WDRS

Washington Disease Reporting System

Reference Guide

Washington State Department of
Health

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Navigating This Document

As you use this reference guide, you will see several symbols that point out key information.

A tip or suggestion that might make things easier for you.

A place where special attention is needed to avoid a problem in the future.

A special comment.

Disclaimers

The examples used in this reference guide are fictitious. Any resemblance between any person or case illustrated in this reference guide, and an actual person or case, is purely coincidental.

Chapter 1: The WDRS Surveillance System

WDRS Overview

WDRS (Washington Disease Reporting System) is an electronic disease surveillance system that allows public health staff in Washington to receive, enter, manage, process, track, and analyze disease-related data. This information comes from various places including, but not limited to, health care entities such as clinics, laboratories, hospitals, and local health care providers, as well as other non-health care sources. WDRS allows secure communication and coordination among state and local health departments. Further, at the time it is fully-released, electronic laboratory reporting (ELR) data will be shared through the connection system WELRS.

WDRS is compatible with state and national IT standards, and also complies with the Centers for Disease Control and Prevention (CDC) Public Health Information Network (PHIN) published standards.

WDRS's security environment displays only the data someone is authorized to see. WDRS features include:

- Enables public health practitioners at local health jurisdictions and the Washington State Department of Health to enter, view, and track case investigations
- Supports case and outbreak management
- Facilitates data entry from paper-based reports
- Allows direct receipt and incorporation of electronic laboratory reports (September 2017)

WDRS Models

WDRS currently has one model:

- Tuberculosis

Four additional models coming in 2017:

- Sexually Transmitted Diseases (including HIV/AIDS)
- Hepatitis B, C, and D (acute, chronic, and perinatal)
- General Communicable Diseases (other notifiable communicable diseases including Hepatitis A and E)
- Blood Lead (pediatric and adult)

Terms Used in WDRS

Concern: A message meant to notify the user of an issue regarding the event.

Deduplication: The process of identifying and merging identical events, people or organizations that appear more than once in WDRS.

Dashboard: A central location from which the user can access the various areas and functionality of the system as well as see an overview of user specific workflows, tasks, assignments and recent events. Referred to in this manual as the "home page."

Event: An "event" in WDRS represents the occurrence of a real-world event of interest to public health. These real-world events include but are not limited to:

- an occurrence of a reportable condition
- an investigation of suspected infection
- a contact/partner investigation
- the occurrence of an outbreak
- intervention activities
- maintenance of a disease registry.

Most often, a WDRS event contains information about the association of a person with a disease or other health condition, for example, influenza, gonorrhea or blood lead poisoning. One person can be associated with one or more real world events, with each real-world event being represented by a separate event in WDRS.

Some kinds of events are time-limited (for example, influenza); more than one event of the same kind can exist for the same person. Other kinds of events persist for the lifetime of the person (for example, HIV); only one event of this kind can exist for the same person.

Sometimes referred to in this guide as a "case" or "record."

Model: A collection of information related to one of five disease groupings in WDRS: General Communicable Disease (GCD), Hepatitis (except A and E, which are parts of GCD), Blood Lead, Sexually Transmitted Diseases/HIV and Tuberculosis (TB).

Party: A party in Maven is an entity that participates in one or more events. A party is most commonly a person, either the subject of an event (a "patient"), or a provider. A party can also be an organization, such as an organization like a health care facility or laboratory.

Question Packages: Sets of fields related to a specific topic for a disease or condition. Question packages allow users to enter information related to an event, including, but not limited to: demographics, clinical information, epidemiological information and public health actions/interventions. Different users can access different question packages as determined by the model, the disease, and the user's security settings.

WDRS: Washington Disease Reporting System; an electronic notifiable conditions reporting system for Washington State.

Wild Card: An asterisk (*) or a question mark (?) that can be used during searches (see the appendix).

Workflow: A list of events that meet specific criteria. An example of a workflow is a worklist of events that need follow-up action in order to be complete. When an event in a workflow is edited and that event no longer meets the criteria of interest, the event is removed from the workflow.

Chapter 2: Security and Logging In

Know Your WDRS Local Representative

Each local health jurisdiction (LHJ) will have one primary WDRS representative. This representative will be able to move users in and out of LHJ-specific groups that control which events may be viewed or edited. In some LHJs this WDRS representative may be their Data Steward; in other LHJs the WDRS representative will be a person separate from their Data Steward. For conditions managed by the WA Department of Health (DOH), someone within DOH will be designated with the responsibility of assigning users to groups. To determine who the representative is for your county, please contact WDRS.community@doh.wa.gov.

Logging in to Secure Access Washington (SAW)

All WDRS users are required to follow SAW security and confidentiality policies. Specifically, as a user you are required to:

- ✓ *Always keep your password confidential and never share it with anyone.*
- ✓ *Always log in under your own user ID.*
- ✓ *Never permit anyone else to use WDRS under your ID.*
- ✓ *Keep others from viewing your WDRS screen.*
- ✓ *Never leave WDRS open and unattended.*
- ✓ *Always log out of WDRS when you are finished using the system.*

All WDRS users will first be required to set up a Secure Access Washington (SAW) account. SAW is a secure, centralized state service that allows the user to access multiple online government agencies with a single login account. Once access to SAW has been established for the participating members, they will need to contact their local health jurisdiction data steward to receive a service code for access to WDRS.

If a user has access to Public Health Issues Management System (PHIMS), PHIMS-STD or PHRED then they already have a SAW account. Existing SAW accounts will need to be updated with the WDRS service code so the user can access WDRS.

If a SAW Account Already Exists:

