WVEDSS-NBS
User Guide

Updated January 1, 2012

Table of Contents

WVEDSS-NBS Information 1
WVEDSS-NBS Security, HIPAA and Client Confidentiality.....1
WVEDSS-NBS PROCESS FLOW.....2
WVEDSS-NBS Features.....3
Getting Help.....7
Logging Onto and Closing the WVEDSS-NBS Application.....8
WVEDSS-NBS Homepage or Dashboard.....9
Data Entry.....10

- Searching for a Patient 10
- Entering Patient Information 12
- Merging Patients 14
- Creating the Investigation.....17
- Associating a Lab Report with an Investigation 18
- Creating the Notification (State and Regional Epidemiologists only) 19
- Entering Treatments 21
- Entering Vaccinations 22
- Open Investigations Queue 23

WVEDSS-NBS Information

WVEDSS-NBS is an acronym that stands for **W**est **V**irginia **E**lectronic **D**isease **S**urveillance **S**ystem-**N**ationalEDSS **B**ased **S**ystem. The WVEDSS-NBS application stores client records for the purpose of electronic disease surveillance.

> WVEDSS-NBS is a patient-centered system. The patient record should be entered only once; multiple disease conditions over multiple years are added to the same patient record.

Using WVEDSS-NBS you can:

- View, Add, and Edit
  - Patient demographic information
  - Laboratory results
  - Investigations
  - Treatment information (if known)
  - Vaccination information
- Electronically submit notifications of reportable conditions to CDC
- Analyze data by creating and running reports, or exporting report output for use in third-party analysis, visualization, and reporting (AVR) tools.

WVEDSS-NBS Security, HIPAA and Client Confidentiality

WVEDSS-NBS Security

Only users who have completed WVEDSS-NBS Training have access to WVEDSS-NBS.

Access to the various WVEDSS-NBS screens and functions depends on assigned role and security permissions. Assigned role and security permissions are determined by job duties.

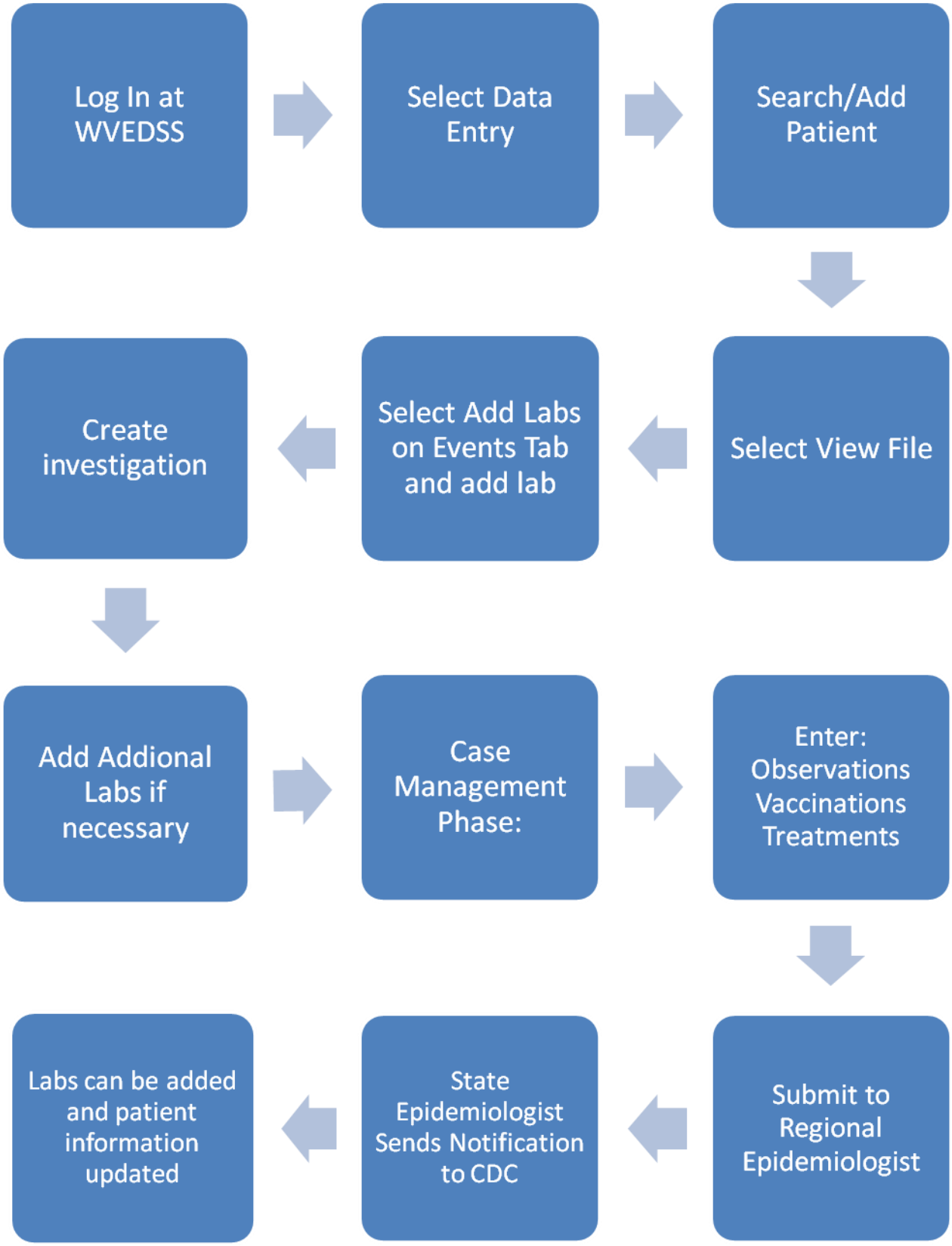
HIPAA

HIPAA stands for Health Insurance Portability and Accountability Act. All WVDHHR employees have completed the level of HIPAA training that was deemed appropriate by their supervisor.

Client Confidentiality

All information about individual clients is confidential and the release of any information about a client is governed by WVDHHR HIPAA Policies and Procedures. WVDHHR HIPAA Polices and Procedures direct the use and disclosure of protected health information (PHI).

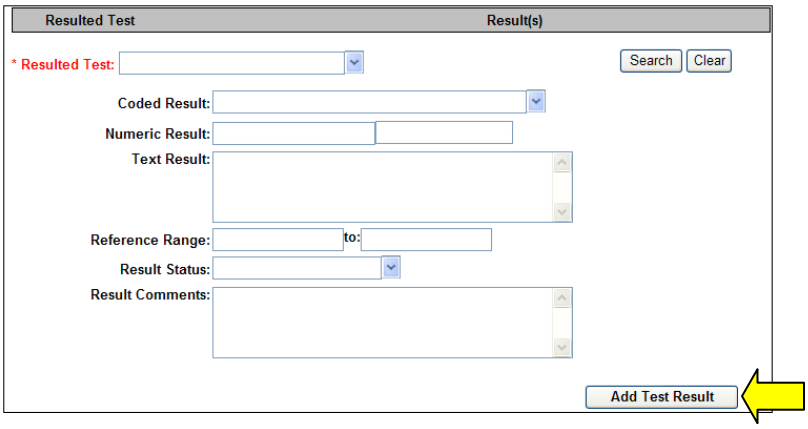
WVEDSS-NBS PROCESS FLOW



WVEDSS-NBS Features

Add [Section Name] **or Update** [Section Name] **button:**

When information is entered into a section that can display multiple values like the Test Result(s) section in the example, you need to click the **Add** [Section Name] or **Update** [Section Name] button to update the information in the box.



If you try to save the information by clicking the Submit button, an error message is displayed at the top of the page: *Click the **Add** [Section Name] or **Update** [Section Name] button to complete the section changes and then click the Submit button to save the information.*

Back and Forward Arrows

Use of the Back and Forward arrows on the browser window is not supported by the application – in other words – **DO NOT use the Back and Forward arrows**.

Browser Settings for WVEDSS-NBS

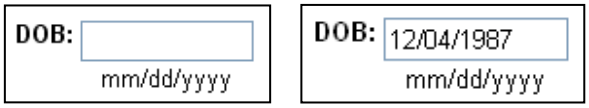
If an information bar shows up at the top of your screen please disable your pop-up blocker.

Checkboxes

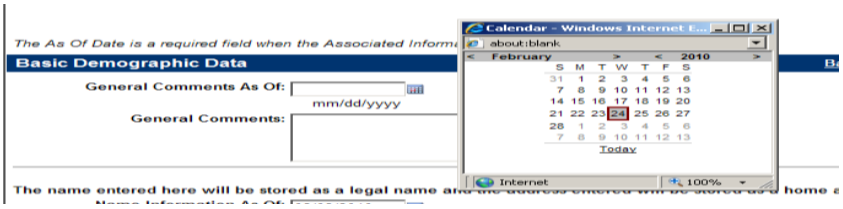
Some fields enable you to select a checkbox to toggle an option on or off. Click the checkbox to select the option. A checkmark displays indicating that the option is selected. Click the checkbox again to deselect the option. Checkboxes can be checked and unchecked by pressing the spacebar when the checkbox is highlighted.

Date Fields

Enter dates in the mmddyyyy format, 2 digits for month, 2 digits for day and 4 digits for year. The system inserts the slashes as you type in the numbers.



You may also click the calendar icon by the date field and use the pop-up calendar to select a date.

