Texas NEDSS User Guide for Tuberculosis Programs

Tuberculosis and Hansen's Disease Unit

TEXAS
Health and Human Services

Texas Department of State Health Services

Contents

Introduction

The Texas National Electronic Disease Surveillance System (NEDSS) User Guide for Tuberculosis Programs, also referred to as the TB User Guide, outlines instructions on how to navigate and use workflow processes in NEDSS. This document describes NEDSS functionally; users are directed to the Texas National Electronic Disease Surveillance System (NEDSS) Data Entry Guide for Tuberculosis Programs for details on entering specific Tuberculosis (TB) variables.

This guide outlines best practices as recommended by the Texas Department of State Health Services (DSHS) Tuberculosis and Hansen's Disease Unit (TB Unit). Use of system features may differ for other conditions in NEDSS.

NEDSS is the primary statewide integrated infectious disease surveillance system utilized by public health epidemiologists and surveillance staff across Texas to monitor and respond to most notifiable infectious disease conditions.

TB Programs will use NEDSS to report persons with Latent TB Infection (LTBI), confirmed or suspected TB disease, contacts, and other individuals screened for TB in Texas to the DSHS TB Unit.

Persons can have multiple conditions and/or multiple episodes of TB/LTBI within NEDSS. Access to other conditions is granted by those specific programs within DSHS.

Requesting Access to NEDSS

To request access to NEDSS for TB Program staff, users must complete the division required forms and security training for Requesting Access to a New DSHS Database, complete the NEDSS Training Courses for Regional and Local Health Departments and receive 100% on all post-course assessments.

When completing the TB/HIV/STD Data Application Account Request Form, users must select a NEDSS TB Access Level. Selecting the level of access will depend on the staff members' roles and responsibilities in the TB program. TB Program Managers may consider the following when selecting the access each staff member will need, as this varies across the state:

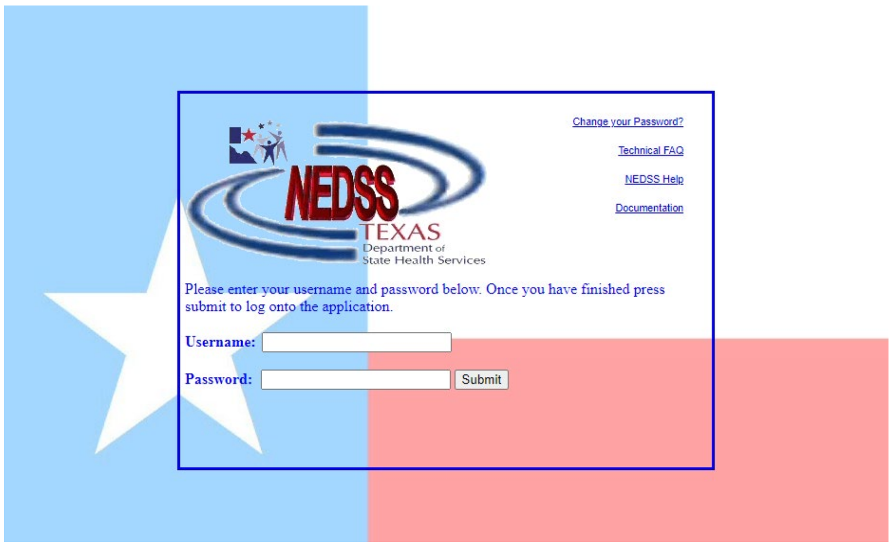
Table 1. NEDSS TB User Access Levels and Descriptions.

Access Level	Description
Level 1: View (Read only)	Allows user to search and view patient information and TB investigations, laboratory reports, and contact records.
Level 2: View, Run Reports	Allows users to perform all functions outlined for Level 1 ***-and-*** create and edit lab reports, create and edit private reports, view public reports, and associate contact records.
Level 3: View and Edit Data, Run Reports, Submit Notifications to Central Office	Allows users perform all functions outlined for level 2 ***-and-*** create and edit patient files and TB/LTBI investigations, manage providers and organizations, edit and transfer ownership of lab reports, associate documents and lab reports, mark documents as reviewed, add and edit contact records, submit notifications to Central Office.

Once access to NEDSS is granted, users will receive login credentials via email from DSHS NEDSS.

How to Access NEDSS

1. Navigate to https://txnedss.dshs.state.tx.us:8009/login/login.asp
2. Enter the assigned username and password in the login screen and click the Submit button.



NEDSS Navigation and Software Requests

1. The following browsers support NEDSS:
   a. Microsoft Edge
   b. Chrome
   c. Firefox
2. Opening multiple tabs of NEDSS in a single browser to edit information can cause data corruption issues.
3. Keyboard short-cuts are useful when navigating in NEDSS:
   a. Tab - Moves the user forward by one page element.
   b. Shift-tab - Moves the user back by one page element.
   c. Backspace - Moves the user back one character within a field.
4. Back Button:
   a. The back button within a browser should NOT be used when navigating in NEDSS.

b. Internet browsers behave differently, and the back button may or may not be enabled depending on the browser being used.
c. Use of the back button may cause the open record or other records to become corrupted (i.e., information that was entered may be deleted or moved). Tracking the errors caused by the corruption is difficult and may not easily be resolved.

If the back button is used by mistake, return to the home page by selecting the ‘Home’ button on the top navigation toolbar to start again.

NEDSS Key Terminology and Acronyms

NEDSS: National Electronic Disease Surveillance System

NBS: NEDSS-Based System

ELR: Electronic Laboratory Report

WDS: Workflow Decision Support

NND: Nationally Notifiable Disease, i.e., Tuberculosis

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

Patient File: Contains all a patient's information, including demographics, observations, and events, if they exist in the system.

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.

Investigation: Type of surveillance event containing information for each incidence of a specific 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.

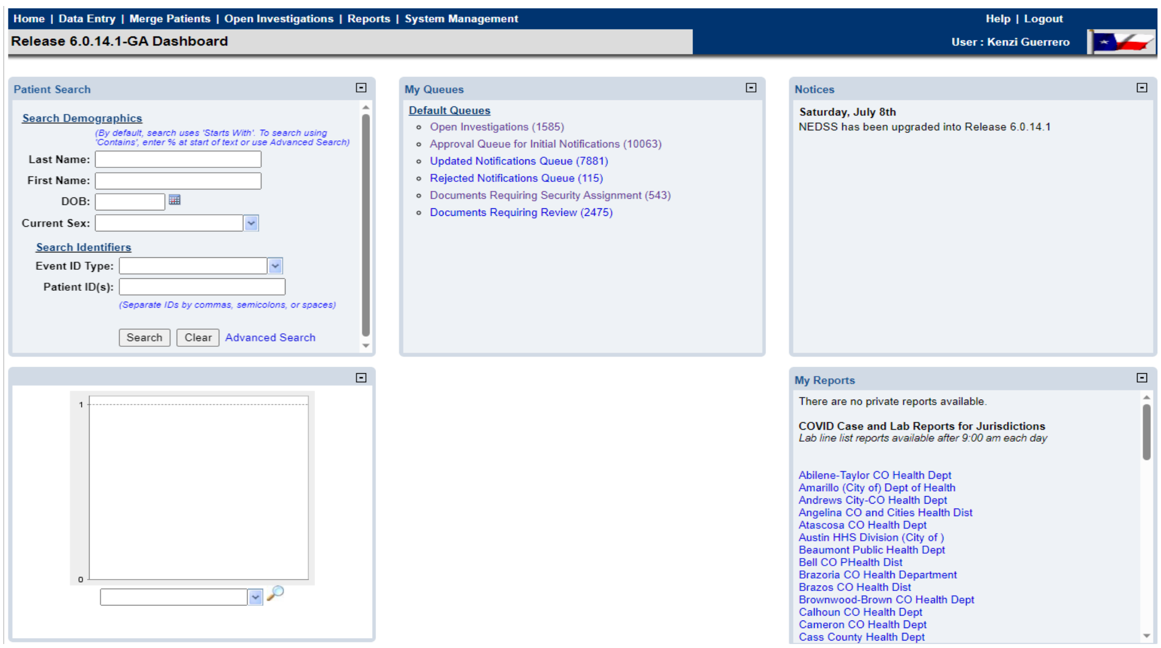
Latent TB infection (TBLISS 2020): the condition for investigations for patients who have been diagnosed with TB infection.

Laboratory Report: Type of surveillance event used to record laboratory report results.

Contact Record: Type of surveillance event used to link named contact investigations to their index/source case investigation.

