

# Share Event vs. LHD to LHD Transfer

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# Agenda

- Sharing an Event
  - When to Share an Event
  - How to Share an Event
  - Unshare an Event
- LHD to LHD Transfer
  - When to use LHD to LHD Transfer
  - How to complete an LHD Transfer
  - LHD to LHD Transfer Workflows
- Recap: Sharing an Event vs LHD to LHD Transfer

# Sharing an Event

- When to Share an Event
- How to Share an Event
- Unshare an Event

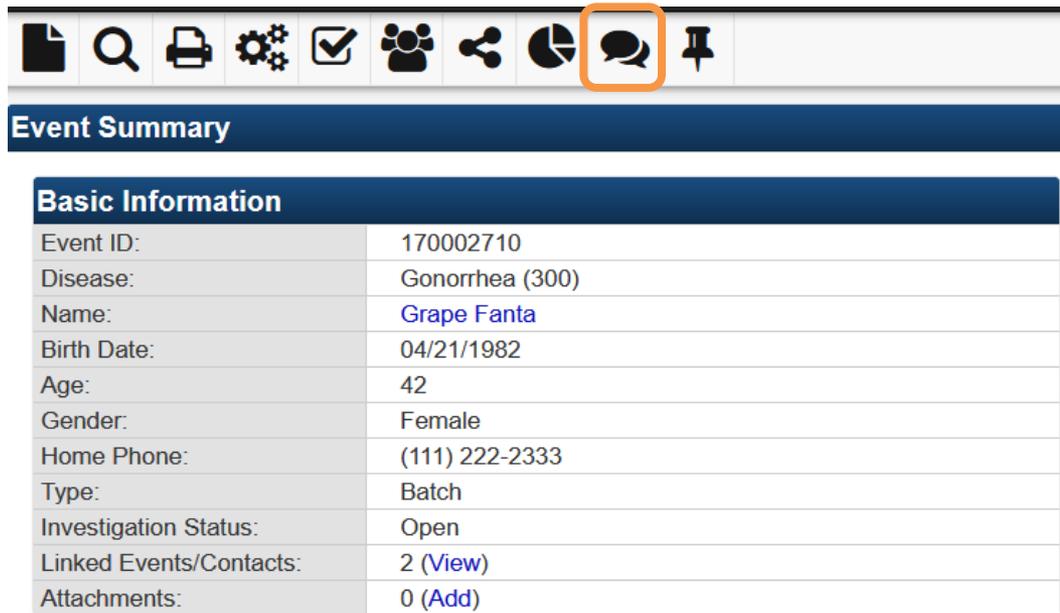
# When to Share an Event

- In certain circumstances, a Local Health Department (LHD) user may need access to an event that is not assigned to their County group in the Administrative package, in the Investigation Trail.
- Example reasons for sharing:
  - Persons/patients from more than one county are involved
  - Conducting a provider call in a county other than the person's county of residence
  - Linking a Contact Event

# When to Share an Event

- Sharing an event with another LHD gives users in that county the ability to view, edit, and/or share the event based on the share permissions given.
- To request an event, you can:
  - Contact the LHD in which the event resides, or
  - You can contact the NC EDSS Help Desk via email ([ncedsshelppdesk@dhhs.nc.gov](mailto:ncedsshelppdesk@dhhs.nc.gov)) and request an event share using the Event ID number

# How to Share an Event



The screenshot shows a software interface with a toolbar at the top containing various icons. The 'Share Event' icon, which is a speech bubble with a plus sign, is highlighted with an orange square. Below the toolbar is a dark blue header labeled 'Event Summary'. Underneath this header is a table with a dark blue header labeled 'Basic Information'.