1. The user will be provided with a "WDRS Production Instance" service code. This code will be 6 digits long and will enable the user to gain access to WDRS through SAW.
   a. The user will need to access SAW at: https://secureaccess.wa.gov/.
   b. The existing SAW user will enter their User ID and then their Password (see screen shot below).
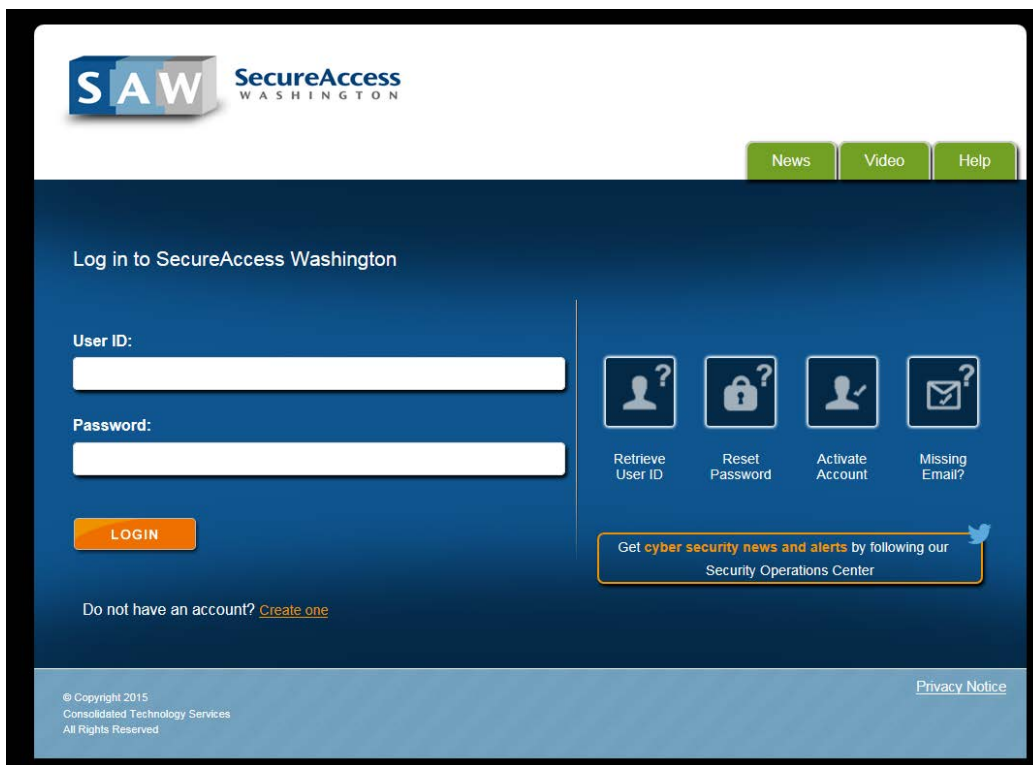
c. Once logged in, the user will click **+ Add a New Service** .

d. The user will enter the 6 digit service code provided to them in the Service code: box and click Apply.
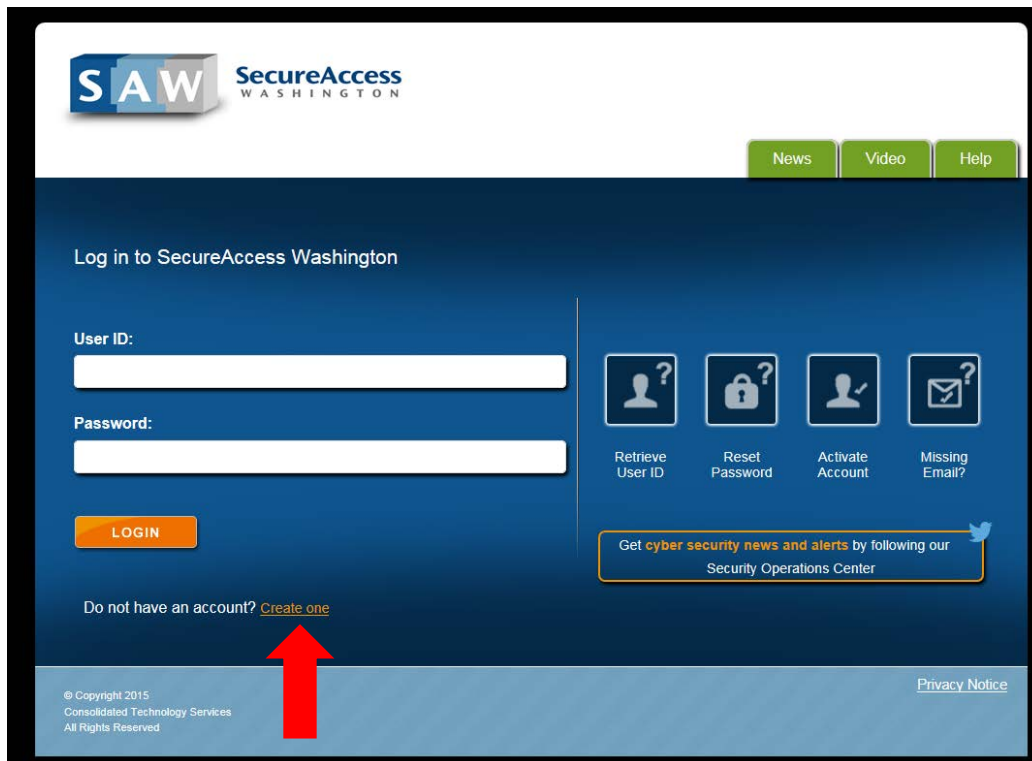
Service code:

If you have been given a service code by an agency, enter it below to apply for access to the service.

[ ]

APPLY

If a SAW Account Does Not Already Exist:

1. The user will need to access SAW: https://secureaccess.wa.gov/.

a. On the SAW homepage, the new user will select the "Create one" link where it asks "Do not have an account?" (See screen shot and arrow below.)

b. The user will proceed through the tabs, entering information as is appropriate:

1 Name & email	2 User ID & password	3 Review information	4 Validate information	5 Check email	6 Log in to account

c. Once through *#4 Validate Information,* the user will return to their email inbox and retrieve their temporary password. They will then login to SAW using their User ID and temporary password.

2. The user will be provided with a "WDRS Production Instance" service code. This code will be 6 digits long and will enable the user to gain access to WDRS through SAW.

   a. The user will need to access SAW at: https://secureaccess.wa.gov/.

   b. The existing SAW user will enter their User ID and then their Password.

   c. Once logged in, the user will click **Add a New Service**.

   d. The user will enter the 6 digit service code provided to them in the Service code: box and click Apply.

Service code:
If you have been given a service code by an agency, enter it below to apply for access to the service.

APPLY

⚠️ *Usernames and passwords are case sensitive, so be sure to enter these exactly as they were provided. For example, XYZ123 is not the same password as xyz123.*

- *Your user name and password will always be the same as the username and password that you use to get into the SAW network. When you change your SAW password, it will automatically update in WDRS.*

If you are unable to login to SAW, call Service Central at 360-236-4357.

Logging in to WDRS

WDRS can be accessed using most Web browsers. WDRS will work with Internet Explorer 9.0 and above (exception noted in the box below), Firefox 3.0 and above, Safari 3.0 and above, Google Chrome 2.0 and above, and Opera 9.0 and above. WDRS does not work with Netscape Navigator.

To login to WDRS:

1. Once you have successfully logged into SAW, you will see a screen that presents the "WDRS" service as a selection option. Click on WDRS for access to the system. SAW will require an additional layer of security of either a phone call, e-mail or "challenge questions."
2. After completing the security verification click on the "Continue" button and you will be guided directly to WDRS.
3. There are two major applications, or computer modes, of the WDRS system – Main and Administration. This guide will focus only on the Main application.
   a. For users with Administration rights, please refer to your disease-specific training resources for additional guidance.

⚠️   WDRS has had compatibility issues with *Internet Explorer 11.0 (IE 11)*. If you are using IE 11, and your system is freezing, please call Service Central at 360-236-4357.

Logging Out of WDRS

To log out of WDRS, click your name in the upper right corner and then click Logout.

For security purposes, WDRS will log out after 30 minutes of no activity.

You will see a warning before this happens:

> Your session is about to expire. Please save your work or hit refresh to continue working.

