



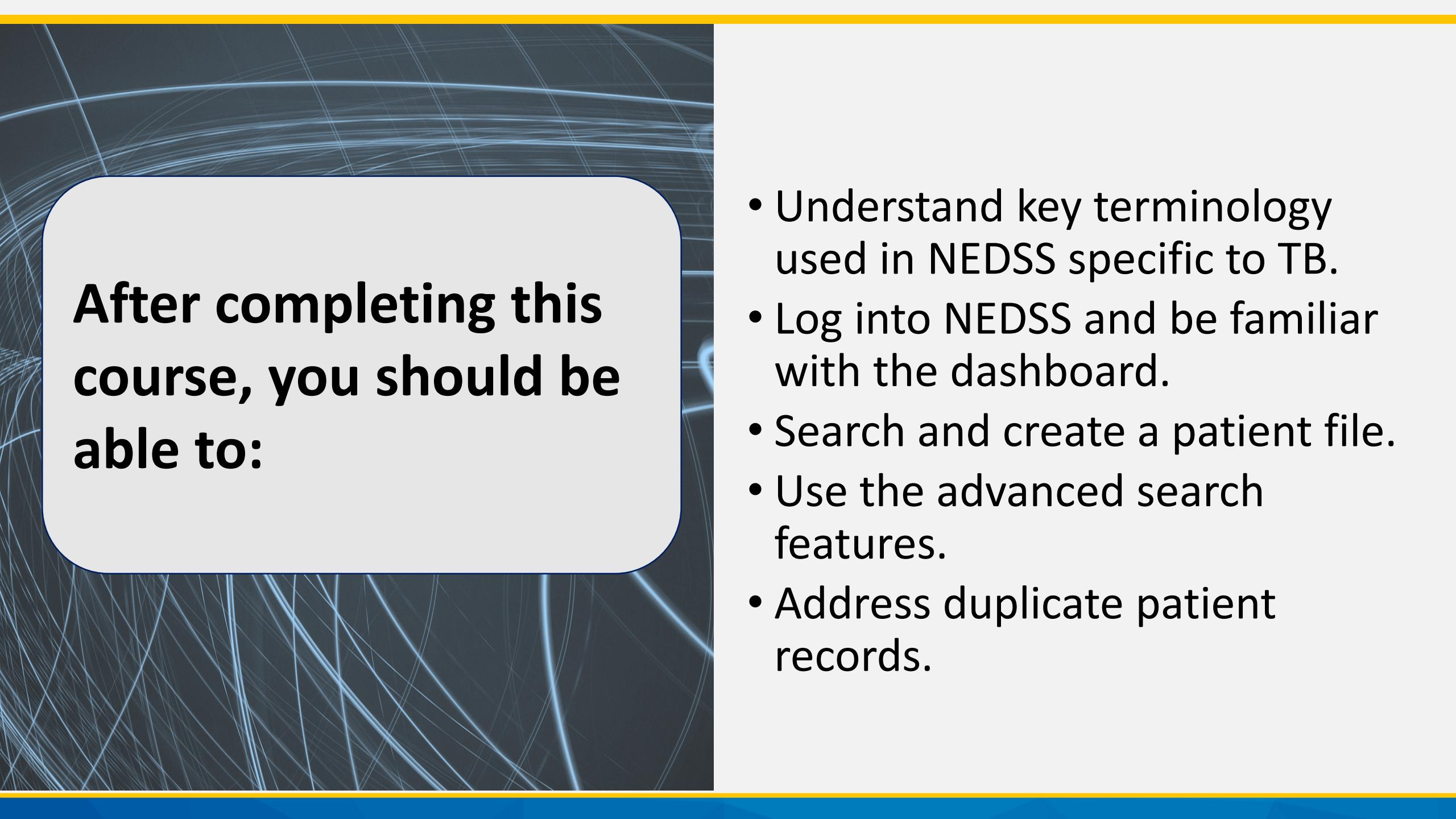
TEXAS
Health and Human
Services

Texas Department of State
Health Services

Tuberculosis and Hansen's Disease Unit
NEDSS Tuberculosis (TB) Training Course
for
Public Health Regions and Local Health
Departments (R/LHDs)

January 2024

Course Number 1:
*Navigating NEDSS and Creating a
TB Patient File*



After completing this course, you should be able to:

- Understand key terminology used in NEDSS specific to TB.
- Log into NEDSS and be familiar with the dashboard.
- Search and create a patient file.
- Use the advanced search features.
- Address duplicate patient records.

Key Terminology

What is NEDSS?

NEDSS is the National Electronic Disease Surveillance System (NEDSS)

- Assists local, state, and territorial public health departments to manage reportable disease data.
- Transmits nationally notifiable disease (NND) data to the Centers for Disease Control and Prevention (CDC).
- Used by R/LHDs to report TB and other diseases.



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Features



Patient records with surveillance and case management data



Ability to merge duplicate patient records



Reports that may be customized



Ability to transfer records to other jurisdictions



Continuous data entry and real-time reporting

NEDSS Terminology

General Terms Across Diseases

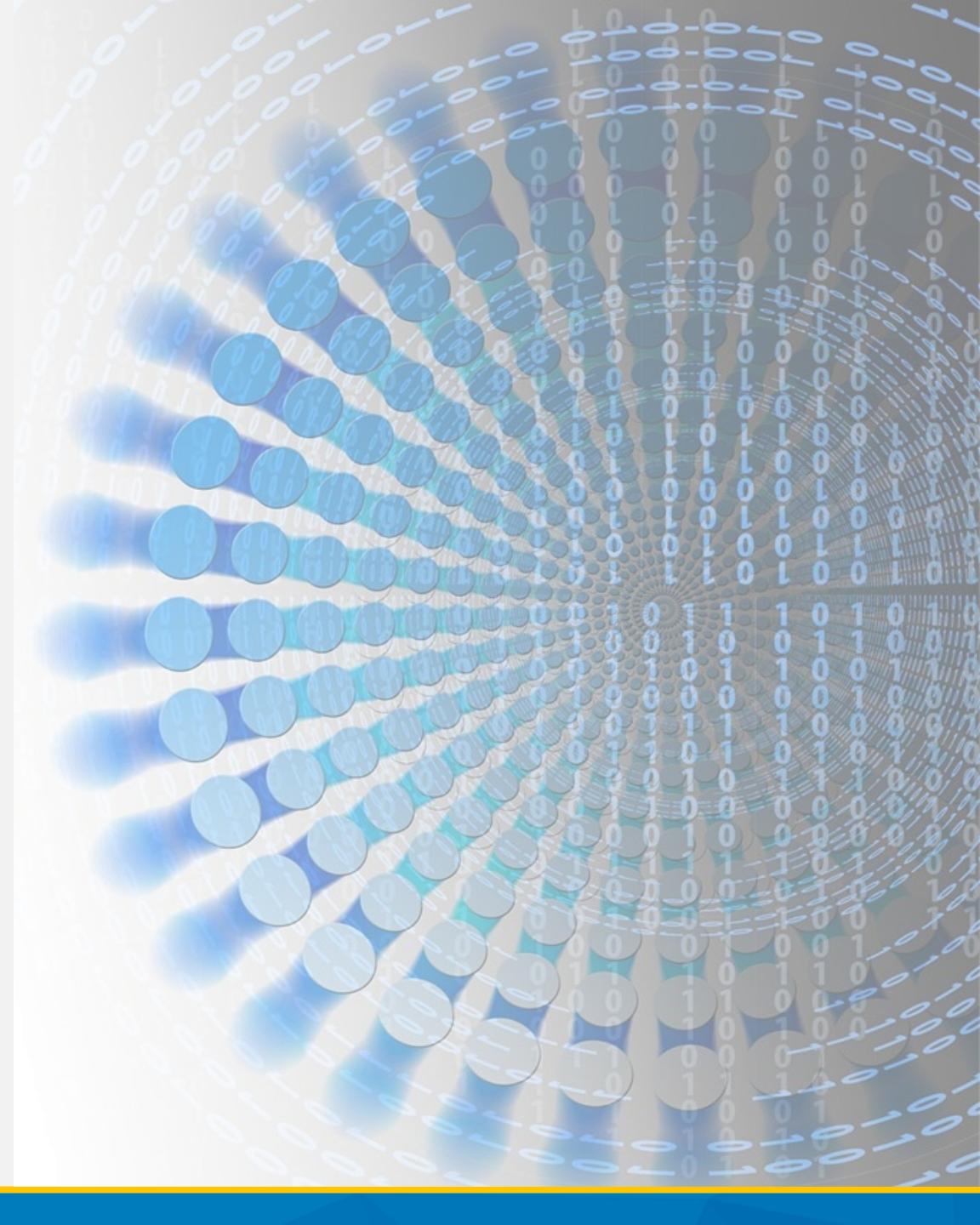
NBS: NEDSS-based system

ELR: Electronic Laboratory Report

Events: Surveillance information associated with a patient such as an investigation, lab report, morbidity report, vaccination record, treatments, documents, and contact records