Basic Information	
Event ID:	170002710
Disease:	Gonorrhea (300)
Name:	<a href="#">Grape Fanta</a>
Birth Date:	04/21/1982
Age:	42
Gender:	Female
Home Phone:	(111) 222-2333
Type:	Batch
Investigation Status:	Open
Linked Events/Contacts:	2 ( <a href="#">View</a> )
Attachments:	0 ( <a href="#">Add</a> )

- To share an event with another LHD:
  1. Open the event
  2. Click on the 'Share Event'  icon and the 'Share Event' screen will populate

\*You must have an event open to see this icon

# Sharing an Event

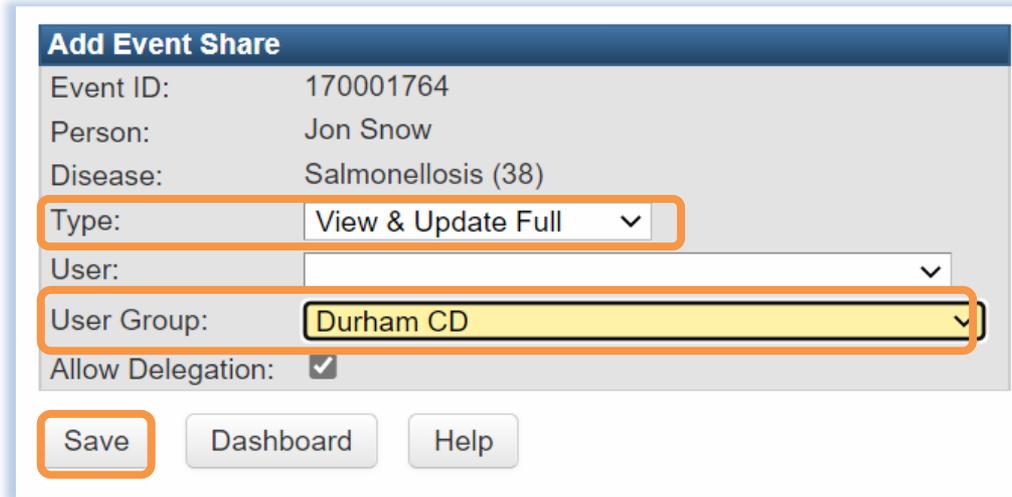
## Share Event - Grape Fanta - Gonorrhea (300)

Currently Shared										
Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action

Add Event Share	
Event ID:	170002710
Person:	Grape Fanta
Disease:	Gonorrhea (300)
Type:	<input type="text" value="View Only Limited"/>
User:	<input type="text"/>
User Group:	<input type="text"/>
Allow Delegation:	<input type="checkbox"/>

- The Currently Shared section is where current and past shares are displayed
- The Add Event Share section is where you add info to submit share request in NC EDSS
- Type: is defaulted to “View Only Limited”.

# Sharing an Event



**Add Event Share**

Event ID: 170001764  
Person: Jon Snow  
Disease: Salmonellosis (38)  
Type: View & Update Full  
User:   
User Group: Durham CD  
Allow Delegation:

Save Dashboard Help

- Type: always select “View and Update Full”
- Select User Group: always assign the LHD user Group instead of a single User
- Check the “Allow Delegation” box so the event can be shared by the user group the event was shared with
- Click the Save button

# Sharing an Event

## Share Event - Jon Snow - Salmonellosis (38)

### Currently Shared

Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action
<a href="#">170001764</a>	Jon Snow	Open	Salmonellosis (38)	View & Update Full	11/10/2022	Alicia Shedd [asheddcovid]		Durham CD	Yes	<a href="#">Unshare</a>

### Add Event Share

Event ID: 170001764  
Person: Jon Snow  
Disease: Salmonellosis (38)  
Type: View Only Limited ▾  
User:   
User Group:   
Allow Delegation:

Save

Dashboard

Help

- In the 'Currently Shared' table, you should now see the event that is shared and who that event is shared with
- Select Dashboard to return to the Event Summary dashboard

# Sharing an Event

The image shows two overlapping windows. The background window is titled 'Event Summary' and contains a 'Basic Information' section with the following data:

Event ID:	170001764
Disease:	Salmonellosis (38)
Name:	Jon Snow
Birth Date:	08/05/1980
Age:	44
Gender:	Male
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 (View)
Attachments:	0 (Add)

Below this is a 'Notifications' section with sub-sections: 'Disease Classification' (Classification: Confirmed), 'Workflow Status' (Event is in workflows [View List]), and 'General Notifications' (County of residence: Wake County). An 'Edit Event Properties' button is at the bottom.