NEDSS Dashboard

The initial landing page upon logging in is the NEDSS Home Page. The Home Page provides a dashboard that allows users to perform a patient search, get quick access to their customized reports, see notices and news feeds specific to their organizations, and obtain access to their work queues, based on their permission level.



Patient Search

Data entry will begin by searching for the patient using the Patient Search section on the NEDSS Home Page. See Patient Management for more details.

My Queues

Other system navigation options can be found in the My Queues section. Below is a description of each queue. Available queues will depend on the users' permission/access level.

1. Open Investigations: Lists all open investigations across the state.
2. Rejected Notifications Queue: Lists investigations that TB Unit Surveillance Case Consultants have returned to Local/Regional Health Departments, with notes explaining what needs to be corrected for the notification to be approved.
3. Documents Requiring Review Queue: Lists new laboratory reports that must be manually reviewed and processed (an investigation needs created from the laboratory report, the laboratory report needs to be associated to an existing investigation, or the laboratory report needs to be marked as reviewed).
4. Private Custom Queues: Unique lists of investigations or laboratory reports created by each user. Only available to the user that created the queue.

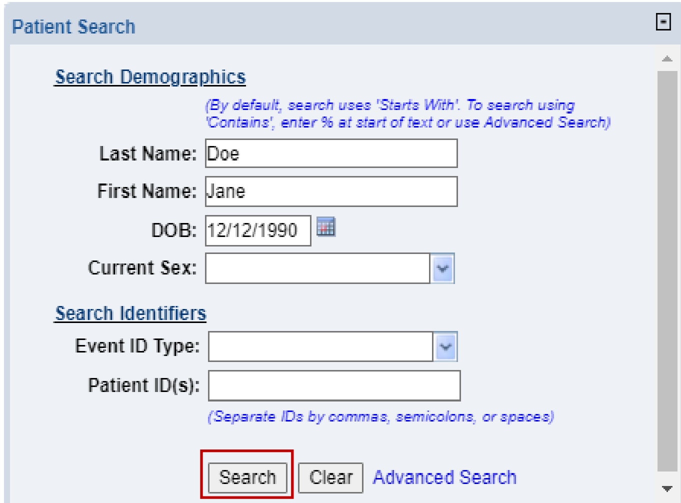
My Reports

The My Reports section is where users can find their saved reports. See Reports Management for more details.

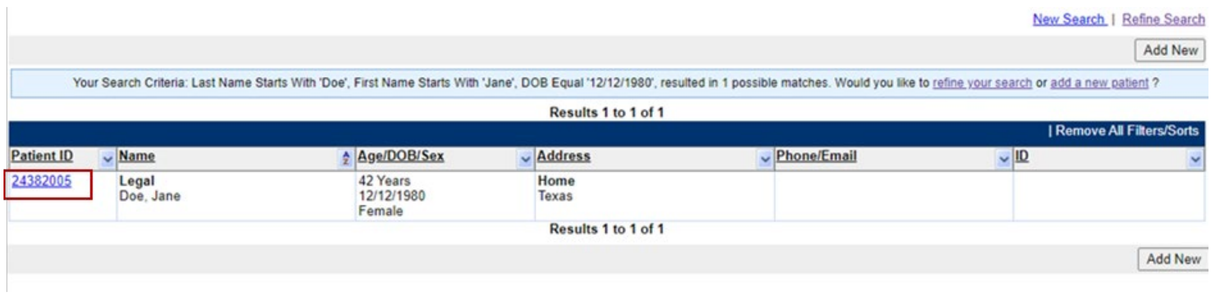
Patient Management

How to Search for Patients

1. A demographic search allows for a patient's record to be accessed in the system by searching by first or last name, date of birth, and/or current sex.
2. To search for a patient:
   a. Enter the first 3-4 characters of last name, AND
   b. The first 3-4 characters of First Name, AND
   c. Enter date of birth (DOB), OR
   d. Click Event ID Type or Patient ID(s) and enter identifiers.
   e. Click Search.



f. If the person the user is searching for already exists in the database, click on the Patient ID hyperlink to open the record.

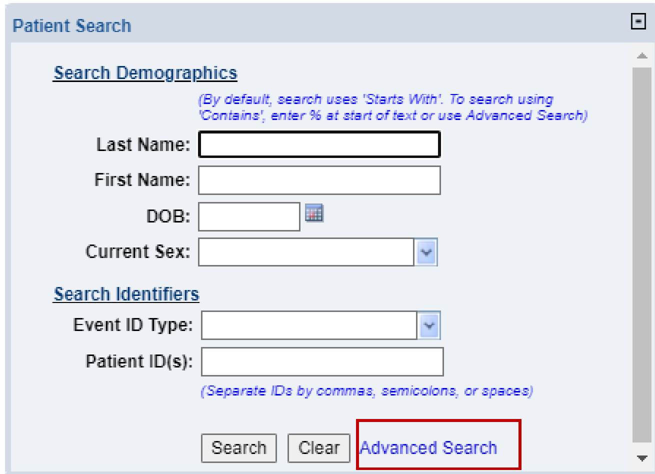


g. If the patient is NOT in the system, the user will need to add the patient. See How to Add a Patient for more detail.

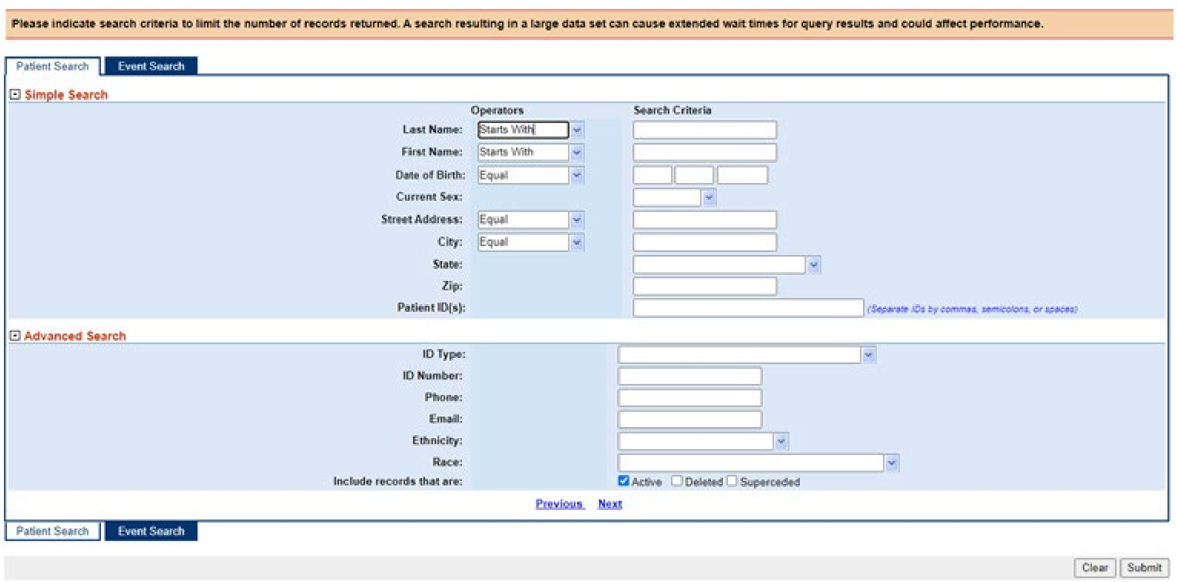
h. Note: If multiple patient records are returned, use the provided information, within columns, to identify the correct patient the user was searching for.

Advanced Search

1. The Advanced Search function can be used to perform a search for the patient if other demographics are known.

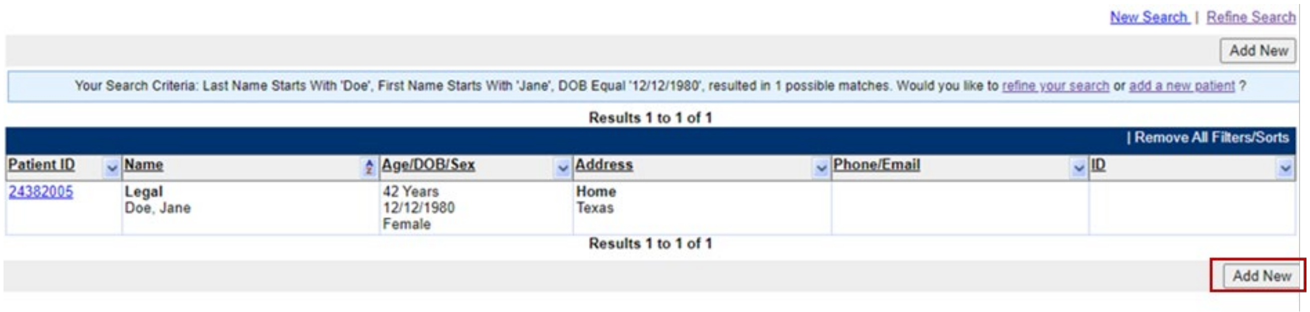


2. Users can search by additional demographic information such as City, State, and Zip Code.
3. Enter the advance search criteria and click submit.