Condition – Specifies the reportable disease for an event

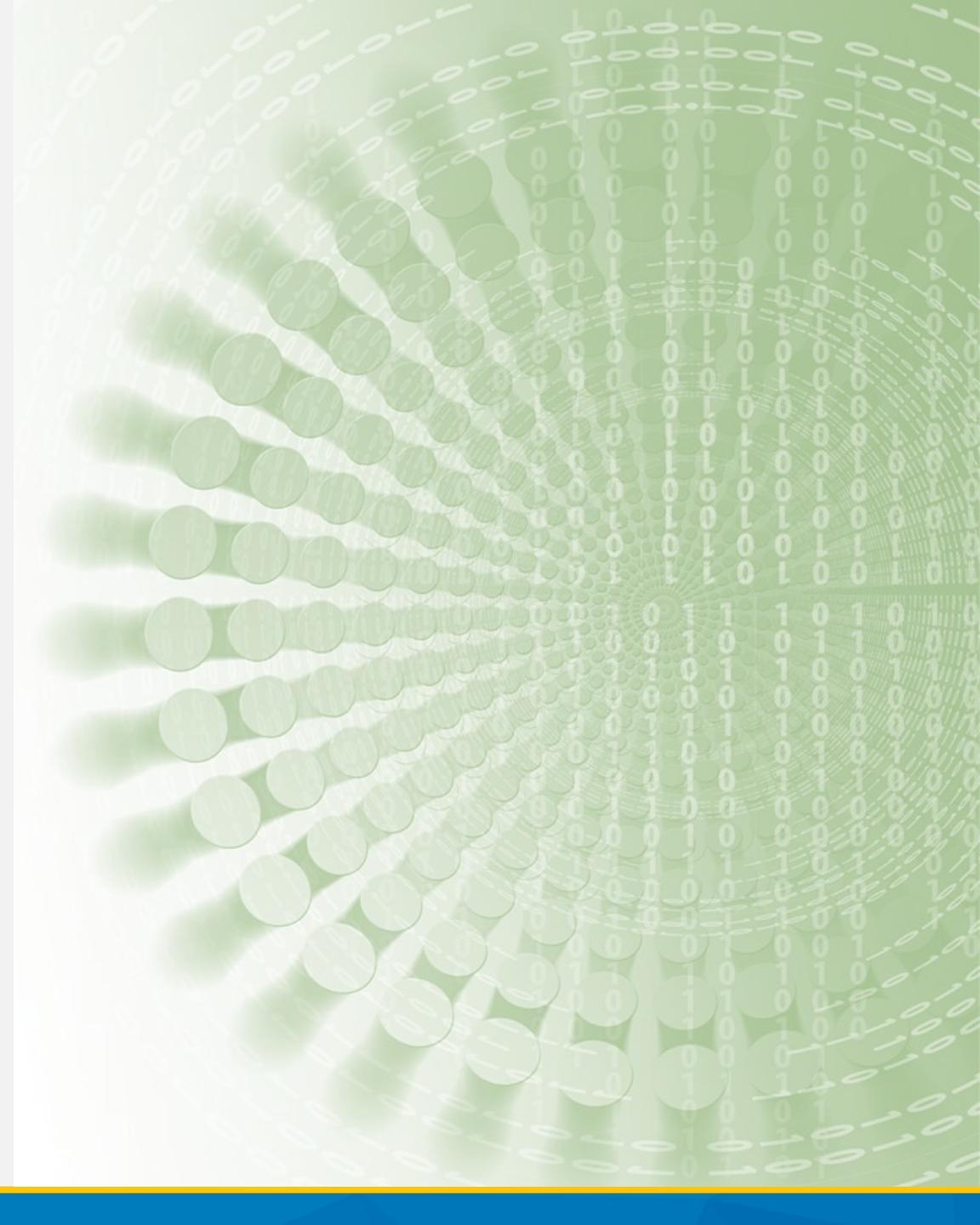
Notifications: Electronic messages sent to CDC to report a verified case of an NND



NEDSS Terminology

General Terms Across Diseases

- **Patient File** –allows a view of the patient's information, including demographics, observations, investigations, and vaccination records, if they exist in the system.
- **Investigation** – Information regarding one incidence of a disease. The bulk of TB data entry occurs here.
 - **Tuberculosis (RVCT 2020)**: the condition for all investigations for patients who have not been diagnosed with latent TB infection.
 - **Latent TB infection (TBLISS 2020)**: the condition for investigations for patients who have been diagnosed with TB infection.



**Log In and Navigate the
Dashboard**

Logging into NEDSS: *Training Site*



Please enter your username and password below. Once you have finished press submit to log onto the application.

Username: firstname.lastname@dshs.trng

Password:

[Change your Password?](#)
[Technical FAQ](#)
[NEDSS Help](#)
[Documentation](#)



Please enter your username and password below. Once you have finished press submit to log onto the application.

Username: firstname.lastname@dshs|

Password:

[Change your Password?](#)
[Technical FAQ](#)
[NEDSS Help](#)
[Documentation](#)

NEDSS Homepage Dashboard

The top menu bar on the landing page contains different menu options based on the user's access.

Left side of menu bar: Home button (among other functions).

Right side of menu bar: Help, Log out, Environment Icon.

Home | Data Entry | Open Investigations | Reports | Help | Logout
User : Name here TRAINING

Release 6.0.14.1-GA Dashboard

Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start or end or use Advanced Search)

Last Name:
First Name:
DOB:
Current Sex:

Search Identifiers
Event ID Type:
Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Search Clear Advanced Search

My Queues Default Queues Notices Friday, December 22, 2023
I will be offline from 11:00am -11:30am for maintenance.

NEDSS Homepage Dashboard



NOTE: Users should be sure they are in the correct site, training (above) vs. production (below).

Patient Identifiable Information should not be entered in the training environment.



NEDSS Homepage Dashboard

Home | Data Entry | Open Investigations | Reports |
Release 6.0.14.1-GA Dashboard Help | Logout
User Name here TRAINING

Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:
First Name:
DOB: 
Current Sex:

Search Identifiers
Event ID Type:
Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Search Clear Advanced Search

My Queues

Default Queues

- Open Investigations
- Rejected Notifications
- Documents Required
- Priority Queue
- Custom Queue

Open Investigations
Open Suspect TB I

Notices

Friday December 22, 2023

line from 11:00am -11:30am for maintenance.

Patient Search is where users will search for the Patient File.

My Reports

There are no private reports available.

NEDSS Homepage Dashboard

The screenshot shows the NEDSS Homepage Dashboard interface. At the top, there is a navigation bar with links for Home, Data Entry, Open Investigations, Reports, Help, and Logout. Below the navigation bar, the title "Release 6.0.14.1-GA Dashboard" is displayed. The main content area is divided into several sections:

- Patient Search**: Contains fields for Last Name, First Name, DOB, Current Sex, Event ID Type, and Patient ID(s), along with Search, Clear, and Advanced Search buttons.
- My Queues**: This section is highlighted with a large red box. It contains two subsections:
 - Default Queues**: Lists Open Investigations (737), Rejected Notifications Queue (0), and Documents Requiring Review (17).
 - Private Custom Queues**: Includes a search bar labeled "Search for private custom queues" and lists Open Investigations Approved and Open Suspect TB Investigation.
- Notices**: Displays a message: "Friday, December 22, NEDSS Training will b...".
- My Reports**: Shows a message: "There are no private reports available."

A large yellow arrow points from the text on the right towards the "My Queues" section.

My Queues is designed for health department use to track TB activity in their area. Queues are covered in more detail in later courses.

