

## UT-NEDSS User Guide

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**Confidentiality Statement**

The data and information found in UT-NEDSS is strictly confidential and cannot be disclosed, released or made public except under the conditions outlined in Utah Code Section [26-6-27](#) (see below).

Any one who violates Title 26 – [Chapter 6](#) of the Utah Code by releasing or making public confidential information, or by breaching the confidentiality requirement of Chapter 6, is guilty of a class B misdemeanor ([26-6-29](#)).

**Utah Code -- Title 26 -- Chapter 06 -- Section 27****26-6-27. Information regarding communicable or reportable disease confidential -- Exceptions.**

(1) Information collected pursuant to this chapter in the possession of the department or local health departments relating to an individual who has or is suspected of having a disease designated by the department as a communicable or reportable disease under this chapter shall be held by the department and local health departments as strictly confidential. The department and local health departments may not release or make public that information upon subpoena, search warrant, discovery proceedings, or otherwise, except as provided by this section.

(2) The information described in Subsection (1) may be released by the department or local health departments only in accordance with the requirements of this chapter and as follows:

(a) specific medical or epidemiological information may be released with the written consent of the individual identified in that information or, if that individual is deceased, his next-of-kin;

(b) specific medical or epidemiological information may be released to medical personnel or peace officers in a medical emergency, as determined by the department in accordance with guidelines it has established, only to the extent necessary to protect the health or life of the individual identified in the information, or of the attending medical personnel or law enforcement or public safety officers;

(c) specific medical or epidemiological information may be released to authorized personnel within the department, local health departments, official health agencies in other states, the United States Public Health Service, the Centers for Disease Control and Prevention (CDC), or when necessary to continue patient services or to undertake public health efforts to interrupt the transmission of disease;

(d) if the individual identified in the information is under the age of 18, the information may be released to the Division of Child and Family Services within the Department of Human Services in accordance with Section **62A-4a-403**. If that information is required in a court proceeding involving child abuse or sexual abuse under Title 76, Chapter 5, the information shall be disclosed in camera and sealed by the court upon conclusion of the proceedings;

(e) specific medical or epidemiological information may be released to authorized personnel in the department or in local health departments, and to the courts, to carry out the provisions of this title, and rules adopted by the department in accordance with

this title;

(f) specific medical or epidemiological information may be released to blood banks, organ and tissue banks, and similar institutions for the purpose of identifying individuals with communicable diseases. The department may, by rule, designate the diseases about which information may be disclosed under this subsection, and may choose to release the name of an infected individual to those organizations without disclosing the specific disease;

(g) specific medical or epidemiological information may be released in such a way that no individual is identifiable;

(h) specific medical or epidemiological information may be released to a "health care provider" as defined in Section **78B-3-403**, health care personnel, and public health personnel who have a legitimate need to have access to the information in order to assist the patient, or to protect the health of others closely associated with the patient. This subsection does not create a duty to warn third parties, but is intended only to aid health care providers in their treatment and containment of infectious disease; and

(i) specific medical or epidemiological information regarding a health care provider, as defined in Section **78B-3-403**, may be released to the department, the appropriate local health department, and the Division of Occupational and Professional Licensing within the Department of Commerce, if the identified health care provider is endangering the safety or life of any individual by his continued practice of health care.

Amended by Chapter 3, 2008 General Session

## General Instructions

### Accessing UT-NEDSS:

The UT-NEDSS 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-NEDSS 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 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.

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 Summers or Valoree Vernon at UDOH (538-6191) and they 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.

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

NOTE: While logged into UT-NEDSS you can access this document along with the steps for contacting the help desk by right clicking on the “**Support**” link located in the lower left corner of the screen. Upon right clicking, select “Open Link in New Window”. This will open a new web-browser that opens to <http://health.utah.gov/nedss> . The UT-NEDSS support documents are located in the “UT-NEDSS User’s Resources” section.

**Rapid Start/Quick Start for Entering New Case:**


- Go to: <https://health.utah.gov/utnedss/>
- **Duplicate Prevention** - any time you click on the “NEW CMR” function, you will be reminded to conduct a search for the case of which you want to enter. The on screen reminder shown states, “Before creating a new morbidity event, please search for the person in question. You may find that:
  - The event you're trying to create already exists, in which case you can either do nothing or edit the existing event.
  - The person in question is already in the system, in which case you can start a new CMR with that person's information
- Use the search option provided on this screen by entering in the name of the case for which you are entering.
- You may also search for a case by clicking on the “**SEARCH**” function located in the top right of screen.
- The SEARCH function brings up two different options, **Event Search** or **People Search**.
- Click on “**Event Search**” or “**People Search**”
  - Note: **Event Search** allows you to refine your search more than **People Search**.
- Enter patient name into “**full-text name**” box (of the Event Search tab), this can be last name, first name, or the first and last name.
- Click on “**Submit Query**” (do not use the “Enter” key use the “Submit Query” button).
- Check to see whether the patient AND disease have been entered