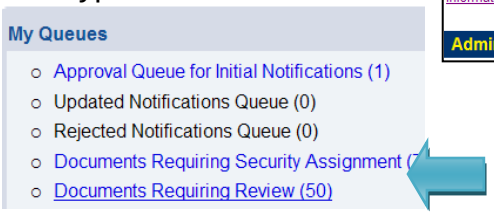


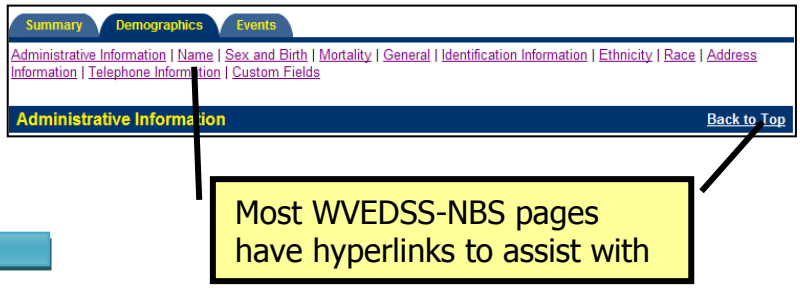
Entering information into WVEDSS-NBS

Press the **Tab** key to move to the next field in the sequence. You can also enter information by clicking the field you want and typing the information you want to enter.

Hyperlink

A hyperlink is underlined text on a web page which, when clicked, opens a new web page or jumps to a new location on the current page. When the mouse cursor is held over an underlined word or phrase and the cursor turns into a hand, which is a hyperlink.





Link or Navigation Link

In WVEDSS-NBS the words at the top of the web page such as Home, Data Entry, Open Investigations, and Reports are Links or Navigation links. To open WVEDSS-NBS pages click on the word or words for the page you wish to open.

Logout

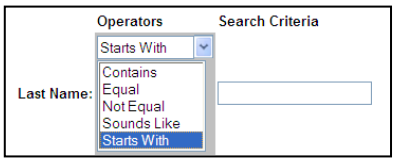
Logout of WVEDSS-NBS when you are not using the application. Click the Logout link at the top of the page.

Multi-Select Fields

Some fields present a list of items for you to choose. To choose an option, click the item you want. To select multiple items, you can press and hold the **CTRL** key and click the items you want.

Operators

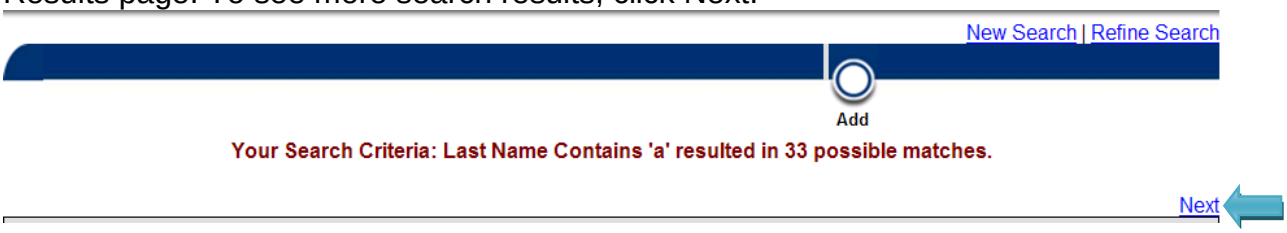
Operators are used in WVEDSS-NBS to add conditions to a search. Conditions help you refine the parameters of your search.



Contains – Displays records containing any of the search information you entered.
Equal – Displays records that exactly match the search information you entered.
Not Equal – Displays records that do not match the search information you entered.
Sounds Like – Displays records similar to the search information you entered. For example, “Steven” returns the value “Stephen”.
Starts With – Displays records that begin with the search information you entered. Starts With is the default operator for Patient search.

Search Results

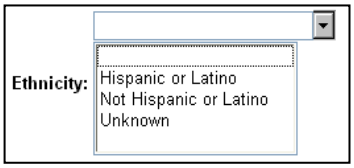
WVEDSS-NBS Search Results frequently return more records than appear on the first Search Results page. To see more search results, click Next.



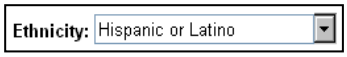
Select Fields

Some fields allow you to choose one or more items from a list of options.

To save screen space these fields hide the available options until you choose an item.



To choose an item from these fields, click the field you want and select the option you want. WVEDSS-NBS displays the selected option in the field.

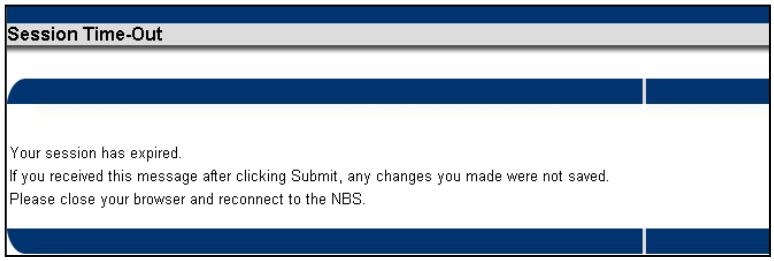


You can also press the **Tab** key to select the field and use the **Up Arrow** and **Down Arrow** keys to select the item you want. Optionally, you can press the key associated with the first letter of the item you want. For example, you can press the **H** key to select the Hispanic or Latino option.

Session Time-Out

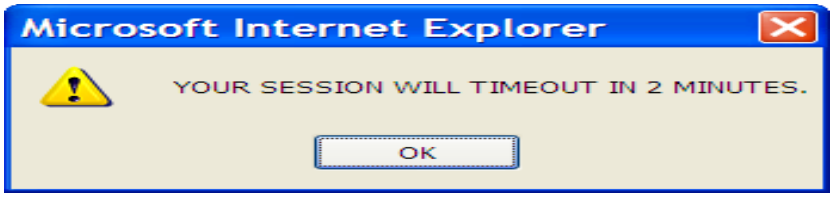
The WVEDSS-NBS session has been set to time-out if there has been no interaction with the system for 45 minutes. To avoid the session time-out, click navigation bar options such as Data Entry or Reports, click buttons such as Submit, Add, Edit or click links that are underlined such as View File and Run. If your session has timed-out you must log in again and information you have entered without submitting will be lost.

The Session Time-Out message is shown below.



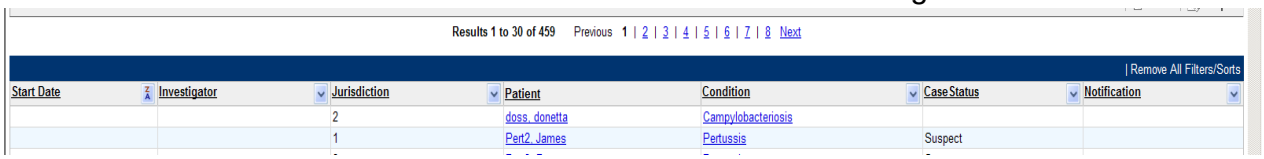
Session Time-Out Warning

WVEDSS-NBS is set to give you a two minute warning before the system times you out.



Sorting and Filtering Columns

Some WVEDSS-NBS pages display information in columns which can be sorted or filtered by the column header. Click on the name of the column to sort or click the arrow by the column header to filter the information. Click Remove All Filters/Sorts to go back to the default view.



Tab key and Shift Tab

Use the Tab key for navigation when moving between fields. To move backwards through the fields hold down the Shift key and press the Tab key.

Type-ahead Feature

When selecting from list boxes such as County or Condition, begin typing the word you want. As you continue typing, the system populates the box with words that match the letters that have been typed. Once the word or words you want to select appear in the list box you can Tab out of the field to make the selection.

Type	Result
S	Salmonellosis
Shi	Shigellosis

❖ *Getting Help*

For WVEDSS-NBS Technical Support – Contact the Help Desk

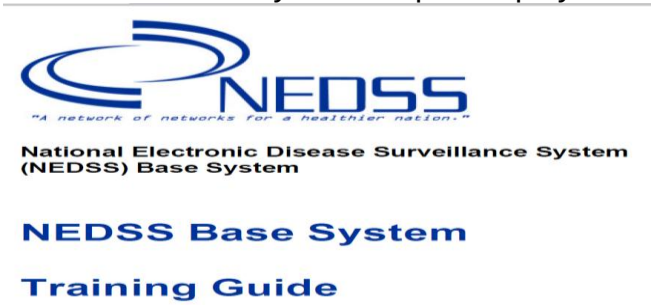
Phone**: 1 (877) 408-8930**

Do not hesitate to call the Help Desk! If the Help Desk is unable to resolve a question or problem the call ticket is referred to the WVEDSS-NBS Coordinator.

❖ NEDSS Base System Help

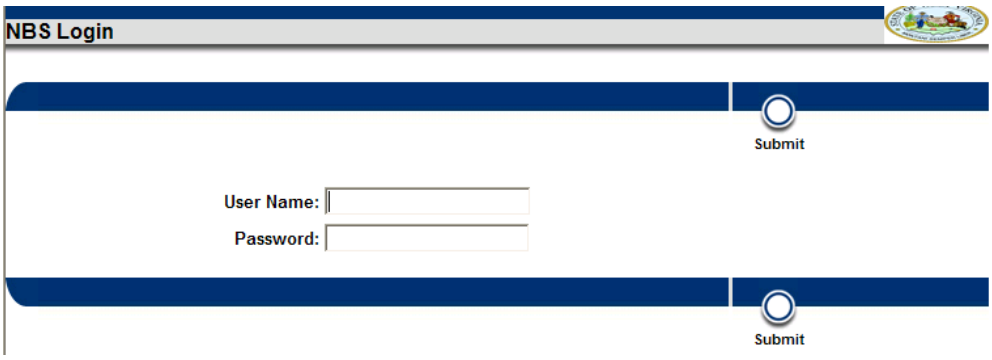
- To view NEDSS Base System Help, click Help on the navigation bar.

NEDSS Base System Help is displayed.