Permissions, Roles, and Groups

Information entered into WDRS includes sensitive health data. Because of this, the system has been designed to meet the security standards of Washington's privacy and health information laws. Access to data in WDRS is determined by a user's permissions, role, and group settings. These restrict user access to make visible or editable only the records that are necessary for a specific user to perform surveillance and outbreak management activities. Users also have responsibilities for maintaining confidentiality.

Permission: Permissions provide the user the ability to perform certain actions, such as "create an event" or "view an event." If you are not provided these permissions, you are unable to perform the specific action.

Role: A role controls the user's permissions – it assigns responsibility to what a user can <u>do</u> with data in WDRS. For example, one role is an LHJ Investigator. This LHJ Investigator role has specific permissions assigned to it, such as creating or updating certain events. So, everyone assigned the same role would have identical permissions to each other. A person can have more than one role.

Group: Groups define what data a user should have access to for viewing, and sometimes editing. The main type of group in WDRS is set by the geographical area and the diseases to which a user has access. The county designation is assigned by the "Accountable County" field within each event. A user can only see and work with records in his or her own group(s). For example, a Thurston County Tuberculosis (TB) group can see only TB events in Thurston County. A user may belong to one or more groups.

Local health jurisdictions defined with multiple counties, or that have data sharing agreements with other counties, will have access to all events they are permitted to see under any relevant security settings and data sharing agreements.

Chapter 3: Navigating the WDRS Home Page

WDRS Home Page

The WDRS home page is the entry point from which most actions take place. It is divided into separate areas: toolbar; workflows; tasks; recent cases; business area; calendar; activity; activity summary; and help desk.

Home page:

WDRS Toolbar

The toolbar displays icons that initiate most activities. It can be found at the top left-hand side of the page inside WDRS. ***Your role will determine which icons you see.*** The toolbar will change depending on your activities in WDRS. The icons listed below are the most widely-available action items in WDRS. Bolded icons are the most commonly accessible to roles; the icons that are not in bold will be limited to specific roles.

Create Event – used to create a new event.

Search Event / Search Case – used to search for an existing event, based on various search criteria.

Print Event – used to print letters or forms specific to the open event. This will be available based specifically on security settings, and might not be visible to everyone.

Workflow / Workflow Queue – used to view user workflow queues. Workflow queues are designed to bring attention to events that need user action.

Tasks – used to assign and update statuses of specific tasks.

Import Roster –allows a user to import a roster, creating multiple events electronically without manual data entry. This will be available based on specific security settings, and might not be visible to everyone.

Update Roster – allows a user to update answers to model questions from a list of selected events on a single screen. This will be available based on specific security settings, and might not be visible to everyone.

Reports / Maven Reporting – used to view, print and export reports from data entered in WDRS including line list, tabular and extract reports that can be customized for local or state use.

Manage Exposure Sites – shows a list of all exposure sites and enables the user to rapidly enter multiple exposure sites. Please refer to disease-specific training resources to determine if and how exposure sites should be used.

View User Calendar – user tool for adding and viewing tasks, meetings, appointments, and more.

Share Event – used to share an event with a user or group who would not ordinarily have permissions to see it.

Recent Events – provides easy access to the previous 20 events that have been viewed by the current user.

Search Field

At the top right-hand side of the screen is a search box. This should only be used to search for an event by its event ID (Case ID), unless instructed otherwise by a disease-specific training resource.
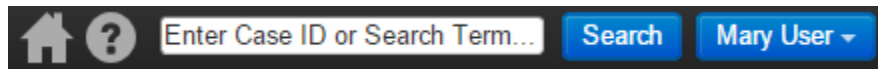
To search for a person or event please use the icon. Detailed instructions on how to search for an event or a person can be found in the next chapter.

Workflows

A workflow is a list of items that need user action. This can be a variety of tasks such as follow-up needed on an event, instruction to look at a case shared with a user, quality assurance tasks and more.

The home page displays the user's top five workflows by priority level that have at least 1 event in it. Additional workflows are available by clicking **More…** at the bottom right of the workflow box.

For additional information on workflows, please refer to "The Workflow Queue, Tasks, and Concerns" chapter of this user manual.

Tasks

Tasks are activities that need to be completed for an event. They can be assigned to specific users or groups, and are updated as they are completed. You can see additional tasks by clicking the **More…** link.

Tasks			
Type	**Priority**	**Full Name**	**Disease**
Assignment	Very High	Elephant, Purple	HIV adult
Outreach	Medium	Elephant, Purple	HIV adult
			More …

Recent Cases

Recent Cases are events that you have recently viewed. You can see the five most recent events you have viewed on the home page. If you wish to see a longer list of recent events, click **More…** on the recent cases screen.

Recent Cases		
Event ID	**Full Name**	**Disease**
100000114	Yogurt, Frozen	TB disease
100000105	Dog, Green	TB disease
100000113	Hippo, Hungry	TB unspecified
100000107	Rabbit, Purple	TB unspecified
100000108	Rabbit, Brown	Giardiasis
		More …

Once you click **More…** you are directed to the recent events page. A recent event and a recent case are the same thing. To quickly locate an event that you created, viewed, or worked on recently, use the recent events screen. This page displays the 20 most recent events you've viewed.

Alternately, you can access the recent events screen by using the recent event icon 📌 on the toolbar.

Once at the Recent Events screen, to load an event, click the **Event ID** link (the blue ID number) found on the far left-hand side.

Recent Events						
Event ID	External ID	Person	Status	Disease	Access Time	Bookmark
100000408	100000408	Test, TB	Open	TB disease	02/20/2017 03:43 PM	⭐
100000401	100000401	James, Michelle	Open	TB disease	02/20/2017 03:43 PM	⭐
100000404	100000404	Chocolates, Dove	Open	TB disease	02/20/2017 03:43 PM	⭐
100000052	100000052	test, violet	Open	TB contact	02/20/2017 03:43 PM	⭐
100000402	100000402	James, Michael	Open	TB contact	02/20/2017 03:43 PM	⭐
100000237	100000237	Pryor, Eli	Open	HIV adult	02/20/2017 03:42 PM	⭐
100000352	100000352	Smart, Matthew C	Open	HIV adult	02/20/2017 03:42 PM	⭐
100000369	100000369	Camp, Elijah	Open	HIV adult	02/20/2017 03:42 PM	⭐
100000362	100000362	Bunch, Nathan	Open	HIV adult	02/20/2017 03:42 PM	⭐
100000370	100000370	Wood, Josiah	Open	HIV adult	02/20/2017 03:42 PM	⭐
100000045	100000045	Dog, Blue	Open	TB disease	02/14/2017 10:12 PM	⭐

To bookmark an event in the bookmark column, click the star with a green plus sign over it

for the appropriate event. When the star is gol ⭐ , the event has been bookmarked. To un-bookmark it, click the gold star. Bookmarked cases do not count toward the 20 recent events that are displayed in the list, and will always be visible until the bookmark is removed.

If you want to bookmark a record that is no longer on your recent events list, search and view the event. This will return it to the recent events list, and you can bookmark it from there.