- If not listed in the search results: click on “**New CMR**” at the top right of the screen or select “**Start a CMR with the criteria you searched on**” under any search results that were returned.
  - If the patient and disease have already been entered, DO NOT create a new CMR unless this is a new disease event for this patient in which case you can create a new record by clicking on the “Create New Patient Event” 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.
  - To edit an existing case, click on the record number of the appropriate case.
- 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 have click on the “**Save & Continue**” button or the “**Save & Exit**” button, questions that are specific to that disease are loaded onto the electronic form. At this time there is no easy way switch out the disease specific questions.
  - **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.
- Click on the “**Save and Exit**” button (top right of screen)
- Click on the “Route to Local Health Depts” link;
  - A “Route to Local Health Department” box will appear. From the drop-down menu 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 jurisdiction, giving them the ability to view the case, you can do so by clicking in the appropriate box.
  - To read about special circumstances where the investigating jurisdiction should route a case they are investigating to another LHD Jurisdiction click [here \(Lead Jurisdiction vs. Investigating Jurisdiction\)](#).
- Click the “**Route Event**” button within the “**Route to Local Health Depts.**” box (See section on Routing to continue the routing process).
- Now the remainder of the CMR can be completed.
- Click on the red “**Edit**” link located near the top left of the screen.
- Begin entering data in the CMR tab-by-tab.
- The “**Save & Continue**” button saves what you have entered, while keeping you in the “**Edit**” mode and while keeping your place in the investigation form.

- The “**Save & Exit**” button saves your work and takes you to the “**Show**” mode. You cannot not edit the form in the “**Show**” mode. To edit the form you must be in the “**Edit**” mode.
- When the case investigation is complete, click on “**Save & Exit**” one last time and approve the case to route it onto the State Health Department.
  - In the CMRS listing under the “Status” column, click the “Accept” button to route it on the State.

## CMR Instructions Tab-by-Tab

### • Demographic Tab:

- Person Information – 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 – enter date of birth. 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. It will not save your date and it will not notify you that it has not saved this information.
  - 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.



- The program also will calculate the age for you after clicking on “Save & Continue”. Calculated age appears directly under “Age at onset”.
  - Telephone/Email –
    - **Phone type** – select from the drop-down menu the phone type (home, work, mobile, unknown)
    - **Area Code** – type in the 3 digit area code (for example: 801 or 435).
    - **Phone number** – type in the phone number, with or without the dash (555-5555 or 5555555).
    - **Email address** – if available you can enter in the patient's email address.
    - **New Telephone / Email** – to add additional phone numbers click on the New Telephone / Email link.
    - **Delete** – click on the icon that looks like a trash can to delete an entire Telephone / Email entry.
  - Demographics –
    - **Birth gender** – select from the drop-down menu case's gender.
    - **Ethnicity** – select from the drop-down menu the case's ethnicity.
    - **Race** – select from the menu the case's race.
      - More than one option can be selected by holding down the “Ctrl” key while making the selection with the mouse click.
    - **Primary Language** – select from the drop-down menu the case's primary language if known.
  - Disease Specific Questions – depending on the disease chosen under the “Clinical” tab, certain questions may appear towards the bottom of the “Demographics” tab. Complete these questions to the best of your knowledge.
- **Clinical Tab:**
  - Disease information –
    - **Disease** – select from the drop-down menu the disease for this case.
    - **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.
      - **NOTE:** [If for whatever reason you need to change the disease name associated with an event...you can. Go to the “Change disease associated with CMR” for step-by-step instructions on how to do change the disease associated with the event.](#)
    - **Onset date** – enter the date of onset of the disease (you can enter the date manually or use the calendar icon).
    - **Date diagnosed** - enter in the date when the individual was diagnosed. This can be done manually or by using the calendar icon to select the date.
  - Hospitalized Health Facilities –
    - **Hospitalized** – select option from the drop-down menu.

