

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)

February 2024

Course Number 3: Open Investigations & Custom Queues

After completing this course, you should be able to:

- Manage Open Investigations by:
 - Sorting and filtering through open investigations;
 - Identify investigations newly created from an electronic laboratory report (ELR); and
- Create Private Custom Queues.

What is the Open Investigation Queue?

My Queues

Open Investigations

• The Open Investigations Queue:

- Is located under the My Queues section on the main dashboard of NEDSS
- Contains all *open* TB and LTBI investigations across the state
- Alerts TB programs of new laboratory confirmed TB cases
- Can be sorted and/or filtered by certain criteria to meet user needs
- Is viewed by all active TB users



Release 6.0.14.1-GA Dashboard

Patient Search My Queues Notices **Default Queues** Thursda Search Demographics Please of Open Investigations (649) (By default, search uses 'Starts With'. To search using Training 'Contains', enter % at start of text or use Advanced Sear Rejected Notifications Queue (1) for main Last Name: Documents Requiring Review (14) First Name: DOB: Current Sex: Search Identifiers Event ID Type: Patient ID(s): (Separate IDs by commas, semicolons, or spaces) Coareh Clear Advanced Coareh

NEDSS Homepage Dashboard

Home Data Entry Open Investigations	Reports
Release 6.0.14.1-GA Dashboard	
Patient Search	My Queues
Search Demographics (By default, search uses 'Starts W''Contains', enter % at start of text o	
Patient ID(s): (Separate IDs by commas, sen	▼

This queue is designed for R/LHDs to access updated information on new and existing patients with an open TB investigation.

The number next to the queue is the number of open investigations statewide and will fluctuate.

Importance of This Queue

The Open Investigations Queue is used by regional and local health department (R/LHD) TB programs:

- 1. To be alerted of any <u>new</u> laboratory confirmed TB case either from a positive nucleic acid amplification (NAA) test or a positive *M.tb* culture.
 - New investigations will be automatically created when most ELRs come into NEDSS (if the investigation does not already exist).
 - The DSHS TB Unit's Central Office will no longer alert R/LHDs of new laboratory-confirmed TB cases. R/LHDs must monitor this queue <u>daily</u>.
- 2. To have an ongoing list of all open TB investigations in the R/LHD jurisdiction.



Texas Department of State Health Services

A Closer Look

s | Reports | System Management

Let's take a closer look at the **data** this queue contains.

Results 1 to 20 of 613 Previous 1 2 3 4 5 6 7 8 Next

Jurisdiction	Patient 🖌	Condition	CaseStatus 🔽 Notific
Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed
Public Health Region 6/5 South	<u>Cruz, Randi</u> Patient ID: 24387639 Male 07/02/1971 (52 Years)	<u>Tuberculosis (2020 RVCT)</u>	Confirmed
Austin HHS Division (City of)	<u>June, Summer</u> Patient ID: 24387648 06/01/1990 (33 Years)	Latent Tuberculosis Infection (2020 TBLISS)	
Public Health Region 6/5 South	<u>Cruz, Peanut</u> Patient ID: 24387649 Male 10/09/1971 (52 Years)	Latent Tuberculosis Infection (2020 TBLISS)	
Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (2020 TBLISS)	
Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect
Austin HHS Division (City of)	Juice, Green Patient ID: 24387623 Female	<u>Tuberculosis (2020 RVCT</u>)	Confirmed

Open Investigations Queue

Open Investigations Queue

User: Name here

🛛 🖶 Print 🗋 Export

		Resu	Its 1 to 20 of 822 Previous 1	2 3 4 5 6 7 8 <u>Next</u>			
Assign						F	Remove All Filters/Sorts
Start Date	X Investigator	Jurisdiction	Patient	Condition	CaseStatus	Notification	Investigation ID
		Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed		CAS483805031TX01
01/11/2024		Austin HHS Division (City of)	<u>Chocolate, Hot</u> Patient ID: 24390119 Male 01/02/1979 (45 Years)	Tuberculosis (2020 RVCT)	Suspect		CAS483807034TX01
01/11/2024		Austin HHS Division (City of)	Olympics, Oslo Patient ID: 24388042 Female 02/25/1952 (71 Years)	Tuberculosis (2020 RVCT)	Suspect		CAS483807035TX01
01/10/2024		Austin HHS Division (City of)	Curtain, Blackout Patient ID: 24390104 07/15/2008 (15 Years)	Tuberculosis (2020 RVCT)	Suspect		CAS483807031TX01
01/10/2024		Austin HHS Division (City of)	Johnson, Joe Patient ID: 24390111 05/22/1974 (49 Years)	Latent Tuberculosis Infection (2020 TBLISS)			CAS483807033TX01
01/09/2024		Houston Dept of HHS	Williams, William Patient ID: 24390071	Latent Tuberculosis Infection (2020 TRUSS)			CAS483807020TX01

Until the data is sorted, users will initially see a list of <u>all</u> open TB investigations in Texas.

