

Administrative Package

June 2024

Agenda

Administrative Package Sections

- 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)

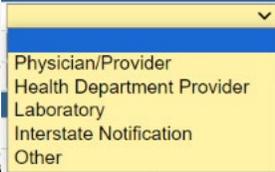
Disease Report Information

Disease Report Information

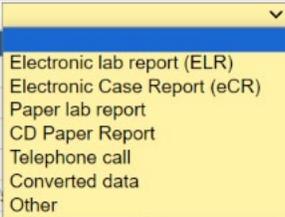
01. Administrative - Minnie Mouse - Gonorrhea (300) Jump To - Save Save & Stay Cancel Help

Disease Report Information

Manually lock this event from auto-closure

Initial Source of Report to Public Health
 
Physician/Provider
Health Department Provider
Laboratory
Interstate Notification
Other

Date of Initial Report to Public Health (Required)
 

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

- Disease Report Information section
 - Is information 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"/>	
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"/>	
Date report entered into system	
<input type="text" value="01/20/2012"/>	<input type="button" value="📅"/>
Date identified as contact	
<input type="text" value="mm/dd/yyyy"/>	<input type="button" value="📅"/>

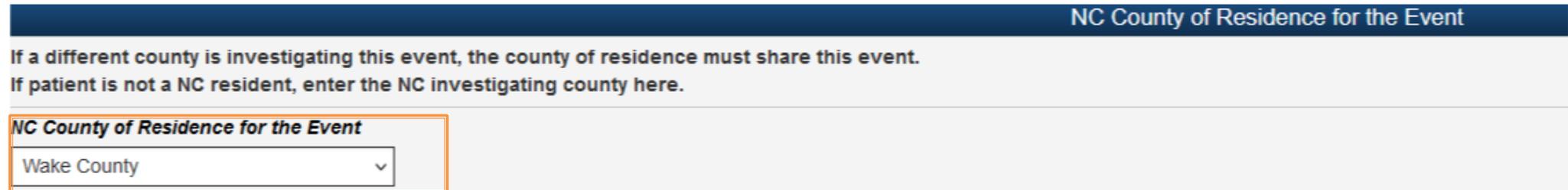
- If your LHD is the source of reporting, then you enter the LHD provider information here
- If you learned about the event from another provider/location fill in their information here

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:

- It helps to establish which jurisdiction the event belongs to,
- Determines which LHD that can see the event
- What workflows the event will feed into



The screenshot shows a form titled "NC County of Residence for the Event". Below the title, there are two lines of instructional text: "If a different county is investigating this event, the county of residence must share this event." and "If patient is not a NC resident, enter the NC investigating county here." Below this text is a dropdown menu with the label "NC County of Residence for the Event" and the selected option "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 be located.
- If it is not completed correctly, the event may not be worked in a timely manner

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

01/12/2011

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

Kandy Kane

Phone number

(919) 100-0000

Classification status

Confirmed

Notes

Investigation Trail

The screenshot shows a web form titled "Date Assigned/Reassigned". At the top, there is a date input field containing "06/20/2024" and a calendar icon. Below this is a blue "Add New" button. A "Group" field is present with a search icon and a trash icon, accompanied by a note: "(You cannot change your group selection unless you clear this entry by erasing the Date Assigned)". To the right is a "Local patient identifier" field. A red asterisk indicates a required field: "* Select the reason for the assignment/reassignment *". A dropdown menu is open, showing four options: "Original/Initial Assignment" (highlighted in blue), "LHD(Region) to LHD(Region) transfer", "Assign to State", and "Reassign to LHD from State".

- There are 4 standard reassignment options to choose from.
- The event can move from jurisdiction to jurisdiction (from one county to another) OR from 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 trans.

Date Assigned/Reassigned
01/12/2011

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
Kandy Kane

Phone number
(919) 100-0000

Classification status
Confirmed

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 trans

Date Assigned/Reassigned
01/12/2011

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
Kandy Kane

Phone number
(919) 100-0000

Classification status
Confirmed

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
Wake County

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation

Add New

Group: You can not change your group selection unless you are reassigning the event to a different investigator.

Wake STD

Select the reason for the assignment/reassignment
Original/Initial Assign

Authorized Reporter Phone number

Classification status
Confirmed

Notes

Is this investigation eligible for early closure?