❖ *Logging Onto and Closing the WVEDSS-NBS Application*

- **Logging onto WVEDSS-NBS Training System**
  1. Open the Internet Explorer browser window.
  2. Type **https://wvedss.wv.gov/nbs/login** into the address area.
  3. Click **Go** or press **Enter**
  4. The WVEDSS-NBS User Logon page opens. Enter the user name: lhdepi
  5. No password is required
  6. Click Submit

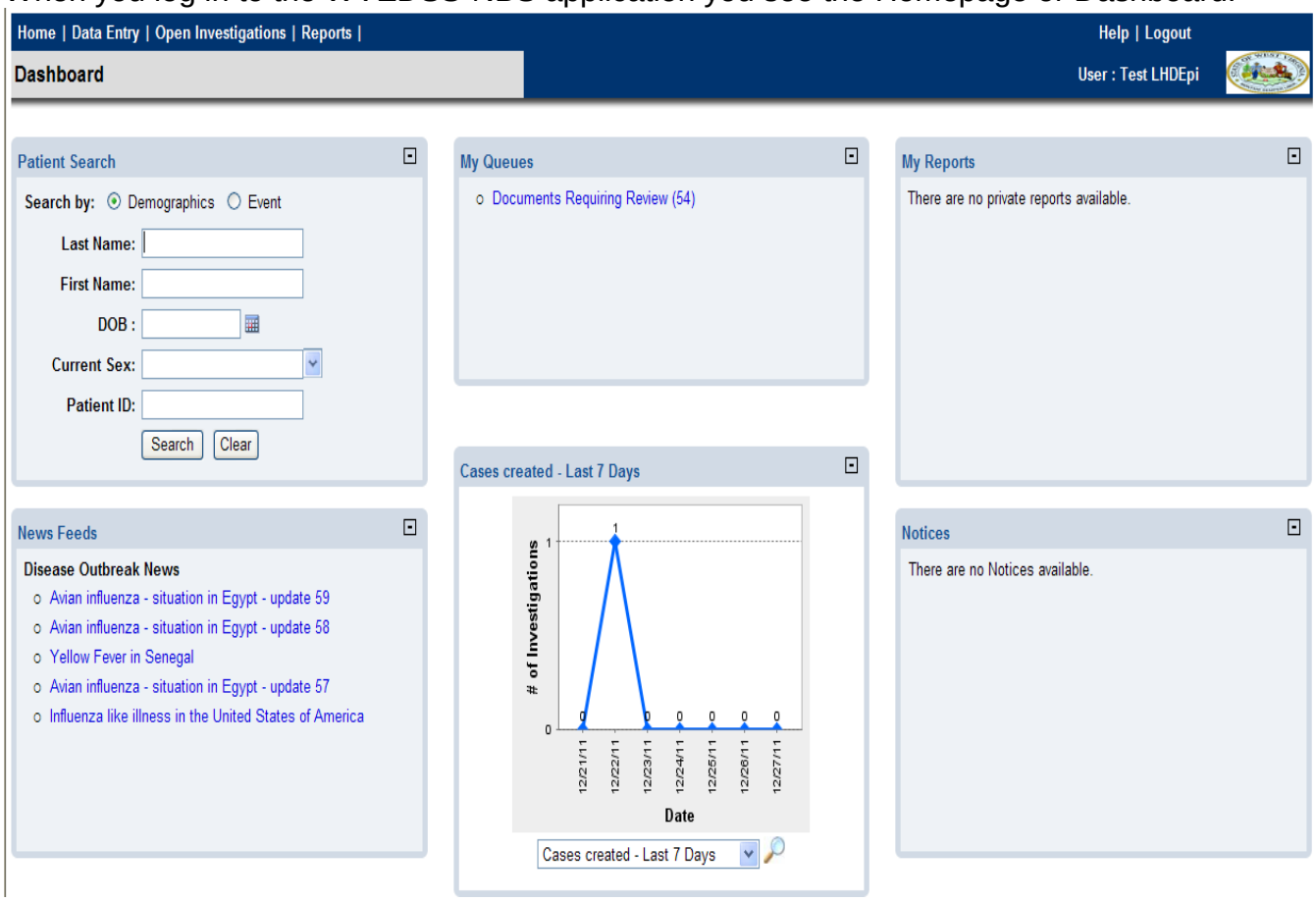


- **Closing WVEDSS-NBS**
  1. Click Logout on the navigation bar. Clicking Logout helps to prevent database locks.

  2. Close the Internet Explorer browser window.

❖ *WVEDSS-NBS Homepage or Dashboard*

When you log in to the WVEDSS-NBS application you see the Homepage or Dashboard.



Navigation Bar: All pages in the WVEDSS-NBS application display the same navigation bar options at the top: **Home**, **Data Entry**, **Open Investigations**, **Reports**, **Help** and **Logout**. Some users may also see more depending on their permission sets.

The table below shows the purposes of the WVEDSS-NBS navigation bar.

Navigation Bar Selection	Purpose
Home	Display observations and notifications queues
Data Entry	Patient search and entering patient information including adding lab results, adding investigations and creating notifications.
Merge Patients	Merge duplicate patient records (only some users)
Open Investigations	View list of program area's open investigations
Reports	Run reports on information entered into WVEDSS-NBS
System Management	System administration functions (only some users)
Help	Display NEDSS Base System Help
Logout	Log out of WVEDSS-NBS

Dashboard: Below the naviagtion bar is the Dashboard which has six moveable sections or 'widgets'. The table below shows the purpose of each dashboard sections:

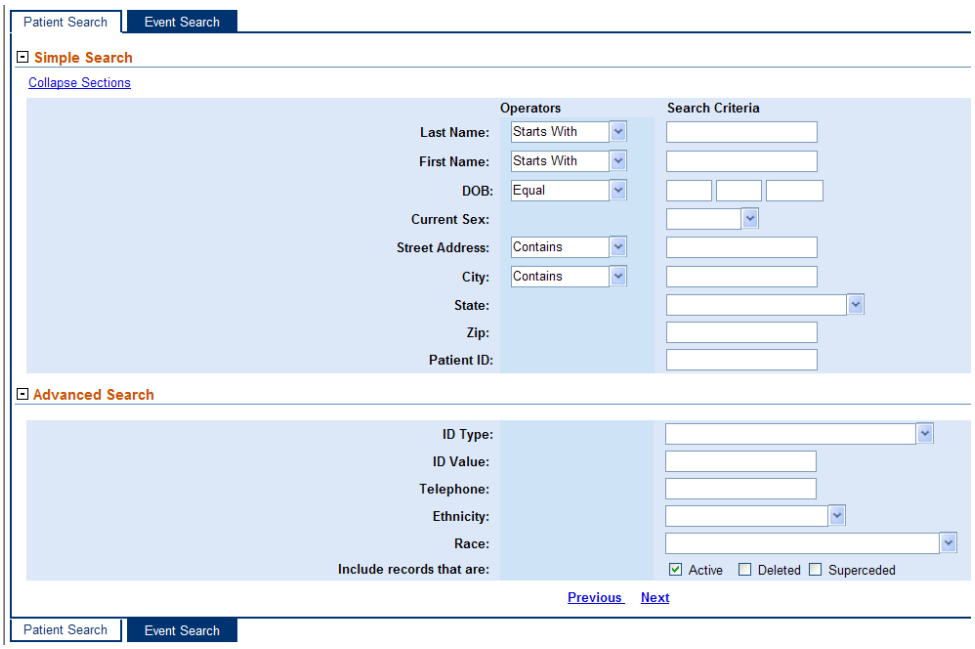
Navigation Bar Selection	Purpose
Patient Search	Alternate patient search screen
My Queues	Work queues for notifications and documents (e.g., lab reports) that display based on user job duties and security permission. Most users will only see one queue: Documents Needing Review.
My Reports	List of a user's Private Reports
News Feeds	Links to health-related news stories
System Reports	Display area for four system-wide reports: - Cases created – last 7 days - Labs created – last 7 days (manual and ELR) - Confirmed Case Counts (for the current week and year) - Cases Assigned – last 14 days (by Investigator Name) Use the drop down box to select a chart. Click the magnifying glass icon for a larger view.
Notices	System updates and links to reports and resources

❖ *Data Entry*

WVEDSS-NBS is a patient-centered system. The patient record should be entered only once. Multiple disease conditions over multiple years are added to the same patient record.

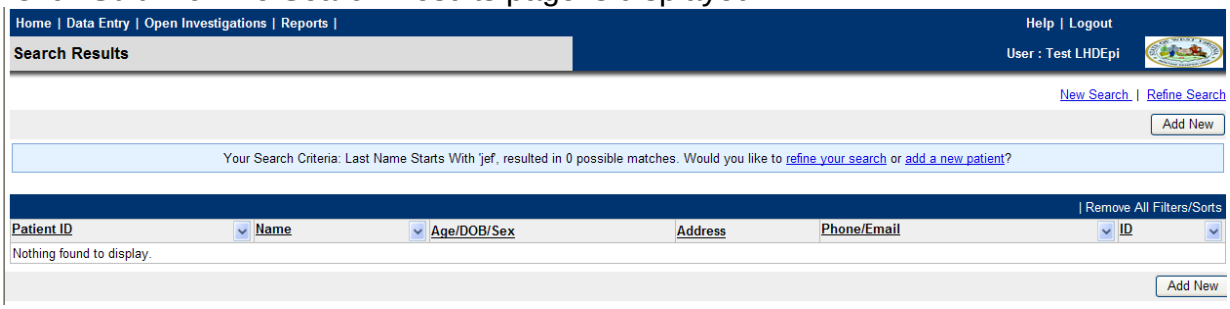
- **Searching for a Patient**
  - To search for a specific patient:
    1. Click **Data Entry** on the navigation bar. WVEDSS-NBS displays a list of available options.

