

# Linking to an Event

May 2023

# Agenda

- Linking Events
- Create a Linked Event for a New Person
- Create a Linked Event for an Existing Person
- Link to an Existing Event
- Link to Multiple Events

# Linking Events

- Why do we link events?
- How to View Linked Events
- Searching

# Why do we link events?

- Linking creates a connection between a person's disease event and...
  - An outbreak of that disease
- OR
- To another person's event
- Linking Events to one another or to an Outbreak
  - Allows users to track related events
  - Helps track and prevent disease spread

# How to View Linked Events

## Event Summary

### Basic Information

Event ID:	170002710
Disease:	Gonorrhea (300)
Person:	<a href="#">Grape Fanta</a> Birth Date: 04/21/1982 ( 41 Female ) Phone: (111) 222-2333
Type:	Batch
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) <a href="#">(View)</a>
Attachments:	0 attachment(s) <a href="#">(Add)</a>
Notifications:	<i>Best date of illness identification is missing</i>

- On the Event Summary dashboard under Basic Information, you will find the Linked Events/Contacts row
  - This indicates if the event is currently linked with any other events and the number of linked events
    - In the example above, the event is linked to 0 (zero) events
  - To view currently linked events or to link an event, click the [\(View\)](#) hyperlink

# How to View Linked Events

Linked Events - Grape Fanta

**Filter Linked Events**

Disease:

**Linked Events**

Event ID ▲	Person	Status	Cre
170002617	Fanta, Orange	Open	05/2/

Displaying link(s) 1...1

**Link Events**

Operation:  ▼

Disease:

Link Type:  ▼

Relationship:  ▼

**Demographics**

First Name:  Middle

Suffix:  Maiden

- Linked Events screen
  - Filter Linked Events section
    - Filters the linked events in the Linked Events table
  - Linked Events table
    - List of all events linked to the event
  - Link Events section
    - Where all the linking gets done
      - Create Linked Event
      - Link to Existing Event
      - Link to Multiple Events

# Searching



- Always search for the person you are linking to your case prior to doing any linking using the Manage People and Facilities icon
  - Displays all persons, regardless of the county/group the user is assigned to (all users see all persons)
- If you do not find the person
  - Create a linked event for a new person
- If you find the person but there is no existing event that corresponds to your case
  - Create a linked event for an existing person
- If you find the person and an existing event that corresponds to your case
  - Link to the existing event

# Create a Linked Event for a New Person



# Create a Linked Event for a New Person

**Link Events**

Operation:

Disease:

Link Type:

Relationship:

**Demographics**

First Name: <input type="text" value="Cherry"/>	Middle Name: <input type="text"/>	Last Name: <input type="text" value="Coca Cola"/>
Suffix: <input type="text"/>	Maiden/Other Name: <input type="text"/>	Alias: <input type="text"/>
Birth Date: <input type="text" value="03/08/1991"/> <input type="button" value="Calendar"/>	Gender: <input type="text" value="Female"/>	Social Security Nu <input type="text"/>

**Contact Information**

Address Type: <input type="text" value="Home"/>	Street: <input type="text" value="159 Red Can Ct"/>	
City: <input type="text" value="Knightdale"/>	State: <input type="text" value="NC"/>	Zip Code: <input type="text" value="27545"/>
County: <input type="text" value="Wake County"/>	Country: <input type="text" value="USA"/>	
Home Phone: <input type="text"/>	Mobile Phone: <input type="text" value="(919) 555-9513"/>	Work Phone: <input type="text"/>
Email: <input type="text"/>		

- Linked Events screen
- Link Events section
  - Operation – Create Linked Event
  - Disease – Select appropriate disease
  - Link Type – Select appropriate link type
  - Relationship – Select appropriate relationship
- Demographics and Contact Information sections – Complete fields with available information
- Click the Save button

# Create a Linked Event for a New Person

Linked Events								
Event ID	Person	Status	Create Date	Disease	Link Type	Relationship	Action	Secondary Case Links
170002618	Coca Cola, Cherry	Open	05/25/2023	Gonorrhea (300)	Other	Other	<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>

Displaying link(s) 1...1 << First < Prev 1 / 1 Next > Last >>

Save

Dashboard

Help

- The linked events is now in the Linked Events table above the Link Events section
- Click the Dashboard button at the bottom left of the Linked Events screen to return to the event summary

# Create a Linked Event for a New Person

## Event Summary

### Basic Information

Event ID:	170002710
Disease:	Gonorrhea (300)
Person:	<a href="#">Grape Fanta</a> Birth Date: 04/21/1982 ( 41 Female ) Phone: (111) 222-2333
Type:	Batch
Investigation Status:	Open
Linked Events/Contacts:	<b>1 linked event(s)/contact(s)</b> ( <a href="#">View</a> )
Attachments:	0 attachment(s) ( <a href="#">Add</a> )
Notifications:	Classification: Unspecified
	Event is in workflows [ <a href="#">View List</a> ]
	County of residence: Wake County