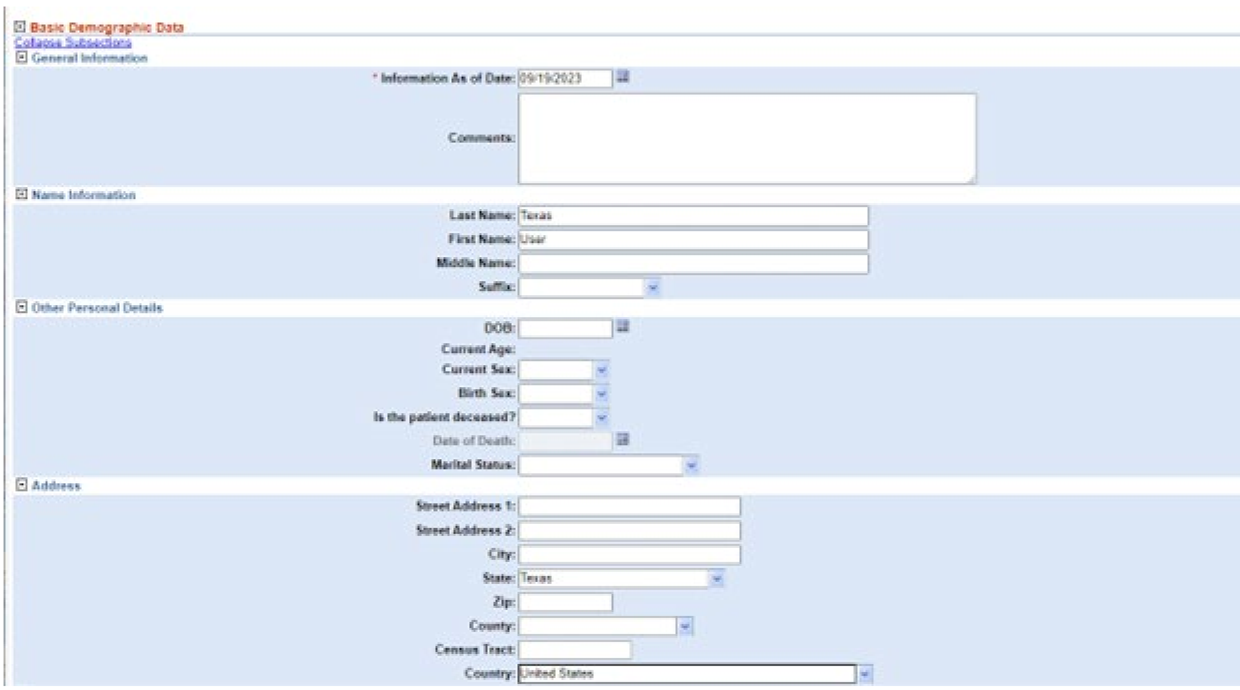


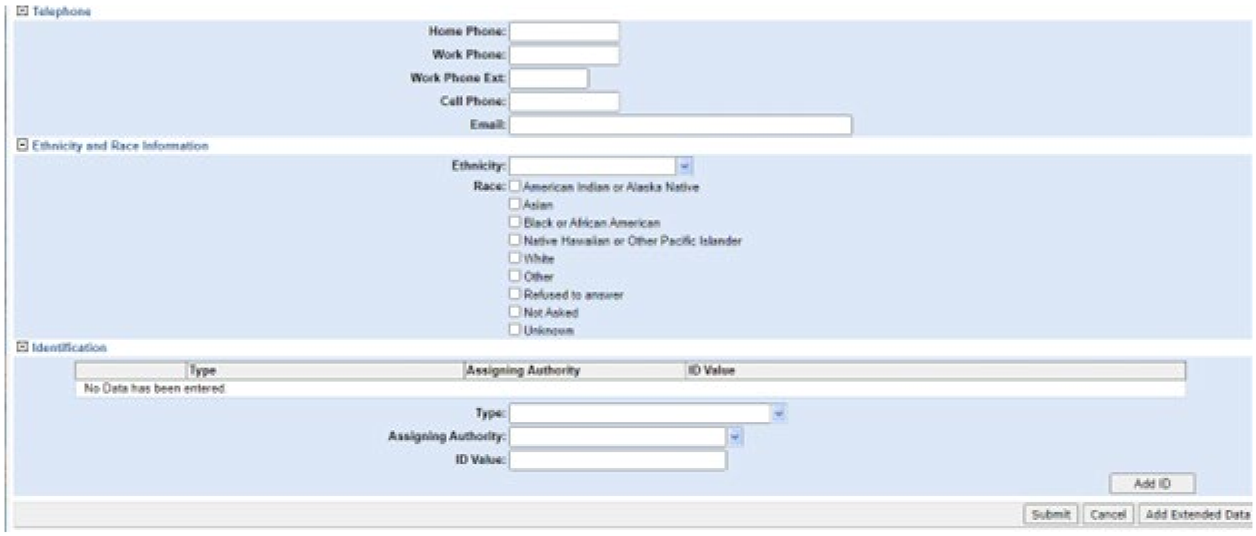
How to Add a Patient

1. To add a new patient, click Add New in the Search Results page.



2. NEDSS will display the Basic Demographic Data page. Enter the patient information that is available. At minimum the user must have the patient's first name, last name, and date of birth to create a new Patient File.





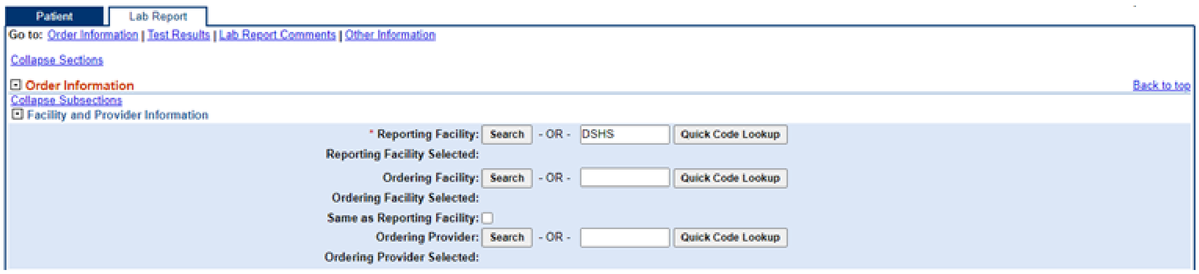
3. Make every effort to fill in required data fields. If unknown, select “Unknown”.
    a. Information As of Date: Defaults to today’s date when a new patient is entered. Other “As of Date” fields for each section will appear when editing patient data, update this field to an earlier date when necessary.
    b. First and Last Name
    c. Date of Birth (DOB)
    d. Current Sex and Sex at Birth
    e. Is the patient deceased?
        i. If yes, enter the Date of Death.
    f. Street Address, City, County, State, Zip Code, Country
        i. If patient street address and/or county is not available because:
            1. The patient is experiencing homelessness, enter the address of the reporting Regional/Local Health Department (R/LHD)
            2. The patient lives in a congregate setting (shelter, assisted living, rehabilitation center, etc.), enter the address of the congregate facility.
        ii. A “State” must be selected for the “County” drop down box to appear.

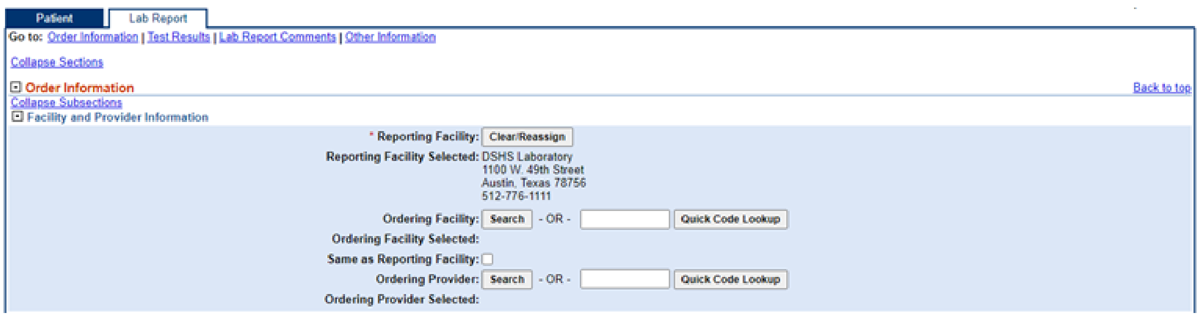
    iii. For Binational Cases enter primary address (U.S. or Mexico) at the time the Patient File is being created. The State drop-down only contains U.S. states and should be left blank if entering a Mexico address.
    iv. It is preferable to enter the patient's physical address. Use standard abbreviations without periods (i.e., St versus St.)
  g. Census Tract- enter in the Patient tab of the Investigation, using the link to the Census Bureau Geocoder.
  h. Phone number
  i. Race and Ethnicity
4. After completing data entry click Submit.

