



# TOP NCEDSS DATA ENTRY MISTAKES

October 2024

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# Agenda

- Searching Errors
- Address Errors
- Date Errors
- Lab Errors
- Disease Report Information Errors
- Investigation Trail Errors
  - Classification Status Errors
  - LHD to LHD Transfer
- Incomplete data
- Submission Errors

# Searching Errors

# Searching Errors

- **Avoiding Duplicate Persons:**

- Be **creative** when searching for individuals to prevent creating duplicates.
- Always utilize the **Manage People and Facilities**  icon, also known as the **Party/Person Search**.
- Search using **3–4 different methods** before concluding that a person is not in the system. Like use partial names and **wildcards** (\*) to broaden your search and to account for potential spelling variations in the system.
- Consider searching with the person's **phone number, email address, home address, or social security number**.

	Smith-Jones*
Robert*	Smith-Jones*
Robert*	*Smith*
Bob*	Smith*
Rob*	Smi*
Robert*	*Jones*
Rob*	*Jones*
Ro*	*Jon*
Bob*	*Jones*
<b>* This is not every possible combo</b>	
<b>Use your best judgement to search</b>	

# Address Errors

# Address Errors

- Abbreviate address extensions according to USPS standards: St, Rd, Blvd

Street 1: 4408 New Bern Ave  
Street 2:   
City: Raleigh  
State: NC  
Zip Code: 27610  
County: Wake County  
Country: USA

✓ Address validated [View] [Apply]

- Address Validation Results

- If the system matches/validated the address to match the address entered, select apply.
- If it does not, select close.

Address Validation Results

Address Differences		
Field	Entered	Validated
Street 1	4408 New Bern Ave	4408 New Bern Ave
City	Raleigh	Raleigh
State	NC	NC
Zip Code	27610	27610
County	Wake County	Wake County
Latitude	35.79862481132076	
Longitude	-78.56267220125785	

View Map

Apply Close

# Address Errors

- **Address Type:**

- **Home:** The primary residence where the person lives most of the time; this determines the reporting jurisdiction.
- **Home (Secondary):** Use only if the person resides and pays taxes in two locations.
- **Work:** A work address may be entered using this designation.

Contact Information					
Type	↑↓	Address	↑↓	County	↑↓
Home * Primary		123 Soda Ln, Raleigh, NC 27513 USA		Wake County	
Home (Secondary)		6790 Central Florida Pkwy, Orlando, FL 32821 USA			
Work		3911 Capital Blvd, Raleigh, NC 27604 USA		Wake County	

Please confirm and add the county in which the person resides

# Address Entry

- **Special Circumstances:**
  - If the person is **incarcerated**, the home address should reflect the address they had prior to incarceration.
  - If the person resides in **prison**, the home address is the **prison** itself.
  - If the person is a **student**, the home address is either the **dormitory** or their local address.

# Date Errors

# Date Errors

- Ensure that you select the correct month and year when using the calendar feature

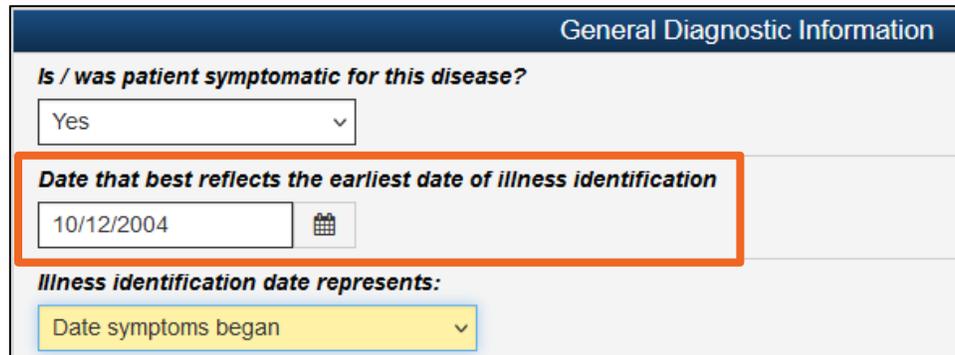


Oct 2024

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today Close

- Entering the person's date of birth (DOB) as the symptom onset date or the lab specimen collection date



General Diagnostic Information

*Is / was patient symptomatic for this disease?*

Yes

**Date that best reflects the earliest date of illness identification**

10/12/2004

**Illness identification date represents:**

Date symptoms began

# Date Errors

- **Missing Diagnosis Date:** Leaving the symptom onset date blank in the Clinical Package.