- If you select “**No**” that the case was not hospitalized you can move on to the “**Status**” section of this tab.
  - **Health facility** – fill in this field only if the case was hospitalized. Use the drop-down menu to select the facility where the case was hospitalized.
  - **Admission date** – fill in this field only if the case was hospitalized. Enter in the hospital admission date. This can be done manually or by using the calendar icon to select the date.
  - **Discharge date** - fill in this field only if the case was hospitalized. Enter in the hospital discharge date. This can be done manually or by using the calendar icon to select the date.
  - **Medical Record Number** – enter in the patient’s medical record number if available.
  - **Add a hospital** – to add an additional hospital click on the [Add a hospital](#) link.
  - **Remove** – use the “[Remove](#)” link just to the right of the “Medical Record Number” to remove or delete an entire hospitalization entry.
- Status – these fields only need to be filled out if they pertain to the case.
- **Died** – select option from the drop-down menu.
  - **Date of Death** – enter in the date of death manually or use the calendar icon to select the date. This can be done manually or by using the calendar icon to select the date.
  - **Pregnant** – select from the drop-down menu.
  - **Pregnancy due date** – enter the due date manually or select the date by using the calendar icon. This can be done manually or by using the calendar icon to select the date.
- Treatments –
- **Treatments given** – use drop-down menu to fill out field.
  - **Treatment** – type in the type of treatment provided.
  - **Date of Treatment** – enter in the date of treatment manually or use the calendar icon to select the date.
  - **Add a treatment** – to add an additional treatment click on the [Add a treatment](#) link.
  - **Remove** – use the “[Remove](#)” link just to the right of the “Date of Treatment” to remove or delete an entire treatment entry.
- Clinicians –
- Use the “**Search for an existing clinician**” field to see whether or not the clinician you are entering already exists in the system. Enter in the clinician’s name.
    - If the clinician already exists in the system it will appear as you begin typing in the name. As the name appears, press the “enter” key or click on the name that appears and the clinician’s information will automatically be filled out below. There is no need to click the “Add a clinician” if the clinician is already in the system. Doing so will just duplicate the information in the system.

- If the clinician you are entering does not already exist in the system click on the “Add a clinician” link in red text and enter in the clinician’s information.
  - **Last name** - type in the clinician’s last name if available.
  - **First name** - type in the clinician’s first name if available.
  - **Middle name** – type in the clinician’s middle name if available.
  - **Phone type** – use drop-down menu to select phone type.
  - **Area Code** – type in the 3 digit area code (for example: 801 or 435).
  - **Phone number** – type in the phone number, with or without the dash (-) (555-5555 or 5555555).
  - **Extension** – enter in applicable phone extension.
- **Add a clinician** – to add an additional clinician click on the Add a clinician link.
- **Remove** – use the “Remove” link just to the right of the “Extension” to remove or delete an entire clinician entry.
- Diagnosing facility –
  - Use the “**Search for a diagnosing facility**” field to see whether or not the diagnosing facility already exists in the system.
    - If the diagnosing facility already exists in the system it will appear as you begin typing in the name. As the name appears, press the “enter” key or click on it and the information for the diagnosing facility will automatically be filled out below. There is no need to click the “Add a diagnosing facility” if the facility is already in the system. Doing so will just duplicate information in the system.
    - If the diagnosing facility you are entering does not already exist in the system click on the “Add a diagnosing facility” link in red text and enter in the information.
      - **Name** – begin to type the name of the diagnosing facility into the “Name” field.
      - **Type** – use the drop-down menu to select the type of facility of the diagnosing facility.
  - **Add a diagnosing facility** – to add an additional diagnosing facility click on the Add a diagnosing facility link in red text.
  - **Remove a diagnosing facility** – to remove a diagnosing facility click on the garbage can icon just to the right of the diagnosing facility record.
- Additional disease specific questions – if additional disease specific questions appear below the diagnosing facility section. Please answer those questions. If you have questions regarding any of the additional disease specific questions please contact the disease responsible epidemiologist at the Utah Dept. of Health at 801-568-6191.

- **Laboratory Tab:**

- **Lab Name** – enter in the name of the lab where the test was run (e.g. ARUP).
- **Test type** – you can begin entering in the name of the test type and auto-fill text will appear. General test types such as: culture, serology, IgM, treponemal, etc. have been pre-programmed in and will appear as you begin to type. As they appear scroll down and select the test type from the list. However, if the test type you need does not appear after beginning to type...you will need to type in the entire name of the test type or select “other” from the populated list.
  - Note: It is important to make sure that the “**Test type**” is entered in correctly.
- **Specify test detail** – (this field is optional) type in the test name (e.g. if the test type is serology IgA, the test name would be HBsAg).
- **Test result** – (this field is required in order to “save” the screen) enter the following into this field:
  - the Test result number if the lab result comes with actual numbers (e.g. for a serological test the lab result may show a number such as 1.2 or 5 ug/ml, etc.)
  - or**
  - type in the name of the organism into this field (e.g. Salmonella Enteritidis, Legionella, Pneumonia, etc.).
- **Reference range** – (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.
- **Interpretation** – (this field is optional) select from the drop-down menu the interpretation of the lab result (e.g. Positive, Negative, Inconclusive, etc.).