- The number of linked events is now updated in the Linked Events/Contacts row

# Create a Linked Event for a New Person Demonstration



# Create a Linked Event for an Existing Person

# Create a Linked Event for an Existing Person

## Link Events

Operation:  ▼

Disease:  ▼

Link Type:  ▼

Relationship:  ▼

- Linked Events screen
- Link Events section
  - Operation – Create Linked Event
  - Disease – Select appropriate disease
  - Link Type – Select appropriate link type
  - Relationship – Select appropriate relationship
- Click the Select Person... button

# Create a Linked Event for an Existing Person

**Search Party**

**Search Criteria**


Party ID:

Last Name:

First Name:


Maiden/Other Name:

Alias:

Birth Date:  

(Inexact)

**Search Results**

Name	Birth Date	Street Address	City	State	Zip Code	External ID
▶ Fanta, Orange 	08/19/1981	123 Soda Ln	Raleigh	NC	27613	PDBFLVJCYWBH

Showing 1 to 1 of 1 entries

First Previous **1** Next Last

- The Search Party window will open
- Search Criteria
  - Party ID – Enter the Party ID of the person you wish to link to your case
  - Hit the enter key or click the Search button
  - Select the person from the Search Results

# Create a Linked Event for an Existing Person

**Link Events**

Operation:

Disease:

Link Type:

Relationship:

**Demographics**

First Name: <input type="text" value="Orange"/>	Middle Name: <input type="text"/>	Last Name: <input type="text" value="Fanta"/>
Suffix: <input type="text"/>	Maiden/Other Name: <input type="text"/>	Alias: <input type="text"/>
Birth Date: <input type="text" value="08/19/1981"/>	Gender: <input type="text" value="Male"/>	Social Security Num: <input type="text"/>

**Contact Information**

Address Type: <input type="text" value="Home"/>	Street: <input type="text" value="123 Soda Ln"/>	
City: <input type="text" value="Raleigh"/>	State: <input type="text" value="NC"/>	Zip Code: <input type="text" value="27613"/>
County: <input type="text" value="Wake County"/>	Country: <input type="text" value="USA"/>	
Home Phone: <input type="text"/>	Mobile Phone: <input type="text" value="(919) 555-7894"/>	Work Phone: <input type="text"/>
Email: <input type="text"/>		

- The Demographics and Contact Information sections are completed
  - You cannot edit this information at this time
- Click the Save button



# Create a Linked Event for an Existing Person

Linked Events								
Event ID ▲	Person	Status	Create Date	Disease	Link Type	Relationship	Action	Secondary Case Links
170002618	Coca Cola, Cherry	Open	05/25/2023	Gonorrhoea (300)	Other	Other	<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>
170002622	Fanta, Orange	Open	05/25/2023	Gonorrhoea (300)	Other	Other	<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>

Displaying link(s) 1...2 << First < Prev 1 / 1 Next > Last >>

Save

Dashboard

Help

- The linked event is now in the Linked Events table above the Link Event section
- Click the Dashboard button at the bottom left of the Linked Events screen to return to the event summary

# Create a Linked Event for an Existing Person

## Event Summary

### Basic Information

Event ID:	170002710
Disease:	Gonorrhea (300)
Person:	<a href="#">Grape Fanta</a> Birth Date: 04/21/1982 ( 41 Female ) Phone: (111) 222-2333
Type:	Batch
Investigation Status:	Open
Linked Events/Contacts:	2 linked event(s)/contact(s) ( <a href="#">View</a> )
Attachments:	0 attachment(s) ( <a href="#">Add</a> )
Notifications:	Classification: Unspecified
	Event is in workflows [ <a href="#">View List</a> ]
	County of residence: Wake County
	<a href="#">Active outbreak: Wake County Love Club Inc 2022</a> ( <a href="#">Link to</a> )

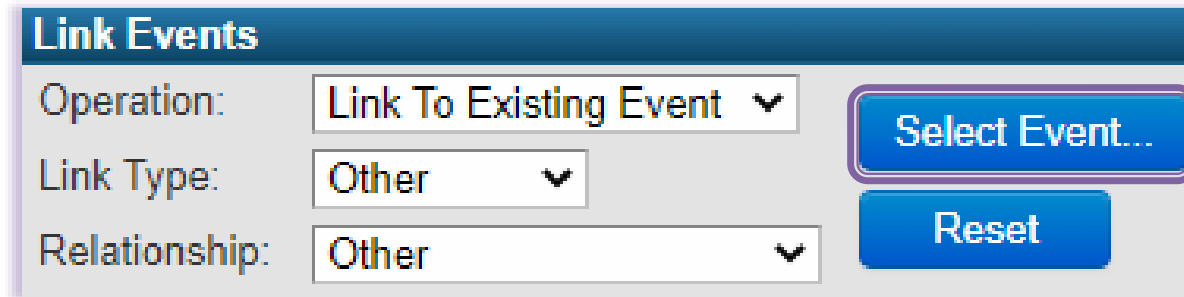
- The number of linked events is now updated in the Linked Events/Contacts row