    2. Click **Patient**. The **Patient Search** tab appears. You can search for patients using the Simple Search or Advanced Search options using as few or as many fields as you need.



3. Type the information for the patient you want in the search criteria fields. To enter information, click the fields you want and type or choose the information you want.
4. Click the Operators list box for the field you want and choose the operator you want. WVEDSS displays the **Starts With** operator by default. To include deleted or superceded records in your search check the Deleted and/or Superceded checkbox.

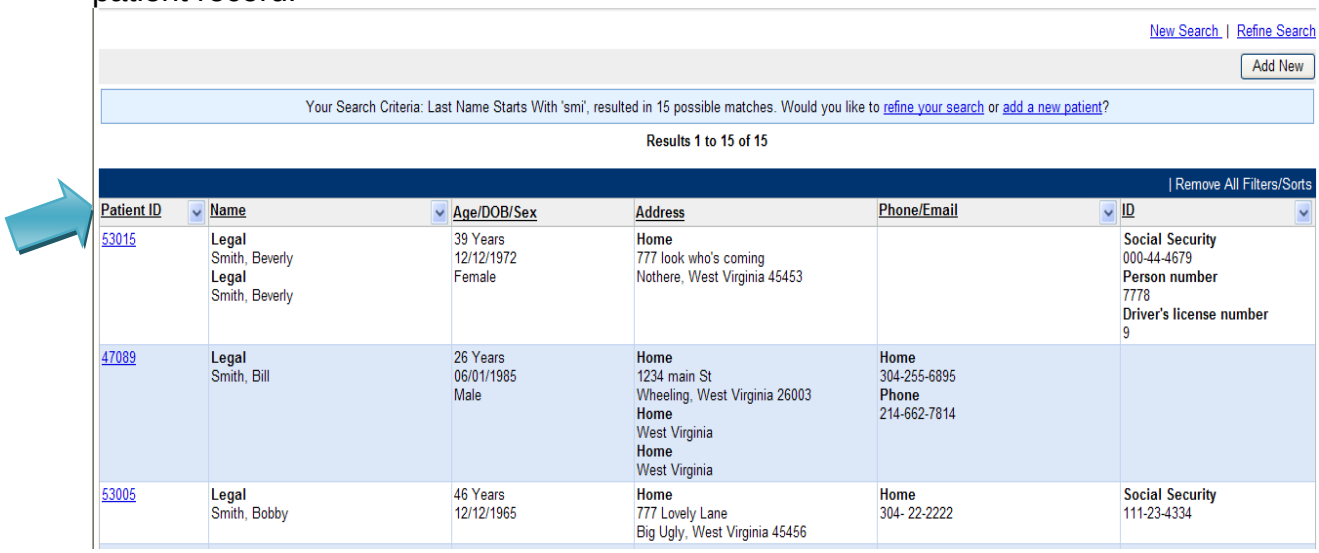
   Note: Deleted Records have been deleted from the system and are inactive. Superseded Records have been merged with another record in the system and are inactive.
5. Click **Submit**. The Search Results page is displayed.



- Click **Add New** to add a new patient record. See Entering Patient Information on page 15.
- Click **New Search** (in the upper right corner of the page) and repeat steps 2 – 4 as described to perform a new search.
- Click **Refine Search** (in the upper-right corner of the page) and repeat steps 2 – 4 as described above to refine the search.

• Viewing a Patient

- If there are matching records , click the **Patient ID** link next to the patient name to view the patient record.



- The View File page opens displaying the **Summary Tab**. The View File page is organized by a series of tabs you use to work with summary, demographic, and events information.

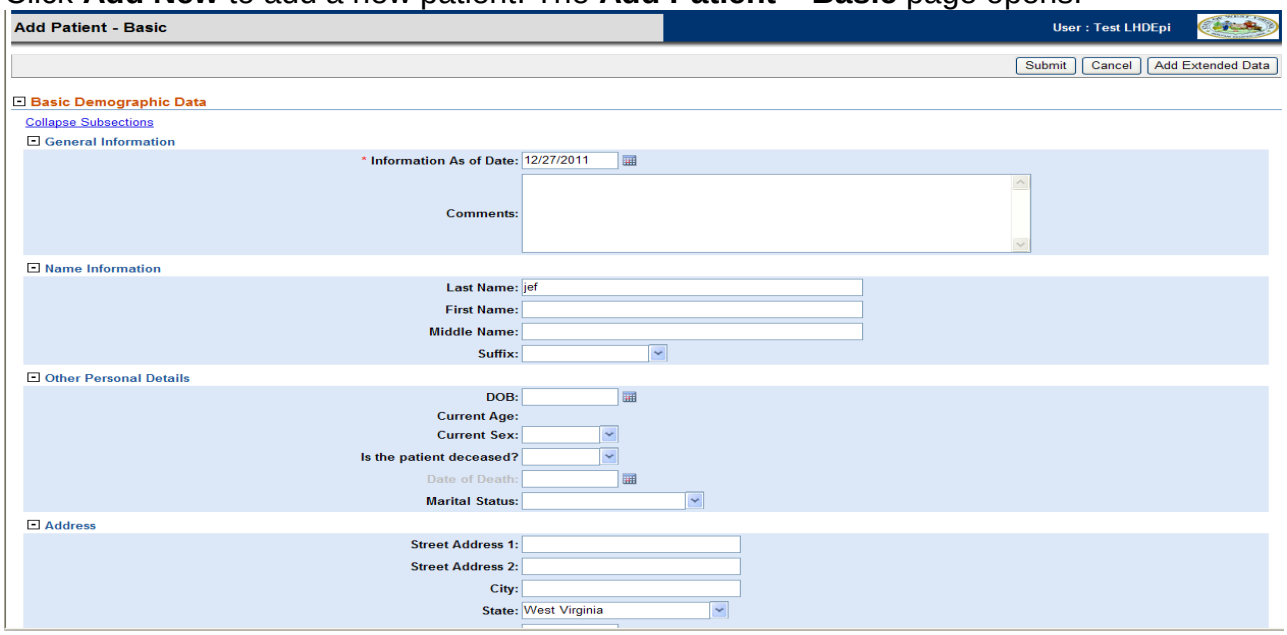
- **View File Page Description**

  The following table lists the tabs on the View File page and describes their function:

Tab	Description
Summary	Displays a summary of available public health information for the patient. It is organized by sections displaying the following information: • Summary of demographic information • List of open investigations • List of new lab reports for review
Demographics	Displays detailed demographic information for the patient. It is organized by sections displaying the following: • Administrative Information • Name • Sex and Birth • Mortality • General • Identification Information • Ethnicity • Race • Address Information • Telephone Information • Custom Fields Demographic information can be edited by pressing the Edit button on this tab but <u>most of the time it is best to edit demographics in the Patient tab of the Lab Report or Investigation.</u>
Events	Displays the events associated with the patient. It is organized by sections displaying the following information: • Investigations • Lab Reports • Treatments • Vaccinations Investigations, Lab Reports, Treatments and Vaccinations are added from this tab.

- ## Entering Patient Information

  - To enter patient information you must first conduct a search to see if the patient record already exists in WVEDSS-NBS.
  - Conduct the search by following the instructions for searching on page 10.
  - Click **Add New** to add a new patient. The **Add Patient – Basic** page opens.

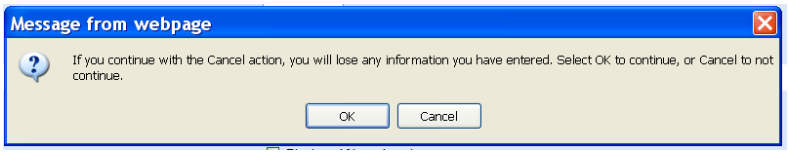


- There are no system required fields in the demographic portion of WVEDSS-NBS. WV requires data entry of the fields shown in **bold** in the table below. Using the **Tab** key to navigate through the page, enter the demographic information as shown in the table below:

Data Element	Rules for Data Entry	Comments
Basic Demographic Data As Of:	Populated by the system	Date is populated by the system with today's date and can be changed if necessary.
General Comments	Not used	
Name		The name entered here will be stored as a legal name and the address entered will be stored as a home address. To add additional information, click the Add Extended Data button.
Last Name	**Required**	Enter patient's Last Name.
First Name	**Required**	Enter patient's First Name.
Middle Name	Enter if known.	Enter patient's Middle Name or Initial
Suffix	Enter if known.	
DOB	**Required**	**Date of Birth – Enter in the mmddyyyy format.**
Current Age	Calculated by the system	The system calculates the age based on today's date and the Date of Birth.
Current Sex	**Required**	Sex as of the date the information is entered.
Is the patient deceased?	Enter if available	
Marital Status	Enter if available	Do not assign if unavailable.
SSN	Not used	
Type / Authority / Value	Not used	
Street Address 1	*Desired - Enter if available*	
Street Address 2		
City	*Desired - Enter if available*	
State	**Required**	
Zip	*Desired - Enter if available*	
County	**Required**	State must be populated first
Home Phone	Enter if available	
Work Phone	Enter if available	
Ethnicity	*Desired - Enter if available*	
Race	*Desired - Enter if available*	
Tribal Affiliation	Not used	
Lives on Reservation?	Not used	
Country of Birth	Not used	
Primary Language	Not used	
Occupation	*Desired - Enter if available*	
Name of employer or school	*Desired - Enter if available*	

- Select one of the following options:

  - **Submit** saves the data. Pressing Submit takes you to the View File page with the Summary tab displayed.
  - **Cancel** takes you back to the Search Results and any information you have entered will be lost.