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	Specify test detail	Test result	Reference range	Interpretation
Culture		N. meningitidis		
Culture		Salmonella		
Culture		Campylobacter species		
Culture		Campylobacter jejuni		
Serology - total	HBsAb			Positive

Serotype	Escherichia coli	O157:H7		
Serotype	Salmonella	Enteritidis		
Serology – IgM	Brucella	1.5		Negative
Smear				
Susceptibility				
Rapid test	Influenza A			Positive
AFB				Positive
PCR	Chlamydia			Positive
PCR	Norovirus	G2		Positive
DNA	M. tuberculosis			Positive
Western Blot	HIV			Positive
Treponemal test				Positive
Quantiferon		3.4		Positive
EIA	Shiga Toxin			Positive

- **Specimen source** – type in closest type (e.g. stool) or unknown.
  - **Collection date** – enter in the collection date of specimen manually or use the calendar icon to select the date.
  - **Lab test date** – enter in the date the lab test was conducted manually or use the calendar icon to select the date. This can be done manually or by using the calendar icon to select the date.
  - **Specimen sent to UPHL?** – use drop-down menu to complete field.
  - **Adding an additional lab result to existing lab result** – to add an additional lab result to an existing lab test click on the Add a lab result to this lab link.
  - **Add a new lab** – this feature is different from the “Add a new lab result to this lab” in that you will use this feature to add a new lab result. This would be a new lab result separate from an already existing lab result.
  - **Removing additional lab result under an existing lab result** – you can remove any additional lab results that are tied to an existing lab result by clicking the “Remove this result” link, but if you delete the last or only lab result under that particular lab result entry, you will delete the entire lab result entry.
  - **Remove/Delete lab results** – use the “Remove lab and its results” link to remove or delete an entire lab result entry.
  - **Additional disease specific questions** – if additional disease specific questions appear below the diagnosing facility section. Please answer those questions. If you have questions regarding any of the additional disease specific questions please contact the disease responsible epidemiologist at the Utah Dept. of Health at 801-568-6191.
- **Contacts Tab:** – entering contacts and place data is a multi-step process. To enter in all contacts information follow the below steps:
    - You can use the “search” field 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.

- **First** - In “Edit” mode, enter in the name, phone numbers, etc. for all contacts. Use the Add a contact link to add additional contacts.
    - **Disposition:** for Local Health Department use only.
    - Use the Add a contact link to add additional contacts.
  - **Second** - Click on the “**Save & Continue**” button.
    - This saves the contact and brings up a new link feature called “Edit contact event”.
  - **Third** - Click on the “Edit contact event” link (to add additional information to each contact entered...you will have to click on the “Edit contact event” link for each individual contact).
    - By clicking on the “Edit contact event” link you are taken into a new page with the following tabs **Demographic, Clinical, Laboratory, Epidemiological, Investigation, and Notes** (tabs are similar to the tabs in the CMR for the original case patient). NOTE: The information to be filled out in these tabs is for the contact and not the original case patient.
      - If the contact is a household contact and has the same street address, you can use the “**Copy from original patient**” button to have the system automatically fill in street address information.
  - **Forth** - Proceed to fill out the information under each tab for each of the contacts. The tabs are identical to the tabs in the CMR for the original case patient (except there is no “Contacts” tab and no “Administrative” tab).
  - **NOTE:** 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 “Original Patient” is shown. To go back to the CMR tabs for the original patient, just click on the “Original Patient” link, which is shown as the original patients’ name.
  - To exit the data entry fields for the “contacts” and return to the data entry fields for the original case, click on the “**Original Patient:**” link, shown as the original case’s name in the top right area of screen.
- **Convert a Contact to a Case:**
    - To convert a contact 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.
    - **Description Field** – this is a free text field which allows the investigation to give a more detailed description of the encounter event.
    - **Location Field** – use the drop down list to select the location of where the public health encounter occurred.
  - More than one encounter event can be added to the CMR. To add additional encounters click the “Add an encounter”.
  - Once an encounter event has been saved to the CMR...a “**Remove**” check box and “**Edit encounter event**” will appear. These two options allow you to delete the encounter or to edit the encounter.
  - The “**Edit encounter event**” brings 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.
    - **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.
    - **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:**
  - Contact Oriented Fields – in this section there are five fields to complete. Four of the fields are drop-down menus (**Food handler**, **Healthcare worker**, **Group living**, and **Day care association**) and the fifth field (**Occupation**) is a free text field in which you type in the case’s occupation. All of these fields except for the “Occupation” field may prompt other questions depending on your answer.
  - Other –
    - **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.
    - **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.
  - **Other data 1, 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:**
  - Reporting Information –
    - **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 you are entering into the system has been previously entered into the system, as you type, you will see it appear in a yellow drop down list. Press the “enter” key or click on it. This automatically fills in the information for the reporting agency below. There is no need to use the “Create a new reporting agency” link if it is already in the system...doing so will create duplicate information in the CMR.
      - If the reporting agency you need does not appear, click on “Create a new reporting agency” 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 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. At this time this is a required field, so it cannot be left blank.
    - **Reporter first name** – if available type in the first name of the person that first reported case to public health.
    - **Phone type** – select phone number type from the drop-down menu.
    - **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.
    - **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.
  