General Diagnostic Information	
<i>Is / was patient symptomatic for this disease?</i>	
<input type="text"/>	
<b>Date that best reflects the earliest date of illness identification</b>	
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="📅"/>
<i>Illness identification date represents:</i>	
<input type="text"/>	

Notifications
<b>Concerns</b>
<b>Best date for illness identification is missing</b>
<b>Disease Classification</b>
Classification: Confirmed
<b>Workflow Status</b>
Event is in workflows [ <a href="#">View List</a> ]
<b>General Notifications</b>
County of residence: Iredell County

# Date Errors

- **Incorrect Symptom Onset Date:** Failing to enter the correct diagnosis date.

General Diagnostic Information	
<i>Is / was patient symptomatic for this disease?</i>	
<input type="text"/>	
<b>Date that best reflects the earliest date of illness identification</b>	
<input type="text" value="10/10/2024"/>	<input type="text"/>
<i>Illness identification date represents:</i>	
<input type="text"/>	

Specimen Info	
<i>* Specimen Date *</i>	Specimen Number
<input type="text" value="10/08/2024"/>	<input type="text"/>
<i>* Specimen Type *</i>	
<input type="text" value="Cerebrospinal fluid sample"/>	
Specimen Collection Volume	Specimen Collection Volume Units
<input type="text"/>	<input type="text"/>

In the Clinical package, the earliest testing date is being after the specimen date. This date should be the same as or before the specimen date, except in the case of the flu, which only reports deaths, so the date type field reflects the date of death.

# Lab Errors

# Lab Errors

- Creating an event without a lab. Always check to make sure you clicked 'Save' when you entered the lab

✓ Add Lab Result - Grape Fanta - Gonorrhea (300) Jump To ▾ **Save** Cancel Help

**Ask At Order Entry**

Answer Value

Question  Answer

Date Question Answered  

**+ Add New**

**Save** Cancel Help

# Lab Errors

- When entering a lab be sure to enter the collection date, test type, and the result. These are considered required information sections.
- Some diseases may require additional information for the lab. Check with your CD nurse lead/manage or TATP liaison for disease specific guidelines

# Disease Report Information Errors

# Disease Report Information Errors

- The Disease Report Information section in the Administrative Package must be completed before assigning the event to the State or CDC.
  - If the event was created through ELR, this section will be auto completed.
  - If you **manually create an event**, remember to complete this section.

Disease Report Information	
<b>Initial Source of Report to Public Health</b>	
Laboratory	▼
Laboratory name	
zz_Other	▼
If other, specify	
Fictional Lab	
<b>Date of Initial Report to Public Health (Required)</b>	
10/08/2024	📅
<b>Initial method of report</b>	
Paper lab report	▼

**DO NOT** select 'Electronic lab report (ELR)' or 'Electronic Case Report (eCR)' as these are for documents that are electronically reported into the database

# Investigation Trail Errors: Classification Status

# Investigation Trail Errors

- When the event is not created by a State user, the first block in the Investigation Trail should include:
  - The LHD Group: County of assignment
  - The Reason for assignment as "Original/Initial assignment."
  - The Authorized Reporter (your name and phone number)

The screenshot shows a web form titled "Investigation Trail: Add a new entry for each group to which the event transfers during the investigation". The form includes several sections:

- Date Assigned-Reassigned:** A date picker set to 10/16/2024 and an "Add New" button.
- Group:** A dropdown menu with "Wake CD" selected. A note above it states: "(You cannot change your group selection unless you clear this entry by erasing the Date Assigned)".
- Reason for assignment:** A dropdown menu with "Original/Initial Assignment" selected. A note above it states: "\* Select the reason for the assignment/reassignment \*".
- Authorized Reporter:** A text input field containing "Teddy Bear".
- Phone number:** A text input field containing "(999) 999-9999".
- Classification status:** A dropdown menu with "Confirmed" selected.
- Notes:** A text area containing "A student at ABC school."