Provider and Organization Management

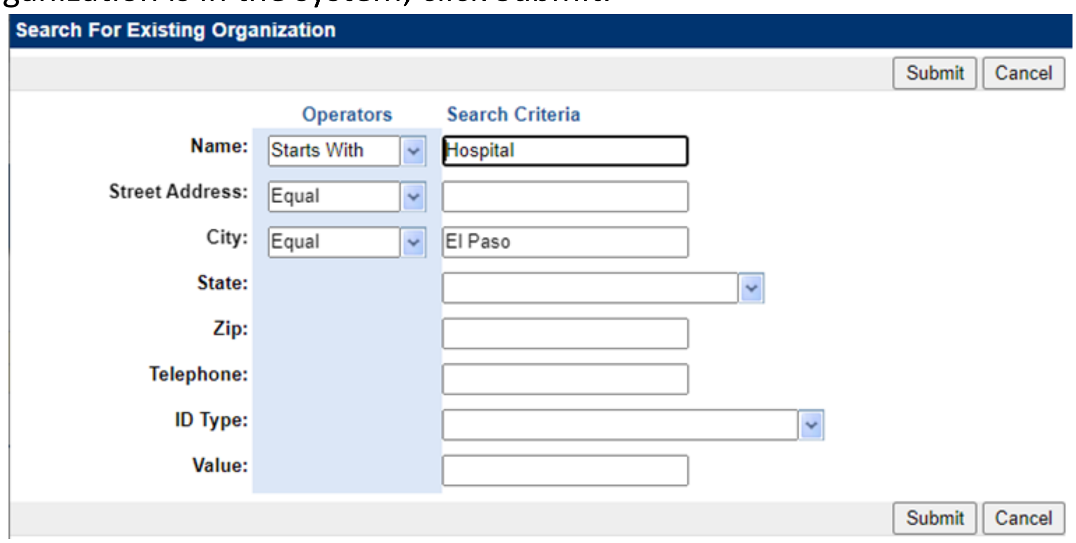
How to Search or Add Organizations within an Investigation or Lab Report Using Quick Search

1. Within investigations and laboratory reports, there are Search boxes next to most Organization elements. You can use these "Search" or "Quick Code Lookup" buttons to quickly find or add organizations within the investigation or laboratory report.
2. If the quick code is known, the code can be entered in the text field, and upon clicking on Quick Code Lookup the system will populate the Organization information.



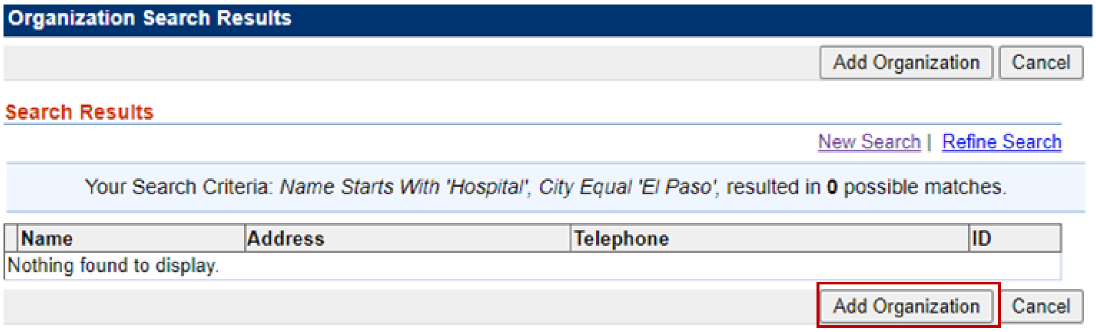


3. If the quick code is not known, click the Search button to bring up the Organization search screen.
4. Enter as much of the information as known to determine if the Organization is in the system; click Submit.

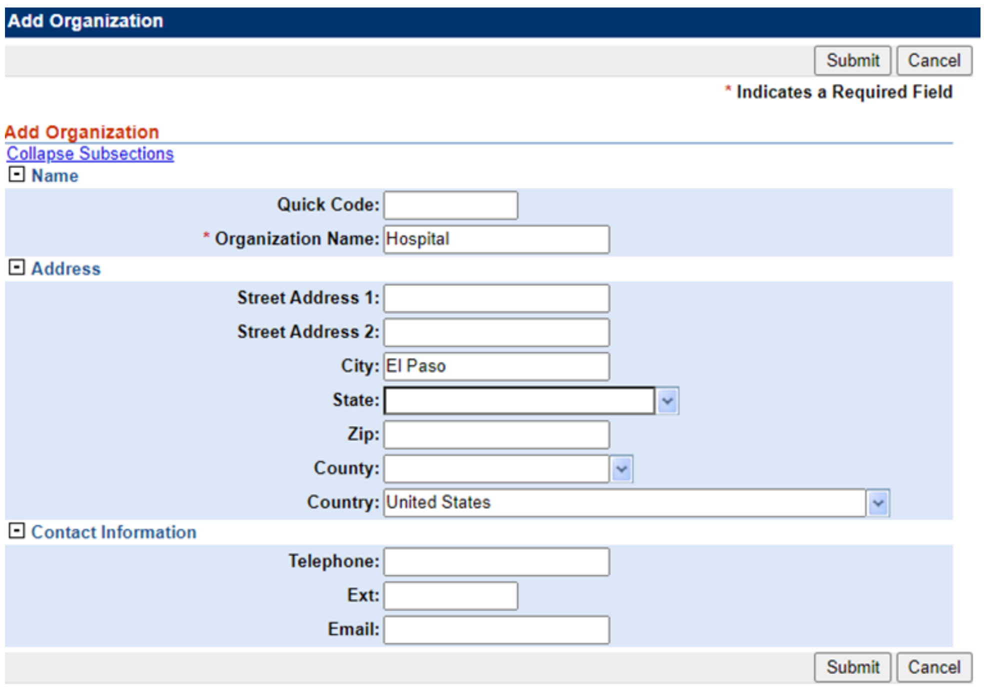


5. If results are displayed, scroll through the provided results to find the appropriate Organization. When found, click Select – and the user will be returned to the data entry screen.

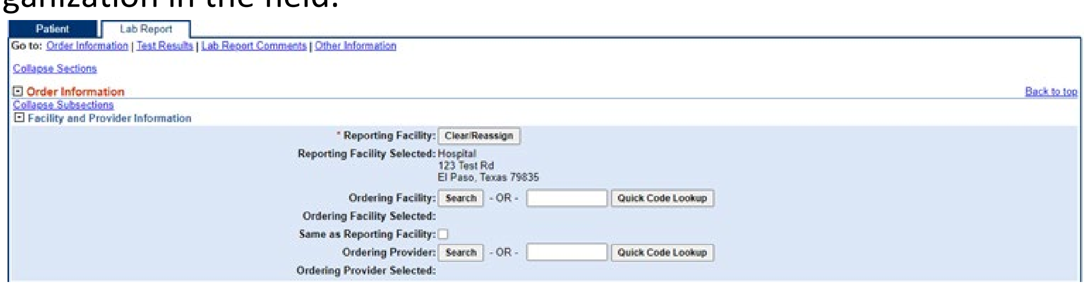
6. If no results are found, click “Add Organization”, and enter the Organization information as outlined in steps 7 and 8.



7. On the Add Organization screen, search criteria will be auto populated. Complete the fields with all information that is available, including address, and click Submit.