  - **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.
  - **Edited event** – 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.
  - **Sorting/Viewing Notes** – you can sort notes by three different views: All, Administrative, and Clinical.
    - NOTE: Tasks are automatically saved in the Notes tab.
- 
- **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

### UT-NEDSS “How To” Listing

**Search** – There use to be two options for searching for events in the UT-NEDSS system, “Event Search” or “People Search”. These two options have now been consolidated into one Search option.

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 5 different criteria you can use to refine or narrow a search (name, demographic, clinical, event, epi/reporting criteria).

- You have the option to “hide” or “show” the available search criteria for each of the five different categories.
- If you do not select individual criteria within a category, it will automatically default to search for all the criteria in a category.
- 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.

- **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.
- **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.

### **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 CMRS listing view you can click on “New Morbidity Report” link in red text at the top left of 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.

**Delete 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 CMRS listing but it is “grayed out” (deleted cases appearing in a People Search or Event Search query list will be struck through). Deleted records will not be exported to CDC or to the IBIS Query Module.

To delete a CMR follow the steps below:

1. A CMR can be deleted from either the “Show” mode or from the CMRS listing.
2. To delete the record click on the red “Delete” link.
3. This will bring up a pop up window that confirms 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. At the top right of the screen click on “New CMR”
4. After the CMR has been deleted the case will still be listed in the CMRS listing but will be “grayed out” and the “Delete” option no longer appears.
5. You are still able to view data in a deleted CMR by clicking on the “Show” mode option.

NOTE: You shouldn't delete a CMR just because it ends up not being a case. For CMR's that end up not being a disease 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. You can enter a note indicating why the case has been marked as “not a case”. Both deleted cases and case marked as “not a case” should still be routed on through to the UDOH. This will clear the case from your list.

**Add Attachment:** The UT-NEDSS system allows you to attach a file to the CMR. The following attachment categories are provided in the system: correspondence, lab result, letter, x-ray.

- To attach a file to a CMR, either locate the CMR in the EVENTS listing or search for the CMR and click on it 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 desire 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 will now appear “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.

NOTE: A listing of all attached files also appears in the NOTES Tab.

**Sort EVENTS Listing:**

You have the ability to sort the view or the order in which the CMR's are listed in the CMRS 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.
- Sort 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 CMRS Listing:

- To customize your view of the CMR's listed in the CMRS listing use the “Change View” option.
  - Go to the CMRS Listing.
  - In the CMRS 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: “Events”, “Queues”, and “Diseases”.
  - You can custom select which “Events”, “Queues”, and “Diseases” will appear in your CMRS listing by selecting from within each listing those items you want to view.
  - Select multiple items by mouse clicking 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 CMRS 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. However, if you select to view 50 or more case events per page, the “Route to Local Health Depts.” and “Status” functions disappear and are no longer available from the EVENTS listing. By eliminating these functions when 50 or more cases are viewed, it allows the system to still maintain its ability to run efficiently.
    - If you would like to route or update the status of an event while viewing 50 or more at a time, you will have to click on the event in the “show” mode and do it from there.

**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. 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 are looking

for, 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.

**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 CMRS listing. You may find it convenient to have more than one custom view of the CMRS listing or may even want to save previously searched criteria when using the “Event Search” or “People Search” search functions. Below are steps for bookmarking custom views using the Change View option in the CMRS listing and for bookmarking search criteria using “Event Search” or “People Search”.

- Bookmarking a custom view of the CMRS listing:
  - Select all the elements you want in your view (see steps in the previous section titled “Change View of CMRS 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 CMRS listing views.
- Customize view by bookmarking a “SEARCH”:
  - Click on the “SEARCH” located in the top right-hand corner of your screen.
  - Select with “Event Search” or “People Search”.
  - 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:
    - While in the CMR go to the “Show” mode.

- Click on the “Print” or “With Notes” option (each is shown in red text at the top left area of the screen right under the patient’s name).
  - The “Print” option will bring up a printable CMR without the notes included in the “Notes” tab.
  - The “(With Notes)” option will bring up a printable CMR with the notes from the “Notes” tab included.
- This brings 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 CMRS listing:
  - While in the CMRS listing, scroll the mouse cursor over the CMR you would like to print and click on either the “Print” or “With Notes” options.
    - The “Print” option will bring up a printable CMR without the notes included in the “Notes” tab.
    - The “(With Notes)” option will bring up a printable CMR with the notes from the “Notes” tab included.
  - This brings 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.