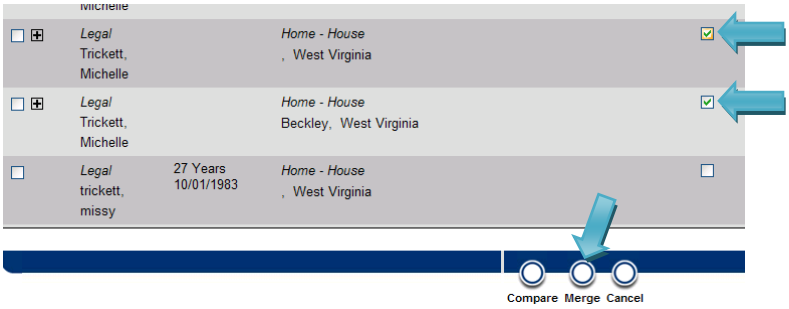
  - **Add Extended Data** takes you to the Add Patient – Extended page. If you enter information on the Add Patient – Extended page and press Cancel before submitting the information, you will lose any information you have entered.

• *Merging Patients*

Note: Feature only available to Regional Epidemiologists and State Level Staff.

- If a patient is found with multiple entries (Last name changed, accidental duplicate patient) you can merge the two patients.
  1. Select the **Merge Patients** link at the top of the page, then select **Manual Search**.

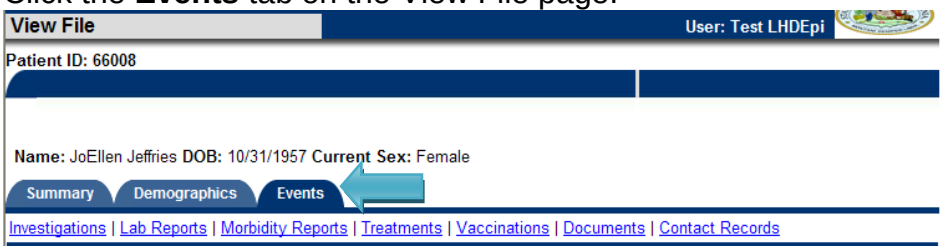
  2. Search for the patient as described on page 10.
  3. Select the patients to merge from the list displayed and click the **Merge** button.



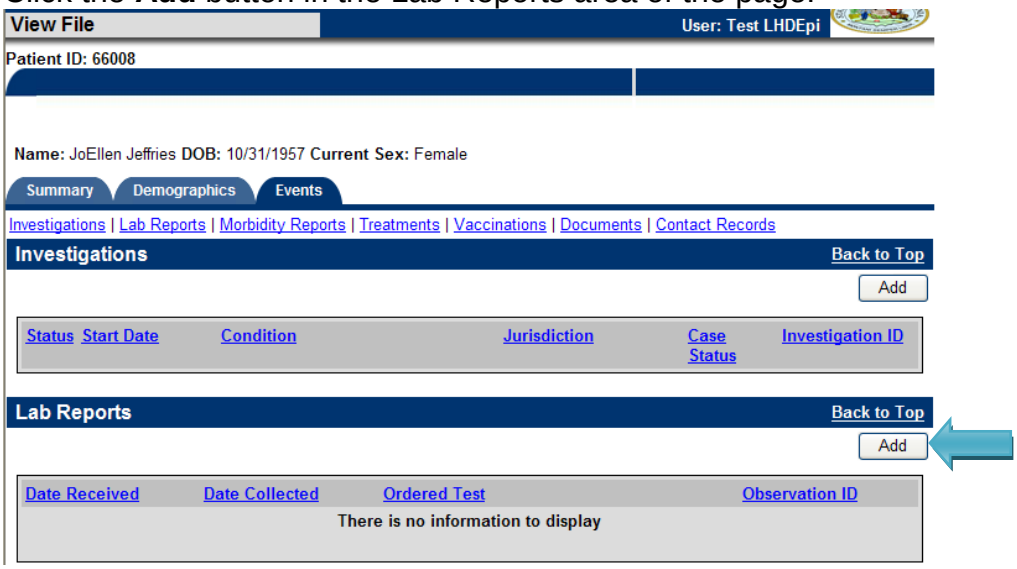
- Lab Reports and Investigations
  - Adding a Lab Report

    Note: Add a lab report after a patient record has been searched for, found and verified or entered.

    1. Click the **Events** tab on the View File page.

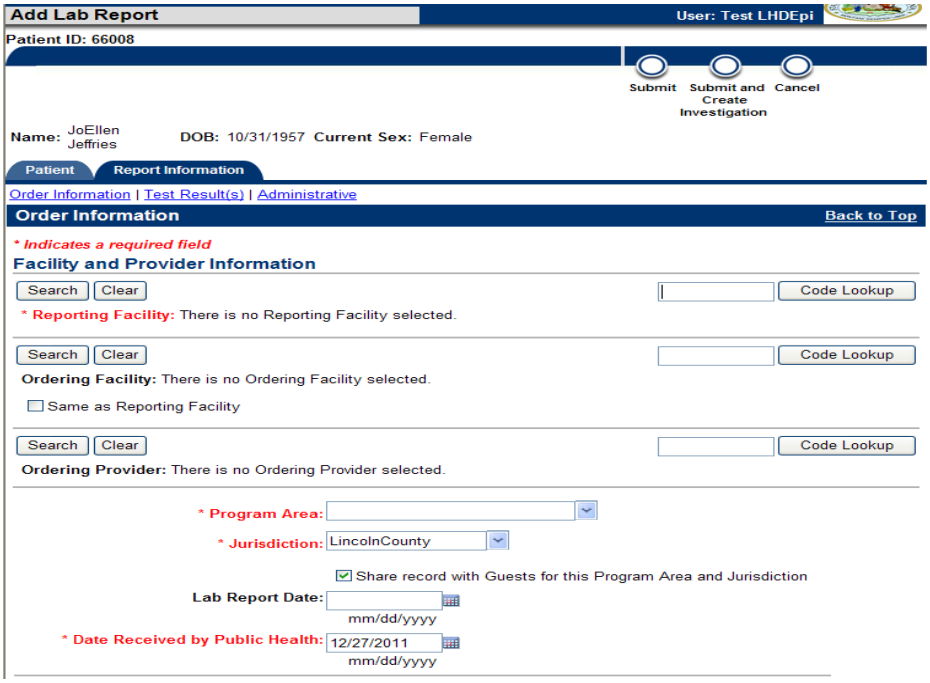


    2. Click the **Add** button in the Lab Reports area of the page.



    3. The Add Lab Reports page opens with the Report Information tab displayed.

    Note: Fields that have an asterisk and are in red are system required fields



4. Using the **Tab** key to navigate through the page, enter the Lab Report information as shown in the table below. WV requires data entry of the fields shown in bold in the table below.

Data Element	Rules for Data Entry	Comments
Order Information		
Reporting Facility	**Required**	Search for and select the Reporting Facility or look up the facility using the Quick Code.
Ordering Facility	Enter if available	Search for and select the Ordering Facility.
Same as Reporting Facility checkbox	Enter if available	Check the box if Ordering Facility is the same as the Reporting Facility
Ordering Provider	Enter if available	Search for and select the Ordering Provider.
Program Area	**Required**	Choices are: Enteric Vaccine Preventable and Invasive Bacterial Diseases (VPD/IBD) STD Hepatitis C Tuberculosis HIV/AIDS Zoonotic (depending on your permission set)
Jurisdiction	**Required**	In WV, Jurisdiction is the County Health Department.
Share record with Guests checkbox		Default is checked.
Lab Report Date	Enter if available	
Date Received by Public Health	**Required**	Populated with today's date, change to date report was received by Public Health
Ordered Test	Enter if available	
Accession Number	Enter if available	
Specimen Source	**Required**	
Specimen Site	Enter if available	
Date Specimen Collected	**Required**	
Test Result(s)		
Resulted Test	**Required**	Select the Resulted Test from the dropdown menu or search the Short list or the Long list. If the Resulted Test is an organism with the species identifed, the Organism field appears.
Organism	**Required if the Resulted Test is a culture.**	Select the Organism from the dropdown menu or search for the Organism Name.
Coded Result	**<u>One</u>** of these fields is required to Add/Update Test Result if Organism is not selected.	
Numeric Result		
Text Result		
Reference Range:	Enter if available	
Reference Range to:	Enter if available	
Result Status	Enter if available	
Result Comments	Enter if needed	
Add Test Result Button	**Required**	The Test Result added is displayed as a row in the Test Result(s) area.

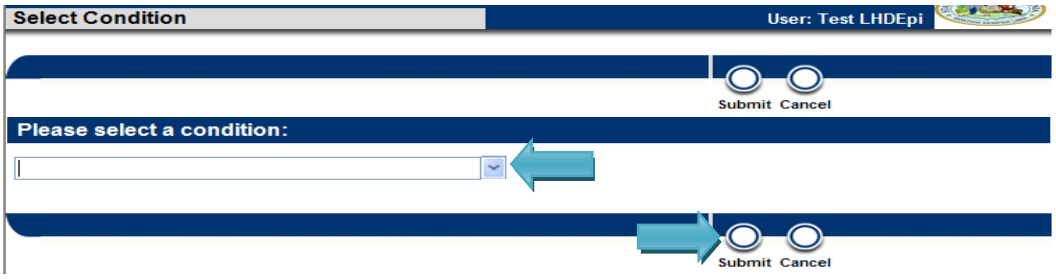
Data Element	Rules for Data Entry	Comments
Administrative		
Comments	Enter if needed	
Isolate Tracking		
Track Isolates checkbox		Always enter "Yes", then indicate if specimen was sent to State Health Lab.