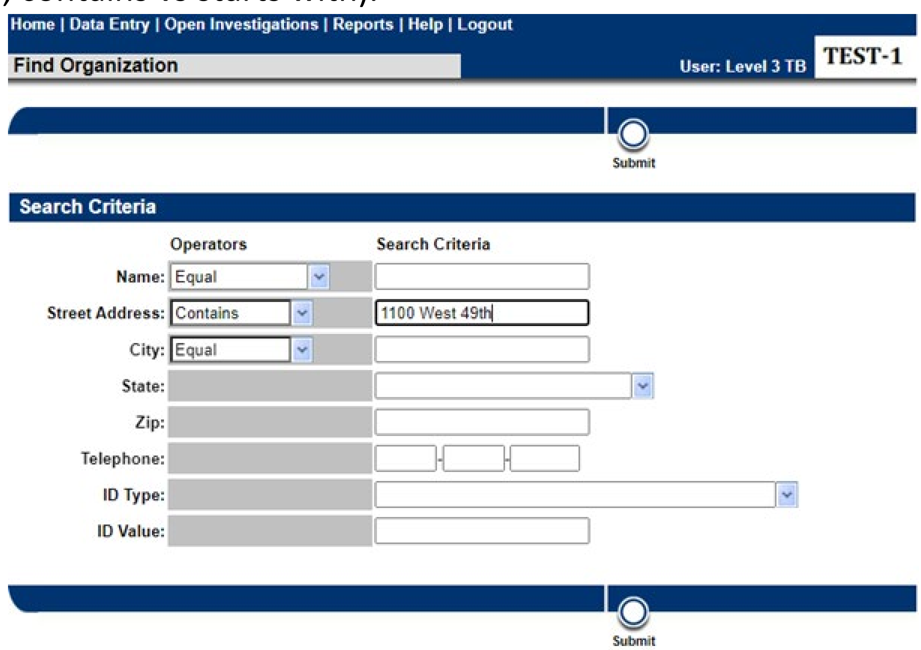
8. The system will add the organization to the database and display the organization in the field.



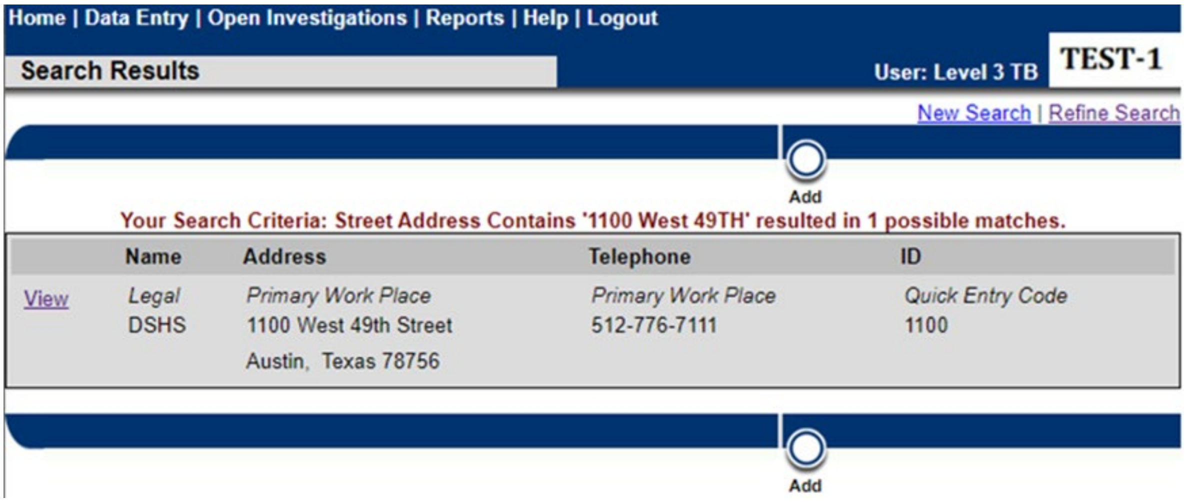
How to Edit Organizations

1. To edit information for organizations, click Data Entry, in the top navigation bar, and then click Organization.

2. NEDSS will display the Find Organization Page.
3. Enter the information for the organization the user is searching for in the Search Criteria fields.
   a. It is recommended that the street address of the organization be used. ***Do not*** include the “street/road/lane/avenue” within the search. The operators can be changed to meet your search needs (e.g., contains vs starts with).



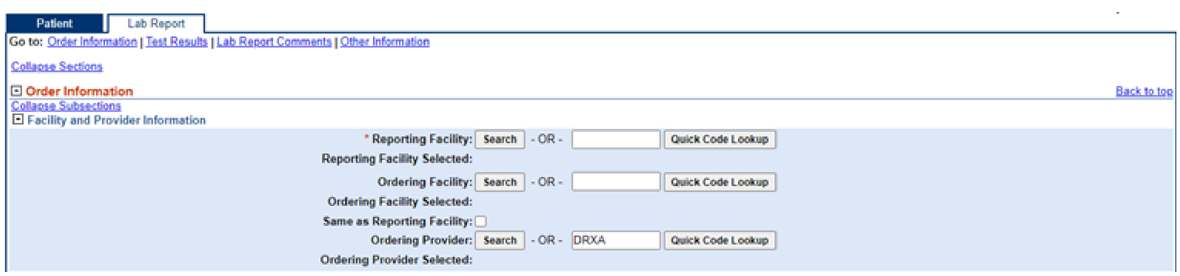
4. Click Submit once all search criteria have been entered.
5. Click View for the organization the user wants to edit.

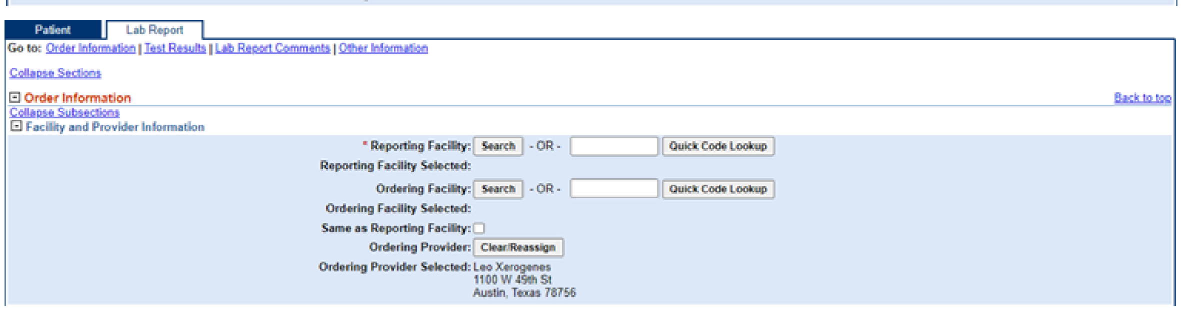


6. On the organization record, the user can click Edit to open the record and edit relevant information.

How to Search or Add Providers within an Investigation or Laboratory Report Using Quick Search

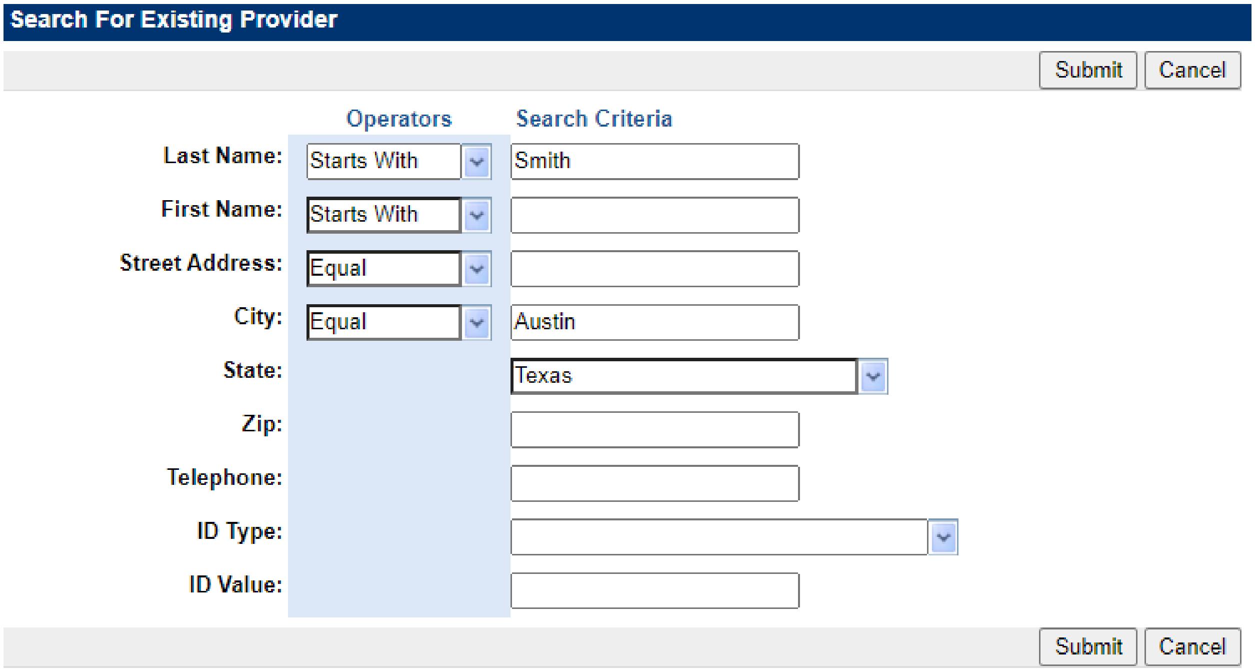
1. Within investigations and laboratory reports, there are Search boxes next to most Provider elements. Use these "Search" or "Quick Code Lookup" buttons to quickly find or add providers within the investigation or lab.
2. If the quick code is known, the code can be entered in the text field, and upon clicking on Quick Code Lookup the system will populate the Provider information.