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

#### **Export a CMR to Spreadsheet (csv file):**

- You can choose to export a single CMR to a spreadsheet or all CMR’s in the CMRS listing.
  - Exporting a single CMR:
    - You can export a single CMR either from the “Show” mode of the CMR you would like to export or from the CMRS listing.
    - 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 cursor 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 “Contacts”, “Place Exposures”, “Lab Results” and/or “Treatments” to be included in the export.
    - 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).
  - Exporting multiple CMR’s using Event Search
    - You can export multiple CMRs after conducting a Search. **This is preferred to exporting multiple CMRs from the CMRS listing (option below), because at this time more data is exported when the search feature is used.**



- After conducting a Search with criteria such as jurisdiction and/or disease, click on 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
    - You can also choose whether to have you 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 show 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 CMRs from the CMRS 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 “Contacts”, “Place Exposures”, “Lab Results” and/or “Treatments” to be included in the export.
  - 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).

**Add 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 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.
- 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.
- 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.

**Route CMR Event:**

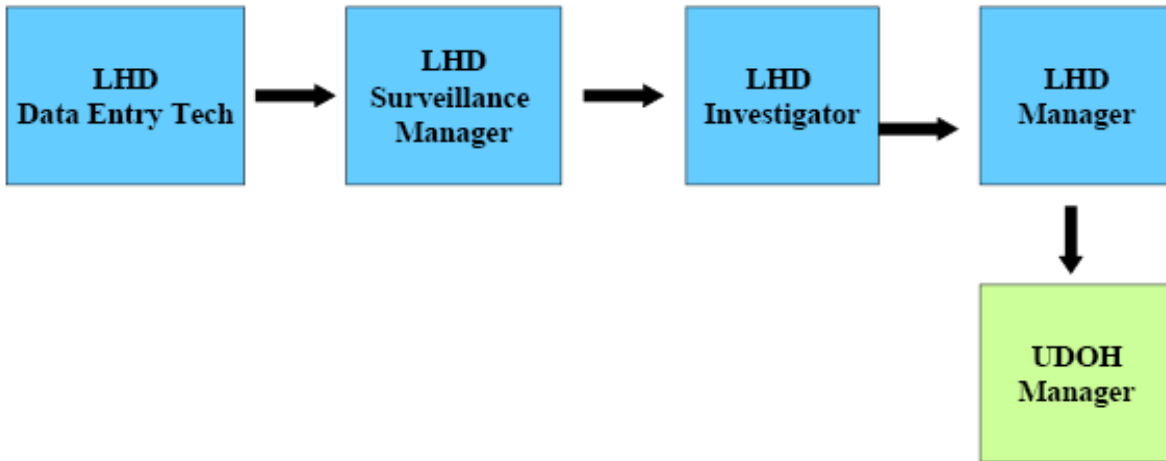
- An individual’s ability to route a case depends on their assigned roles in the system. A case can be routed to a certain queue and/or an investigator depending on how it is set up with your LHD. Not all individuals will be able to conduct each routing step described in the following scenarios. The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

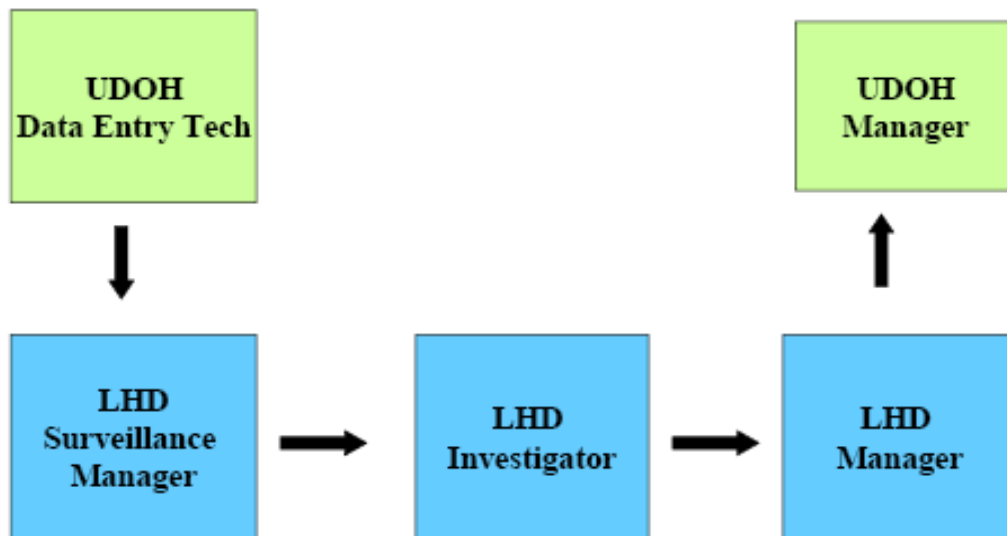
- **Routing to other jurisdictions** – (for instructions on how to route a case see the Rapid Start/Quick Start section on page 7 or click [here](#))
  - If you receive a case that belongs to another jurisdiction...don’t reject the case, just route it directly to the correct jurisdiction. All roles (data 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 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.
- **LHD Surveillance Manager Role**
  - To route or receive a case you must be in “Show” mode or be 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.  
NOTE: This option is specific to certain users, you may not have this right.
  - 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.  
NOTE: This option is specific to certain users, you may not have this right.
  - The case will then be sent to the assigned investigator or investigators that are set up to receive cases in certain queues.  
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 person logged into the system does not have the right to route the CMR at its (the CMR’s) current location 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. Any time a change to a CMR is made, a log of who made the changed is saved in the Notes tab of the CMR.
- **LHD Investigator Role**
  - To route or receive a case you must be in “Show” mode or be 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.  
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 person logged into the system does not have the right to route the CMR at its (the CMR’s) current location in the routing process. For example, if your role is that of an “LHD Investigator” you may see the message if the CMR has yet to be routed to you for the investigation or if you have completed the investigation 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. Any time a change to a CMR is made, a log of who made the change is saved in the Notes tab of the CMR.