Business Area

Department of Health contact information is provided in the Business Area section of the home page. Contact information is broken out by the disease models within WDRS so that you can obtain appropriate and specific assistance. Additionally, for more general WDRS questions, you can contact the WDRS Administration Office.

BUSINESS AREA	PHONE	EMAIL
TUBERCULOSIS:	360-236-3443	tbservices@doh.wa.gov
STD (SURVEILLANCE AND HIV/STD PARTNER SERVICES):	360-236-3445	Teal.Bell@doh.wa.gov
HIV SURVEILLANCE:	360-236-3427	HIV_Surv@doh.wa.gov
HEPATITIS B AND D:	206-418-5500	CommDisEpi@doh.wa.gov
HEPATITIS C:	360-236-3390	Tessa.fairfortune@doh.wa.gov
GENERAL COMMUNICABLE DISEASES:	206-418-5500	CommDisEpi@doh.wa.gov
BLOOD LEAD:	360-236-4280	lead@doh.wa.gov
WDRS ADMINISTRATION OFFICE:	360-236-4229	wdrs.community@doh.wa.gov

Calendar

The calendar provides a simple solution for organizing team meetings, client appointments, and resource usage. The calendar allows for collaborative case work among team members, and coordination of scarce materials between teams.

Calendar functions include:

- Event- and non-event specific calendar entries (with associated parties and users)
- Daily, weekly, monthly, and 5-day view support
- Link appointment with resource (through a special location reference code)
- Support for case specific, party specific and user specific views

Using the WDRS Calendar function, users can, among other things:

- Create a new appointment
- Reschedule a meeting time
- Respond to a meeting request via a workflow monitor

Activity and Activity Summary

The Activity section shows active events, outbreaks, and related information for all of WDRS. The user will see this information for all disease conditions.

The Activity Summary section shows a breakdown of activity by disease, including the number of events in the past week, the average over the last four weeks, and the total number during the past year. It does not include personally identifiable information.

Activity Summary as of 01/30/2017 11:00 AM

Type	# Last Week	# Average Last 4 Weeks	# Last 52 Weeks
Chlamydia	1	0	1
HCV screening program	1	0	1
Hepatitis B and D	1	0	1
HIV adult	2	0	2
Listeriosis	1	0	1
Pertussis	1	0	1
Shiga toxin-producing Escherichia coli (STEC)	1	0	1
TB disease	4	4	19

Help Desk

This section provides links to the Help Desk via both phone or via email. Please contact the WDRS Help Desk for assistance with any technical needs relating to the WDRS system (i.e. your ability to login, or for system problems).

Help Desk

DOH Service Central: 360-236-4357 or *ServiceCentral@doh.wa.gov*

If you have disease-specific questions, please do not reach out to the Help Desk – those questions should be directed to your disease area point of contact, and are listed in the Business Area section of the home page.

Chapter 4: Search for Persons and Events

⚠️ **_CRITICAL_**: **_Always search for an event or person before creating a new event or new person._**

To search for an event or a person click the **Search Event** icon 🔍 on the toolbar to display the Search Case screen.

A user can search for a **person** and see all of the **events** associated with that person.

Alternately, a user can search for an **event** and see all of the **persons** associated with that event. Remember, a user will only be able to view what their security settings allow for.

Search for a Person

To search for a person record, enter information about the person into the various fields under Search Criteria, then click the Search button. The search results appear in the table to the right.

> WDRS allows the use of wildcards in searching. A wildcard lets you replace letters that you do not know with an asterisk (*). For details about how to use wildcards, see "Using Wildcards" in the Appendix.

There are four advanced search options to help you find persons:

- **Search History** will enable searching against historical event/person information. When this box is checked, older demographics and address information are compared against the search criteria. This may be useful if the person has had multiple addresses.
- **Search Soundex** will include words that sound similar to the search criteria, but may not have identical spelling. For example, searching for Tony Green with the Search Soundex box checked will also find records for Toni Greene. If Search Soundex is not checked, only the exact spelling will be returned.

- **Sort By** sorts the results by either name or address.
- **Sort Order** sorts the results either ascending or descending order.

If the system does not find a matching record, then a "No Matching Events Found" message will appear below the table.

If a matching record for the person is found, then all events viewable within security rights will appear.

The Search Results list has a clickable preview button 🔍 next to each found event, which brings up more detail about the person or event. This preview will help you identify if this is the correct person or event. If you are <u>at all</u> uncertain that it may be the same person, choose to create a new person.

There is a standard process for the system to merge duplicate persons. **Please err on the side of creating a new person if there is any doubt about whether the person is a duplicate.** It is easier to merge two persons than to separate two persons that should have been separate.

To create a new person you can click the Create New button below the search fields. This will bring you to the Create Event screen and will pre-populate the person information.

If the person is found, but not the event, (e.g. the right person but the wrong disease) you can create another event for this person from this screen. Select the event with the wrong disease associated, and then click the Create Record for Person. This will bring you to the Create Event screen and will pre-populate the person information.

As noted above, you can preview the search results. To see additional details about a person in the Search Results, click the [icon] icon next to the person's name. This will open the Preview window. If the Preview window shows the person you wish to select, X out of the Preview box, and click the Select button.

Search for an Event

To search for an event that you have not worked with recently, click the **Search Event** icon

🔍 on the toolbar to display the search event screen. Enter information about the event into the various fields under Search Criteria, then click the Search button. The search results appear in the table to the right. For common diseases, try to use a limited time frame or more fields in the search.

Search Case

Search Criteria			Search Results						
Type:	Single Event ▾		**Search Results**						
Event ID:			Event ID	Full Name	Birth Date	Status	Disease	Event Date	Sex at birth
Last Name:			100000026 🔍	edel weiss		Open	Hepatitis C		
First Name:			100000018 🔍	Jane C Chronic	02/05/1986	Open	Hepatitis C		
Birth Date: (Inexact)	MM/DD/YYYY 📅		Showing 1 to 2 of 2 entries				First Previous 1 Next Last		
Sex at birth:	▾								
Street:			Select	Create Record for Person		Cancel	Help		
City:									
State:	▾								
Zip Code:									
Status:	▾								
Disease:	Hepatitis C ▾								
From Date:	02/01/2017 📅								
To Date:	02/28/2017 📅								
Sort Options									
Sort By:	Create Date ▾								
Sort Order:	Descending ▾								
Search Options									
Search History:	☐								
Search Soundex:	☐								
Search	Clear	Create New							

> *WDRS allows the use of wildcards (*) in searching. A wildcard lets you replace letters that you do not know. For details about how to use wildcards, see Using Wildcards in the Appendix.*

There are four advanced search options to help you find events:

- **Search History** will enable searching against historical event/person information. When this box is checked, older demographics and address information is compared against the search criteria. This may be useful if the person has had multiple addresses.
- **Search Soundex** will include words that sound similar to the search criteria, but may not have identical spelling. For example, searching for Tony Green with the Search Soundex box checked will also find records for Toni Greene. If Search Soundex is not checked, only the exact spelling will be returned.