Start Date

Home Data Entry Open Inve	stigations Reports System Manage	ement			Help	o Logout
Open Investigations Que	ue				User :	
						🖶 Print 🗋 Expor
	Results	1 to 20 of 613 Previou	s 1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> Ne	<u>xt</u>		
Assign						Remove All Filters/Sorts
<u>Start Date</u> <u>X</u> Ir vestigator	Jurisdiction	Patient	Condition	CaseStatus	Notification	Investigation ID
	Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed		CAS483805031TX01
The <i>Sta</i>	Public Health Region 6/5	e investigat	tion was created.	Confirmed		CAS483805300TX01 CAS483805303TX01
		06/01/1990 (33 Years)				
12/05/2023	Public Health Region 6/5 South	<u>Cruz, Peanut</u> Patient ID: 24387649 Male 10/09/1971 (52 Years)	Latent Tuberculosis Infection (20 TBLISS)	<u>)20</u>		CAS483805304TX01
12/05/2023	Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (20 TBLISS)	0 <u>20</u>		CAS483805305TX01
12/04/2023	Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect		CAS483805290TX01

Investigator

Home Data E	ntry Open Investigatio	ns Reports System Manage	ement			Help	Logout
Open Investi	igations Queue					User :	
							📄 Print 🗋 Export
		Results	1 to 20 of 613 Previous	1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> Ne	<u>ext</u>		
Assign							Remove All Filters/Sorts
Start Date	<u>Investigator</u>	urisdiction	Patient	Condition	✓ CaseStatus	Notification	Investigation ID
		Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed		CAS483805031TX01
12/05/2023		Public Health Region 6/5 South	Cruz, Randi Patient ID: 24387639	Tuberculosis (2020 RVCT)	Confirmed		CAS483805300TX01
	The I	nvestiaator is	not used by	TB but may be u	used		
12/05/2023		her NEDSS cor	•				CAS483805303TX01
12/05/2023		South	Patient ID: 24387649 Male 10/09/1971 (52 Years)	<u>Latent ruberculosis miection (z</u> <u>TBLISS)</u>	020		CAS483805304TX01
□ 12/05/2023		Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (2 TBLISS)	020		CAS483805305TX01
12/04/2023		Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect		CAS483805290TX01

Jurisdiction

Home Data Entry C	Open Investigat	ions Reports System Manag	ement			Help Logout
Open Investigation	ns Queue					User :
						🛛 🖶 Print 🗋 Export
		Results	1 to 20 of 613 Previous	5 1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> N	<u>ext</u>	
Assign						Remove All Filters/Sorts
Start Date Inves	stigator	Jurisdiction	Patient	Condition	CaseStatus Votif	fication Vertication ID
		Cameron Corneatin Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed	CAS483805031TX01
12/05/2023		Public Health Region 6/5 South	Cruz, Randi Rationt ID: 24387630	Il identify the re	Confirmed	CAS483805300TX01
12/05/2023		A		patient's TB or L	U U	ation.
12/05/2023		F <mark></mark> South	Patient ID: 24387649 Male 10/09/1971 (52 Years)	<u>TBLISS)</u>		CAS483805304TX01
□ 12/05/2023		Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (2 TBLISS)	2020	CAS483805305TX01
12/04/2023		Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect	CAS483805290TX01

Patient

Home Data E	Entry Open Investigat	tions Reports System Manage	ement			Help Log	gout
Open Invest	tigations Queue					User :	
							🖨 Print 🗋, Export
		Results	1 to 20 of 613 Previous	1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> N	<u>ext</u>		
Assign						F	Remove All Filters/Sorts
Start Date	Investigator	Jurisdiction	Patient	Condition	CaseStatus V	otification	Investigation ID
		Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed		CAS483805031TX01
12/05/2023		Public Health Region 6/5 South	<u>Cruz, Randi</u> Patient ID: 24387639 Male 07/02/1971 (52 Years)	<u>Tuberculosis (2020 RVCT)</u>	Confirmed		CAS483805300TX01
2/05/2023		Austin HHS Division (City of)	The Pat	ient data will ind	lude the p	atient's ID), sex
12/05/2023		Public Health Region 6/5 South		and date of birt			TX01
0 12/05/2023		Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (2 TBLISS)	2020		CAS483805305TX01
12/04/2023		Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	Tuberculosis (2020 RVCT)	Suspect		CAS483805290TX01