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

- LHD to LHD Transfer
- If a LHD receives a Part 1 form, paper lab or ELR for a person and they determine that said person resides in a different county, a LHD to LHD transfer must be completed
- In order for the new LHD to see the event the transferring LHD MUST do 2 things...

Investigation Trail Reassignment: LHD to LHD Transfer

The screenshot displays the 'Investigation Trail' interface. At the top, a dark blue header reads 'Investigation Trail: Add a new entry for each group to which the event transfers during the investigation'. Below this, there are two panels. The left panel shows a date field with '06/23/2021' and a calendar icon, and a blue 'Add New' button with a plus icon. An orange arrow points from the 'Add New' button to a date input field in the right panel that contains a placeholder 'mm/dd/yyyy' and a calendar icon. Another orange arrow points from this field to the main form on the right. The main form is titled 'Date Assigned/Reassigned' and contains the following fields: a date field with '05/17/2024' and a calendar icon; a blue 'Add New' button; a 'Group' dropdown menu with a search icon and a trash icon; a 'Local patient identifier' text field; a required dropdown menu for 'Select the reason for the assignment/reassignment' with 'LHD(Region) to LHD' selected; 'Authorized Reporter' and 'Phone number' text fields; a 'Classification status' dropdown menu with 'Unspecified' selected; a 'Notes' text area; and a final dropdown menu for 'Is this investigation eligible for early closure?'.

- Select Add New
- Enter the date and hit tab and all the fields will populate below to be completed.
- In the box for reason, select LHD to LHD Reassign; keep Classification status as the previous box and save.
- After the event has been assigned to the new LHD, the old LHD will no longer have access to view it unless it is shared with them.

Assign to State

Block 1

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation

Date Assigned/Reassigned
05/17/2024

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: Blu Arrow Phone number: (919) 555-1111

Classification status: Confirmed

Notes

Date Assigned/Reassigned
05/18/2024

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 ▾	Phone number <input type="text"/>
Authorized Reporter	<input type="text"/>	
Classification status	Confirmed ▾	
Notes		
<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 ▾	Phone number <input type="text"/>
Authorized Reporter	<input type="text"/>	
Classification status	Confirmed ▾	
Notes	Please change classification to Probable Missing Information: 1. Date of Death 2. Best date of Illness Identification	

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
Durham County

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation

Date Assigned/Reassigned
05/17/2024

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

Select the reason for the assignment/reassignment *
Original/Initial Assignment

Authorized Reporter
Minnie Rip
Phone number
(919) 888-8888

Classification status
Confirmed

Notes
Is a student at NCSU

Date Assigned/Reassigned
05/19/2024

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

Select the reason for the assignment/reassignment *
Assign to State

Authorized Reporter
Blue Jean
Phone number
(919) 555-5555

Classification status
Confirmed

Notes
Missing address. please update and resubmit

Is this investigation eligible for early closure?

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
05/17/2024

Date Assigned/Reassigned
05/18/2024

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 *
LHD(Region) to LHD(Region) transfer

Authorized Reporter
Smiley Jo
Phone number
(919) 777-1111

Classification status
Confirmed

Notes

Date Assigned/Reassigned
05/20/2024

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 *
Reassign to LHD from State

Authorized Reporter
Low Blow
Phone number
(919) 333-2222

Classification status
Confirmed

Notes

Is this investigation eligible for early closure?

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 & Gonorrhea 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 ***NCCOVID only***
- 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?	No v		
Report to CDC	No v		
Projected/Actual First CDC event date sent. i	<input type="text" value="01/18/2012"/>	Date type	<input type="text" value="Date Event Created v"/>
Date Type	v		
CDC Event Date next send if recomputed i	<input type="text" value="01/18/2012"/>	Date Type	<input type="text" value="Date Event Created v"/>
Interstate Notification			
Interstate notification letter sent	v		
Laboratory Report Tracking			
Lab review required (local)?	v		
Lab review date (local)?	<input type="text" value="01/01/1900"/>		
Lab review required (state)?	v		
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)?	v		
eCR review date (local)?	<input type="text" value="01/01/1900"/>		
eCR review required (state)?	v		
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"/>		
Last Disease Status	Unspecified v		
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!

Trainings: ncedsstrainings@dhhs.nc.gov
Helpdesk: NCEDSSHelpDesk@dhhs.nc.gov