# Create a Linked Event for an Existing Person Demonstration



# Link to an Existing Event

# Link to an Existing Event



The screenshot shows a form titled "Link Events" with the following fields and buttons:

- Operation: Link To Existing Event (dropdown menu)
- Link Type: Other (dropdown menu)
- Relationship: Other (dropdown menu)
- Select Event... (button)
- Reset (button)

- Linked Events screen
- Link Events section
  - Operation – Link to Existing Event
  - Link Type – Select appropriate link type
  - Relationship – Select appropriate relationship
- Click the Select Event... button

# Link to an Existing Event

**Search Case**

**Search Criteria**

Type: Normal

Event ID: 170002623

Last Name:

First Name:

Maiden/Other Name:

Birth Date: MM/DD/YYYY

Gender:

**Search Results**

Event ID	Name	Birth Date	Status	Disease	Effective From	Gender	External ID
▶ 170002623	Cherry Sprite	09/24/1998	Open	Gonorrhea (300)	05/25/2023	Female	PDBFLVJPDRBM

Showing 1 to 1 of 1 entries

First Previous **1** Next Last

- The Search Case window will open
- Search Criteria
  - Type – Ensure Normal is selected
  - Event ID – Enter the Event ID of the person’s event you wish to link to your case
  - Hit the enter key or click the Search button
  - Select the event from the Search Results

# Link to an Existing Event

**Link Events**

Operation:

Disease:

Link Type:

Relationship:

**Demographics**

First Name: <input type="text" value="Cherry"/>	Middle Name: <input type="text"/>	Last Name: <input type="text" value="Sprite"/>
Suffix: <input type="text"/>	Maiden/Other Name: <input type="text"/>	Alias: <input type="text"/>
Birth Date: <input type="text" value="09/24/1998"/>	Gender: <input type="text" value="Female"/>	Social Security Num: <input type="text"/>

**Contact Information**

Address Type: <input type="text" value="Home"/>	Street: <input type="text" value="359 Lemon Lime Rd"/>	
City: <input type="text" value="Wendell"/>	State: <input type="text" value="NC"/>	Zip Code: <input type="text" value="27591"/>
County: <input type="text" value="Wake County"/>	Country: <input type="text" value="USA"/>	
Home Phone: <input type="text"/>	Mobile Phone: <input type="text" value="(919) 555-8426"/>	Work Phone: <input type="text"/>
Email: <input type="text"/>		

- The Disease, Demographics section and Contact Information sections are completed
  - You cannot edit this information at this time
- Click the Save button

# Link to an Existing Event

Linked Events									
Event ID ▲	Person	Status	Create Date	Disease	Link Type	Relationship	Action		Secondary Case Links
170002618	Coca Cola, Cherry	Open	05/25/2023	Gonorrhea (300)	Other	Other	<a href="#">Edit</a>	<a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>
170002622	Fanta, Orange	Open	05/25/2023	Gonorrhea (300)	Other	Other	<a href="#">Edit</a>	<a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>
170002623	Sprite, Cherry	Open	05/25/2023	Gonorrhea (300)	Other	Other	<a href="#">Edit</a>	<a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>

Displaying link(s) 1...3 << First < Prev 1 / 1 Next > Last >>

Save

Dashboard

Help

- The linked event is now in the Linked Events table above the Link Event section
- Click the Dashboard button at the bottom left of the Linked Events screen to return to the event summary



# Link to an Existing Event

## Event Summary

### Basic Information

Event ID:	170002710
Disease:	Gonorrhea (300)
Person:	<a href="#">Grape Fanta</a> Birth Date: 04/21/1982 ( 41 Female ) Phone: (111) 222-2333
Type:	Batch
Investigation Status:	Open
Linked Events/Contacts:	<b>3 linked event(s)/contact(s)</b> ( <a href="#">View</a> )
Attachments:	0 attachment(s) ( <a href="#">Add</a> )
Notifications:	Classification: Unspecified
	Event is in workflows [ <a href="#">View List</a> ]
	County of residence: Wake County

