

New Person, New Event, New Lab

November 2024

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Agenda

- How to Search for a Person/Event
- When to create a new person
- When to create a new event
- Adding a New Lab to an Existing Event

How to Search for a Person/Event

How to Search for a Person/Event

- 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

How to Search for a Person



- The “Search Persons/Facilities” is the recommended search for **ALL** users
- All users can see all persons, but not all users can see all events. Access to events is based on user permissions
- Be creative and search multiple ways to determine if your person exists



How to Search for a Person

Search Person Party page will appear

- Enter the information that you have for the patient
- Once you have put in the information you click Search

Search Person Party

Search Criteria

Class	Event
Category	Person
Party ID	
Last Name	M6*
First Name	
Maiden/Other Name	
Alias	
Birth Date (Range)	mm/dd/yyyy
Gender	
Street	
City	
State	
Zip Code	
Mother's Maiden Name	
Phone	

Search Options

Sort By			
Sort Order			
Search History	<input checked="" type="checkbox"/>	Search Soundex	<input type="checkbox"/>
Leave Window Open	<input checked="" type="checkbox"/>		

How to Search for a Person

- **Searching Tips**

- Search using one or more fields and with wildcards
- Be creative!
 - Name (first and/or last combination) and 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	

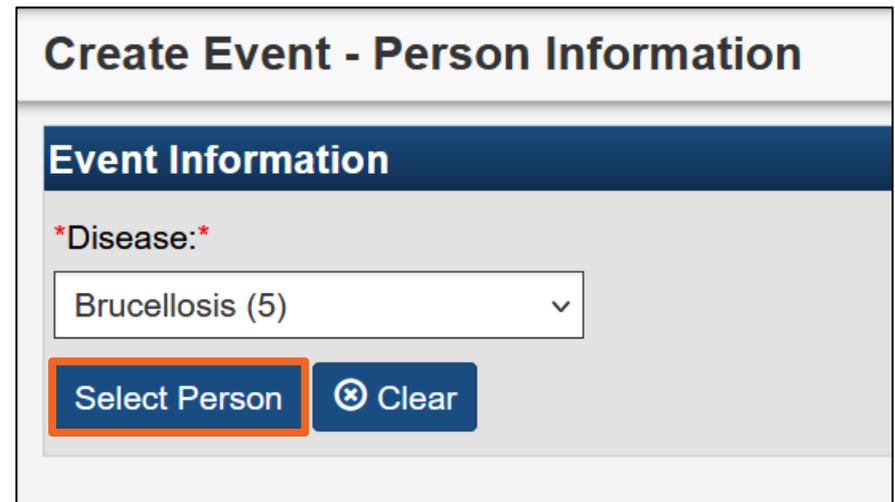
How to Search for an Event



- Do not use the Search Event icon to complete person searches in the system.
- Searching using the Search Event icon restricts the results to the counties you have permission to see.
 - This could result in duplicate events being created.
- Effective searching prevents duplicate reporting, duplicate events and unnecessary work for both the LHD and State staff
- The Search Event icon CAN be used for outbreak searches as these are not person specific

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:

Brucellosis (5) ▾

Select Person Clear

Searching for a Person

Searching for a Person

Person

- A Person can be created from a positive lab, negative lab, or no lab (contact)

****There should be only one Person profile in the application per person**

Searching for a Person

- **Search results** appear to the right of the search criteria.
- To determine if the person(s) in the search results match the individual you are looking for, double-click their name to view the person summary screen.