NEDSS Homepage Dashboard

The screenshot shows the NEDSS Homepage Dashboard interface. At the top, there is a navigation bar with links for Home, Data Entry, Open Investigations, Reports, Help, Logout, and a user name field. Below the navigation bar, the dashboard is divided into several sections:

- Patient Search:** Contains fields for Last Name, First Name, DOB, Current Sex, Event ID Type, and Patient ID(s). It includes a Search button.
- My Queues:** Shows Default Queues.
- Notices:** A section titled "Notices" containing a message about NEDSS Training being offline from 11:00am -11:30am for maintenance on Friday, December 22, 2023. This section is highlighted with a yellow arrow pointing to it from the text in the center of the page.
- My Reports:** A section stating "There are no private reports available."

Text Overlay: A large yellow box with a yellow arrow pointing towards the Notices section contains the following text:
Important information for
NEDSS users will be placed
in the **Notices** section by
the NEDSS team.

NEDSS Homepage Dashboard

[Home](#) | [Data Entry](#) | [Open Investigations](#) | [Reports](#) |

Release 6.0.14.1-GA Dashboard

[Help](#) | [Logout](#)

User Name here



Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:
First Name:
DOB:
Current Sex:

Search Identifiers
Event ID Type:
Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

[Advanced Search](#)

My Queues

Default Queues

- Open Investigations (737)
- Rejected Notifications Queue (0)
- Documents Requiring Review (17)

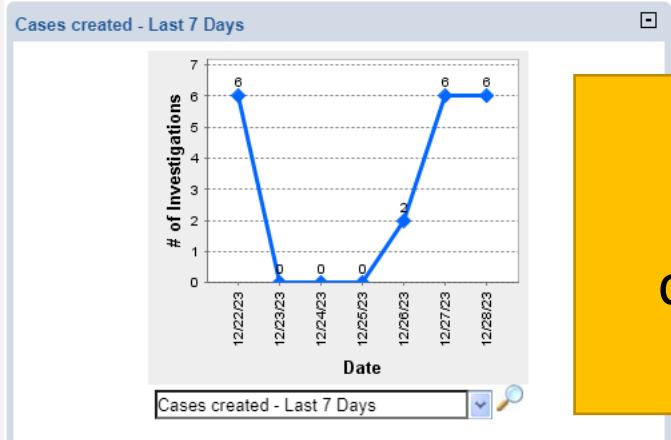
Private Custom Queues

[Search for private custom queues](#)

- Open Investigations Approved
- Open Suspect TB Investigation

Notices

Friday, December 22, 2023
NEDSS Training will be offline from 11:00am -11:30am for maintenance.



My Reports will display reports customized by the user.

My Reports

There are no private reports available.

NEDSS Homepage Dashboard

Home | Data Entry | Open Investigations | Reports | Help | Logout
Release 6.0.14.1-GA Dashboard User: Name here 

Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:
First Name:
DOB: 
Current Sex:

Search Identifiers
Event ID Type:
Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Search Clear Advanced Search

My Queues

Default Queues

- Open Investigations (737)
- Rejected Notifications Queue (0)
- Documents Requiring Review (17)

Private Custom Queues

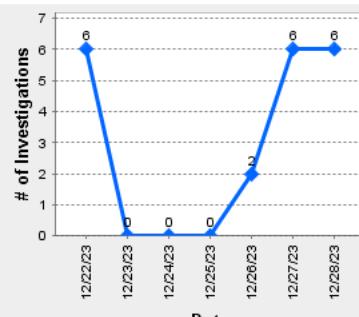
Search for private custom queues

- Open Investigations Approved
- Open Suspect TB Investigation

Notices

Friday, December 22, 2023
NEDSS Training will be offline from 11:00am -11:30am for maintenance.

Cases created - Last 7 Days



Date	# of Investigations
12/22/23	6
12/23/23	0
12/24/23	0
12/25/23	0
12/26/23	2
12/27/23	6
12/28/23	6

Cases created - Last 7 Days 

This box may be blank initially.
As data is entered, it can be tailored to show information in designated time frames (i.e., case created in a week).

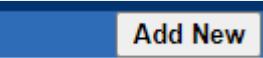
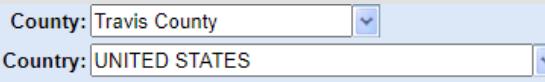
Understand the Visual Interface and Common Icons in NEDSS



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NEDSS Icons and Features

NEDSS Feature Images	Feature Name	Tips for Use
	Home Button	Always use the Home button to return to the main dashboard navigating in NEDSS. Do NOT use the web browser back button.
	Add New Button	Click the Add New button to create a new event (i.e., patient file, investigation, lab report).
	Submit and Cancel Buttons	Click Submit to save work. NEDSS times out after 20 minutes of inactivity. Click Cancel to stop editing the page without saving the data that was entered.
	Edit and Print Buttons	Click the Edit button to update previously submitted items. Click Print to print the current event (i.e., investigation or lab report).
	Drop Down Menus	Click the arrow and scroll through the drop-down options or click inside the field and start typing if the drop-down values are known.
	Date Fields and Calendar Icons	Click the calendar icon or start typing the date in MM/DD/YYYY format, including leading zeros for month and day.

NEDSS Icons and Features

Selected Values:

Other 25. Site of TB Disease (select all that apply):

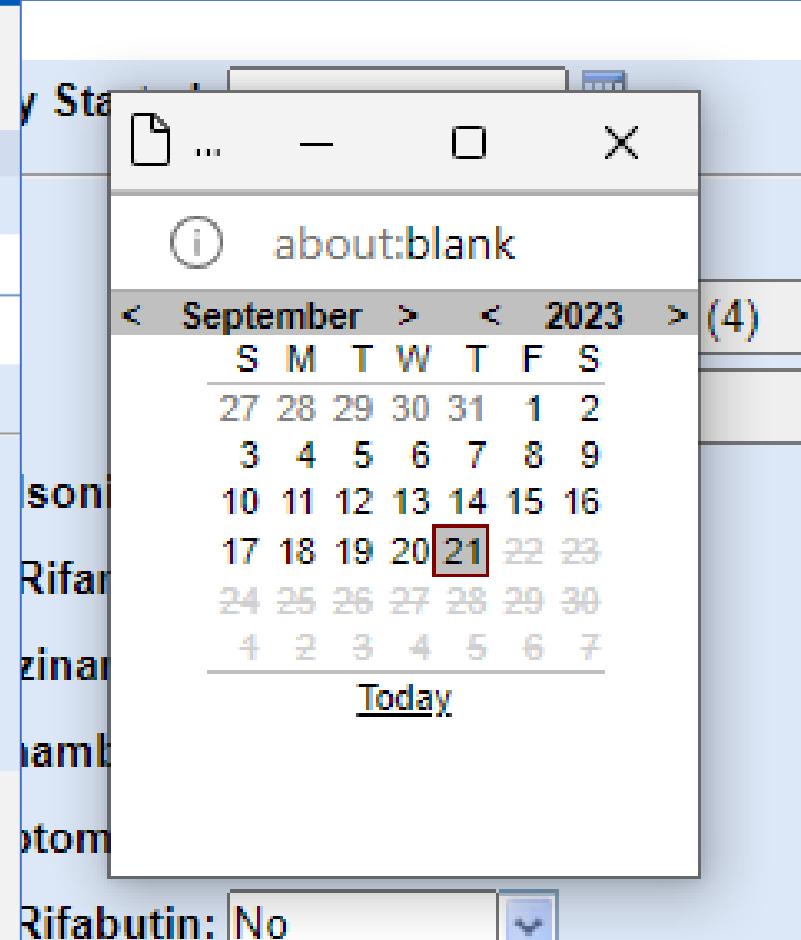
30. Date Therapy Started: 

Calendar icons: Allows date selection from a pop-up. Alternative is to type in MM/DD/YYYY including leading zeros.

Pyrazinamide:

Rifampicin:

Rifabutin: No



NEDSS Icons and Features

Your Search Criteria: Last Name Starts With 'olympics', resulted in 15 possible matches. Would you like to [refine your search](#) or [add a new patient](#)?

Results 1 to 15 of 15 | Remove All Filters/Sorts

Patient ID	Name	Age/DOB/Sex	Address	Phone/Email	ID
24388117	Legal Olympics, Athen	19 Years 08/10/2004	Home 123 Greece		
24388073	Legal Olympics, Barcelona				Driver's license number 12345678
24384189	Legal Olympics, Calgary		Home 5 Rings Dr Austin , Texas 78753		
24389147	Legal Olympics, Lillehammer	29 Years 02/12/1994 Male	Birth Place Norway Home 15 Norway Drive Austin, Texas 78757		
24384191	Legal Olympics, London	11 Years 07/27/2012 Male	Home 101 Gold Ave Austin, Texas 78753	Home 222-333-4444	

Hyperlinked Text in a Queue will take users to a new page in NEDSS.