5. Click the **Submit and Create Investigation** button.

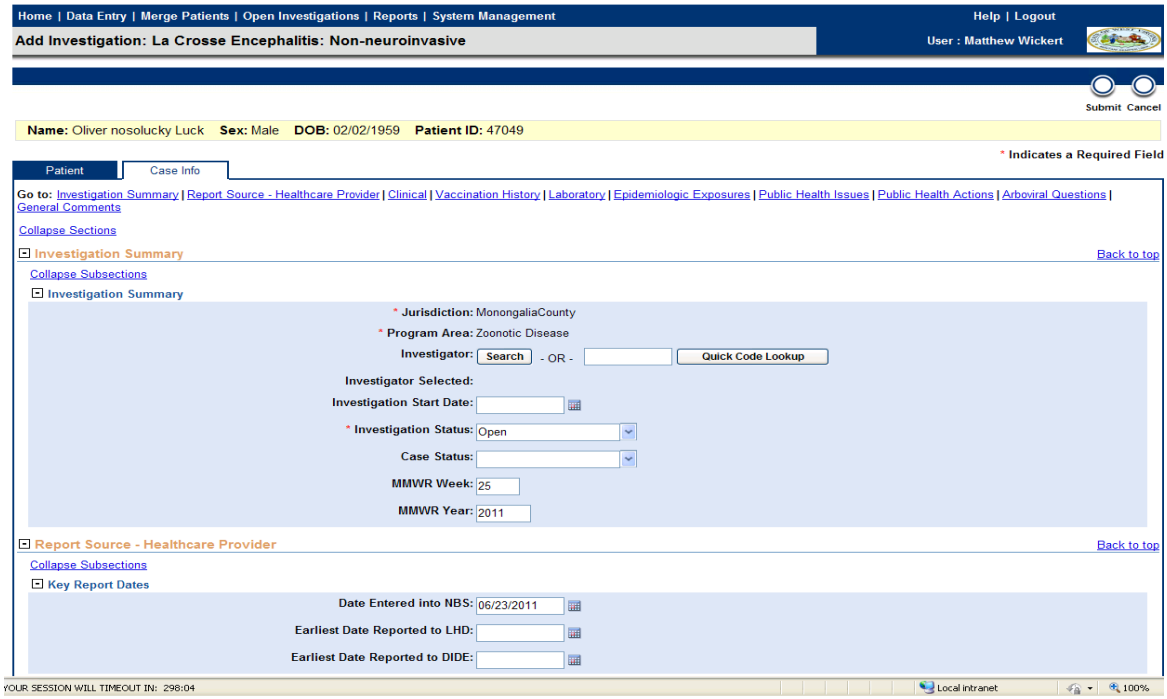
- ***Creating the Investigation***

Note: As an example the steps for creating a Zoonotic Disease Investigation are shown below. Investigation screens for other conditions may have different fields. Refer to disease specific case investigation forms on the DIDE webpage for guidance.

- Select the **Condition**. Selecting a condition is required before the Investigation can be created.

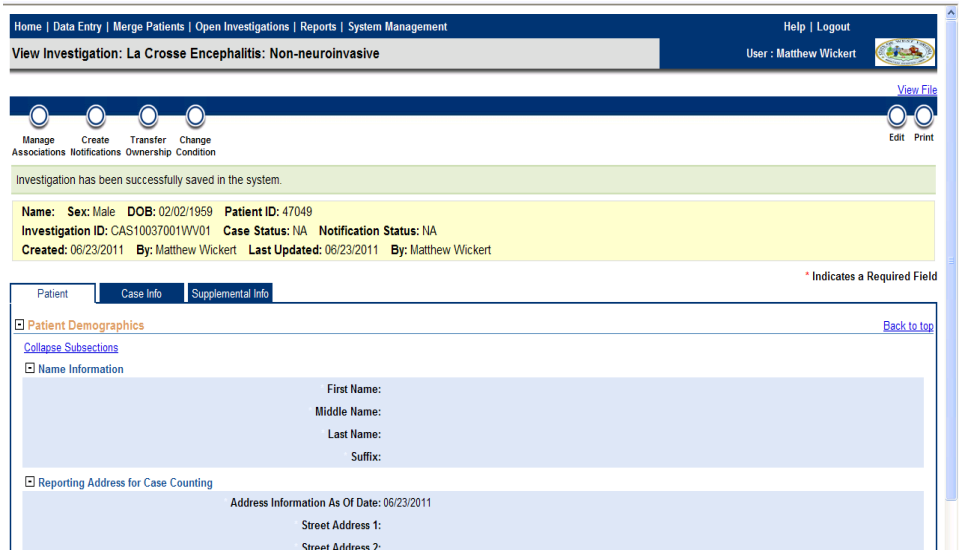


- Click **Submit** to save the record.
- Using the **Tab** key to navigate through the page, enter the Investigation information.
  Note: Fields that have an asterisk and are in red are system required fields.
  Note: The specific information required for each disease investigation page varies by condition. Please enter all information requested. For the specific requirements of each condition consult the disease protocol.



- Once all information has been entered, click the **Submit** button.

- The **View Investigation** page opens.

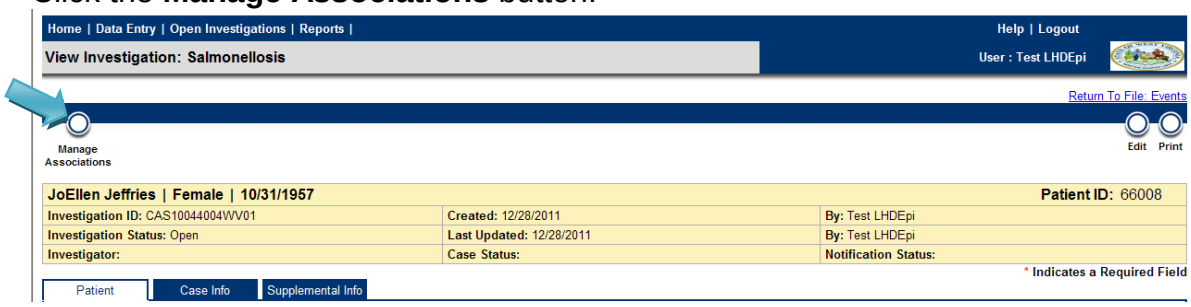


• Associating a Lab Report with an Investigation

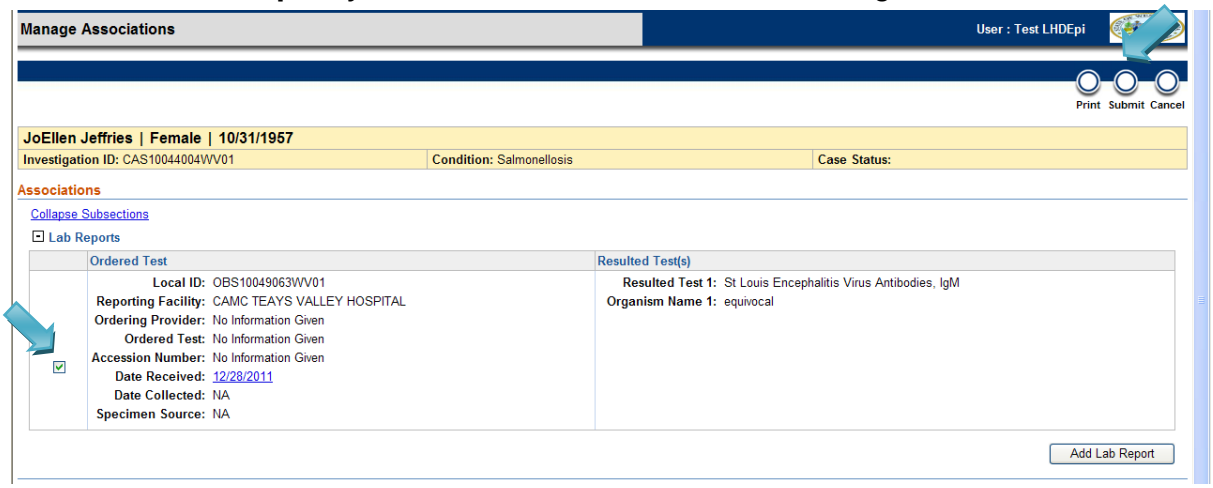
- Sometimes Lab Reports are added without being associated with an investigation. In order to associate a Lab Report with an investigation, follow the steps below.
  - Associate a **Lab Report** with an **Investigation** after a patient record has been searched for, found and verified or entered.
  - Click the **Events** tab on the **View File** page.
  - Click the **Start Date** hyperlink for the Investigation you wish to view.

  - The View Investigations page opens.

- Click the **Manage Associations** button.



- The **Manage Associations** page opens. In the **Lab Reports** section **Check** the box next to the **Lab Report** you want to associate with the investigation. Click **Submit**.