- **Sort By** sorts the results by either name or address.
- **Sort Order** sorts the results either ascending or descending order.

If the system does not find a matching record, then a "No Matching Events Found" message will appear below the table.

 There is a standard process for the system to merge duplicate events. **Please err on the side of creating a new event if there is any doubt about whether the event is a duplicate.** It is easier to merge two events than to separate two events that should have been separate. For further instruction, please see your disease-specific training resources.

You may click Use Selected Event if the event is located; however, if the person is found but not the event, (e.g. the right person but the wrong disease) you can create another event for this

person from this screen. Select the event with the wrong disease/time period associated and then click the Create Event for Person. All of the information entered on the search screen will come over to the Create Event screen. Follow the normal steps for Creating a New Event.

Remember, some diseases maintain one ongoing event for information. Alternately, new events may be necessary if a case was resolved previously and there is a new incidence of a disease. Please see your disease-specific training resources to determine if a new event should be created.

The Search Results list has a clickable preview button next to each found event, which brings up the preview screen. This screen shows more detail about the person or event.

If the search returns the event you are looking for, you may open it by double clicking on the Event ID or by clicking on the event and clicking Select.

Additionally, you can also search for an event by the Event ID using the box in the top right-hand corner.
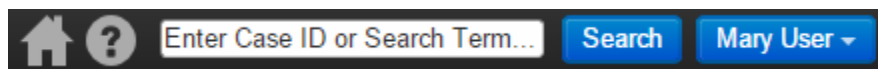
This field can be used to quickly look up an event if you have an existing Event ID for the event. **It is not recommended to use this search field if you are searching for other identifiers, such as person information.** Clicking the Search button takes you to the Advanced Search screen. *Please refer to your disease-specific training resources to determine if you should use this box or not.*

Please use the Search Event *button to perform your searches unless otherwise directed. The Search Event feature provides a much more robust and system-wide search, and reduces the likelihood of duplicative entries.*

Please refer to your disease-specific training resources for additional information.

Chapter 5: New Events and Updating Data

Create a New Event

When entering new event information, ALWAYS start by searching for the person and disease to verify that they do not already exist in the system.

After searching and verifying that the person/event does not already exist in WDRS, you may create a new event.

To create an event in WDRS:

1. Click the **Create Event** icon ▯ on the toolbar to create an event. While it is helpful to add as much information as you can relating to a specific event, we recognize much of that information might not be readily available.

    Note: Please see your disease-specific training resources for data-entry instructions if this information is missing.

> ⚠️ The minimum information required to create an event is a First and Last Name for the Person, as well as a Disease.

Create Event - Person Information

Event Information
Disease:

Add Person
First Name: Middle Name: Last Name:
Suffix:
Birth Date: Sex at birth: Social Security Number:
MM/DD/YYYY

Additional Demographics
Name alternate first:
Add New
DOB alternate:
MM/DD/YYYY Add New
Sex alternate:
Add New
SSN alternate last 4 only:
Add New
Phone number:
Add New
Email:
Add New
Electronic contact:
Add New
Person identifier:
Add New
Current WDRS person ID:
Previous WDRS person IDs:
Add New
Never match:

Contact Information
Address Type: Street:
Home
City: State: Zip Code:
WA
County: Country:
USA
Survey Email:
Residence Type: Address Status:
Select Person...   Clear

2. At the top of the Event Information, select the Disease.

Event Information
Disease: TB disease

To navigate to the disease list quickly, type the first letter of the disease name to go directly to the disease that begins with that letter.

Add Person

When entering new event information, ALWAYS start by searching for the person and disease to verify that they do not already exist in the system.

If information about the person is not in the system, enter the data about the person manually into the fields in the Add Person section. Please enter as much information as possible. If a person already exists in the system, please add all new names, dates of birth, etc., to the additional demographics information (see below).

Add Person		
First Name:	Middle Name:	Last Name:
Mint	R	Cookie
Suffix:		
Birth Date:	Sex at birth:	Social Security Number:
06/03/1980	Female	999-99-9999

Additional Demographics

The Additional Demographics fields serve two purposes: 1) they allow you to capture additional or incomplete information; and, 2) they allow you to add information to a person over time.
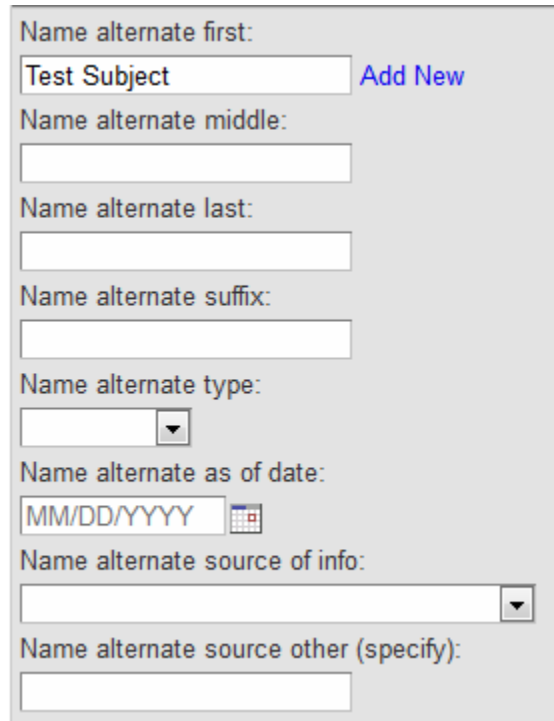
Alternate fields exist for situations where you have received two or more pieces of identifying information, such as an alternate name spelling, for the same person. They also exist to capture incomplete data.

Many fields on the Additional Demographic screen do not display until the user clicks in them and then pushes the Tab key on the keyboard.

Additional Demographics

Name alternate first:
[   ] Add New

DOB alternate:
[MM/DD/YYYY] [📅] Add New

Sex alternate:
[▼] Add New

SSN alternate last 4 only:
[   ] Add New

Phone number:
[   ] Add New

Email:
[   ] Add New

Electronic contact:
[   ] Add New

Person identifier:
[   ] Add New

Current WDRS person ID:
[   ]

Previous WDRS person IDs:
[   ] Add New

Never match:
[▼]

Name alternate first

Name alternate first:

Test Subject   Add New

Name alternate middle:

Name alternate last:

Name alternate suffix:

Name alternate type:

Name alternate as of date:

MM/DD/YYYY

Name alternate source of info:
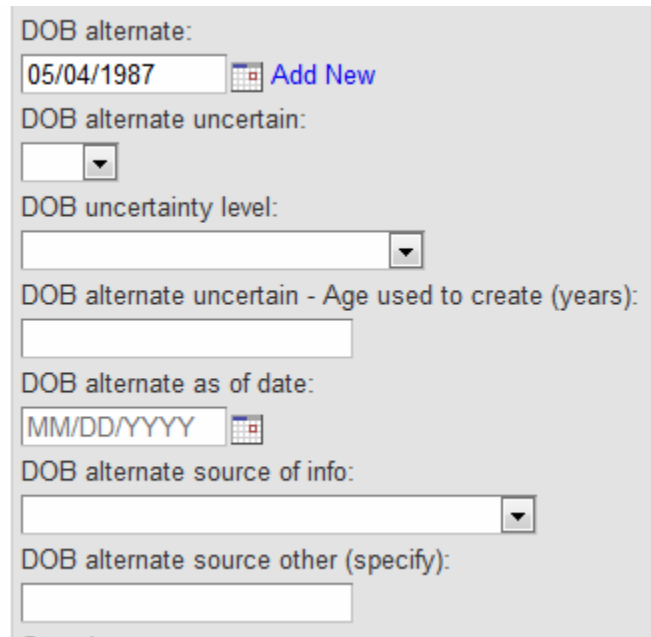
Name alternate source other (specify):

Entering information in the "Name alternate first" box followed by pushing Tab on the keyboard will allow you to view the additional alternate name questions. Please note the "Name alternate first" box appears to not allow you to enter an alternate last name. Once you push the Tab key on your keyboard, it will be possible to enter alternate last names.

Alternate questions allow you to capture different instances of a person's name you may receive. For example, a hospital may have a name as June Seymour-Halliday while an additional document has the name as June Halliday-Seymour. These fields would allow you to capture the additional version of the full name and associate it with the person. This allows us to more easily match up information we may receive on a person in the future.

Alternate names may also be nicknames or pseudonyms that a person uses at various times. These could include a previous name, an alternate spelling, a corrected hyphenated name or a married name. *Any name that you know belongs to the same person should be captured.*

To add additional Name alternate information, click Add New.

DOB alternate

DOB alternate:
05/04/1987 ▦ Add New
DOB alternate uncertain:
[ ] ▾
DOB uncertainty level:
[   ] ▾
DOB alternate uncertain - Age used to create (years):
[   ]
DOB alternate as of date:
MM/DD/YYYY ▦
DOB alternate source of info:
[   ] ▾
DOB alternate source other (specify):
[   ]

Entering information in the "DOB alternate" box, followed by pushing Tab on the keyboard, will allow you to view the additional alternate DOB questions. These questions allow you to capture partial information around a date of birth when you are missing information, or only given limited information, such as an age.

Ex: When creating a person you may only receive an age for a person, and not a date of birth. If this is the case, you would still need to enter a Birth Date in the Add Person section (please see your disease-specific training resources for numbering conventions). You would then complete the rest of the fields to indicate that it is an incomplete date of birth, and to specify how much information you were given when creating this date of birth. To add additional DOB alternate information, click Add New.
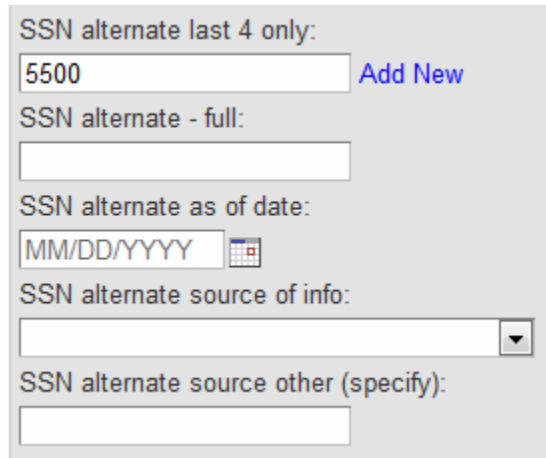
Sex alternate

Sex alternate:
Female ▾ Add New

Sex alternate other (specify):
[   ]

Sex alternate reason:
[▾]

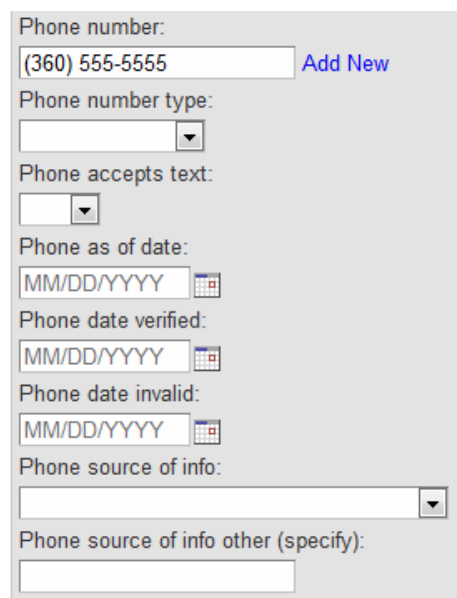Sex alternate as of date:
MM/DD/YYYY [📅]

Sex alternate source of info:
[▾]

Sex alternate source other (specify):
[   ]

Entering information in the "Sex alternate" box, followed by pushing Tab on the keyboard, will allow you to view the additional alternate Sex questions. These questions allow you to capture additional information related to a person's sex. If you receive one statement of sex on a lab report, and a different statement of sex on another lab report, this is a useful place to capture both. To add additional Sex alternate information, click Add New.

SSN alternate last 4 only

Entering information in the "SSN alternate last 4 only" box, followed by pushing Tab on the keyboard, will allow you to view the additional alternate SSN questions. ***Note: please see your*** [*disease-specific training resources*](#) ***for instructions on reporting SSN information.***

These fields allow you to capture a partial social security number. They also allow you to capture alternates that may be different from the original SSN. To add additional alternate SSN information, click Add New.

Phone Number

Entering information in the "Phone number" box, followed by pushing Tab on the keyboard, will allow you to view the additional phone number questions. This is where you will capture all of the contact phone numbers you have for a person. To add additional phone numbers click the Add New button.

Phone as of date: the date the phone number is entered into WDRS.

Phone date verified: date when the phone number was successfully used to reach the person.

Phone date invalid: date when the phone number was attempted to be used to reach the person but failed to do so. This might occur when a phone number has been disconnected.

E-mail

Email:
testsubject@test.com   Add New
Email type:
[▼]
Email as of date:
MM/DD/YYYY [▦]
Email date verified:
MM/DD/YYYY [▦]
Email date invalid:
MM/DD/YYYY [▦]
Email source of info:
[▼]
Email source of info other (specify):
[ ]

Entering information in the "Email" box, followed by pushing Tab on the keyboard, will allow you to view the additional email questions. This is where you will capture all of the contact email addresses you have for a person. To add additional email addresses click the Add New button.
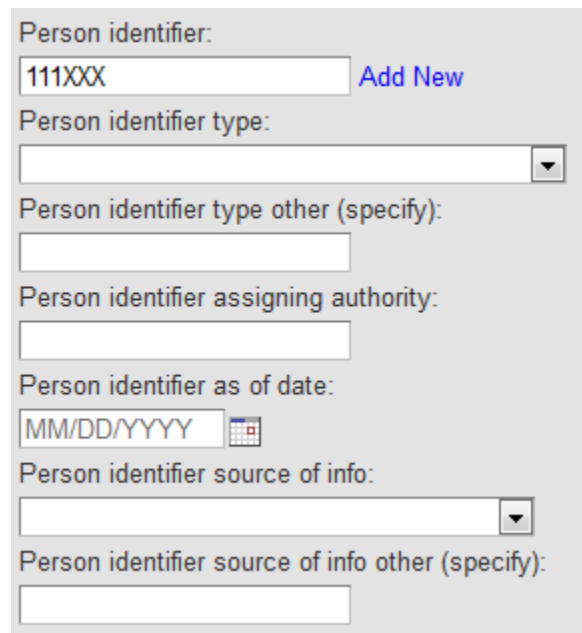
Electronic contact