- **LHD Manager Role**

- To route or receive a case you must be in “Show” mode or be 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.

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 person logged into the system does not have the right to route the CMR at its (the CMR’s) current location in the routing process. For example, if your role is that of an “LHD Manager” you may see the message if the CMR has yet to be routed to you for investigation or if the CMR is currently with the LHD investigator being completed or the investigation has been completed and was successfully sent to the UDOH. 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. Any time a change to a CMR is made, a log of who made the change is saved in the Notes tab of the CMR.

- **UDOH Manager Role**

- To route or receive a case you must be in the “Show” mode or be 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. Notify the LHD Manager by phone or email and use the “**Notes**” tab to document the reason for reopening the case.

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 person logged into the system does not have the right to route the CMR at its (the CMR’s) current location in the routing process. For example, if your role is that of an “UDOH Manager” you may see the message if the CMR has yet to be routed to

you because the investigation for the CMR has yet to be completed or you have sent the CMR off to a LHD for investigation. 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. Any time a change to a CMR is made, a log of who made the change is saved in the Notes tab of the CMR.

- **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).



<p><b>Data Entry – Conventions:</b></p>
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- Addresses - Put the house number in the “street number” and the rest in the “street name”. Spell out all directional acronyms. for example N should be NORTH.
  - If the address is 12 West Temple– then 12 goes in the street number and West Temple goes in the street name.
  - If the address is 12 North Main, then 12 is the street number, and North Main is the street name.
  - If the address is 12 N Main, then 12 is the street number, and North Main is the street name.
  - If the address is 120 S 3900 W, then 120 is the street number, and South 3900 West is the street name.
  - If the only address given is a **PO Box**...then enter the entire PO Box # in the “Street name” field. NOTE: With a PO Box leave the “Street number” field blank, but remember to fill out city, state and zip.
- Names and other information in text boxes:
  - The requirement has changed. All data entered into UT-NEDSS needs to be entered using Proper Case (example: John Doe not john doe or JOHN DOE).
  - Spell out city names and do not use slang or initials. For example use Salt Lake City, rather than SLC or other naming conventions.
- **Enter in Dates**
  - To enter **dates**, you can 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, the system will not recognize that as a date. It will not save your date and it will not notify you that it has not saved this information.



- At this time, we know that there are dates in the program that you may not be familiar with, for example “lab test date” and “diagnosis date”.
- As always, “onset date”, “lab test date”, and “reporting date” are important for all events and should be entered.
- **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 one that should always be answered.
- **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.

### Miscellaneous information:

- 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 shaded in light yellow within that tab must be completed before you can “Save & Continue”.
- Move from place to place using the “**tab**” key.
- **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.
- **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.
- 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.
- 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.
- **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.
- **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.
- **LHD information (reviewer, investigator, etc.)** –This is automatically entered into the program. You do not need to manually enter any of this information.
- **Pregnancy field** – The pregnancy field is located on the same line as the death data.
- **Parent/ guardian information** – Please put this information into the open text area in the “notes” tab.

- **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.
- **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).
- **Notes area** – Enter all note information in the “new notes” area. It will automatically stamp your note with your name. Hit “Save & Continue” to move your notes into the permanent file. You can never delete a note, but you can strike through the note to indicate that it is no longer valid.
- **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.
- **Garbage cans and remove buttons** – When fields are repeating (they say “add another field”), click on the garbage can or the remove button to remove the data from that field.
- **Treatment field** – the treatment field problems are similar to the clinician field.
  - Additional treatment data can be entered in a text box located under the treatment field.
- **EVENTS** - 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.
  - **Data loss** – UT-NEDSS automatically will 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 4 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.
- **Identification number**
  - The ID number is located in the administrative tab.
- **TriSano and Disease Form Feedback**
  - If you would like to provide feedback on either a disease form or the system in general, you can do this through the gray “TriSano Feedback” link at the bottom left of each TriSano screen.