New Search | Refine Search Add New

NEDSS Icons and Features

Patient File User: Name here TRAINING

Print

Melbourne Olympics | Female | 11/11/1956 (67 Years) Patient ID: 24389018

Summary Events Demographics [Expand All](#) | [Collapse All](#)

Patient Summary

Go to: [Patient Summary](#) | [Open Investigations](#) | [Documents Requiring Review](#)

Patient Summary

Address (Home)
1 Opera House Drive
Austin, Texas 78753
Travis County

No R

Open Investigations (1)

Start Date	Conditions	Investigation ID	Co-Infection ID
12/29/2023	Tuberculosis (2020-PVCT)	CAS483806036TX01	

Documents Requiring Review (0)

[Back To Top](#)

[Previous](#) [Next](#)

Summary Events Demographics Print

Hyperlinked Text in the Patient File will open a new page in NEDSS or help the user navigate through the current page.

NEDSS Icons and Features

NEDSS Icons and Features

The *plus* and *minus* signs can be used to collapse or expand a Section or Subsection.

View Investigation: Tuberculosis (2020 RVCT)

User Name here 

[Return to File: Summary](#)

 Manage Associations  Create Notifications  Transfer Ownership  Edit  Print

Melbourne Olympics | Female | 11/11/1956 (67 Years) Patient ID: 24389018

Investigation ID: CAS483806036TX01	Created: 12/29/2023	By: kathryn yoo
Investigation Status: Open	Last Updated: 12/29/2023	By: kathryn yoo
Investigator:	Case Status: Confirmed	Notification Status: PEND_APPR

* Indicates a Required Field

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
---------	-----------	------------	--------------	-----------------	--------	-----------	------------------------------------	-----------------------	-----------------	-------------------

Go to: [Initial Evaluation](#) | [Risk Factors](#) | [Diagnostic Testing](#) | [Chest Imaging](#) | [Additional Imaging](#) | [Epidemiologic Investigation](#)

[Expand Sections](#)

Initial Evaluation [Back to top](#)

[Expand Subsections](#)

- 11. Nativity
- 12. Country of Usual Residence
- TB Diagnosis
- Symptom Screening
- Symptom Screening Repeating Block
- Medical Consult

Risk Factors [Back to top](#)

[Expand Subsections](#)

- 15. Occupation and Industry
- 15b. Current Industry and Occupation Information
- 16. Other Risk Factors

Diagnostic Testing [Back to top](#)

Chest Imaging [Back to top](#)

Additional Imaging [Back to top](#)

Epidemiologic Investigation [Back to top](#)

[Previous](#) [Next](#)

NEDSS Icons and Features

View Investigation: Tuberculosis (2020 RVCT)

User: Name here 

[Return to File: Summary](#)

Manage Associations Create Notifications Transfer Ownership Edit Print

Melbourne Olympics | Female | 11/11/1956 (67 Years) Patient ID: 24389018

Investigation ID: CAS483806036TX01	Created: 12/29/2023	By: kathryn yoo
Investigation Status: Open	Last Updated: 12/29/2023	By: kathryn yoo
Investigator:	Case Status: Confirmed	Notification Status: PEND_APPR

* Indicates a Required Field

Patient Case Info TB History Tuberculosis TB Disease Only MDR TB LTBI Only Comprehensive TB Treatment Details Contact Investigation Contact Records Supplemental Info

Go to: [Clinical History and Findings](#) | [Initial Treatment Information](#) | [Genotyping and Drug Susceptibility](#) | [MDR TB Case](#) | [Case Outcome](#)



Tabs – Similar to dividers in a notebook, each tab “opens” and becomes white, allowing user to view the data in the patient's record.

Repeating Block Questions

34. Was phenotypic/growth-based drug susceptibility testing done?: Yes

IF YES, provide test results (For the initial susceptibility testing please send a response for each test type in the value set. Changes in susceptibility should be reported for each individual drug when change is identified)

Phenotypic Drug Susceptibility Testing Information

	Drug Name	Date Collected	Date Reported	Specimen Source	Result	
		Ethambutol	01/05/2023	02/10/2023	Sputum	Susceptible
		Isoniazid	01/05/2023	02/10/2023	Sputum	Susceptible
		Pyrazinamide	01/05/2023	02/10/2023	Sputum	Susceptible
		Rifampin	01/05/2023	02/10/2023	Sputum	Susceptible

 Standard Susceptibilities (4)
Mark Rest 'Not Done'
Drug Name:
Drug Name:

NEDSS allows for data entry into what is called a *repeating block format*.

Repeating blocks - a series of data fields that are repeated in a table format; each row includes unique data of the same type.

In this example, the repeated data type to be entered is Phenotypic Drug Susceptibility Testing Information. Each row contains results of each unique drug.

Repeating Block Questions

34. Was phenotypic/growth-based drug susceptibility testing done?: Yes

IF YES, provide test results (For the initial susceptibility testing please send a response for each test type in the value set. Changes in susceptibility should be reported for each individual)

Phenotypic Drug Susceptibility Testing Information

	Drug Name	Date Collected	Date Reported	Specimen Source
	Ethambutol	01/05/2023	02/10/2023	Sputum
	Isoniazid	01/05/2023	02/10/2023	Sputum
	Pyrazinamide	01/05/2023	02/10/2023	Sputum
	Rifampin	01/05/2023	02/10/2023	Sputum

In each repeating block, there are three icon options:

Page icon- Allows users to view all data entered in the data fields.

Page with pencil icon – Allows users to edit data in the row.

Red X – Allows users to delete data in that row.

Standard Susceptibilities (4)

Mark Rest 'Not Done'

Drug Name:

Other Drug Name:

Date Collected: 

Date Reported: 

Specimen Source:

Other Specimen Source:

Result:

Test Method (Optional):

Test Method (Optional):

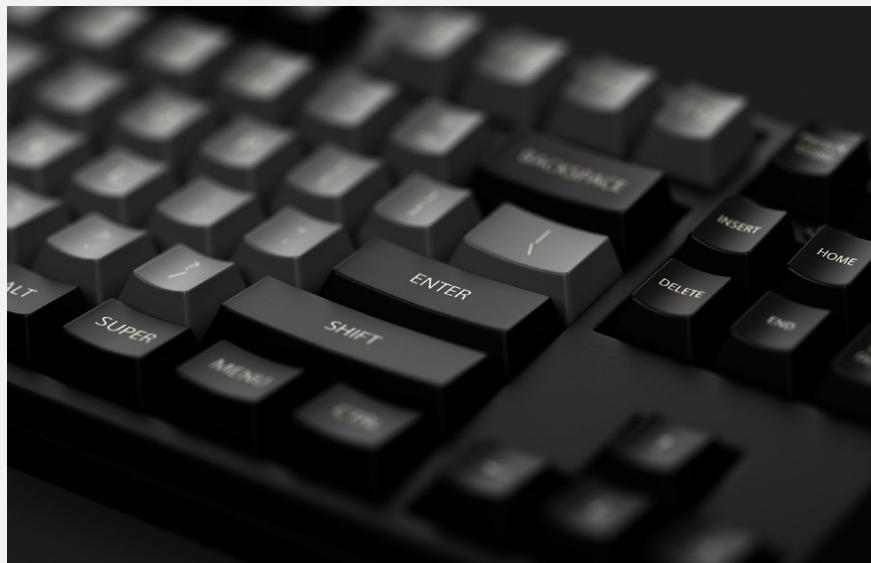
Tips and Tricks



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Keyboard Shortcuts



Ctrl

To select more than one item in a list press the Ctrl button and click on the desired items.

Tab

Moves user forward one field.

Shift

Allows user to select multiple items.

To select all items between two items in a list or drop-down menu, select the first item, hold shift and select the second item.

Backspace

Moves user back one character within a field.