Electronic contact:
testsubject   Add New
Electronic contact type:
[▼]
Electronic contact Site:
[ ]
Electronic contact as of date:
MM/DD/YYYY [▦]
Electronic contact verified date:
MM/DD/YYYY [▦]
Electronic contact invalid date:
MM/DD/YYYY [▦]
Electronic contact source of info:
[▼]
Electronic contact source of info other (specify):
[ ]

Entering information in the "Electronic contact" box, followed by pushing Tab on the keyboard, will allow you to view the additional electronic contact questions. This is where you will capture other electronic means to identify or contact a person. An example would be a screenname for social networking apps or sites. To add additional electronic contacts click the Add New button.
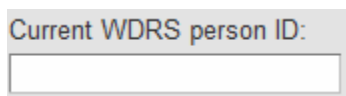
Person identifier

Entering information in the "Person identifier" box followed by pushing Tab on the keyboard will allow you to view the additional person identifier questions. This is where you will capture additional pieces of identifying information for a person, like a military ID number, or a medical record number. To add additional person identifiers click the Add New button.
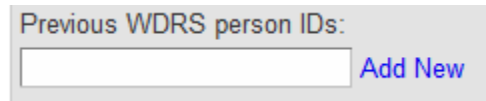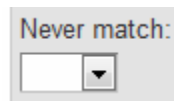
Current WDRS person ID

If you are creating a new person, you will not enter information into this field. **_Please refer to your [disease-specific training resources](#) for information on completing this field._**

Previous WDRS person IDs

Previous WDRS person IDs:

[   ] Add New

This field captures previous WDRS IDs when cases have been merged. This will primarily be performed and completed by staff at DOH.

Never match (DOH-use only)

Never match:

[▼]

This field serves as a lock to prevent this person from matching to other persons due to situations of common or similar names, and other identifying information that are determined through careful assessment to be different. This will be handled by specially trained staff at DOH. **Please do not use this field if you have not been trained and instructed to use it.**

After a person has been created, we want to maintain any and all information we receive about them.

Person information should not be edited, except in extremely rare circumstances. When additional information is received, the alternate fields should be used to capture it. This includes small adjustments to the address or name. To assist in case and data management, we need all data received on a person for the history of their existence in WDRS. ***This is achieved by building onto an existing person instead of editing it and removing data.***

The Add New button allows for new blank versions of questions on a person.

Contact Information

After the demographic information, you are then requested to enter Contact Information. The City and Zip Code will drop down with suggestions after you begin to type in the appropriate field. The County list is determined by the state that has been selected. County is a required field.

> ⚠️ *You must choose a County when entering information.*

> *DO NOT USE ABBREVIATIONS when entering the city. Use the city drop-down list whenever possible.*

Once you have entered all of the Person and Contact/Address Information, select the Save button. This will automatically save person information and take you to the associated event where additional data can be collected.

Event Summary Dashboard

The event summary dashboard opens in all models when a new event is created or an existing event is opened.

The event summary dashboard contains links to all of the screens and question packages associated with the event. The top section displays basic information and notes about the case. It also provides links to a person's summary page, linked events, and attachments (these links are in blue and take you to new screens). Important warnings or messages may also be seen under the basic information section. Depending on your permissions, you may be able to view and add notes in the upper right box by clicking Add/Edit. If you add a note, you may set the note to **Public**, meaning that anyone with permission to see the event can see the note, or **Sensitive**, meaning that only you, or people with more enhanced security, can see the note.

The bottom section of the event summary dashboard contains the question packages for the case, as well as tabs with additional event information and the drop-down list of available wizards (discussed later in this chapter).

The tabs for all models are:

Tab	Notes
Event Data	The Event Data tabs is where the questions packages for this event are located. Question packages are used to view and edit information on an event.
Lab Results	The Lab Results tabs is where you add and review labs for this event. This is also where electronic lab reports will be viewable.
Concerns	The Concerns tab is where you can view any concern for the event. A concern is an important issue that could affect the event. There are two types of concerns: 1) a system-generated concern is automatically generated by WDRS and is used to highlight important characteristics of the event (potential data entry issues, pediatric case, MDR, etc.); and, 2) a user-generated concern is created by the user to bring attention to an issue.
Persons	The Persons tab provides details about the person associated with the event, and is used to add or update identifying and contact information about the person.
Tasks	The Tasks tab provides information about any task associated with an open event. You can add Tasks here.
Calendar	The WDRS Calendar tab provides a simple solution for organizing team meetings, client appointments, and resources usage.
Event History	This tab provides a history of when the event was created and updated, including details about what changes were made to a question package and who made them. It can provide a helpful snapshot about who has done what on the event. This history is displayed at the question package level, not by individual question.

To exit the event summary dashboard, click the X at the upper right of the dashboard.

Editing an Event

Event Data Tab

Additional disease information is collected within the question packages on the Event Data tab. Most case management and data entry is performed inside question packages. The question packages will look different for different diseases. Which question packages are visible to you will depend on both the disease that is selected for the event, as well as your security permissions.

Saving an Event

Once the person's information has been entered, click the Save button. The system will then compare the entered person information to existing persons in the database. If the system finds a potential duplicate record for that person, it will open a Potential Matches screen. Clicking Save closes the Create Event window and brings you back to the WDRS dashboard, where information about the newly created event is displayed.

> As you are entering data, you should click "Save and Stay" to save information you have entered on that page without navigating away from the page. Clicking "Save" in a question package takes you back to the Event Summary page.

Wizards

Wizards are a way to make data entry or data viewing easier. They are disease-specific, and take relevant questions from the different question packages to create one spot for data entry (instead of going into each question package separately to do the data entry). Wizards are often based on common data-entry questions, and either matching investigator forms, official WA DOH case reporting forms, CDC forms or matching a shortlist of questions applicable to certain data-entry situations.

When in the event summary dashboard, a dropdown of available wizards can be found below the individual question packages in the Event Data tab. The user will select which wizard they want to view from the drop-down menu.

⭐ Additional wizard information is available in your disease-specific training resources.

Lab Results Tab – the "Lab Tab"

The lab tab summary will look the same for each disease event. The fields available when adding a new lab result will be different for each event depending on the disease/event type and data-entry method. For more information about how to complete information found on the lab tab please see your disease-specific training resources.