The foreground window is a Mozilla Firefox browser titled 'Add/Edit Notes'. The address bar shows the URL: <https://ncedss6-training.dph.ncdhhs.gov/editNotes!input.d>. The page content includes an 'Add Note' form with a text area containing 'Shared event with Durham County/Linked Outbreaks'. Below the text area, it says '2452 characters left'. There are two dropdown menus: 'Category:' set to 'Generic' and 'Type:' set to 'Public'. At the bottom of the form are 'Save' and 'Close' buttons.

- Add/Edit Notes window
  - Example: Shared event with Durham County/Linked Outbreaks
- Click on the Save button

# Unshare an Event

Currently Shared										
Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action
<a href="#">170002710</a>	Grape Fanta	Open	Gonorrhea (300)	View & Update Full	10/02/2024	Wake Student22 [WakeLHC22]		Johnston STD	Yes	<a href="#">Unshare</a>

If an event no longer needs to be shared with a specific user group, click on the [Unshare](#) hyperlink in the Currently Shared section of the Share Event screen.

# Unshare an Event

## ▲ A. General

☆	Shared Events - Events shared by me
☆	Shared Events - Events shared with me or my group(s)

Monitor events shared by you or shared with you/ your group via the Shared Events workflows and unshare when no longer needed.

# Sharing an Event Demonstration



# LHD to LHD Transfer

- When to use LHD to LHD Transfer
- How to complete an LHD Transfer
- LHD to LHD Transfer Workflows

# When to use LHD to LHD Transfer

- An LHD to LHD transfer is completed when an LHD determines that the person/patient resides in a different county. The transfer changes the 'ownership' of an event
- An LHD to LHD transfer requires two actions to transfer ownership:
  - Update the NC County of Residence for the Event
  - Add a new block in the Investigation Trail

# How to complete an LHD Transfer

## 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



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

- **Action 1:** Update the NC County of Residence for the event to the new county

# How to complete an LHD Transfer

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

**Date Assigned/Reassigned**  
06/23/2021   
**Add New**

**Date Assigned/Reassigned**  
05/17/2024   
**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 \*  
LHD(Region) to LHD 

**Authorized Reporter** **Phone number**

**Classification status**  
Unspecified 

**Notes**

Is this investigation eligible for early closure?

- **Action 2:** Add a new block in the Investigation Trail to assign the event to the new county group
- Click the Add New button in the current Investigation Trail block
- Enter the date in order to open the rest of the fields in the block
- Reason for Assignment: select LHD to LHD Reassign;
- Classification status: keep same as the previous block and save.

# How to complete an LHD Transfer

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

**Date Assigned-Reassigned**  
09/26/2024

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

**Local patient identifier**

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

**Authorized Reporter**  
Asta Feng

**Phone number**  
(555) 555-5555

**Classification status**  
Confirmed

**Notes**  
Pt resides in Durham Co

**Date Assigned-Reassigned**  
10/03/2024

**Add New**

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

**Local patient identifier**

**Select the reason for the assignment/reassignment:**  
LHD to LHD transfer

**Authorized Reporter**

**Phone number**

**Classification status**  
Confirmed

**Notes**

**Include notes supporting reason for transfer to help new LHD.**

- You have now transferred the event to a new county
- Make sure you have completed the Authorized Reporter/Phone Number field in the block with your group
- Add notes to document the reason for transfer

# LHD to LHD Transfer Demonstration



# LHD to LHD Transfer Workflows

## C.2 CD Review and Approval Workflows

CD Events Submitted for Review and Approval (Bacterial Diseases): 1. Original Assignment

CD Events Submitted for Review and Approval (Bacterial Diseases): 2. LHD to LHD Transfer