Helpful Reminders

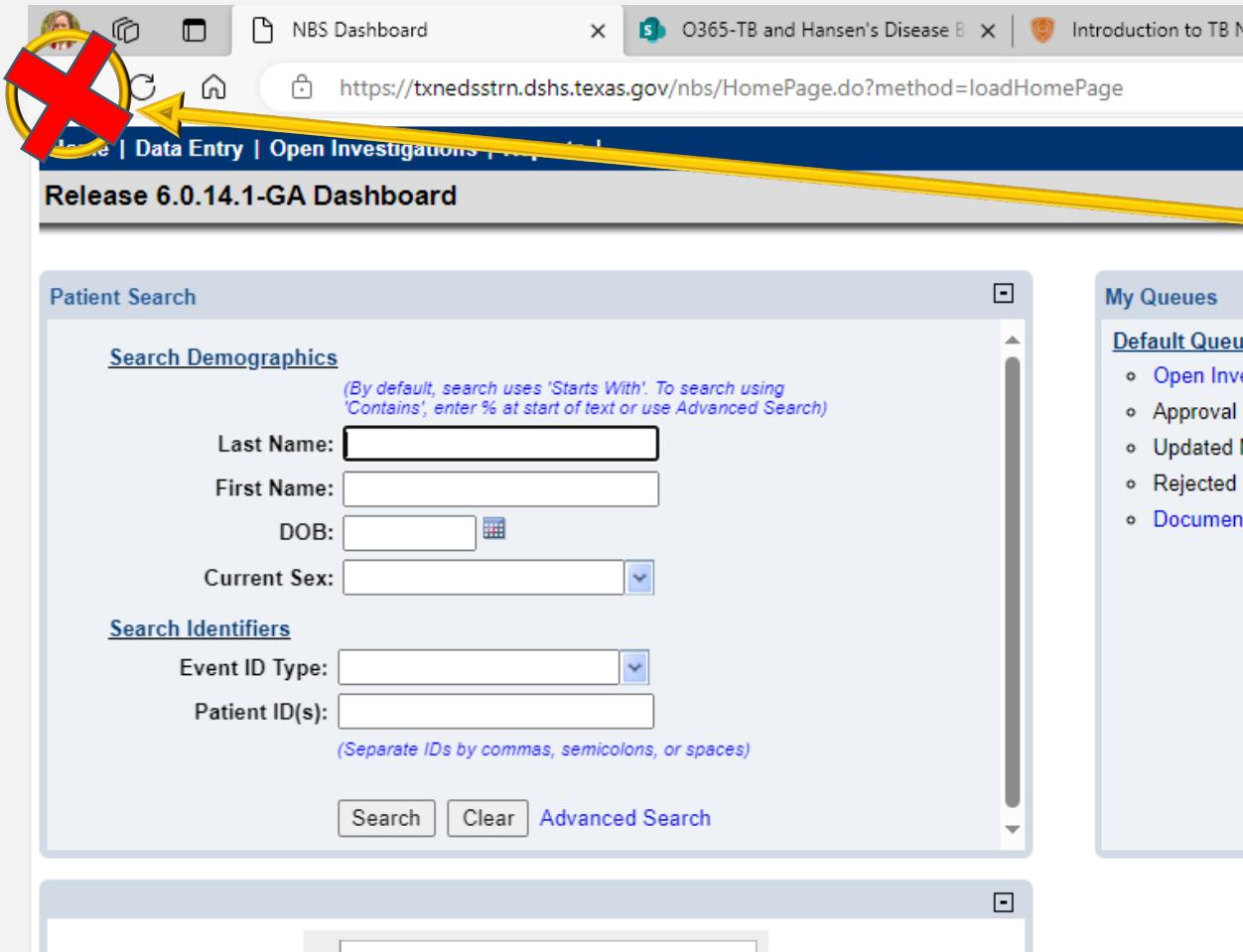


Use Microsoft Edge if possible. It is most compatible with using NEDSS.



Avoid opening multiple sessions of NEDSS. Having multiple sessions open/running may corrupt data. If a new session must be referenced, use two different web browsers.

Reminder



Back Button on Internet Browser

1. The back button on your internet browser should **NOT** be used when navigating in NEDSS.
2. Some browsers/versions of browsers behave differently, and the back button may or may not be visible.
3. Use of the back button may cause the open record or other records to become corrupted.
4. If you use the back button by mistake, **return to the home page** to start again.

Test Your Log-in



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How to Search for a Patient

What To Know about Searching



Always conduct a search, even if you believe the patient or their investigation does *not* exist. The patient may be in NEDSS due to another condition.



Search broadly. Enter only the first 3 letters of the first and last name and date of birth (DOB).



Review the search results carefully. Consider if the search should be refined before adding a new patient file (to avoid duplicates).



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Why Search Broadly?

- If the patient is in NEDSS from a previous notifiable disease condition, their name may have been entered differently from the data provided in their TB record.
- Search broadly to avoid creating a duplicate patient file, in the event the patient already exists in NEDSS with a variation of their name.



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NEDSS Homepage Dashboard

Home | Data Entry | Merge Patients | Open Investigations | Reports | System Management

Release 6.0.9-GA Dashboard

Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:

First Name:

DOB: 

Current Sex: 

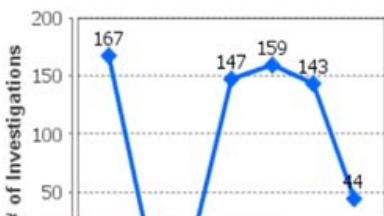
Search Identifiers

Event ID Type:

Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Search Clear Advanced Search

Cases created - Last 7 Days



Date	Cases Created
Day 1	167
Day 2	147
Day 3	159
Day 4	143
Day 5	44

My Queues

Open Investigations (957)

Documents Requiring Review

My Reports

There are no private reports available.

Search Demographics is where users will search for the patient using demographic information.

Search broadly by selecting the **first 3 letters** in the first name, the **first 3 letters** in the last name and **DOB**.

NEDSS Homepage Dashboard

Home | Data Entry | Merge Patients | Open Investigations | Reports | System Management Help | Logout
Release 6.0.9-GA Dashboard User : Pamela Stuart



Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:
First Name:
DOB: 
Current Sex:

Search Identifiers

Event ID Type:
Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Search Clear Advanced Search

My Queues

- Open Investigations (957)
- Approval Queue for Initial Notifications (629)
- Updated Notifications Queue (150)
- Rejected Notifications Queue (127)
- Documents Requiring Security Assignment
- Documents Requiring Review (14266)

Notices

Search Identifiers is where users will search for the patient a Patient ID, Investigation ID, Laboratory ID, etc.

The user will need to know the exact ID number to use the Search Identifiers.

Cases created - Last 7 Days



A line chart titled "Cases created - Last 7 Days" showing the number of investigations created each day. The Y-axis is labeled "# of Investigations" and ranges from 0 to 200. The X-axis represents the days of the week. The data points are: Monday (167), Tuesday (147), Wednesday (159), Thursday (143), Friday (44). The chart shows a general downward trend from Monday to Friday.

Day	# of Investigations
Monday	167
Tuesday	147
Wednesday	159
Thursday	143
Friday	44

Search for a Patient File



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Report of Case and Patient Services

Initial Report Drug Resistance Followup or Medical Review Hospital Admission or Discharge

Name Mermaid Ariel Fish DOB 11/17/1989
(Last) (First) (Middle)

123 Fish Lane Austin Travis 78752 SSN _____
Street Apt# County Zip Code

Facility/Care Provider Name: County Health Departm

Facility responsible for patient care: Public Health

Signs/Symptoms at DX (Check all that apply)
 Fever Weight Loss ($\geq 10\%$)
 Chills Nausea
 Cough Other: _____
 Productive Cough If Abdominal pain
 Hemoptysis Comm
 Night Sweat Date of earliest onset _____

11/2/2023
 Unknown Status
 Stable Worsening
 Improving Unknown

If Pediatric TB Case (<15 Years Old)
Country of birth for primary guardians:
Guardian 1: _____
Guardian 2: _____
Patient lived outside US for > 3 months
 Yes, country: _____
 No Unknown

Using just a few letters in the name with DOB will broaden the search.

SAVE PRINT CLEAR

Date reported to health department 12/11/2023

Date form sent to PHR 12/11/2023

Date form sent to central office _____

Patient Search

Search Demographics

(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name: Mer

First Name: Ari

DOB: 11/17/1989

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Data Entry:

Use the name and date of birth provided to enter in the **Search Demographics** fields.

Two Situations Can Occur in a Patient Search

Situation 1

- The broad search yields multiple patients with the same letters in their first/last name.