- While logged into UT-NEDSS/TriSano, RIGHT click on the and highlight “open link in new window”
- Under the Submit Feedback heading click on “Simple Feedback Form” or “Usability Survey” to provide general feedback. Click on “Disease Form Feedback” to provide feedback on a specific disease form.
- Log in to **CollabNet** with your CollabNet user name and password; if you have questions on this username and password, contact UDOH Epi.

## Technical Support for UT-NEDSS

NOTE: this document is available separately by going to <http://health.utah.gov/nedss/>. It is located under the UT-NEDSS User's Resources Section titled "Help Desk ("Remedy") Instructions for UT-NEDSS".

### Accessing the DTS Remedy Help Desk System to Report Technical Problems

Customers can report computer problems or requests through the DTS Help Desk by telephone, through the web, or via live chat.

- Customers can reach the DTS Help Desk by calling 538-3440 or 1-800-678-3440.
- If all DTS Customer Service Representatives (CSR) are busy, customers have the option to leave a voice mail or stay on the line.
- Customers may also submit problems or requests online at <http://dts.utah.gov/> by selecting "Service Desk" from the right hand side.

The problem or request will be documented and tracked in the DTS Remedy Help Desk System.

Customers are given an initial call-back target (a time period in which a DTS employee will contact the customer by phone). Problems are assigned a problem priority. (Targets are not given for requests).

- Urgent Priority, 30 clock minutes
- High Priority, 1 clock hour
- Medium Priority, 1 business hour
- Low Priority, 1 business hour

Tickets are assigned to the Technical Staff in "Assigned" status. The IT Staff is responsible for assigning problems to Technical Support Staff members. Once the technician is assigned, they will begin work on the problem, change the ticket status to "Work in Progress", and contact the customer.

### Step-by-Step Instructions for Accessing the DTS Remedy Help Desk System to Report a Computer Problem:

- Open a browser and go to <http://dts.utah.gov>
  - This will bring up the DTS Home Page as shown below. On the right side of the DTS home page, locate and click on "Service Desk".
- After clicking on "Service Desk"... options for contacting the DTS Service Desk will appear (24/7 via Live Phone, Submit Service Request via Web, 24/7 Live Online Help). Select the option you would like.

- 24/7 via Live Phone – Customer Support Center or DTS Help Desk numbers are shown if you wish to submit a problem by phone.
- 24/7 Live Online Help – selecting this option will open a live chat window with a DTS customer service representative.
  - Just type in your name, email address, your question, and click “CHAT”. A customer service rep. (CSR) will respond to your question in real time. \*\*\*NOTE\*\*\* Live Chat only supports basic computer problems and the CSR will normally submit a trouble ticket.
- Submit Service Request via Web – Here is where you can submit computer problems directly through the DTS Remedy Help Desk System. When you click to “Create a Service Request”, the Utah Master Directory (UMD) login screen appear. Enter in UMD login information.
  - After a successful login to the Remedy System, you are offered a choice of “Remedy Requester” or “DTS Approval Central”.
  - Select “Remedy Requester.”
  - Then select “Create Request”
    - When you select “Create Request”, it takes you to a page where you can enter your problem or request.
      - Selections on this screen include:
        - **Case Type Definitions.** Select this and it will bring up the DTS definition of a “Problem” or a “Request”.
        - **Urgency Guidelines.** Selecting this displays the different levels of urgency from “Low” to “Urgent” with a brief explanation of each.
        - **Summary.** This is where you can provide a brief summary of the problem (i.e. can’t print, GroupWise problem, etc.).
        - **Details.** Here you can go into details of your computer problem, like what you were trying to do, error messages received, other symptoms, etc. Please try to be as specific as possible so the technician can quickly determine the cause and the correct solution.
        - **Attachments.** If you click on the “Attachment” window (lower right), an “Add” button will appear where you can add documents, screenshots of error messages, etc.  
NOTE: The attachment size is limited to 2 MB.
        - Click on “Save” to submit the problem or request. This will bring up a window letting you know the request was successfully submitted.

You may review the progress of problems or requests you have submitted by returning to the Customer Support Center page at any time. Select “View and

Manage Your Recent Problems or Requests” and a list of your recent tickets will be displayed. Simply click on the one you wish to review.

NOTE: The following important information is provided at the bottom of the screen when submitting a problem or request:

*During DTS business hours (7:00 a.m. to 6:00 p.m. Monday through Thursday), your problem will typically be dispatched within 15 minutes of receipt. Problems reported via the Internet outside business hours are typically dispatched the next business day. Hours for agencies other than DTS may be slightly different.*

*If it is outside business hours and your problem requires immediate attention, please enter the ticket and then call the Customer Support Center at 801-538-3440 or 800-678-3440.*

**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.)