

New Person, New Event or New Lab?

How can you tell and avoid creating duplicates?

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New Person, New Event, or New Lab?



New Person – you add a new person when you have searched and determined that no person matching your search criteria exists

New Person, New Event or New Lab?



New Event – you add a new event when you search and determine that a person matching your criteria exists

AND

- They have a closed event

OR

- They have an open event where the first positive lab's specimen collection date is more than 90 days (before or after the lab you have)

New Person, New Event or New Lab?



New Lab – add a new lab onto an existing event on an existing person when you confirm that

- The person matched your search criteria
AND
- They have an open event where the first positive lab's specimen collection date is within 90 days (before or after the lab you have)

Searching Recap

»» Conducting a Proper Search

Search Features

Users can search 2 ways to determine if a person/event already exists:

- Person Search



- Displays all PERSONS, regardless of the county group(s) you see/are assigned to

- Event Search



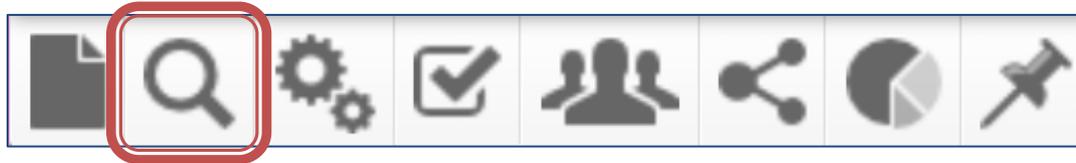
- Only displays persons with disease EVENTS within the county group(s) the user has permission to see

Person Search Feature



- ALL users can see ALL persons in NC COVID
- Searching for a person can ensure that you don't create a duplicate person/event
- Searching for a person is the RECOMMENDED search procedure

Event Search Feature



- Users can only see events in the county group(s) they are assigned
- Searching by event can lead to mistakes with creating duplicate persons

Event Summary	
Basic Information	
Event ID:	170002427
Disease:	Coronavirus (COVID-19)
Person:	Crystal Rose Gault Birth Date: 06/29/1979 (49 Female) Phone: (704) 999-1111 Deduplication Status: Pending Deduplicate
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Attachments:	0 attachments (0 / 10)

Search vs Select Person

- The Search Person icon is NOT the same as going straight to the Create Event icon and clicking the Select Person button
- When you search on a person from the Create Event screen you are telling the application to create a new event for the person you select from the search

Create Event - Person Information

Event Information

Disease:

Add Person

First Name: Middle Name: Last Name:

Suffix: Maiden/Other Name: Alias:

Mother's Maiden Name:

Birth Date: Gender: Social Security Number:

Contact Information

Address Type: Street:

City: State: Zip Code:

County: Country:

Home Phone: Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:

Searching for a Person

»» Screen Shots and
Guidance

Search Person Screens



- Search Party (Person) screen allows you to search for a person using most of the demographic fields that exist within the Person Summary

Search Party

Search Criteria

Class:

Category:

Party ID:

Last Name:

First Name:

Maiden/Other Name:

Alias:

Birth Date:

Gender:

Street:

City:

State:

Zip Code:

Mother's Maiden Name:

Social Security Number:

Phone:

Email:

Sort Options

Sort By:

Sort Order:

Search Options

Search History:

Search Soundex:

Search Person Screens

Searching Tips

- Search using one or more fields and with wildcards
- Be Creative!
 - Name (first and/or last combination) & DOB
 - Name Only—using variations of names that have alternative spellings or first names with common nicknames
- DOB only
- SSN
- Phone Number

Examples of possible names to Search

	Smith-Jones*
Robert*	Smith-Jones*
Robert*	*Smith*
Bob*	Smith*
Rob*	Smi*
Robert*	*Jones*
Rob*	*Jones*
Ro*	*Jon*
Bob*	*Jones*

* This is not every possible combo

Use your best judgement to search

Search Person Screens

- Search results display to the right side of search criteria
- In order to determine if the person(s) in the search results are a match to your person, double-click the person's name to see the person summary screen