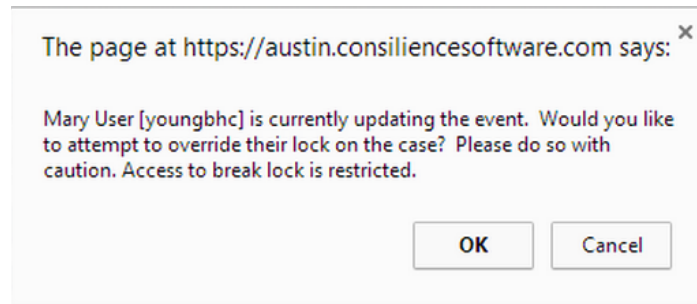To view lab results, click the lab results tab on the event summary dashboard.

From this screen you will be able to view general information about labs that exist for this event.

If your disease-spsecific training resources instruct you to manually enter a lab result through the lab results tab, click Add Lab Result. The next steps for completing lab information can be found in your disease-specific training resources.

Your security settings will determine if you are able to update or delete existing lab results. While those options are present in the picture above, you may not see these buttons depending on those security settings.

Event Lock

Only one user at a time can have an "editable" copy of an event open. When one user has an event open, other users are not able to work on the same event. WDRS places a temporary lock on all events that are being worked on by someone else. When a user attempts to open an event that another user is working on, a prompt displays about the locked event.

The page at https://austin.consiliencesoftware.com says: ×

Mary User [youngbhc] is currently updating the event. Would you like to attempt to override their lock on the case? Please do so with caution. Access to break lock is restricted.

OK   Cancel

You will still be able to open the event, but you will have read-only access – you will not be able to edit the event. The question package will still appear to be editable, but the Save button is deactivated and you will be unable to save your data.

Chapter 6: The Workflow Queue, Tasks & Concerns

Workflows

Workflows are important in WDRS because they organize events and identify items that need user action. Each workflow is a question or query asked about events in WDRS.

Workflows may ask questions specific to a disease or condition, general questions, or questions about a pending status. In this way, the system organizes lists of events with similar pending actions, such as deduplication, address verification, or open outbreaks.

Since one event may fit several questions, an event may appear in more than one workflow. Closed events can appear in some workflows, but not in others, depending on the specifications of the workflow.

WDRS runs queries intermittently throughout a 24-hour period. Most workflow queries run every 15 minutes, while others run once in 24 hours. The frequency with which the workflow query runs is based on the criticality of the workflow, as well as the burden on the system. Some queries look at more data and, therefore, take longer to run than those that look at only one or two pieces of information. The latest result of each of these queries is displayed on the workflows queues page and is tagged with the time the query was last run. Workflows will not immediately be removed from the queue when the associated questions are updated, they will only disappear when the next refresh happens.

Workflow Queue Screen

The first time you click on the workflow icon ⚙ during a session, you will be brought to the Workflow Queues screen. Once you open a particular workflow, you will return to that workflow instead of the main workflow screen until you click the Workflows button at the bottom of the screen.

The workflow screen contains a list of all the workflows that you can see. *Depending on your security settings, you will see some or all of the following queues:*

Clicking the icon pulls up the details of the queue:

Workflow Fields

The following information is displayed for each queue:

Workflow	The name of the query which describes the condition of the events. Each line item is a clickable link which will open a new screen which lists the event(s) in the queue
Total Count (Assigned to me)	The number of events that have been triggered by the specific monitor and the number within the parentheses ( ) is the number of events that have specifically been assigned to you.
Priority	Displays the priority assigned to the specific workflow.
Last Update	Displays the date and time the workflow was last updated along with an information box .

Because some workflow queues are set to refresh at different intervals, the Workflow Queues page lists the Last Update. Within that column is an information box icon . Clicking on this icon brings up an information box. This box includes the following:

Full Name:	Name of the workflow.
Description:	More descriptive details for the workflow.
Next Refresh:	Amount of time left until this workflow is scheduled to refresh.
Frequency:	Amount of time in between refreshes.
Average Time:	Average time it takes for the system to complete the workflow refresh.

What you view on your workflow queue is based on your security settings. **_For more information about workflows specific to your disease-area, please see your [disease-specific training resources]._**

Event-Specific vs. Task-Specific Workflows

On the workflow queues screen, workflows are grouped into categories to make it easy for the user to find the workflow they need.

In the example below, there is one event-specific task, as well as one general task that is not related to a specific event.

You can also see your most recent pending tasks on the WDRS home page.

The primary difference between the event-specific monitors, and the task-specific monitors, is that the event-specific monitors are triggered automatically by something in the system (such as missing data), and don't have a specified due date. Task-specific monitors usually have a due date and are often manually created. In the example above, the task "Perform QA on existing cases" was created and assigned to this user.

Event-Specific Monitors

An event-specific monitor is automatically "watching" for a specific set of conditions which will trigger it. These conditions may vary from disease to disease and role to role. For example, when an electronic lab result leads to the creation of a new event within WDRS, an event-specific monitor will appear to indicate that there are new events in WDRS. A message will then be displayed in the appropriate users' or groups' workflow queue. These types of monitors can be cleared, and the workflow queue emptied, by filling in the required fields in the question packages for that event.

It is not necessary to have an event open in order to view the workflow queue. To interact with the workflow queues, follow these steps:

1. Click the Workflow icon ⚙️ on the WDRS toolbar.
2. Observe that the case specific monitors and the task specific monitors for the specific user are listed.
3. Click the link to the appropriate workflow queue to list items in that workflow. A screen similar to the one below will appear:

4. Click the Event ID link if applicable. This will either open the appropriate question package or open the event summary dashboard so that you can perform the required action(s).
5. Remember that in order to apply changes to question packages, you must click the Save button. This action returns you to the WDRS home page for the currently active event.

Tasks

Similar to the events in the event-specific monitors, tasks within WDRS are another way for you to delegate assignments or work to others. *The major difference between a task and an event-specific monitor, is that a task can have a due date. An event-specific monitor cannot.*

Tasks can be viewed and created in three places:

- From the Tasks tab in the event information section
- From the workflows page
- From the tasks icon ☑ in the toolbar on the home page

All three provide similar information, but offer slightly different views and functionality. Note that the workflows page may display a single task in multiple categories (e.g., Open Task and also Open Tasks Created by Me).

Please see your [***disease-specific training resources***](#) ***to determine if and how tasks should be used.***

Concerns

A concern is a note that is added to a record to indicate that there is something important for the user, often a problem with that record or anything the user may need to be aware of (ex: pregnancy, pediatric, etc.).

Appendix

Using Wildcards

WDRS supports single and multiple character wildcard searches within single terms (not within phrase queries).

To perform a single character wildcard search, use the "?" symbol.

To perform a multiple character wildcard search, use the "*" symbol.

The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for "text" or "test" you can use the search:

te?t

Multiple character wildcard searches looks for 0 or more characters. For example, to search for test, tests or tester, you can use the search:

test*

You can also use the wildcard searches in the middle of a term.

te*t

You cannot use an * or ? symbol as the first character of a search.

Revision History

Date	Version	Author	Reason For Change
3/6/17	1	KC Wilkerson	N/A