Search Person Party

Search Criteria	
Class	Event
Category	Person
Party ID	
Last Name	Mou*
First Name	Min*
Maiden/Other Name	
Alias	
Birth Date (Range)	mm/dd/yyyy
Gender	
Street	
City	
State	

Search Results				
Name	Birth Date	Street Address	City	State
Mouse, Minnie	07/04/1976	300 McDowell St.	Raleigh	NC
Mouse, Minnie	10/27/1955			NC
Mouse, Minnie	07/04/1976	12 Sparta Rd	North Wilkesboro	NC

Showing 1 to 3 of 3 entries

Select Add Cancel Help

Search Person/Facilities

- You will only see the events for the county group(s) you have permission to see
- If the person has an event in a county or for a disease you don't have permission to see, you will not see the event

Person Summary

Demographic Information

Party ID:	PDBFPTGMZPEA
Name:	Barbie Doll
Gender:	Female
Birth Date:	06/12/2001
Living Status:	Alive
Current Age:	23
Deduplication Status:	Done

[Edit Person](#)

Notes

No data available for this section

Contact Information

Type	Address	County	Residence Type	Address Status	Phone	Fax	GIS Info
Home * Primary	4455 Dollhouse Ln, Clayton, NC 27520 USA	Johnston County			(H) (919) 999-9999		Invalid Data

[Add Address Type](#) [Edit Address](#) [Make Primary](#)

Event Information

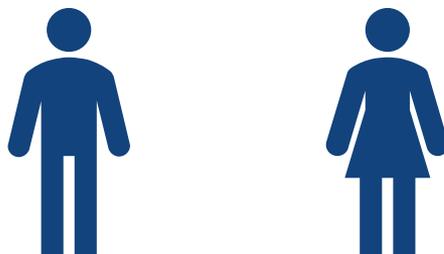
Demonstration



New Event/New Person

New Person

- **New Person** – Add a new person only after thoroughly searching and confirming that no individual in the system matches your search criteria.





New Event



- **New Event** – Add a new event after confirming that a person matching your search criteria exists, and either:
 - The person has a closed event, or
 - They have an open event where the new date of diagnosis (lab or symptom onset) is outside the disease timeframe of the existing event.

Event

- An Event defines the relationship a person has with a disease at a particular point in time (positive/negative lab or contact)
- A person can have multiple Events of the same disease or different diseases
- NC EDSS assigns a unique identifier for each event called the Event ID

Creating New Event/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:

- Acute flaccid myelitis (AFM)
- Anthrax (3)
- Babesiosis
- Botulism - foodborne/wound (10)
- Botulism - infant (110)
- Brucellosis (5)
- Campylobacter infection (50)
- Candida auris (C. auris)
- Carbapenem-resistant Enterobacteriaceae (CRE)
- Chancroid (100)
- Chikungunya
- Chlamydia (200)**

Creating New Event/New Person

- Enter the Person information from the document
 - If there is information missing on the lab, add a note in the Investigation Trail or Dashboard
 - Use sentence case format and no punctuation
 - Don't guess – enter info exactly

Create Event - Person Information

Event Information

Disease:

Add Person

* First Name *	Middle Name	Last Name
<input type="text" value="Teddy"/>	<input type="text"/>	<input type="text" value="Bear"/>
Maiden/Other Name	Alias	Mother's Maiden Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Gender		
<input type="text" value="Female"/>		
Birth Date		
<input type="text" value="01/01/1999"/> <input type="button" value="Calendar"/>		

Creating New Event/New Person

- Use USPS standards for address, Ex: St, Rd, Ave, etc
 - Apartment, Unit, Lot number should go in the Street 2 box

Contact Information

* Type *

Home

Street 1
225 N McDowell St

Street 2

City
Raleigh

State
NC

Zip Code
27603
✓ Address validated [\[View\]](#) [\[Apply\]](#)

County
Wake County

Country
USA

Home Phone

Mobile Phone
(999) 999-9999

Work Phone

Email

Contact Method
Mobile phone

Residence Type
Private Residence

Address Status
Verified

Creating New Event/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, click Apply.
- If the address doesn't match, click Close.

The screenshot shows a web form titled "Contact Information" with the following fields: Type (Home), Street 1 (225 N McDowell St), Street 2, City (Raleigh), County (Wake Co), Home Phone, Email, Contact Method (Mobile p), Zip Code (27603), Work Phone, and Address Status (Verified). An "Address Validation Results" pop-up window is overlaid on the form, displaying a table of address differences and a "View Map" button. An orange arrow points from the "View" button in the pop-up to the "View" button in the main form's address validation status.