Condition

Home Data En	try Open Investigations	Reports System Manage	ement			Help	Logout
Open Investi	gations Queue					User :	
							🛛 🔿 Print 🗋 Export
		Results	1 to 20 of 613 Previous	1 2 3 4 5 6 7 8 Next			
Assign							Remove All Filters/Sorts
Start Date	Investigator	Jurisdiction	Patient	Condition	🥏 CaseStatus 🔍	Notification	Investigation ID
		Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed	_	CAS483805031TX01
12/05/2023		Public Health Region 6/5 South	Cruz, Randi Patient ID: 24387639	Tuberculosis (2020 RVCT)	Confirmed		CAS483805300TX01
	The Cor	ndition will sh	now both typ	oes of TB investiga	ations: 7	Fuberculo	sis
□ 12/05/2023				sis Infection (202			AS483805303TX01
12/05/2023		Public Health Region 6/5 South	Cruz, Peanut Patient ID: 24387649 Male 10/09/1971 (52 Years)	Latent Tuberculosis Infection (2020 TBLISS)	2		CAS483805304TX01
□ 12/05/2023		Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (2020 TBLISS)	0		CAS483805305TX01
12/04/2023		Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect		CAS483805290TX01

Case Status

Home Data E	ntry Open Investigat	tions Reports System Man	agement			Help	Logout
Open Invest	igations Queue			User :			
							🛛 🔿 Print 🗋 Export
		Resu	Ilts 1 to 20 of 613 Previou	s 1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> N	ext		
Assign							Remove All Filters/Sorts
Start Date	Investigator	Jurisdiction	Patient	Condition	CaseStatus	Notification	Investigation ID
		Cameron CO Health De	pt <u>Elephant, Dumbo</u> Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed	Ť	CAS483805031TX01
12/05/2023		Public Health Region 6/ South	5 <u>Cruz, Randi</u> Patient ID: 24387639	<u>Tuberculosis (2020 RVCT)</u>	Confirmed		CAS483805300TX01
□ 12/05/2023		Austin HHS		us will show the status for TB (202			CAS483805303TX01
12/05/2023		Dublic Usel	U	: Confirmed, Sus	· · · · · ·	lot a Case	CAS483805304TX01
□ 12/05/2023		Austin HHS Division (Ci of)		Latent Tuberculosis Infection (2 TBLISS)	2020		CAS483805305TX01
12/04/2023		Lubbock City Health De	pt Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect		CAS483805290TX01

Notification

Home Data Entry	y Open Investigations	Reports System Manage	ement			Help Lo	gout
Open Investiga	ations Queue					User :	
							🐵 Print 🗋 Export
		Results	1 to 20 of 613 Previous 1	2 3 4 5 6 7 8 <u>Next</u>			
Assign							Remove All Filters/Sorts
Start Date 👔	Investigator	Jurisdiction	Patient	Condition	CaseStatus	Notification	v nvestigation ID
		Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed		CAS483805031TX01
12/05/2023				column is design			CAS483805300TX01
12/05/2023		Austin H JUI	salction of the	e status of the ca	se noti	fication to	CAS483805303TX01
		of) CDC	: Approved.	Rejected or Pend	Appro	OV.	
12/05/2023		Public He					CAS483805304TX01
		South	Patient ID: 2438/649 Male 10/09/1971 (52 Years)	<u>TBLISS)</u>			
□ 12/05/2023		Austin HHS Division (City of)	Shortcake, Strawberry Patient ID: 24387654 Female 01/01/2001 (22 Years)	Latent Tuberculosis Infection (2020 TBLISS)			CAS483805305TX01
12/04/2023		Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect		CAS483805290TX01