Orange boxes highlight the "Group", "Reason for assignment", "Authorized Reporter", and "Phone number" fields, indicating they are required for the event to be created by a State user.

It is extremely important for follow up that a direct phone number including the extension is provided

# Investigation Trail Errors

- The Classification status that aligns with the lab results.
- The Notes section to provide any comments/information you would like to share with the state. The State SMEs do read these boxes

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

**Date Assigned-Reassigned**  
10/16/2024   
**Add New**

**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** **Phone number**  
Teddy Bear (999) 999-9999

**Classification status**  
Confirmed

**Notes**  
A student at ABC school.

# Investigation Trail Errors

- Avoid submitting the classification status as “Unspecified” or selecting the wrong classification based on positive lab results.
- If the classification is submitted as “Unspecified,” provide an explanation in the **Notes** section to clarify the reason.

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

**Date Assigned-Reassigned**  
10/16/2024   
**Add New**

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

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

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

**Classification status**  
Unspecified ▾

**Notes**  
Insufficient Information: The laboratory test did not provide enough detail to determine a specific diagnosis or classification.

# Investigation Trail Errors

- When selecting the classification status, remember that lab tests are hierarchical:
  - **Positive tests override negative tests.**
  - **Confirmed tests** (e.g., Positive PCR/RNA/NAA) take precedence over **Probable tests** (e.g., Positive Antigen).
  - **Probable tests** (e.g., Positive Antigen) override **Suspect tests.**
- Some Classifications are based not only on lab result but also clinical symptoms and epi linkages to other cases and disease settings.

# Investigation Trail Errors

- **Classification Guidelines Continued:**
  - **Negative results should never be entered** unless a positive result has been previously documented, and only for specific diseases (e.g., some vector-borne diseases and tuberculosis).
  - A negative culture **does not override** a positive PCR result; the event is still **reportable for surveillance**.
  - An event should not be created with **only a negative lab result**.

# Investigation Trail Errors

- For **Does Not Meet Criteria**, please refer to the [case definition](#) for the appropriate labs for each disease.
  - Negative, inconclusive, undetermined lab result(s)
  - Positive IgG or AB lab result(s)
  - Out of state resident

Labs								
Lab No.	Specimen Date	Specimen Number	Specimen Type	Result	Result Status	Result Value	Test	Last Update
1	01/19/2022		Nasopharyngeal swab	Negative			SARS-CoV+SARS-CoV-2 Antigen...	03/24/2022
2	01/21/2022		Nasopharyngeal swab	Inconclusive			SARS-CoV RNA XXX QI NAA+pro...	03/24/2022
3	01/25/2022		Nasopharyngeal swab	Specimen unsatisfactory for...			SARS-CoV RNA XXX QI NAA+pro...	03/24/2022

# Investigation Trail- LHD to LHD Transfer

## Investigation Trail – LHD to LHD Transfer

- An LHD-to-LHD transfer occurs when it is determined that a person diagnosed with a disease resides in another county.
- Events may be assigned incorrectly if the patient's address is not included with the initial lab result, or if the individual is identified as a student or incarcerated.
- Action Steps:
  - Update the County of Residence to the correct county.
  - Add a new block and assign it to the appropriate county LHD.
  - Ensure the patient's address is updated.