Contact Information

* Type *

Home

Street 1: 225 N McDowell St

Street 2:

City: Raleigh

County: Wake Co

Home Phone:

Email:

Contact Method: Mobile p

Zip Code: 27603

Work Phone:

Address Status: Verified

Address Validation Results

✓ Address validated [View] Apply

Address Differences

Field	Entered	Validated
Street 1	225 N McDowell St	225 N Mc Dowell St
City	Raleigh	Raleigh
State	NC	NC
Zip Code	27603	27603
County	Wake County	Wake County
Latitude	35.78296081632653	
Longitude	-78.64159530612245	

View Map

Apply Close

Creating New Event for a New Person

- Review the information you have entered to ensure it is accurate and complete
- Click the Save button to create your new person and new event

Create Event - Person Information

Home <input type="text" value="Home"/>		
Street 1 <input type="text" value="225 N McDowell St"/>	Street 2 <input type="text"/>	
City <input type="text" value="Raleigh"/>	State <input type="text" value="NC"/>	Zip Code <input type="text" value="27603"/> ✓ Address validated [View] [Apply]
County <input type="text" value="Wake County"/>	Country <input type="text" value="USA"/>	
Home Phone <input type="text"/>	Mobile Phone <input type="text" value="(999) 999-9999"/>	Work Phone <input type="text"/>
Email <input type="text"/>		
Contact Method <input type="text" value="Mobile phone"/>	Residence Type <input type="text" value="Private Residence"/>	Address Status <input type="text" value="Verified"/>
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	<input type="button" value="Help"/>

Demonstration



New Event/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

Demographic Information	
Party ID:	PDBFPSXFCAB
Name:	Teddy Bear
Gender:	Male
Birth Date:	01/01/1999
Living Status:	Alive
Current Age:	25
Deduplication Status:	Done

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



Event Information

Disease:

Acute flaccid myelitis (AFM)

Anthrax (3)

Babesiosis

Botulism - foodborne/wound (10)

Botulism - infant (110)

Brucellosis (5)

Campylobacter infection (50)

Candida auris (C. auris)

Carbapenem-resistant Enterobacteriaceae (CRE)

Chancroid (100)

Chikuncunva

Chlamydia (200)

Create Event - Person Information

Event Information

Disease:

Chlamydia (200)

Select Person Clear

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 Person Party

Search Criteria

Class	Event
Category	Person
Party ID	PDBFPNZUPKD
Last Name	
First Name	
Maiden/Other Name	
Alias	
Birth Date (Range)	mm/dd/yyyy
Gender	
Street	
City	
State	
Zip Code	
Social Security Number	
Mother's Maiden Name	
Phone	
Email	

Search Options

Sort By	Name		
Sort Order	Ascending		
Search History	<input checked="" type="checkbox"/>	Search Soundex	<input type="checkbox"/>
Leave Window Open	<input type="checkbox"/>		

Search Results

Name	Birth Date	Street Address
Bear, Teddy	01/01/1999	225 N McDowell St

Showing 1 to 1 of 1 entries

Select Add Cancel Help

Search Clear

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:
Gonorrhea (300)

Select Person

Add Person

* First Name *	Middle Name	Last Name	Suffix
<input type="text" value="Teddy"/>	<input type="text"/>	<input type="text" value="Bear"/>	<input type="text"/>
Maiden/Other Name	Alias	Mother's Maiden Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Gender

Birth Date

Social Security Number

Contact Information

* Type *

Home

Street 1	Street 2	
<input type="text" value="225 N Mc Dowell St"/>	<input type="text"/>	
City	State	Zip Code
<input type="text" value="Raleigh"/>	<input type="text" value="NC"/>	<input type="text" value="27603"/>
County	Country	
<input type="text" value="Wake County"/>	<input type="text" value="USA"/>	

Home Phone	Mobile Phone	Work Phone
<input type="text" value="(919) 999-9999"/>	<input type="text"/>	<input type="text"/>

Email

Contact Method	Residence Type	Address Status
<input type="text"/>	<input type="text"/>	<input type="text"/>