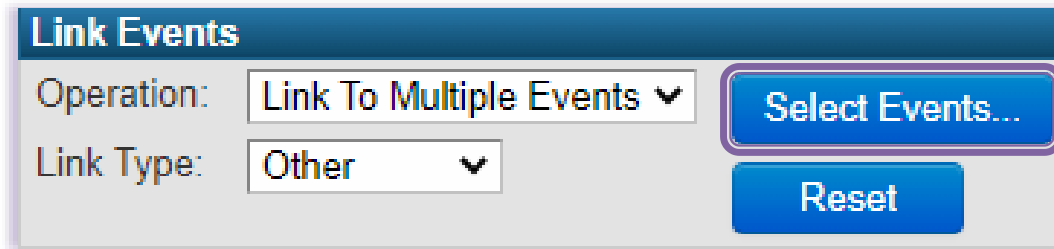
- The number of linked events is now updated in the Linked Events/Contacts row

# Link to an Existing Event Demonstration



# Link to Multiple Events

# Link to Multiple Events



**Link Events**

Operation:  ▼

Link Type:  ▼

[Select Events...](#)

[Reset](#)

- Linked Events screen
- Link Events section
  - Operation – Link to Multiple Events
  - Link Type – Select appropriate link type
- Click the Select Events... button

# Link to Multiple Events

**Search Case**

**Search Criteria**

Type: Normal ▾

Event ID: 170002710

Last Name:

First Name:

Maiden/Other Name:

Birth Date: MM/DD/YYYY

(Inexact)

Gender:

**Search Results**

Event ID	Name	Birth Date	Status	Disease	Effective From	Gender	External ID
▶ 170002710	Grape Fanta	04/21/1982	Open	Gonorrhea (300)	04/21/2022	Female	PDBFIXYQAEB

Showing 1 to 1 of 1 entries

First Previous **1** Next Last

Select Select All Cancel Help

- The Search Case window will open
- Search Criteria
  - Type – Ensure Normal is selected
  - Event ID – Enter the Event ID of the person’s event you wish to link to your case
  - Hit the enter key or click the Search button
  - Select the event from the Search Results
- Repeat this for each event you are linking to your case

# Link to Multiple Events

**Link Events**

Operation:

Link Type:

**Link To Following Events**

Event ID	Person	Status	Create Date	Disease	Action	Secondary Case Links
170002623	Sprite, Cherry	Open	05/25/2023	Gonorrhea (300)	<a href="#">Delete</a>	<a href="#">View Secondary Links</a>
170002618	Coca Cola, Cherry	Open	05/25/2023	Gonorrhea (300)	<a href="#">Delete</a>	<a href="#">View Secondary Links</a>
170002622	Fanta, Orange	Open	05/25/2023	Gonorrhea (300)	<a href="#">Delete</a>	<a href="#">View Secondary Links</a>
170002710	Fanta, Grape	Open	04/21/2022	Gonorrhea (300)	<a href="#">Delete</a>	<a href="#">View Secondary Links</a>

- The Events will list below the Link Events section
- Once you have selected all the events to link to your case, click the Save button

# Link to Multiple Events

## Linked Events

Event ID	Person	Status	Create Date	Disease	Link Type	Relationship	Action	Secondary Case Links
170002618	Coca Cola, Cherry	Open	05/25/2023	Gonorrhea (300)	Other		<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>
170002622	Fanta, Orange	Open	05/25/2023	Gonorrhea (300)	Other		<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>
170002623	Sprite, Cherry	Open	05/25/2023	Gonorrhea (300)	Other		<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>
170002710	Fanta, Grape	Open	04/21/2022	Gonorrhea (300)	Other		<a href="#">Edit</a> <a href="#">Delete Link</a>	<a href="#">View Secondary Links</a>

Displaying link(s) 1...4

<< First < Prev 1 / 1 Next > Last >>

Save

Dashboard

Help

- The linked events are now in the Linked Events table above the Link Event section
- Click the Dashboard button at the bottom left of the Linked Events screen to return to the event summary

# Link to Multiple Events

## Event Summary

### Basic Information

Event ID:	170002624
Disease:	Gonorrhea (300)
Person:	<a href="#">Strawberry Sunkist</a> Birth Date: 02/15/2004 ( 19 Female ) Phone: (919) 555-7426
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	<b>4 linked event(s)/contact(s)</b> ( <a href="#">View</a> )
Attachments:	0 attachment(s) ( <a href="#">Add</a> )
Notifications:	Classification: Confirmed
	Event is in workflows ( <a href="#">View List</a> )
	County of residence: Wake County

- The number of linked events is now updated in the Linked Events/Contacts row



# Link to Multiple Events Demonstration





**Thank you for joining today!**

Trainings: [ncedsstrainings@dhhs.nc.gov](mailto:ncedsstrainings@dhhs.nc.gov)

Helpdesk: [NCEDSSHelpDesk@dhhs.nc.gov](mailto:NCEDSSHelpDesk@dhhs.nc.gov)