

Administrative Package

September 2023

Administrative Package Sections

Agenda

- Disease Diagnosis Information
- Reporter Information
- NC County of Residence for the Event
- Investigation Trail
 - Original/Initial Assignment
 - LHD to LHD Transfer
 - Assign to State
 - Reassign to LHD from State
- Other Sections (State or System Use only)

Disease Report Information

Disease Report Information

01. Administrative - Shady Pulley - Gonorrhea (300) [Jump To...] Save Save & Stay Cancel

+ Expand Details

Disease Report Information	
Manually lock this event from auto-closure	No
Initial Source of Report to Public Health	<input type="text"/>
Date of Initial Report to Public Health (Required)	MM/DD/YYYY
Initial method of report	<input type="text"/>

- Physician/Provider
- Health Department Provider
- Laboratory
- Interstate Notification
- Other

- Electronic lab report (ELR)
- Electronic Case Report (eCR)
- Paper lab report
- CD Paper Report
- Telephone call
- Converted data
- Other

- Disease Report Information section
 - Required for reporting an event to the State, CDC, and used for data analysis/quality assurance
 - This information is automatically populated for events created via ELR but must be directly entered for manually created events

Reporter Information

Reporter Information

Reporter Information	
Reporting Physician/Practice	<input type="text"/>
Contact Person/Title 	<input type="text"/>
Phone number	<input type="text"/>
Fax (area code):	<input type="text"/>
Health Care Provider for this disease (if not reporting physician)	<input type="text"/>
* Provider Type	<input type="text" value="▼"/>
Name of provider's practice or facility	<input type="text"/>
Telephone number for health care provider (area code):	<input type="text"/>
Fax number(area code):	<input type="text"/>
Name of person to contact if health care provider is unavailable	<input type="text"/>
Telephone number for alternate contact for health care provider	<input type="text"/>
Date report entered into system	<input type="text" value="01/18/2012"/>
Date identified as contact	<input type="text" value="MM/DD/YYYY"/> 

- If your LHD is the source of reporting, then you enter the LHD provider information here
- If you learned about the event from another provider/location, fill in their information here

NC County of Residence for the Event

NC County of Residence for the Event

The **NC County of Residence for the Event** field is very important:

- Establishes which jurisdiction the event belongs to,
- Determines which LHD that can see the event
- Determined what workflows the event will populate

NC County of Residence for the Event	
If a different county is investigating this event, the county of residence must share this event. If patient is not a NC resident, enter the NC investigating county here.	
NC County of Residence for the Event	Wake County ▼

If the address is entered or imported correctly, the county will be automatically assigned. **Always** check against the patient's address to confirm.

Investigation Trail

- Original/Initial Assignment
- LHD to LHD Transfer
- Assign to State
- Reassign to LHD from State

Investigation Trail

- This shows the history of who had the event and who is currently responsible to work the event.
 - The current (most recent) block determines what workflows the event will populate.
- If it is not completed correctly, the event may not be worked in a timely manner

NC County of Residence for the Event Durham County		Expand Details
Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
Date Assigned-Reassigned <input type="text" value="01/20/2012"/>	Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned) <input type="text" value="Wake CD"/>	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	Original/Initial Assignment <input type="text" value="AS"/>	Phone number <input type="text" value="(919) 999-1111"/>
Authorized Reporter	Classification status <input type="text" value="Confirmed"/>	
Notes	Is a student at Duke.	
Date Assigned-Reassigned <input type="text" value="01/25/2012"/> Add New	Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned) <input type="text" value="Durham CD"/>	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	LHD to LHD transfer <input type="text"/>	Phone number <input type="text"/>
Authorized Reporter	Classification status <input type="text" value="Confirmed"/>	
Notes		

Investigation Trail

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
Date Assigned/Reassigned <input type="text" value="08/28/2023"/> <input type="button" value="Add New"/>		
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	<input type="text"/>	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	Original/Initial Assignment ▼	
Authorized Reporter	Original/Initial Assignment	Phone number <input type="text"/>
Classification status	LHD(Region) to LHD(Region) transfer	
Notes	Assign to State	
	Reassign to LHD from State	

- There are 4 standard assignment options to choose from
- The event can move from jurisdiction to jurisdiction (from one county to another) OR from a county to the North Carolina Department of Public Health/State