Situation 2

- The broad search yields no patients with those letters in their first/last name.



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Situation 1: The search yields multiple results.



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Situation 1: Multiple Results

Home | Data Entry | Open Investigations | Reports | System Management

Release 6.0.14.1-GA Dashboard

Patient Search

Search Demographics

(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name: First Name: DOB:

Current Sex:

Search Identifiers

Event ID Type: Patient ID(s):
(Separate IDs by commas, semicolons, or dashes)

Enter:
Last Name: Mer
First Name: Ari
DOB: 11/17/1989

Hit the “Search” button

Situation 1: Multiple Results

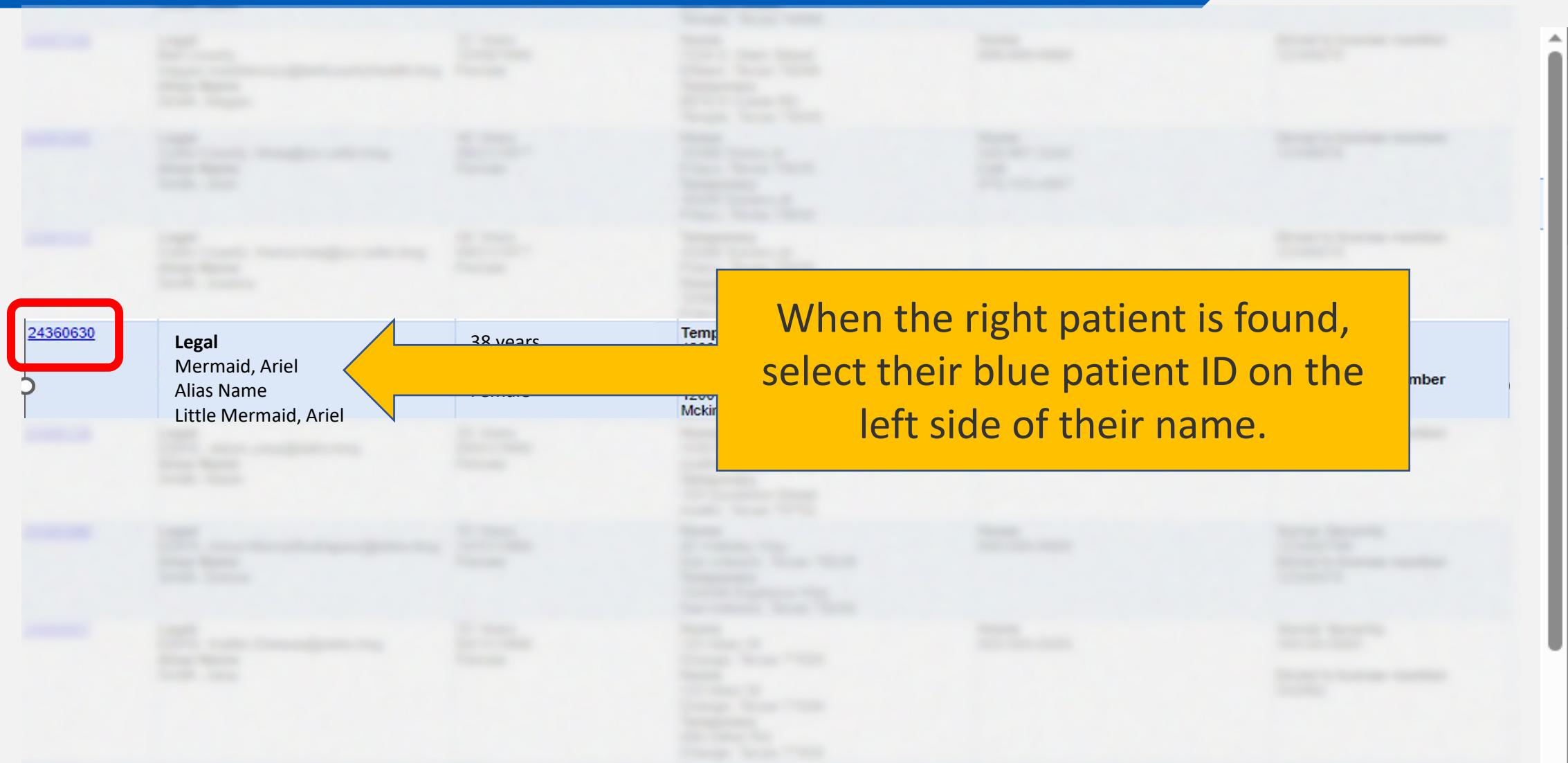
This broad search brought up 45 patients with a first and last name starting with “Mer, Ari”.

Use the grey toggle bar to scroll down the list until the right patient is found.

Go to each new page using the blue page links until the right person is found. Verify name, DOB, address.

Results 1 to 20 of 100 Previous [1](#) | [2](#) | [3](#) | [4](#) | [5](#) [Next](#)

Situation 1: Multiple Results



Situation 1: Multiple Results

Home | Data Entry | Merge Patients | Open Investigations | Reports | System Management Help | Logout
Patient File User: Name here 

Ariel Mermaid | Female | 01/01/1985 (38 Years) Patient ID: 24384002
Summary Events Demographics Delete Print

Patient Summary
Go to: [Patient Summary](#) | [Open Investigations](#) | [Documents Requiring Review](#)
 Patient Summary Back To Top
Address (Home)
123 Fish Street
Austin, Texas 78752
Travis County No Phone Info Available No ID Info Available Race
Unknown
Ethnicity
No Ethnicity Info Available

[+ Open Investigations \(0\)](#) Back To Top
[+ Documents Requiring Review \(0\)](#) Back To Top

[Previous](#) [Next](#)
Summary Events Demographics Delete Print

Users are now in the **Patient File**. It is possible the patient exists in NEDSS because of having another disease condition (i.e., COVID 19). *Users may need to create a TB investigation before entering TB specific data. Creating Investigations will be covered in Course #2.*

Situation 2: The search does not yield any results.



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Situation 2: No Results

Home | Data Entry | Open Investigations | Reports | System Management

Release 6.0.14.1-GA Dashboard

Patient Search

Search Demographics

(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name: First Name: DOB:

Current Sex:

Search Identifiers

Event ID Type: Patient ID(s):
(Separate IDs by commas, semicolons, or dashes)

Enter:
Last Name: Mer
First Name: Ari
DOB: 11/17/1989

Hit the “Search” button

Situation 2: No Results

Home | Data Entry | Open Investigations | Reports | Help | Logout
User: Name here 

Search Results [New Search](#) | [Refine Search](#) [Add New](#)

Your Search Criteria: Last Name Starts With 'Mer', First Name Starts With 'Ari', DOB Equal '11/17/1989', resulted in 0 possible matches. Would you like to [refine your search](#) or [add a new patient](#)?

| Remove All Filters/Sorts

Patient ID	Name	Age/DOB/Sex	Address	Phone/Email	ID
Nothing found to display.					

[Add New](#)



Nothing is found, so the person does not currently exist in the database. Users will need to **Create** this person's Patient File before entering their TB specific data.

Performing an Advanced Patient Search

Purpose of Advanced Search

Avoiding Duplicate Records

To make sure a duplicate record is not created in NEDSS, a thorough search is required.

R/LHD TB users should be sure a patient file does not exist before creating a new patient file.

The Advanced Search feature can:

- assure the user that the patient does not exist, and/or
- assist with finding a patient under various data fields.

Initiate an Advanced Search

An Advanced Search can be initiated from the Patient Search section of the NEDSS home screen **or** the Refine Search option within the search results page.

Home | Data Entry | Open Investigations | Reports |

Release 6.0.14.1-GA Dashboard

Patient Search

Search Demographics
(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:

First Name:

DOB:

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):
(Separate IDs by commas, semicolons, or spaces)

Search Results User: Name here TRAINING

New Search Add New

Your Search Criteria: Last Name Starts With 'olympics', resulted in 15 possible matches. Would you like to [refine your search](#) or [add a new patient](#) ?

Results 1 to 15 of 15 | Remove All Filters/Sorts

Patient ID	Name	Age/DOB/Sex	Address	Phone/Email	ID
24388117	Legal Olympics, Athen	19 Years 08/10/2004 Female	Home 123 Greece Austin, Texas 78757		
24388073	Legal Olympics, Barcelona	31 Years 07/25/1992 Male	Birth Place Spain Home 100 Swim Lane Austin, Texas 78757	Home 222-333-4444	Driver's license number 12345678
24384189	Legal Olympics, Calgary	36 Years 01/01/1988 Female	Home 101 Gold Ave Austin , Texas 78753 Home 5 Rings Dr Austin , Texas 78753	Home 555-555-5555	

The Advanced Search Page

Please indicate search criteria to limit the number of records returned. A search resulting in a large data set can cause extended wait times for query results and could affect performance.