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	
Event ID:	170002681
Disease:	Gonorrhea (300)
Name:	Teddy Bear
Birth Date:	01/01/1999
Current Age:	25
Gender:	Male
Home Phone:	(919) 999-9999
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 (View)
Attachments:	0 (Add)
Notifications	
Concerns	
Race has not been selected for this person	
Initial date of report to public health is missing and is required	
Disease Classification	
Classification: Unspecified	
General Notifications	
County of residence: Wake County	
<input type="button" value="Edit Event Properties"/>	

Demonstration



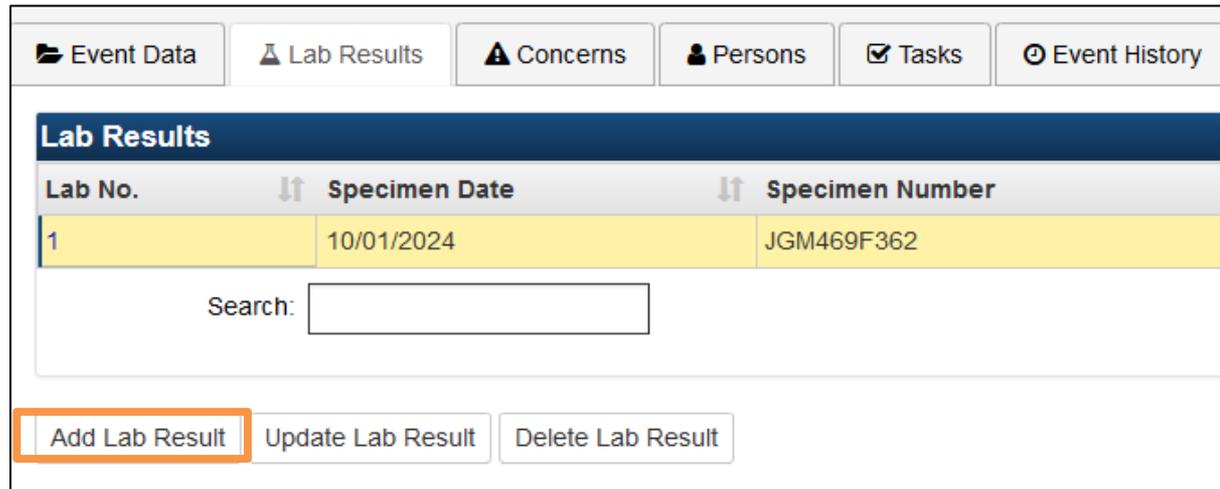
Adding a New Lab to an Existing Event



- **New Lab** – Add a new lab to an existing event for an existing person when you confirm that:
 - The person matches your search criteria, AND
 - They have an open event where the new date of diagnosis (lab or symptom onset) is within the disease timeframe of the existing event.

Adding a New Lab to an Existing Event

- Search and find the existing person and review any existing events to determine if they are within the same disease timeframe as your document
- 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 buttons for 'Event Data', 'Lab Results', 'Concerns', 'Persons', 'Tasks', and 'Event History'. Below this is a 'Lab Results' section with a table. The table has three columns: 'Lab No.', 'Specimen Date', and 'Specimen Number'. A single row is visible with the values '1', '10/01/2024', and 'JGM469F362'. Below the table is a search field labeled 'Search:'. At the bottom of the interface, there are three buttons: 'Add Lab Result' (highlighted with an orange border), 'Update Lab Result', and 'Delete Lab Result'.

Lab No.	Specimen Date	Specimen Number
1	10/01/2024	JGM469F362

Search:

Add Lab Result Update Lab Result Delete Lab Result

Adding a New Lab to 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

Lab Results

Lab No.	Specimen Date	Specimen Number	Specimen Type	Result	Result Status	Result Value	Test	Last Update
1	10/01/2024	JGM469F362	Urine specimen	Positive			...PCR	11/12/2024
2	11/09/2024		Urine specimen	Positive			...PCR	11/12/2024

Search:

Add Lab Result Update Lab Result Delete Lab Result

Demonstration





Thank you for joining today!

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