Original/Initial Assignment

Investigation Trail: Add a new entry for each group to which the event transfers du	
Date Assigned/Reassigned <input type="text"/>	02/16/2022 <input type="button" value="Add New"/>
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake STD
* Select the reason for the assignment/reassignment	Original/Initial Assignment <input type="text"/>
Authorized Reporter	<input type="text"/>
Classification status	Confirmed <input type="text"/>
Notes	*only put notes in your county block in the investigation trail

- Date Assigned/Reassigned
- Group county and disease specification
- Reason for Assignment/Reassignment: Original/Initial Assignment
- Authorized Reporter: Enter the staff name and phone number to contact if questions need to be answered
- Classification Status: determined based on lab results
- Notes: Where you/Authorized reporter will put any notes if applicable to the event

Original/Initial Assignment

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
Date Assigned-Reassigned <input type="checkbox"/>	01/18/2012 <input type="button" value="Add New"/>	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake CD <input type="button" value="Add"/>	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	Original/Initial Assignment <input type="button" value="v"/>	Phone number <input type="text"/>
Authorized Reporter		
Classification status	Confirmed <input type="button" value="v"/>	
Notes		

Event Classification Status is determined with one of the following statuses:

- **Confirmed:** if the person has a positive PCR/NAA/RNA lab test
- **Probable:** if the person ONLY has a positive Antigen lab test
- **Suspect:** if the person has a positive AT HOME lab test
- **Does not meet Criteria:** if the patient's test is negative OR if the patient has a positive IgG or AB test OR lives out-of-state
- **Unspecified:** NEVER leave the classification status 'Unspecified' for NCCOVID cases

LHD to LHD Transfer

#1. Change the NC County of Residence to the county where the event is being transferred.

NC County of Residence for the Event			
If a different county is investigating this event, the county of residence must share this event. If patient is not a NC resident, enter the NC investigating county here.			
NC County of Residence for the Event		Durham County	
Investigation Trail: Add a new entry for each group to which the event transfers			
Date Assigned-Reassigned	07/17/2008	Add New	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake CD		
* Select the reason for the assignment/reassignment	Original/Initial Assignment		
Authorized Reporter	A. Shedd		

#2. Click Add New in order to get a new box in the Investigation Trail

- If an LHD receives a Part 1 form, paper lab or ELR for a person and they determine that said person resides in a different county, an LHD to LHD transfer must be completed
- In order for the new LHD to see the event, the transferring LHD MUST do 2 things
 - #1 – Change the county of residence
 - #2 – Click the Add New hyperlink to get a new block

LHD to LHD Transfer

Investigation Trail: Add a new entry for each c

Date Assigned-Reassigned 07/12/2021 Add New

Date Assigned-Reassigned MM/DD/YYYY

Date Assigned-Reassigned 07/13/2021 Add New

Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)

Select the reason for the assignment/reassignment

Original/Initial Assignment

^ Authorized Reporter

Classification status

Unspecified

Notes

- Enter the date and use the Tab key on your keyboard and all the fields will populate below to be completed.
- In the box for Reason, select LHD to LHD Reassign; keep the Classification status the same as the previous box and Save.
- After the event has been assigned to the new LHD, the previous LHD will no longer have access to view it unless the event is shared with them.

Assign to State

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
Date Assigned/Reassigned ▾	02/22/2022	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake STD	Local patient identifier
* Select the reason for the assignment/reassignment	Original/Initial Assignment ▾	
Authorized Reporter	AShedd	Phone number (555) 123-4567
Classification status	Confirmed ▾	
Notes		
Block 1		
Date Assigned/Reassigned ▾	02/22/2022 Add New ←	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	State Disease Registrar	Local patient identifier
* Select the reason for the assignment/reassignment	Assign to State ▾	
Authorized Reporter		Phone number
Classification status	Confirmed ▾	
Notes		
Block 2		

- Once you have completed the investigation and both the lab and all data has been entered into the patient's event; you will assign the event to the State

Reassign to LHD from State

- If additional information is needed, the State will add another block with notes that the LHD must address before reassigning the event back to the State for review.