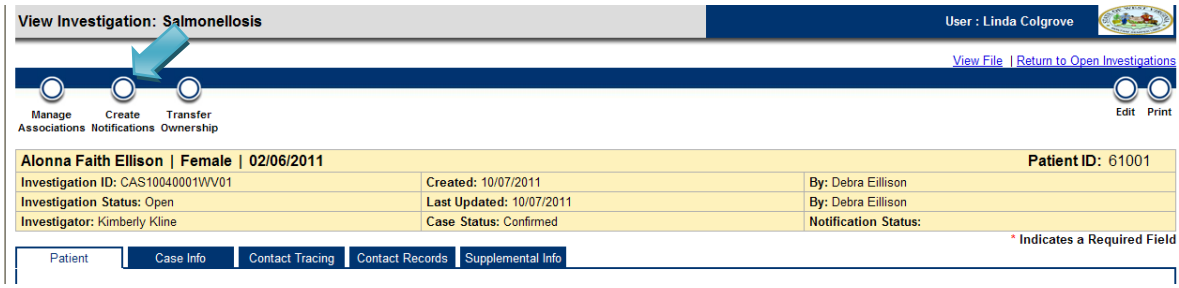


- ***Creating the Notification (State and Regional Epidemiologists only)***

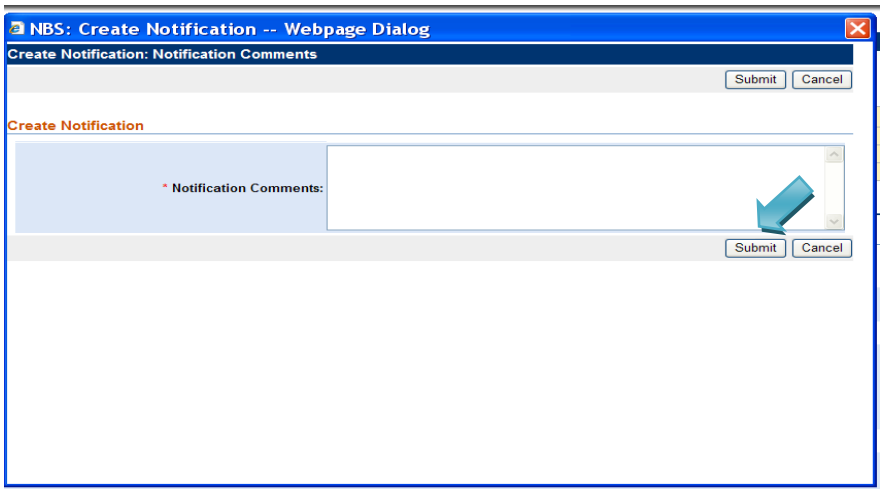
1. Select the **Open Investigations** tab, filter the **Investigators** column to find cases assigned a specific investigator.

Start Date	Investigator	Jurisdiction	Patient	Condition	Case Status	Notification
	Kline, Kimberly	KanawhaCounty	torlone, darien	St. Louis Encephalitis: Neroinvasive		
	Kline, Kimberly	KanawhaCounty	Kline, Biff	St. Louis Encephalitis: Neroinvasive	Probable	
	Kline, Kimberly	KanawhaCounty	mclemore, stephanie	St. Louis Encephalitis: Neroinvasive	Probable	
	Kline, Kimberly	KanawhaCounty	Wilson, Suzanne	St. Louis Encephalitis: Neroinvasive	Confirmed	
	Kline, Kimberly	KanawhaCounty	barnhart, james	St. Louis Encephalitis: Neroinvasive		
10/03/2011	Kline, Kimberly	CabellCounty	Ellison, Alonna	Salmonellosis	Confirmed	
07/27/2011	Kline, Kimberly	KanawhaCounty	mclemore, stephanie	St. Louis Encephalitis: Neroinvasive		
07/26/2011	Kline, Kimberly	KanawhaCounty	Haggerty, Derrick	St. Louis Encephalitis: Non-neuroinvasive	Confirmed	
07/21/2011	Kline, Kimberly	KanawhaCounty	mclemore, stephanie	St. Louis Encephalitis: Neroinvasive		
07/10/2011	Kline, Kimberly	KanawhaCounty	Keyser, Kami	St. Louis Encephalitis: Neroinvasive	Confirmed	
07/10/2011	Kline, Kimberly	KanawhaCounty	Harding, Cara	St. Louis Encephalitis: Neroinvasive		
07/10/2011	Kline, Kimberly	KanawhaCounty	Crites, Shawna	St. Louis Encephalitis: Neroinvasive	Confirmed	

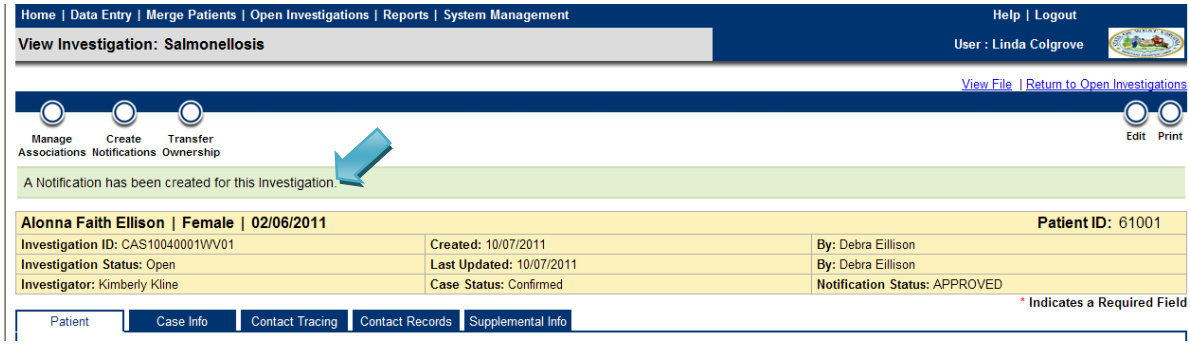
2. Select the hyperlink for the **Condition**. The **View Investigation** page comes up. Select **Create Notifications**.



3. Enter **Notification Comments** (if applicable). Click the **Submit** button.



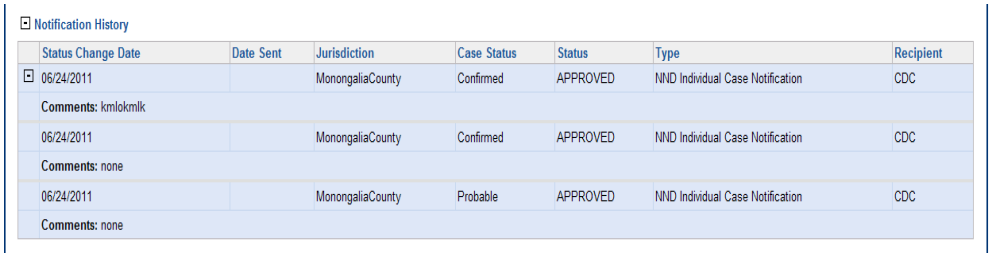
4. The View Investigations page opens with statement that notification was created.



Note: The **Notification** has been submitted. It will be reviewed by the State Epidemiology Surveillance Team. CDC will be notified of this new case.

- ## Verifying the Notification Status

1. Navigate to the **Supplemental Info Tab** on the **View Investigation** page.
2. Notification Status is shown in the History area.
3. Click the '**+**' to view Notification history. The most recent Status appears at the top of the list.

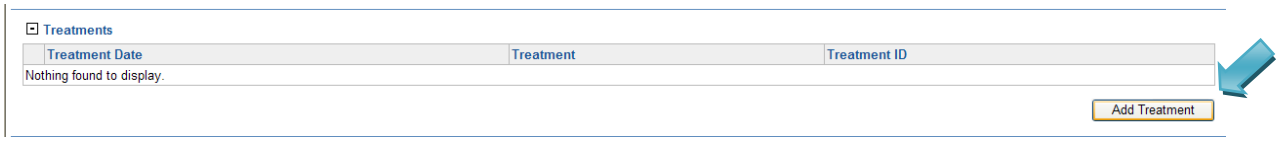


Notification History

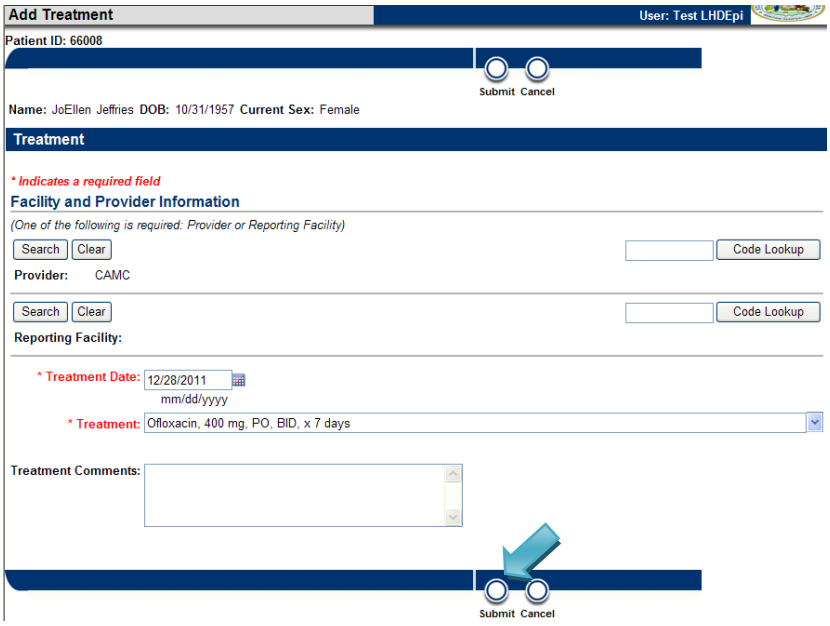
Status Change Date	Date Sent	Jurisdiction	Case Status	Status	Type	Recipient
06/24/2011		MonongaliaCounty	Confirmed	APPROVED	NND Individual Case Notification	CDC
Comments: kmlokmlk						
06/24/2011		MonongaliaCounty	Confirmed	APPROVED	NND Individual Case Notification	CDC
Comments: none						
06/24/2011		MonongaliaCounty	Probable	APPROVED	NND Individual Case Notification	CDC
Comments: none						

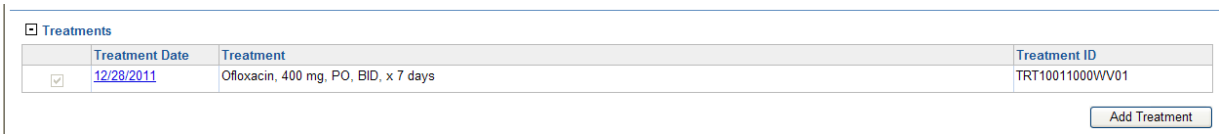
- **Entering Treatments**

1. Enter **Treatments** after a patient record has been searched for, found and verified or entered.
2. Click the **Events** tab on the View File page.
3. Click the **Open Investigations Start Date** hyperlink.
4. Click the **Manage Associations** button.
5. Click **Add Treatment**.