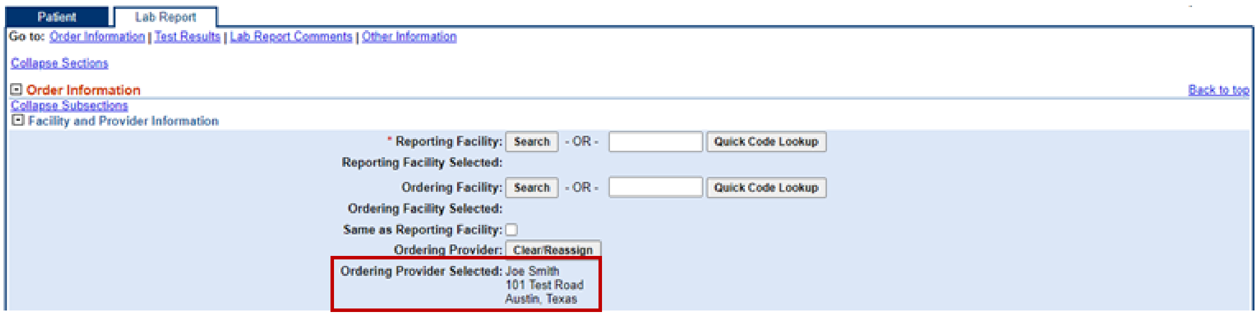
3. If the quick code is not known, click the Search button to bring up the Provider search screen.

4. Enter as much of the information as known to determine if the Provider is in the system; click Submit.



5. If results are displayed, you can scroll through the provided results to find the appropriate Provider. When found, click Select – and the user will be returned to the data entry screen.
6. If no results are found, click "Add Provider" and enter the Provider information as outlined in step 7 and 8.

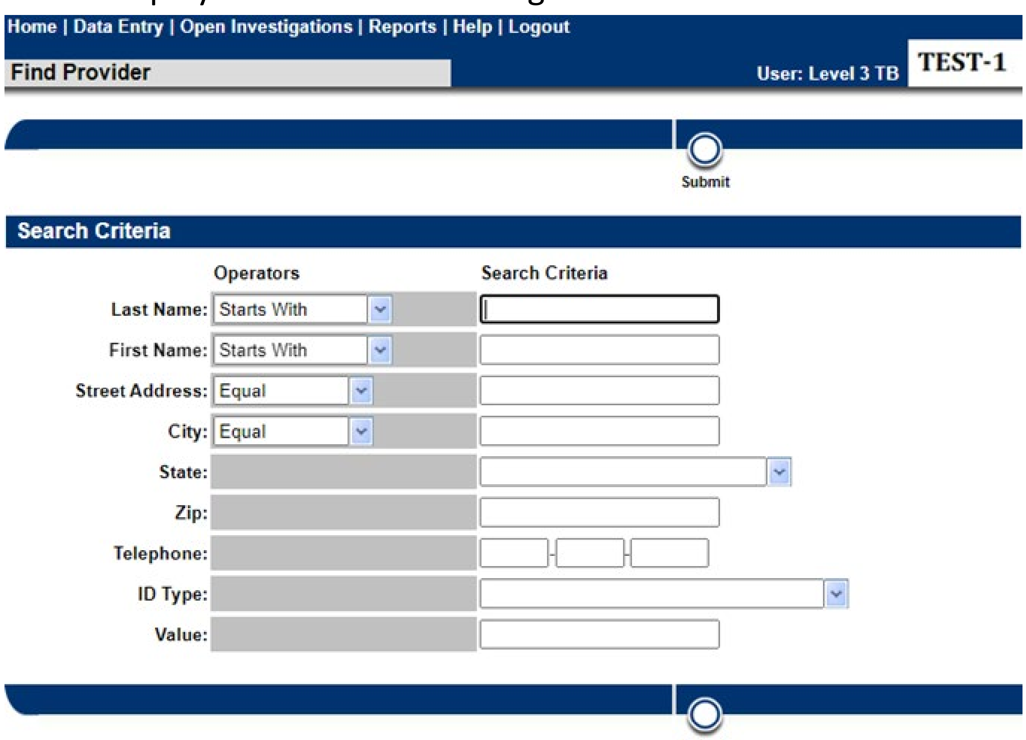
7. On the Add Provider screen, search criteria will be auto populated. Complete the fields with all information that is available, including address and click Submit.
8. The system will add the provider to the database and display the provider in the field.



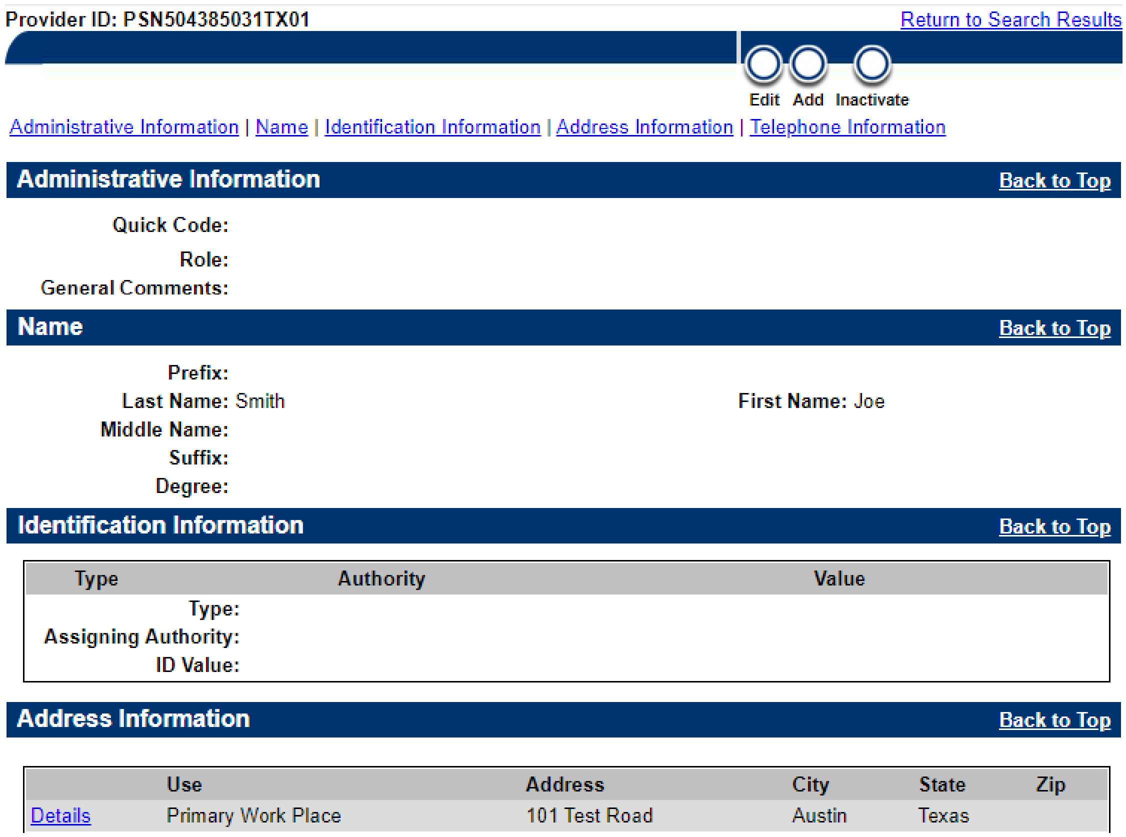
How to Edit Providers

1. To edit information for a provider, click Data Entry in the top navigation bar, and then click Provider.

2. NEDSS will display the Find Provider Page.



3. Enter search criteria for the provider in the Search Criteria fields. The operators can be changed to meet the users search needs (e.g. contains vs starts with).
4. Click Submit once all search criteria have been entered.
5. Click View for the organization the user wants to edit.
6. On the provider record, click Edit to open the record and edit relevant information. Click Submit to save changes.