Date Assigned-Reassigned ▾	01/20/2012	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	State Disease Registrar	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	Assign to State ▾	
Authorized Reporter	<input type="text"/>	Phone number <input type="text"/>
Classification status	Confirmed ▾	
Notes	<input type="text"/>	
<hr/>		
Date Assigned-Reassigned ▾	01/25/2012 Add New	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake CD	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	Reassign to LHD from state ▾	
Authorized Reporter	<input type="text"/>	Phone number <input type="text"/>
Classification status	Confirmed ▾	
Notes	<div style="border: 2px solid orange; padding: 5px;">Please change classification to Probable Missing Information: 1. Date of Death 2. Best date of Illness Identification</div> <input type="text"/>	

Investigation Trail Reassignments

NC County of Residence for the Event			
If a different county is investigating this event, the county of residence must share this event. If patient is not a NC resident, enter the NC investigating county here.			
NC County of Residence for the Event Wake County			
Investigation Trail: Add a new entry for each group to which the event transfers during the investigation			
Date Assigned/Reassigned	08/01/2023		
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Durham STD		Local patient identifier
* Select the reason for the assignment/reassignment	Original/Initial Assignment		Phone number
Authorized Reporter	PA		(919) 888-8888
Classification status	Confirmed		
Notes	Is a student at NCSU		
Date Assigned/Reassigned	08/02/2023		
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake STD		Local patient identifier
* Select the reason for the assignment/reassignment	LHD(Region) to LHD(Region) transfer		Phone number
Authorized Reporter	CD		(919) 999-9999
Classification status	Confirmed		
Notes			
Date Assigned/Reassigned	08/04/2023		
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	State Disease Registrar		Local patient identifier
* Select the reason for the assignment/reassignment	Assign to State		Phone number
Authorized Reporter	AS		(919) 991-1111
Classification status	Confirmed		
Notes	Missing address, please update and resubmit		
Date Assigned/Reassigned	08/14/2023	Add New	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake STD		Local patient identifier
* Select the reason for the assignment/reassignment	Reassign to LHD from State		Phone number
Authorized Reporter			
Classification status	Confirmed		
Notes			

Other Sections

- State or System Use only

Other Sections

- CDC Reporting Information
 - This section is completed when the event is reported to the Centers for Disease Control and Prevention (CDC).
- CCTO Reporting Information ***NCCOVID only***
 - If the event has been sent to the CCTO team, there will be a date in this field.
- Interstate Notification
 - This section is completed by the Movement, Monitoring and Notification Team when an interstate notification is sent to an OOS residents home state. YOU do not enter information in these fields.
- State Review for Possible Reinfection
- Laboratory Report Tracking – system fields
- Import Tracking (eCR) – system fields
- Deduplication– system fields

Other Sections

CDC Reporting Information			
Additional Date for a Reporting Date Basis (includes both Contacts and Cases) i	<input type="text" value="01/18/2012"/>		
Is this event the responsibility of another state or country to report?	<input type="text" value="No"/>		
Report to CDC	<input type="text" value="No"/>		
Projected/Actual First CDC event date sent. i	<input type="text" value="01/18/2012"/>	Date type	<input type="text" value="Date Event Created"/>
Date Type	<input type="text" value=""/>		
CDC Event Date next send if recomputed i	<input type="text" value="01/18/2012"/>	Date Type	<input type="text" value="Date Event Created"/>
Interstate Notification			
Interstate notification letter sent	<input type="text" value=""/>		
Laboratory Report Tracking			
Lab review required (local)?	<input type="text" value=""/>		
Lab review date (local)?	<input type="text" value="01/01/1900"/>		
Lab review required (state)?	<input type="text" value=""/>		
Lab review date (state)?	<input type="text" value="01/01/1900"/>		
Latest Specimen Collection Date	<input type="text" value="01/01/1900"/>		
Electronic Case Report Tracking (eCR)			
eCR review required (local)?	<input type="text" value=""/>		
eCR review date (local)?	<input type="text" value="01/01/1900"/>		
eCR review required (state)?	<input type="text" value=""/>		
eCR review date (state)?	<input type="text" value="01/01/1900"/>		
Deduplication			
Date Basis for Deduplication (derived)	<input type="text" value="01/18/2012"/>		
Date Basis for Deduplication (override)	<input type="text" value=""/>		
Last Disease Status	<input type="text" value="Unspecified"/>		
Type of the last group to which this event is assigned	<input type="text" value="Not Assigned"/>		
* Indicates required field			

Administrative Package Demonstration





Thank you for joining today!

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