# Investigation Trail – LHD to LHD Transfer

- For the new LHD to access the event, the transferring LHD must complete the following two steps:

The screenshot shows a web form titled "NC County of Residence for the Event". The form has a dark blue header with the title. Below the header, there is a light gray area with the text: "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." Below this text is a dropdown menu labeled "NC County of Residence for the Event" with "Durham County" selected. An orange box highlights this dropdown, and an orange arrow labeled "1" points to it. Below the dropdown is a dark blue bar with the text: "Investigation Trail: Add a new entry for each group to which the event transfers during the investigation". Below this bar is a section titled "Date Assigned-Reassigned" with a date input field containing "10/16/2024" and a calendar icon. Below the date field is a blue button with a plus icon and the text "Add New". An orange box highlights this button, and an orange arrow labeled "2" points to it.

1. Change the NC County of Residence to the county where the event is being transferred.
2. Click Add New to get a new box in the Investigation trail.

# Investigation Trail Reassignment: LHD to LHD Transfer

- Enter the date and press Tab; all relevant fields will populate to be completed.
- In the Reason box, select LHD to LHD Reassign; keep the Classification Status as it was in the previous box, then save.
- After the event is assigned to the new LHD, the old LHD will no longer have access to view it unless it is reshared with them.

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

**Date Assigned-Reassigned**

10/16/2024 

**Add New**

**Date Assigned-Reassigned**

10/15/2024 

**Add New**

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

**Local patient identifier**

**\* Select the reason for the assignment/reassignment \***

LHD to LHD transfer 

**Authorized Reporter**

**Phone number**

# Incomplete Data

# Incomplete Data

- Some questions trigger follow-up (child) questions that won't appear unless the initial question is answered.

The image shows two side-by-side screenshots of a web form. The left screenshot shows the initial state where the 'Ingest infant formula?' dropdown is set to 'Yes'. Below it is a text input field for 'Formula Type / Manufacturer'. Further down are two more dropdown questions: 'Eat commercial baby food?' and 'Eat at a group meal?'. An orange arrow points from the 'Formula Type / Manufacturer' field in the left screenshot to a corresponding field in the right screenshot.

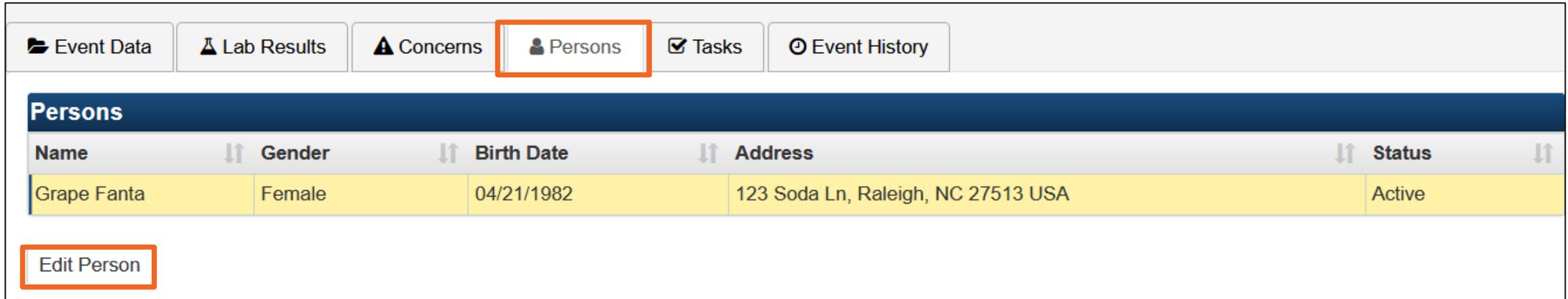
The right screenshot shows the form after the 'Formula Type / Manufacturer' field has been filled with 'Test'. This triggers the appearance of two additional questions, which are highlighted by an orange square: 'What was the type of infant formula?' and '\* Where was formula obtained? \*'. Below these is a date field 'Consumed on (date)' with a calendar icon. The 'Where was formula obtained?' dropdown is highlighted in orange.