Investigation ID

Home Data E	ntry Open Investigat	tions Reports System Manag	ement			Help	Logout
Open Invest	igations Queue					User :	
							🖶 Print 🗋 Export
		Results	1 to 20 of 613 Previous	1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> N	lext		
Assign							Remove All Filters/Sorts
Start Date	Investigator	Jurisdiction	Patient	Condition	CaseStatus	Notification	NINVESTIGATION ID
		Cameron CO Health Dept	Elephant, Dumbo Patient ID: 24387068 Male 08/26/1980 (43 Years)	Tuberculosis (2020 RVCT)	Confirmed		CAS483805031TX01
12/05/2023		Public Health Region 6/5 South	Cruz, Randi Patient ID: 24387639 Male	<u>Tuberculosis (2020 RVCT)</u>	Confirmed		CAS483805300TX01
12/05/2023		Austin HHS Division (Cit of)		stigation ID is a			
12/05/2023		Public Health Region 6/5 South		be used to look sharing protecte			
12/05/2023		Austin HHS Division (City of)	Female 01/01/2001 (22 Years)	<u>10:00)</u>			K01
12/04/2023		Lubbock City Health Dept	Board, Ironing Patient ID: 24387612 02/02/2002 (21 Years)	<u>Tuberculosis (2020 RVCT)</u>	Suspect		CAS483805290TX01

How Often Should R/LHDs Monitor the Open Investigation Queue?

Frequency of Monitoring this Queue

R/LHDs should monitor this queue DAILY for:

- New investigations created by ELR.
- Investigations that may have been transferred to the user's jurisdiction from another county/city.
- A review of the status of investigations assigned to the user's jurisdiction.
- A review of the status of notifications to the DSHS TB Unit's Central Office



Texas Department of State Health Services

How to Identify New Investigations Created By ELRs

Open Investigations Queue

🐵 Print 🕅 Export Previous 1 | 2 Next Results 1 to 20 of 25 Remove All Filters/Sorts Assian Start Date Jurisdiction Condition Case Status Notification Investigation ID Investigator Patient 01/11/2024 Austin HHS Division (City of) Tuberculosis (2020 RVCT) CAS483807034TX01 Chocolate, Hot Patient ID: 24390119 Male 01/02/1979 (45 Years) Austin HHS Division (City of) Tuberculosis (2020 RVCT) Olympics, Oslo CAS483807035TX01 01/11/2024 Suspect Patient ID: 24388042 Female 02/25/1952 (71 Years) 01/10/2024 Look at the start date and the case status columns: CAS483807033TX01 The date will indicate when the investigation was created 01/10/2024 CAS483807031TX01 New investigations will not have a case status • 01/09/2024 CAS483807020TX01 Male 04/22/1965 (58 Years) Tuberculosis (2020 RVCT) 01/09/2024 Austin HHS Division (City of) Dragon, Blue CAS483807026TX01 Suspect Patient ID: 24390087 Female 05/05/2000 (23 Years) Tuberculosis (2020 RVCT) 01/09/2024 Austin HHS Division (City of) Tac, Tic Confirmed CAS483807029TX01 Patient ID: 24390099 11/11/2011 (12 Years)

User: Name here

RAINIA

Sorting and Filtering Within the Queue

Sort and/or Filter Options



Users may sort the list of open investigations by either clicking on the column header or filter by selecting from the dropdowns in the header.



Clicking on the column header will sort the column alphabetically or earliest/latest date. Clicking on the arrow next to the column header allows users to filter by the specific categories/text.



Texas Department of State Health Services



Users are only able to edit investigations that are in their assigned jurisdiction(s), therefore it's recommended to first filter by jurisdiction. Filtering by jurisdiction allows users to see open investigations for the selected jurisdiction.

Sort and/or Filter

Once the list of open investigations is created for a given jurisdiction, users can then filter with other variables, depending on need. Users looking specifically for new investigations created by an ELR may consider sorting the list by the start date or filter the list by selecting *Today* from the list of Start Date options.



Texas Department of State Health Services

Manage All Open Investigations for a Jurisdiction(s)



Creating Custom Queues

Custom Queues For Quick Results

The purpose of creating a custom queue is to help the user quickly find a specific set of criteria that they may otherwise have to sort and/or filter out from one of the default (existing) queues.

- Custom queues allow the user to configure a list of results which is helpful for monitoring more than one NEDSS jurisdiction.
- ✓ NEDSS jurisdictions are not specific to TB. These non-TB jurisdictions will need to be reviewed by the respective region.
- ✓ Custom queues are private to the specific user and can't be shared with other users.
- Custom queues have a set size limit but are configurable. The more search criteria, the more it will impact the overall performance of the queue.

Steps to Creating a Custom Queue



TEXAS Health and Human Services

Texas Department of State Health Services

Demonstration

https://vimeo.com/901264788/9761cad4d3?share=copy



Texas Department of State Health Services

Course Number 3 Demonstration: Open Investigations & Custom Queues

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

Let's try it together.

Questions?

End of NEDSS TB Training, Course 3