Search Party

Search Criteria

Class:

Category:

Party ID:

Last Name:

First Name:

Maiden/Other Name:

Alias:

Birth Date:

Gender:

Street:

City:

State:

Zip Code:

Mother's Maiden Name:

Phone:

Email:

Sort Options

Sort By:

Sort Order:

Search Options

Search History:

Search Soundex:

Search Results

Search Results		
Name	Birth Date	Street Address
▶ Rose Quartz, Crystal <input type="button" value="info"/>	06/28/1972	5678 Hea

Showing 1 to 1 of 1 entries

Search Person Screens

- You will only see the events for the county group(s) you have permissions to see
- If the person had COVID in more than one county, you may not see that event

Person Summary

Demographic Information (View History)		Notes (Add/Edit)				
Name:	Rose Quartz, Crystal					
Maiden/Other Name:						
Alias:						
Gender:	Female					
Birth Date:	06/28/1972					
Death Date:						
Living Status:	Alive					
Age:	49					
Social Security Number:						
Party ID:	PCWFGZWBUUDJ					
Create Date:	07/30/2021					

Contact Information						
Type	Address	County	Country	Phone	GIS Info	Action
Home * Primary	5678 Healing Stone Rd, Charlotte, NC 28201	Mecklenburg County	USA	(H) (704) 999-1111	Invalid Data	Edit Delete

[Edit Person](#)

Event Information

Events				
Event ID	Person	Status	Create Date	Disease
170002427	Rose Quartz, Crystal	Open	07/30/2021	Coronavirus (COVID-19)



Demonstration

Creating a New Event

»» For a NEW Person

Creating New Event for a New Person

- You have searched and determined that no person exists, so you create a new person



- Click on Create Event icon

- Select Disease from dropdown menu

Event Information	
Disease:	<input type="text" value=""/> 
Add Person	
First Name:	<input type="text" value=""/>
Middle Name:	<input type="text" value=""/>
Last Name:	<input type="text" value=""/>

A red arrow points to the dropdown menu in the 'Disease:' field, which is open and showing two options: 'Coronavirus (COVID-19)' and 'Coronavirus death (COVID-19D)'.

Creating New Event for a New Person

- Enter the Person information exactly as from your lab
 - If there is information missing on the lab, add a note in the Investigation Trail or Dashboard
 - Use sentence case format and no punctuation

Create Event - Person Information

Event Information

Disease: 

Add Person

First Name:	Middle Name:	Last Name:
<input type="text" value="Tinker"/>	<input type="text"/>	<input type="text" value="Bell"/>
Suffix:	Maiden/Other Name:	Alias:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mother's Maiden Name:	<input type="text"/>	
Birth Date:	Gender:	Social Security Number:
<input type="text" value="07/24/1989"/> 	<input type="text" value="Female"/> 	<input type="text"/>

Creating New Event for a New Person

- Use USPS standards for addresses, Ex: St, Rd, Ave, etc
 - Apartment, Unit, Lot number should go on the 2nd address line

Contact Information

Address Type: Home
Random Facility

City: Raleigh State: NC
County: Wake County Country: USA

Home Phone: (919) 555-6666 Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:

Creating New Event for a New Person

NOTE: If the system recognizes the address, validation will run, and you may have the option to 'View' or 'Apply'. ALWAYS select 'View' as sometimes the system will change the street address. If your address matches exactly, click Apply. If they do not, click Close.