Queue Management

Various queues are available based on the user role and permissions that are enabled for each user:

- Open Investigations Queue: Available to all TB Users; displays all investigations with a status of Open. Users will only be able to edit investigations that are within their jurisdiction.
- Rejected Notifications Queue: Available to users with notification permissions; displays notifications that have been rejected by the TB Unit surveillance case consultant for resolution by R/LHD staff.
- Documents Requiring Review Queue: Available to all TB Users; displays all documents - manually created laboratory reports and electronically received lab reports that are not associated to an investigation or marked as reviewed.
- Private Custom Queues: Available to all TB Users; displays custom lists of investigations or laboratory reports created by each user. This feature is available to all TB users, but custom queues will only be visible to the user who created them.

All queues are displayed in a table format. The underlined column headers can be clicked to sort the table in alphabetical (A-Z, Z-A) order. In addition, filtering the table is available by clicking on the relevant icons in each column header.

Open Investigations Queue

All state-wide open investigations, created by Electronic Laboratory Reports (ELR) or manually created by TB users, will be found in the Open Investigations Queue. Investigations will remain in this queue until the investigation is closed. This will be a primary queue for Regional/Local Health Department (R/LHD) users.

As all Open Investigations across Texas are found in this queue, it is recommended that users utilize the search/filter criteria in the column headers to filter by their jurisdiction. Users will be able to view all open investigations across the state but will only be able to edit investigations within their assigned jurisdiction.

Open Investigations Queue — User : Pradeep Sharma — TEST-1

Print | Export

Results 1 to 5 of 5

Assign | Remove All Filters/Sorts

Start Date	Investigator	Jurisdiction	Patient	Condition	CaseStatus	Notification	Investigation ID
10/04/2023		Beaumont Public Health Dept	Jurisdiction, NEDSS **Patient ID:** 24364168 Female 10/11/1991 (32 Years)	Tuberculosis (2020 RVCT)	Suspect	Approved	CAS483801000TX01
10/04/2023		Austin HHS Division (City of)	Thursday, Muses **Patient ID:** 24386001 08/08/1988 (35 Years)	Tuberculosis (2020 RVCT)	Confirmed	Approved	CAS483801001TX01
10/04/2023		Amarillo (City of) Dept of Health	Patient, Test **Patient ID:** 24385007 07/25/1990 (33 Years)	Tuberculosis (2020 RVCT)	Suspect		CAS483800002TX01
10/04/2023		Bell CO PHealth Dist	Sunday, Bacchus **Patient ID:** 24385005 05/05/1978 (45 Years)	Tuberculosis (2020 RVCT)	Not a Case		CAS483800001TX01
10/03/2023		Austin HHS Division (City of)	Gras, Mardi **Patient ID:** 24385000 Male 01/01/1985 (38 Years)	Tuberculosis (2020 RVCT)	Confirmed	Approved	CAS483800000TX01

Results 1 to 5 of 5

Print | Export

Users can access the Patient File by clicking on the hyperlinked patient name in the Patient column or access the investigation by clicking on the condition name in the Condition column.

Rejected Notifications Queue

If a notification is Rejected, it will be routed to the Rejected Notifications Queue. Rejected Notifications requires that R/LHD users address the reason for rejection and resubmit the notification.

Rejected Notifications Queue — User : Level 5 TB — TRAINING

Print | Export

Results 1 to 1 of 1

| Remove All Filters/Sorts

Submit Date	Submitted By	Recipient	Type	Patient	Condition	Status	Rejected By	Comments
11/08/2023	Level 3 CorpusChristi	CDC	NND Individual Case Notification	Mouse, Mickey	Tuberculosis (2020 RVCT)	Confirmed	Level 5 TB	CXR and Chest CT Needed

Results 1 to 1 of 1

Print | Export

In the Comments column, the reason for rejection of the notification will be provided. Users can click on the hyperlinked Condition to update the investigation, and then resubmit the notification. See [Notification Management] for more details.

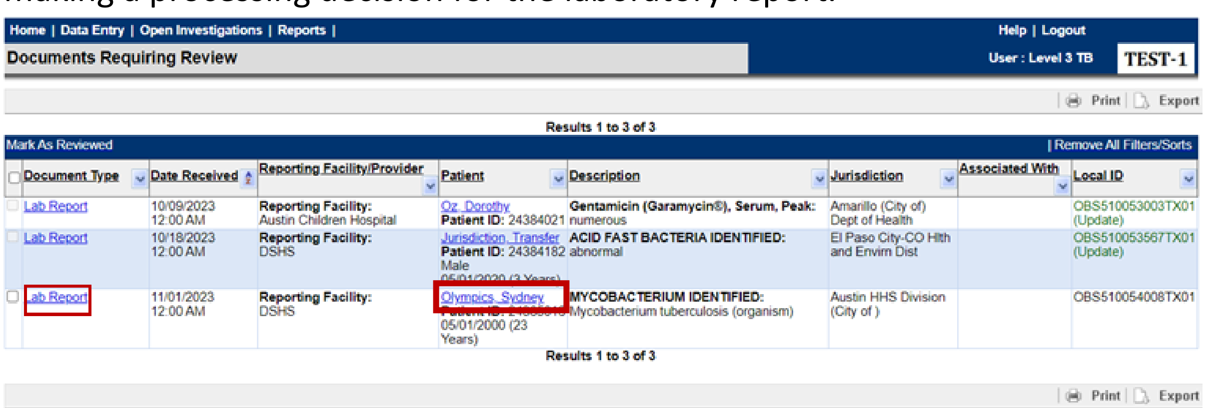
Documents Requiring Review Queue

The Documents Requiring Review Queue (DRRQ) contains Laboratory Results that are:

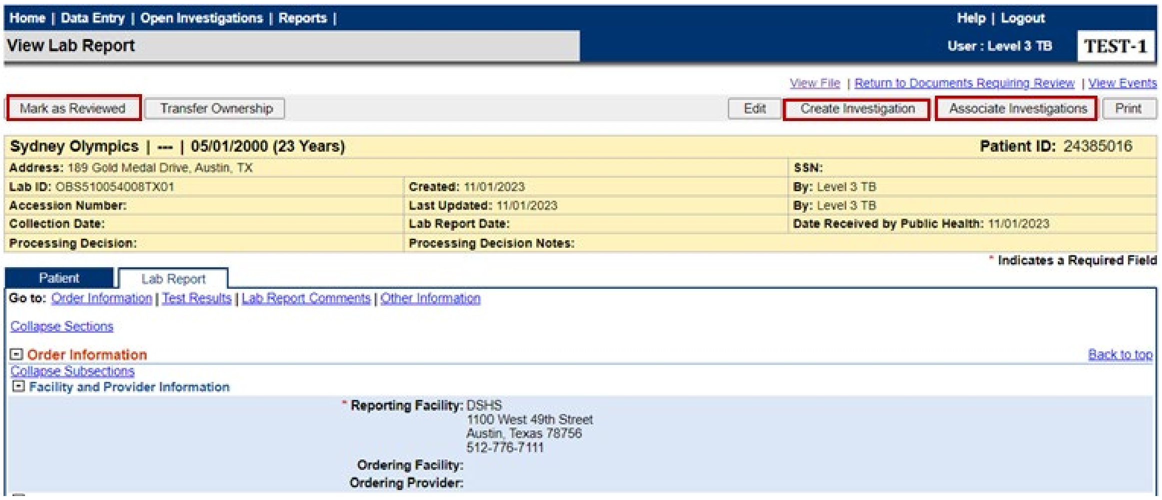
- Manually entered with no action taken such as creating/associating to an investigation or marking as reviewed.
- Electronic lab results that did not match against a Workflow Decision Support (WDS) algorithm and need to be manually reviewed by the TB Program or R/LHD.
- Updated electronic lab result to a result received previously. While the updated lab will take on the same disposition as the original, the updated lab is found in the queue – with a green update indicator – for review.
- An electronically received case document – while this is not implemented yet, these types of documents may be found in the queue.

Users should monitor the DRRQ, and use filter/search functionality, to identify laboratory results for patients within their jurisdiction and either create an investigation from the laboratory result, associate the lab to an existing investigation, or mark the lab as reviewed.

1. From the DRRQ, click on the hyperlinked Patient Name in the Patient column and review all information in the Patient File which will help in making a processing decision for the laboratory report.