The additional child questions (in the orange square) did not appear until the 'Formula Type/Manufacturer' field was completed.

# Death date error

# Death date error

- Click on the Persons Tab on the Event Summary Dashboard
- Click the Edit Person button



The screenshot displays the Event Summary Dashboard interface. At the top, there is a navigation bar with several tabs: Event Data, Lab Results, Concerns, Persons, Tasks, and Event History. The 'Persons' tab is currently selected and highlighted with an orange border. Below the navigation bar, the 'Persons' section is visible, featuring a table with the following columns: Name, Gender, Birth Date, Address, and Status. The table contains one entry for 'Grape Fanta', a female born on 04/21/1982, residing at 123 Soda Ln, Raleigh, NC 27513 USA, with a status of 'Active'. Below the table, there is an 'Edit Person' button, which is also highlighted with an orange border.

Name	Gender	Birth Date	Address	Status
Grape Fanta	Female	04/21/1982	123 Soda Ln, Raleigh, NC 27513 USA	Active

# Death date error

**Edit Person**

* First Name *	Middle Name	Last Name	Suffix
<input type="text" value="Grape"/>	<input type="text"/>	<input type="text" value="Fanta"/>	<input type="text"/>
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	Death Date	Living Status	
<input type="text" value="04/21/1982"/>	<input type="text" value="09/01/2024"/>	<input type="text" value="Dead"/>	

\*If the Living Status is dead, please enter the date of death

Social Security Number

Deduplication Status

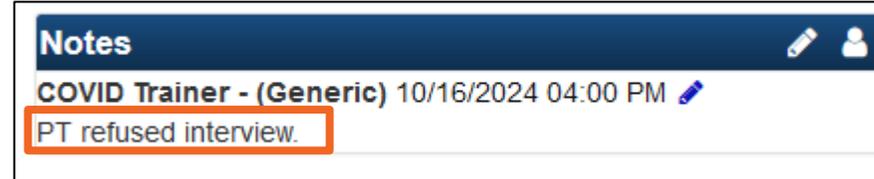
## ○ Edit Person

- In the Death Date field, enter the date of death
- In the Living Status field, select Dead
- Click the Save button

# Submission Errors

# Submission Errors

- Avoid submitting events to the state with missing required fields.
  - Simply adding notes in the Dashboard is insufficient; make sure all necessary fields are completed.



# Submission Errors

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

## 📅 Date Assigned/Reassigned

04/21/2022



+ 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 \*

Original/Initial Assignment



**Authorized Reporter**

Deanna Faison

**Phone number**

(919) 345-9989

**Classification status**

Confirmed



**Notes**

Patient refused to give race



# Submission Errors

- Pay attention to the Red Concerns on the Dashboard before submitting an event.

### Notifications

**Concerns**  
**Initial date of report to public health is missing and is required**  
**Race has not been selected for this person**

**Disease Classification**  
Classification: Contact

**Workflow Status**  
Event is in workflows [[View List](#)]

**General Notifications**  
County of residence: Wake County

**Outbreaks**  
[Linked outbreak: Wake County Love Club Inc 2023 \[Open\]](#)  
[Linked outbreak: Johnston Co Love Club Inc March 2021 Outbreak \[Open\]](#)  
[Linked outbreak: Wake Co Love Club Inc March 2019 Outbreak \[Open\]](#)

[Edit Event Properties](#)

# Submission Errors

- The Disease Report Information section is a required section. Information in the section should always be completed before submitting the event to the State.

Disease Report Information	
<b>Manually lock this event from auto-closure</b>	
<input type="text" value="No"/>	
<b>Initial Source of Report to Public Health</b>	
<input type="text"/>	
<b><i>Date of Initial Report to Public Health (Required)</i></b>	
<input type="text" value="mm/dd/yyyy"/>	
<b>Initial method of report</b>	
<input type="text"/>	



**Thank you for joining today!**

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