Contact Information

Address Type: Street:

City: State: Zip Code: ✓ Address validate

County: Country:

Home Phone: Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:

Address Validation Results

Address Differences		
Field	Entered	Validated
Street	225 N Mc Dowell St	225 N Mc Dowell St
City	Raleigh	Raleigh
State	NC	NC
Zip Code	27603	27603
County		Wake County
Latitude	35.78296081632653	
Longitude	-78.64159530612245	

[View Map](#)

Creating New Event for a New Person

- Review the information you have entered to ensure it is accurate and complete
- Click the Save button and your person will be created, along with a new event

Create Event - Person Information

Event Information

Disease:

Add Person

First Name: Middle Name: Last Name:

Suffix: Maiden/Other Name: Alias:

Mother's Maiden Name:

Birth Date: Gender: Social Security Number:

Contact Information

Address Type: Street:

Random Facility:

City: State: Zip Code:

County: Country:

Home Phone: Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:



Demonstration

Creating New Event

»» For an EXISTING Person

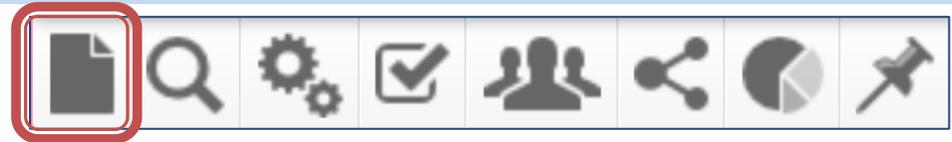
Creating New Event for an Existing Person

- You searched and found an existing person, but determine that you need to create a new event
- Copy the Party ID in the Demographic section of the Person Summary screen
 - The Party ID is the unique identifier for this person

Person Summary	
Demographic Information (View History)	
Name:	Rose Quartz, Crystal
Maiden/Other Name:	
Alias:	
Gender:	Female
Birth Date:	06/28/1972
Death Date:	
Living Status:	Alive
Age:	49
Social Security Number:	
Party ID:	PCWFGZWBUUDJ
Create Date:	07/30/2021

Creating New Event for an Existing Person

- Click the Create Event icon on the toolbar
- Select the Disease from the Create Event Screen
- Click the Select Person Button



Create Event - Person Information

Event Information

Disease: ←

Add Person

First Name: Middle Name: Last Name:

Suffix: Maiden/Other Name: Alias:

Mother's Maiden Name:

Birth Date:

Contact Information

Address Type: Street:

City: State: Zip Code:

County: Country:

Home Phone: Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:

Creating New Event for an Existing Person

- Paste the Party (Person) ID that you copied from the Person Summary screen into the Party ID search field, then click the search button
- Select the person from the Search Results

Search Party

Search Criteria

Party ID: PCWFGZWBUUDJ

Last Name:

First Name:

Maiden/Other Name:

Alias:

Birth Date:

(Inexact)

Gender:

Street:

City:

State:

Zip Code:

Mother's Maiden Name:

Phone:

Email:

Sort Options

Sort By:

Sort Order:

Search Options

Search History:

Search Soundex:

Search Results

Name	Birth Date	Street Address	City
▶ Rose Quartz, Crystal	06/28/1972	5678 Healing Stone Rd	Cha

Showing 1 to 1 of 1 entries

Creating New Event for an Existing Person

- The person information will be auto-populated in the Create Event Screen
- Click the Save button to create a new event

Create Event - Person Information

Event Information

Disease:

Add Person

First Name: Middle Name: Last Name:

Suffix: Maiden/Other Name: Alias:

Mother's Maiden Name:

Birth Date: Gender: Social Security Number:

Contact Information

Address Type: Street:

City: State: Zip Code:

County: Country:

Home Phone: Mobile Phone: Work Phone:

Email:

Contact Method: Residence Type: Address Status:

Creating New Event for an Existing Person

- The new disease event is created, and the event is now ready for data entry

Event Summary

Basic Information	Notes (Add/Edit Show My Notes)
Event ID: 170002621	
Disease: Coronavirus (COVID-19)	
Person: Crystal Rose Quartz Birth Date: 06/28/1972 (49 Female) Phone: (704) 999-1111	
Type: Interactive	
Investigation Status: Open	
Linked Events/Contacts: 0 linked event(s)/contact(s) (View)	
Attachments: 0 attachment(s) (Add)	
Notifications: Best date for illness identification is missing Initial date of report to public health is missing and is required	
Classification: Unspecified	
County of residence: Mecklenburg County	
[Show More]	
Active outbreak: Mecklenburg East Mecklenburg High School 2022 [Link to Outbreak] [Open]	
Active outbreak: Mecklenburg COVID-19 Youth Group Outbreak December 2021 [Link to Outbreak] [Open]	
Active outbreak: Mecklenburg Covid-19 Some Kind of School Cluster November 2021 [Link to Outbreak] [Open]	
Active outbreak: Wake County Elementary School Random Outbreak [Link to Outbreak] [Open]	
Active outbreak: Mecklenburg COVID-19 Small LTCF Outbreak November 2021 [Link to Outbreak] [Open]	

Event Data
Lab Results
Concerns
Persons
Tasks
Event History

Question Packages				
Question Package	Person	Last Update	Upd	Eliz
▶ 01. Administrative	Crystal Rose Quartz	02/22/2022		Eliz
02. Demographic	Crystal Rose Quartz	02/22/2022		Eliz
03. Clinical	Crystal Rose Quartz	02/22/2022		Eliz
04. Risk History	Crystal Rose Quartz	02/22/2022		Eliz
09. Risk Questions - Part 1	Crystal Rose Quartz	02/22/2022		Eliz
10. Contact Tracing	Crystal Rose Quartz	02/22/2022		Eliz
11. Vaccination	Crystal Rose Quartz	02/22/2022		Eliz

Wizards



Demonstration

Adding a New Lab

»» On an Existing Event

Adding a New Lab on an Existing Event

- Search and find the existing person and review the event where the first positive lab's specimen collection date is within 90 days (before or after the lab you have)
- Click the Add Lab Result button to add a new lab result to the existing event

The screenshot displays a software interface with a navigation bar at the top containing tabs for 'Event Data', 'Lab Results', 'Concerns', 'Persons', 'Tasks', and 'Event History'. Below the navigation bar is a table titled 'Labs' with the following columns: Lab No., Specimen Date, Specimen Number, Specimen Type, Result, Result Status, Result Value, Test, and Last Update. The first row of the table is highlighted in yellow and contains the following data: Lab No. 1, Specimen Date 01/24/2022, Specimen Number 343753945743, Specimen Type Nasopharyngeal swab, Result Detected, Result Status (empty), Result Value (empty), Test SARS-CoV RNA XXX QI NAA+pro..., and Last Update 02/22/2022. Below the table are three buttons: 'Add Lab Result' (highlighted with a red border), 'Update Lab Result', and 'Delete Lab Result'.

Lab No.	Specimen Date	Specimen Number	Specimen Type	Result	Result Status	Result Value	Test	Last Update
1	01/24/2022	343753945743	Nasopharyngeal swab	Detected			SARS-CoV RNA XXX QI NAA+pro...	02/22/2022

Buttons: Add Lab Result, Update Lab Result, Delete Lab Result

Adding a New Lab on an Existing Event

- Enter all lab information and click the Save button
- You will see the lab you just entered is now on the lab table on the Lab Results tab

Event Data	Lab Results	Concerns	Persons	Tasks	Event History			
Labs								
Lab No.	Specimen Date	Specimen Number	Specimen Type	Result	Result Status	Result Value	Test	Last Update
1	01/24/2022	343753945743	Nasopharyngeal swab	Detected			SARS-CoV RNA XXX QI NAA+pro...	02/22/2022
2	02/07/2022	89474594	Nasopharyngeal swab	Positive			SARS-CoV-2 Antigen (Ag) Res...	02/22/2022



Demonstration

New Person, New Event or New Lab?

Now you should be able to identify which is which and avoid duplicates

Questions?

- If you accidentally create a duplicate person or event, please contact the NCEDSS Helpdesk at: NCEDSShelpdesk@dhhs.nc.gov or
- call (919)715-5548 or toll-free at (877)625-9259