CD Events Submitted for Review and Approval (Bacterial Diseases): 3. Reassign to LHD from State

CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 1. Original Assignment

CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 2. LHD to LHD Transfer

CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 3. Reassign to LHD from State

CD Events Submitted for Review and Approval (HEPC): 1. Original Assignment

CD Events Submitted for Review and Approval (HEPC): 2. LHD to LHD Transfer

- From the workflows screen, navigate to the C.2 CD Review and Approval Workflows. Each disease category has a workflow for CD Events Submitted for Review and Approval: 2. LHD to LHD Transfer
- Other categories that include LHD to LHD transfer workflows are:
  - E. HEP B Surveillance Workflows
  - G. STD Specific Workflows
  - K. VPD Specific Workflows

# LHD to LHD Transfer Workflows

## STD Events Submitted For Review And Approval: 2. LHD To LHD Transfer (Last Update: 10/02/2024 01:26 PM)

Event	Name	Status	Create Date	Disease	Last Update
170000753 Question Packages • 01. Administrative	Pink Green	Open	12/02/2010	Gonorrhea (300)	10/02/2024
170000752 Question Packages • 01. Administrative	Orange Yellow	Open	12/02/2010	Gonorrhea (300)	10/02/2024
170000751 Question Packages • 01. Administrative	Blue Purple	Open	12/02/2010	Gonorrhea (300)	10/02/2024
170000750 Question Packages • 01. Administrative	Purple Pink	Open	12/02/2010	Gonorrhea (300)	10/02/2024

Click on the Administrative hyperlink, to go directly to the event Investigation Trail.

If patient is not a NC resident, enter the NC investigating county here.

NC County of Residence for the Event

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

Date Assigned/Reassigned	<input type="text" value="12/02/2010"/>	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	<input type="text" value="Pitt STD"/>	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	<input type="text" value="Original/Initial Assignment"/>	
Authorized Reporter	<input type="text" value="Betty Boop"/>	Phone number <input type="text" value="(252) 888-8888"/>
Classification status	<input type="text" value="Confirmed"/>	
Notes	<input type="text" value="Patient is a NCSU student and resides most of the year in Wake County."/>	
Date Assigned/Reassigned	<input type="text" value="12/05/2010"/> <a href="#">Add New</a>	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	<input type="text" value="Wake STD"/>	Local patient identifier <input type="text"/>
* Select the reason for the assignment/reassignment	<input type="text" value="LHD(Region) to LHD(Region) transfer"/>	
Authorized Reporter	<input type="text"/>	Phone number <input type="text"/>
Classification status	<input type="text" value="Confirmed"/>	
Notes	<input type="text"/>	

# LHD to LHD Transfer Workflows

## G. STD Specific Workflows

Bacterial STDS Where Treatment is Incomplete	36 (0)
STD Events Submitted for Review and Approval: 1. Original Assignment	46 (0)
STD Events Submitted for Review and Approval: 2. LHD to LHD Transfer	24 (0)
STD Events Submitted for Review and Approval: 3. Reassign to LHD from State	2 (0)

Events remain in the **‘Events Submitted for Review and Approval: 2.LHD to LHD Transfer’** Workflow until they are ready to be assigned to the State or another LHD group if the person’s residence of diagnosis is determined to be another county.

# LHD Transfer Workflow Demonstration



## Recap: Sharing an Event vs LHD to LHD Transfer

- Sharing an Event:
  - Allows another county/user that does not have access to the current jurisdiction to view/edit/update the event.
  - The responsibility of completing the investigation and reporting to the State remains with the county of residence.
  - The event remains in the original county's workflows until assigned to the State or another LHD via LHD-to-LHD transfer.

## Recap: Sharing an Event vs LHD to LHD Transfer

- LHD to LHD transfer:
  - Reassigns the responsibility of investigation and reporting to the State to the new county.
  - Once the event is assigned via “LHD to LHD transfer”, it will no longer show up in the original assignee’s workflows.
  - The original county will no longer have access to view the event unless it is shared with them.



**Thank you for joining today!**

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