the system does not have the right to route the CMR at this point in the routing process. (For example, if your role is that of an "LHD Surveillance Manager" you may see the message if the CMR has yet to be routed to you or if you have accepted a CMR and successfully sent the CMR onto your LHD Manager.)
It is also important to note that despite not having "routing rights", all users have the right to edit a case or to re-route the case at all times. Every time a CMR is edited, this action is automatically logged in the Notes section of the CMR.

LHD Surveillance Manager Role

- To route or receive a case you must be in "Show" mode, or in the CMR listing.
- Under "STATUS" at the top right of the screen, click on "**Accept**" to accept the case for your LHD. This will bring up a "**Route locally to:**" field. In the "**Route locally to:**" field, you can choose to assign the case to a queue (these are specific to each county), to an individual, or both. Use the drop-down lists to select the appropriate queue or individual. The case will then be sent to the assigned investigator(s) that are set up to receive cases in certain queues.

LHD Investigator Role

- To route or receive a case you must be in "Show" mode, or in the CMR listing.
- Click "Accept" to accept a case for investigation.
- After completing the investigation click on the "Mark Investigation Complete" button.
- This will send the case to your LHD Manager for local approval.

LHD Manager Role

- To route or receive a case you must be in "Show" mode, or in the CMR listing.
- Review a case investigation for completeness in either the "**Edit**" or "**Show**" mode.
- Ensure that the "**LHD Case Status**" field under the "**Administrative**" tab has been completed.
- If the investigation is complete, click on "**Approve**" to send the case to the UDOH.
- If the investigation is not complete, click on "**Reopen**" to send the case back to the investigator.

UDOH Manager Role

- To route or receive a case you must be in "Show" mode, or in the CMR listing.
- Review a case investigation for completeness in either the "Edit" or "Show" mode
- If the investigation is complete click on "Approve" to approve the case at UDOH
- Complete the "UDOH Case Status" field under the "Administrative" tab has been completed
- If the investigation is not complete click on "Reopen" to send the case back to the LHD Manager, and use the "Notes" tab to document the reason for reopening the case.

Policy on reopening cases:

State program staff will reopen cases if the minimum required information to complete a communicable disease investigation is missing. The minimum required information is determined by UDOH based on CDC case definition and includes data required for assignment of case status, disease specific information listed in disease plans and forms required for CDC reporting, cluster/outbreak investigation, or MMWR week assignment.

If an investigation is not complete, state program staff will click on "Reopen" to send the case back to the LHD manager and use the "Notes" tab to document the reason for reopening the case. If the information requested is unavailable, this may be specified by the LHD in the Notes section. If the LHD investigator requires assistance to obtain the needed information, for whatever reason, they are to contact the state program staff for assistance or to obtain the information with state resources.

Routing "Not a Case" procedure (for UDOH)

- From either "Show" mode or the CMR listing, Click on "Route to Local Health Department"
- Select "Utah State" as the Investigating Jurisdiction and click on "Route Event"
- Click on "Approve" multiple times to route the case all the way through to "Approved by State" (you will be assigned all of the roles required to allow you to do this).

Technical Support for UT-NEDSS

Data loss

- UT-NEDSS will automatically log you out of the system if the system is open and idle for more than 2 hours**.** Any unsaved data will be lost when this happens.
- All UT-NEDSS sessions will automatically close after 10 hours time, regardless of activity. Any unsaved data will be lost when the system automatically closes.
- Also, hitting TAB plus the backspace key at the same time will delete all non-saved information.

- While saving data, wait until the ‘progress’ bar (bottom of browser window, green ‘thinking bar’) has stopped. You will see the word “Done” appear on the bottom left hand corner when the data has been saved. You can now move to a new tab to enter more data on the same page.

Error Messages

- An error message may appear after clicking “Save & Continue” or “Save & Exit” due to the fact that a required field was left blank. You may even notice an error message that does not match the current tab or screen you are looking at when saving the CMR. This can happen if when completing the CMR you did not save after completing each tab, and the error message is related to a previous tab.
- If you need to enter two items from a **drop down list**, use the Ctrl key and click with the mouse to add each item.
- **Investigation tab** – If you click on the Investigation tab in “edit” view, you may see the following information: **No investigation forms are configured for this event and/or disease.** That is normal. Your CMR was still entered correctly.

Reporting problems with UT-NEDSS/TriSano

Please send an email describing the error/problem to: nedss@utah.gov