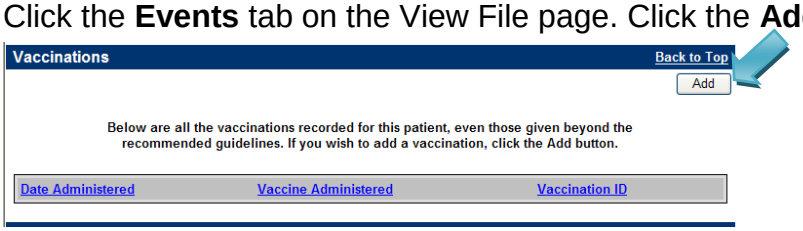
6. The **Add Treatment** page opens.
7. Search for and select either **Provider** or **Reporting Facility**.
8. Enter **Treatment Date**
9. Select **Treatment**.
10. Click the **Submit** button.
11. The treatment is added and displayed on the **Manage Treatments** page.



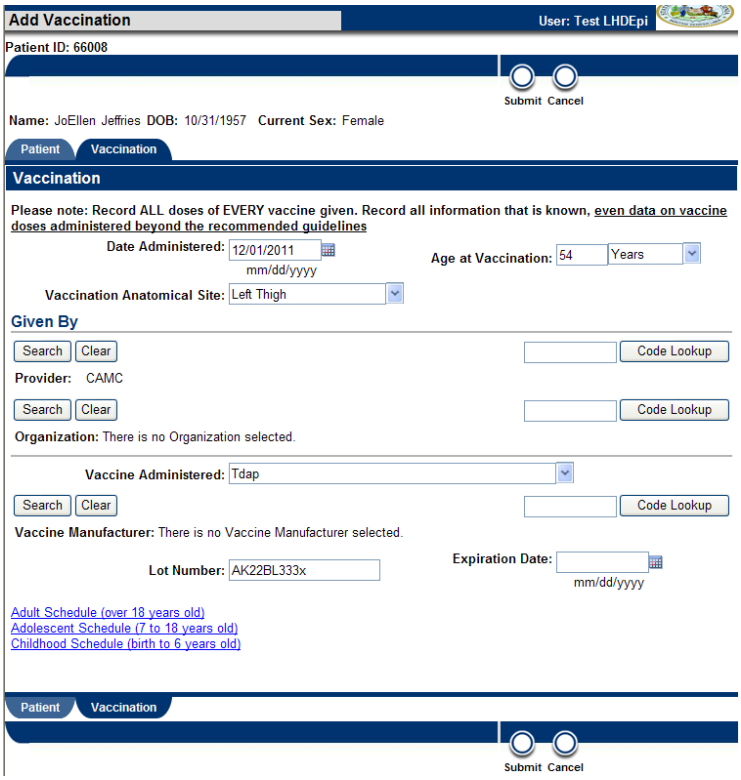


- ## Entering Vaccinations

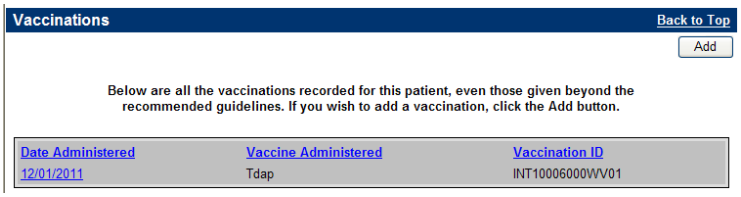
1. Enter **Vaccinations** after a patient record has been searched for, found and verified or entered.
2. Click the **Events** tab on the View File page. Click the **Add** button under **Vaccinations**.



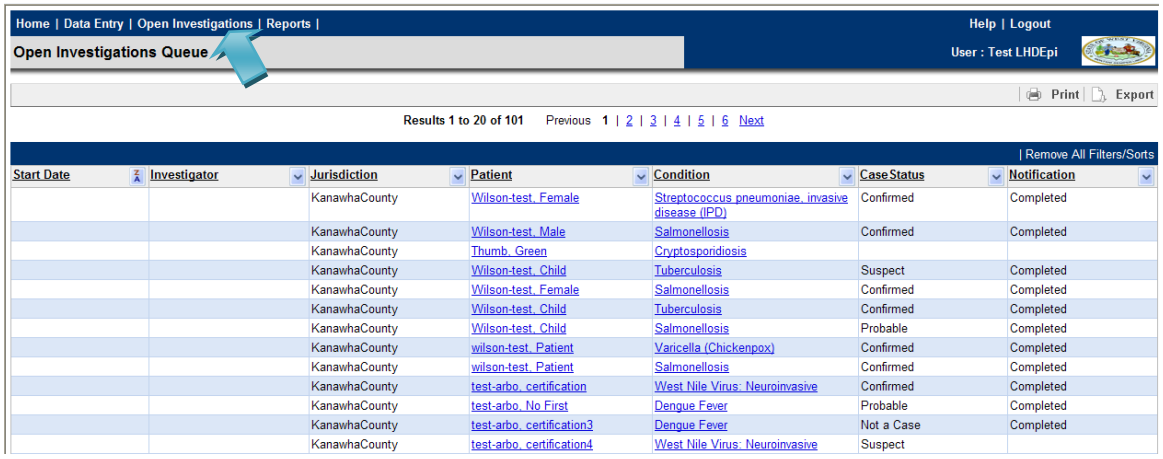
3. The Add Vaccination page is displayed.



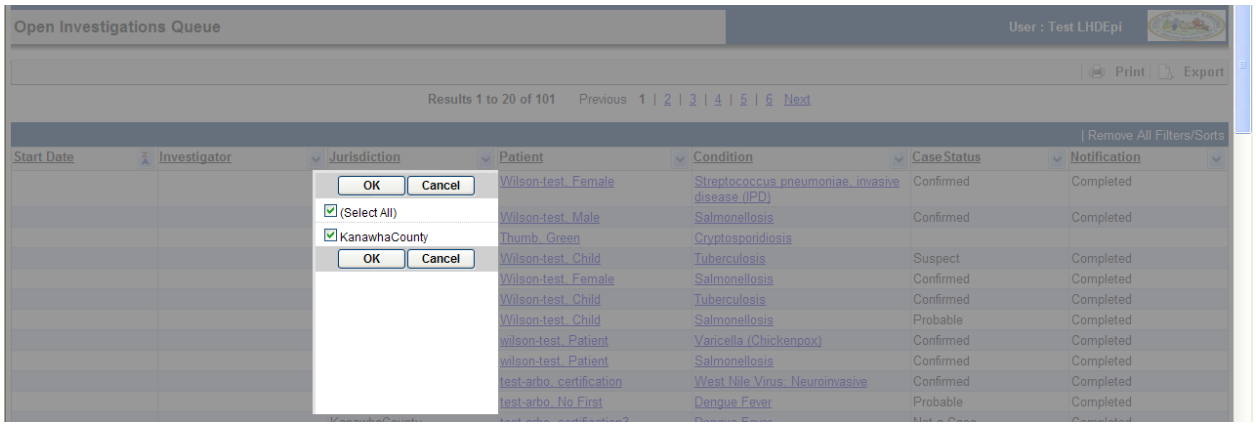
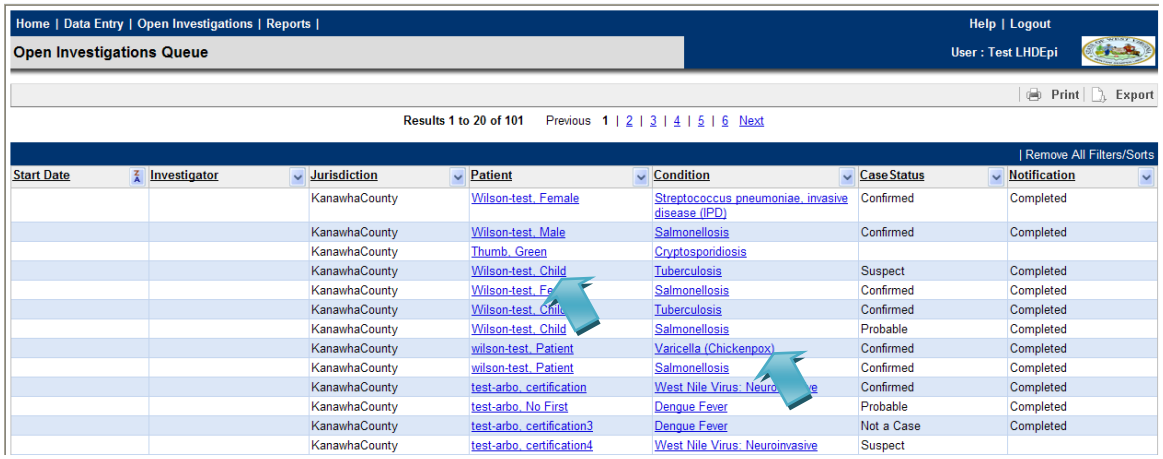
4. Enter **Vaccination** information.
5. Click **Submit**. The **vaccination** added is displayed in a table in the **Vaccinations** area.



- **Open Investigations Queue**
  - The Open Investigations queue displays a list of open investigations. Once an investigation is closed it is no longer displayed on the queue but can still be accessed by searching for the patient's record.
  - Click **Open Investigations** on the navigation bar. The **Open Investigations** page is displayed.



  - Columns on the **Open Investigations** page can be sorted or filtered by the column header.



  - You can select the hyperlink for the patient or condition to view patient or investigation information.