Patient Search | Event Search

Simple Search

Operators		Search Criteria	
Last Name:	Starts With		
First Name:	Starts With		
Date of Birth:	Equal		
Current Sex:			
Street Address:	Equal		
City:	Equal		
State:			
Zip:			
Patient ID(s):		(Separate IDs by commas, semicolons, or spaces)	

Advanced Search

In advanced search, **Operators** are ranges or descriptions to specify the search criteria. They include:
Starts with, Contains, Equal, Not equal, Sounds like, and Between.

Patient Search | Event Search

Advanced Search Operators



'Starts with' option is where users would enter the first 3-4 letters of the last/first name.



'Contains' option allows users to search any part of the last/first name.



'Equal' option is used to search for the complete last/first name.



'Not equal' option is not recommended, as it does not provide the most effective search results.



'Sounds like' option is used if the spelling of the name is unknown; enter it as it sounds.



'Between' option is used to search for a date within a specific range.

Searching by Name

Home | Data Entry | Open Investigations | Reports | System Management

Help | Logout

User : Kathryn Yoo

DEV-5

Find Patient

Clear Submit

Please indicate search criteria to limit the number of records returned. A search resulting in a large data set can cause extended wait times for query results and could affect performance.

Patient Search

Event Search

Simple Search

Operators

Last Name: Starts With
Contains
Equal
Not Equal
Sounds Like

First Name: Starts With

Search Criteria

Example: If searching for Winter Olympics, users could search in the following ways:

Starts with: Last Name 'Oly' + First Name 'Win'

Contains: Last Name 'pic' + First Name 'int'

Equals: Last Name 'Olympics' + First Name 'Winter'

Searching by Date of Birth

Home | Data Entry | Open Investigations | Reports |

Find Patient

Please indicate search criteria to limit the number of records returned. A search resulting in a large data set can cause extended wait times for query results and could affect performance.

Patient Search Event Search

Simple Search

Operators		Search Criteria
Last Name:	Starts With	<input type="text"/>
First Name:	Starts With	<input type="text"/>
Date of Birth:	Between	<input type="text"/> - <input type="text"/>
	Equal	<input type="text"/>

‘Equal’ option is used to search for a specific date
‘Between’ option is used to search for a date within a specific range.

Searching by Patient Address

There are three options in ***the Street Address*** and ***City*** drop-downs that are used the same way as the name search:

1. ‘Contains’ option can be used when user has a partial address, i.e., the street number but not street name.
2. ‘Equal’ is used when user has the full address.
3. ‘Not Equal’ should not be used.

The screenshot shows a search form for patients. On the left, there's a legend explaining the search operators for address and city fields. A large yellow arrow points from this legend to the search form on the right. The search form includes fields for Last Name, First Name, Date of Birth, Current Sex, Street Address, City, State, Zip, and Patient ID(s). Below these are fields for ID Type, ID Number, Phone, Email, Ethnicity, and Race. At the bottom, there's a checkbox for "Include records that are:" followed by three options: Active (checked), Deleted, and Superceded. The "Street Address" and "City" dropdown menus are highlighted with a red rectangle, indicating they follow the same operator rules as the name search fields.

Operators

Last Name:	Starts With
First Name:	Starts With
Date of Birth:	Equal
Current Sex:	Equal Contains Equal Not Equal
Street Address:	Equal Contains Equal Not Equal
City:	Equal
State:	
Zip:	
Patient ID(s):	

Search Criteria

ID Type:

ID Number:

Phone:

Email:

Ethnicity:

Race:

Include records that are:

Active Deleted Superceded

[Previous](#) [Next](#)

Searching by Patient Address

The **State** drop-down lists all 50 states and the District of Columbia.

The **Zip Code** is free text and can be entered as the five digit or extended zip code.

The screenshot shows a search interface with the following fields:

Operators		Search Criteria
Last Name:	Starts With	[Search Box]
First Name:	Starts With	[Search Box]
Date of Birth:	Equal	[Search Box]
Current Sex:		[Search Box]
Street Address:	Equal	[Search Box]
City:	Equal	[Search Box]
State:		Texas
Zip:		78753-4455

Below the search criteria, there are additional fields:

Patient ID(s):	[Search Box]
ID Type:	[Search Box]
ID Number:	[Search Box]
Phone:	[Search Box]
Email:	[Search Box]
Ethnicity:	[Search Box]
Race:	[Search Box]

At the bottom, there are checkboxes for filtering results:

- Active
- Deleted
- Superceded

Navigation links at the bottom are: Previous and Next.

Searching by Patient ID(s)

Operators		Search Criteria		
Last Name:	Starts With			
First Name:	Starts With			
Date of Birth:	Equal			
Current Sex:				
Street Address:	Equal			
City:	Equal			
State:				
Zip:				
Patient ID(s):	<input type="text"/> (Separate IDs by commas, semicolons, or spaces)			



The **Patient ID(s)** search allows users to search for specific NEDSS Patient ID(s).

Searching by ID Type and Other Available Data

The **ID Type** drop-down options include various identification numbers the patient may have, if available.

Use this feature as needed to help in the advanced search.

Phone, Email, Ethnicity, and Race can also be specified in the Advance Search.

Always search Active records (do not select Deleted or Superseded fields).

The screenshot shows a search interface with the following fields and controls:

- ID Type:** A dropdown menu listing:
 - Account number
 - Alternate person number
 - CHIP Identification number
 - Driver's license number
 - ImmTrac ID
- ID Number:** An input field.
- Phone:** An input field.
- Email:** An input field.
- Ethnicity:** An input field.
- Race:** An input field.
- Include records that are:** A dropdown menu with three options: Active (selected), Deleted, and Superseded.
- Buttons:** Previous and Next.

Practice Searching for a Patient



TEXAS
Health and Human
Services

Texas Department of State
Health Services

Create a New Patient File

Creating a Patient File for ‘Light Bulb’

- **Last name:** Bulb
- **First name:** Light
- **Date of Birth:** 01/01/2017
- **Sex at Birth:** Female



Texas Department of State
Health Services

Creating a Patient File

Start with a Search

Home | Data Entry | Open Investigations | Reports |

Release 6.0.14.1-GA Dashboard

Patient Search

Search for:

Last Name: B-U-L
First Name: L-I-G
DOB: 01/01/2017

Search Demographics

(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name: Bul

First Name: Lig

DOB: 01/01/2017

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):

(Separate IDs by commas, semicolons, or spaces)

Click **Search**

The screenshot shows a 'Patient Search' dialog box over a 'Release 6.0.14.1-GA Dashboard'. On the left, a yellow box highlights search parameters: 'Last Name: B-U-L', 'First Name: L-I-G', and 'DOB: 01/01/2017'. A large yellow arrow points from these parameters to the search fields in the dialog. Another yellow box at the bottom left contains the instruction 'Click **Search**' followed by three buttons: 'Search', 'Clear', and 'Advanced Search'. The dialog includes sections for 'Search Demographics' and 'Search Identifiers' with various input fields and dropdown menus.

Creating a Patient File

Start with a Search

Home | Data Entry | Open Investigations | Reports | Help | Logout
Search Results User : kathryn yoo TRAINING New Search | Refine Search Add New

Your Search Criteria: Last Name Starts With 'bul', First Name Starts With 'lig', DOB Equal '01/01/2017', resulted in 0 possible matches. Would you like to [refine your search](#) or [add a new patient](#) ?

Patient ID	Name	Age/DOB/Sex	Address	ID
Nothing found to display.				Add New

If a Patient File is not identified from the search, Click **Add New**.

Creating a Patient File

Enter Patient Data

After clicking **Add New**, users are directed to a page where demographic data entry will occur.

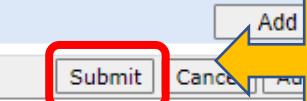
Enter all available patient information.

NOTE: Fields are case sensitive- be sure to capitalize proper nouns such as name, address, etc.

The screenshot shows a 'Basic Demographic Data' form with several sections:

- General Information:** Includes a date field set to '01/11/2024' with a calendar icon, and a 'Comments' text area.
- Name Information:** Fields for Last Name (Mer), First Name (Ari), Middle Name, and Suffix.
- Other Personal Details:** Fields for DOB (11/11/1989), Current Age (34 Years), Current Sex, Birth Sex, Deceased status, Date of Death, Marital Status, and State HIV Case ID.
- Address:** Fields for Street Address 1, Street Address 2, City, State (Texas), Zip, County, Census Tract, and Country (United States).
- Telephone:** A section for entering telephone numbers.
- Ethnicity and Race Information:** A dropdown for Ethnicity and a list of checkboxes for Race, including American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Other, Refused to answer, Not Asked, and Unknown.
- Identification:** A section for identification numbers.

Information As of Date will auto-populate the date that data entry occurs. The information in the **Name** and **DOB** fields will populate from the search criteria.



Once all information is entered, Click **Submit**.

Creating a Patient File

Home | Data Entry | Open Investigations | Reports | **Patient File**

Light Bulb | Female | 01/01/2017 (6 Years)

Summary Events Demographics [Expand All](#) [Collapse All](#)

Patient Summary

Go to: [Patient Summary](#) | [Open Investigations](#) | [Documents Requiring Review](#)

[Patient Summary](#) [Back To Top](#)

Address (Home)
123 Electric Avenue
Austin, Texas 78752
Travis County

No Phone Info Available

No ID Info Available

Race
No Race Info Available

Ethnicity
Hispanic or Latino

[Open Investigations \(0\)](#) [Back To Top](#)

[Documents Requiring Review](#) [Back To Top](#)

[Previous](#) [Next](#)

There are no **Open Investigations** because this is a new Patient File. In the next course, users will learn how to create an investigation.

Print

Congratulations! You have successfully created a new Patient File.

437

Navigating the Patient File: Summary Tab

Oslo Olympics | Female | 02/25/1952 (71 Years) Patient ID: 24388042

[Summary](#) [Events](#) [Demographics](#) [Expand All](#) | [Collapse All](#)

Patient Summary

Go to: [Patient Summary](#) | [Open Investigations](#) | [Documents Requiring Review](#)

[Patient Summary](#) [Back To Top](#)

Address (Home) 3 Bronze Way Austin, Texas 78757 Travis County	Home 333-333-3333	No ID Info Available	Race Asian, Black or African American Ethnicity Not Hispanic or Latino
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[Open Investigations \(1\)](#) [Back To Top](#)

Start Date	Conditions	Case Status	Notification	Jurisdiction	Investigator	Investigation ID	Co-Infection ID
12/20/2023	Tuberculosis (2020 RVCT)	Confirmed	PEND_APPR	Austin HHS Division (City of)		CAS483805480TX01	

[Documents Requiring Review \(0\)](#) [Back To Top](#)

[Summary](#) [Events](#) [Demographics](#)

The **Summary Tab** of the Patient File will display patient demographic information, Open Investigations, and Documents Requiring Review.

[Print](#)

Navigating the Patient File: Events Tab

Oslo Olympics | Female | 02/25/1952 (71 Years) Patient ID: 24388042

Summary **Events** Demographics [Expand All](#) | [Collapse All](#)

Go to: [Investigations](#) | [Lab Reports](#) | [Morbidity Reports](#) | [Vaccinations](#) | [Treatments](#) | [Documents](#) | [Contact Records](#)

Patient Events History

Investigations (2) [Add New](#) [Back To Top](#)

Start Date	Status	Condition	Case Status	Notification	Jurisdiction	Investigator	Investigation ID	Co-Infection ID
12/20/2023	Open	Tuberculosis (2020 RVCT)	Confirmed	PEND_APPR	Austin HHS Division (City of)		CAS483805480TX01	
12/20/2020	Closed	Latent Tuberculosis Infection (2020 TBLISS)			Austin HHS Division (City of)		CAS483805450TX01	

Lab Reports (1) [Add New](#) [Back To Top](#)

Date Received	Facility/Provider	Date Collected	Test Results	Associated With	Program Area	Jurisdiction	Event ID
01/09/2024 12:00 AM	Reporting Facility: DELL SETON MEDICAL CENTER	No Date	Mycobacterium tuberculosis Ab.IgG: positive	CAS483805480TX01 Tuberculosis (2020 RVCT)	Tuberculosis	Austin HHS Division (City of)	OBS510059164TX01

Morbidity Reports (0) [Back To Top](#)

Vaccinations (0) [Back To Top](#)

Treatments (0) [Back To Top](#)

Documents (0) [Back To Top](#)

Contact Records (0) [Back To Top](#)

[Previous](#) [Next](#)

Summary **Events** Demographics [Print](#)

The **Events Tab** of the Patient File will display Open and Closed Investigations, Lab Reports, and Contact Records for TB patients.

Navigating the Patient File: Demographics Tab

Oslo Olympics | Female | 02/25/1952 (71 Years) Patient ID: 24388042

Summary | Events | **Demographics** | [Expand All](#) | [Collapse All](#)

Patient Demographics [Edit](#) | [Back To Top](#)

Go to: [Patient Summary](#) | [Administrative](#) | [Name](#) | [Address](#) | [Phone & Email](#) | [Identification](#) | [Race](#) | [Ethnicity](#) | [Sex & Birth](#) | [Mortality](#) | [General Patient Information](#)

Patient Summary

Address (Home) 3 Bronze Way Austin, Texas 78757 Travis County	Home 333-333-3333	No ID Info Available	Race Asian
--	----------------------	----------------------	---------------

Administrative

General Co

Name

	As of	Type	Last	First	Middle	Suffix
Details	01/09/2024	Legal	Olympics	Oslo		

Address [Back To Top](#)

	As of	Type	Address	City	State	Zip
Details	12/15/2023	Apartment/Condominium/Home	15 Norway Drive	Austin	Texas	78757
Details	11/22/2022	House/Home	3 Bronze Way	Austin	Texas	78757

Phone & Email [Back To Top](#)

	As of	Type	Phone Number	Email Address	Comments
Details	01/09/2024	Phone/Home	333-333-3333		
Details	12/22/2023	Phone/Home			

The **Demographics Tab** of the Patient File tracks all patient demographic, location, and identification information for the patient over time.

Addressing Duplicate Records

How Duplicate Records Occur



Duplicate records will undoubtedly be created, either by Electronic Lab Reports(ELRs) or by a user who has not done a complete search.



When this happens, duplicate records will need to be addressed by the DSHS TB Unit.

Duplicate Record Example

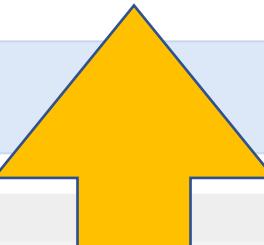
Search Results

Your Search Criteria: Last Name Starts With 'Oly', First Name Starts With 'Win', resulted in 2 possible matches. Would you like to [refine your search](#) or [add a new patient](#)?

Results 1 to 2 of 2

Patient ID	Name	Age/DOB/Sex	Address	Phone/Email
168163185	Legal Olympics, Winter	35 Years 02/13/1988 Male	Home 123 Calgary Drive Austin, Texas 78753	Email winter.olympics@yahoo.com Home 555-555-5555
168163186	Legal Olympics, Winter	35 Years 02/13/1988 Male	Home 5 Rings Drive Katy, Texas 77449	Email winter.olympics@yahoo.com Home 555-555-5555

Results 1 to 2 of 2



This broad search resulted in two Patient Files with the same information except the address. It is possible a user or ELR created a new patient file since the addresses did not match, but they are the same person.

How to Address Duplicate Records

R/LHDs should do the following when a duplicate record is found:



1. Notify the assigned TB Unit surveillance case consultant of the duplication, including investigation numbers.
 - a) Investigation ID Numbers will start with 'CAS'
2. The TB Unit surveillance case consultant will notify the R/LHD once the merge is complete and provide the surviving Investigation ID.
3. ***Until the user hears back from the consultant, data should not be entered into either investigation.***

Demo

<https://vimeo.com/901264716/92db90c977?share=copy>

Course Number 1 Demonstration: *Navigating NEDSS and Starting a TB Patient File*

National Tuberculosis (TB) Training Course for
Public Health Regions and Local Health Departments (PH/LHDs)
Texas Department of State Health Services

Questions?

End of NEDSS TB Training,
Course 1