2. After reviewing the Patient File, the user should review the laboratory report in full by clicking on the Lab Report hyperlink. The purpose of completing this review is to take one of three actions to clear the lab from the queue:



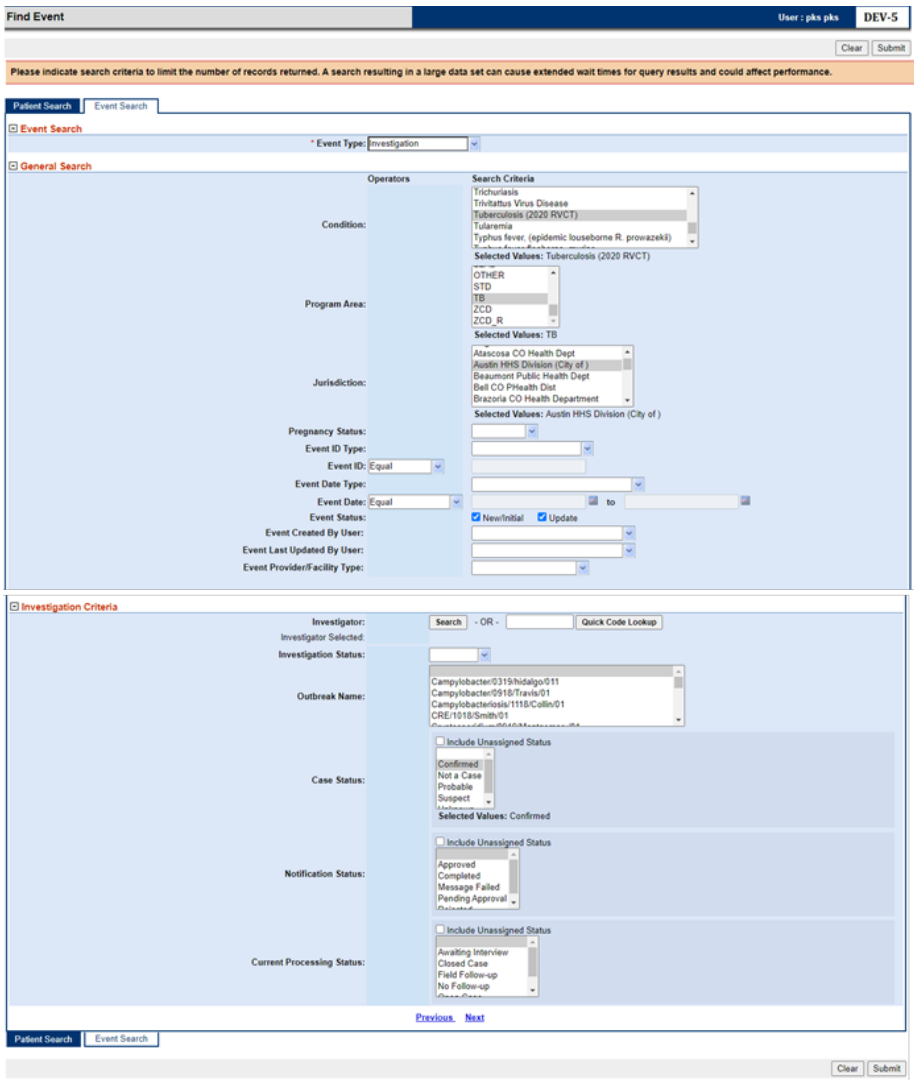
   a. Create an Investigation: An investigation does not exist in the system, and one needs to be created based on the laboratory report result. Click "Create Investigation" and follow the instructions in How to Create an Investigation. Clicking Cancel will navigate back to the laboratory report.
   b. Associate Investigations: A pop-up will be displayed to allow the user to associate the laboratory report to an existing investigation. Check the checkbox for the investigation the laboratory report should be associated to and click submit to move forward with the association or cancel to go back to the laboratory report. See Managing Associations for more information.
   c. Mark as Reviewed: The lab will be marked as reviewed and will reside in the Events tab of the Patient File. The user will receive a confirmation that the lab was marked as reviewed.

Custom Queues

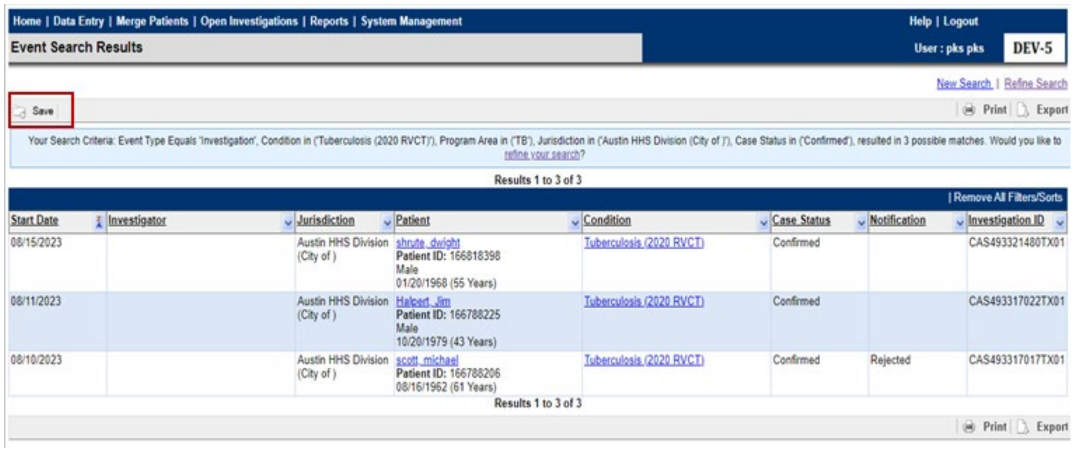
Unique lists of investigations or laboratory reports created by each user. Only the user that created the queue will see the queue listed on their NEDSS Home Page dashboard.

The primary purpose of custom queues is to pull together investigations or laboratory reports matching the selected search criteria and display a subset of ALL matching records.

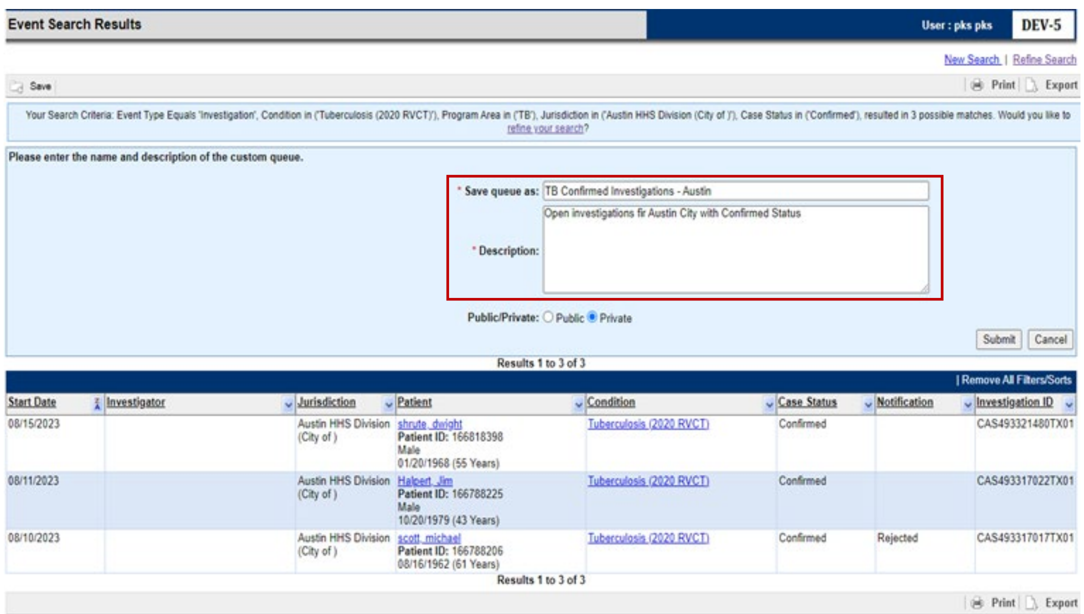
1. Custom queues can be created from the Advanced Search menu.
2. In the Event Search tab, select the appropriate Event Type and any other parameters necessary for the intended custom queue. Click Submit.



3. The event Search results will display. If these meet the specified criteria, click the Save button at the top left corner of the page.



4. The system will then prompt for a queue name and a description of the queue. Complete and click Submit.
    a. Note: Use of special characters (%, $, etc.) and leading or trailing spaces in the Queue Name may corrupt the custom queue from running correctly.



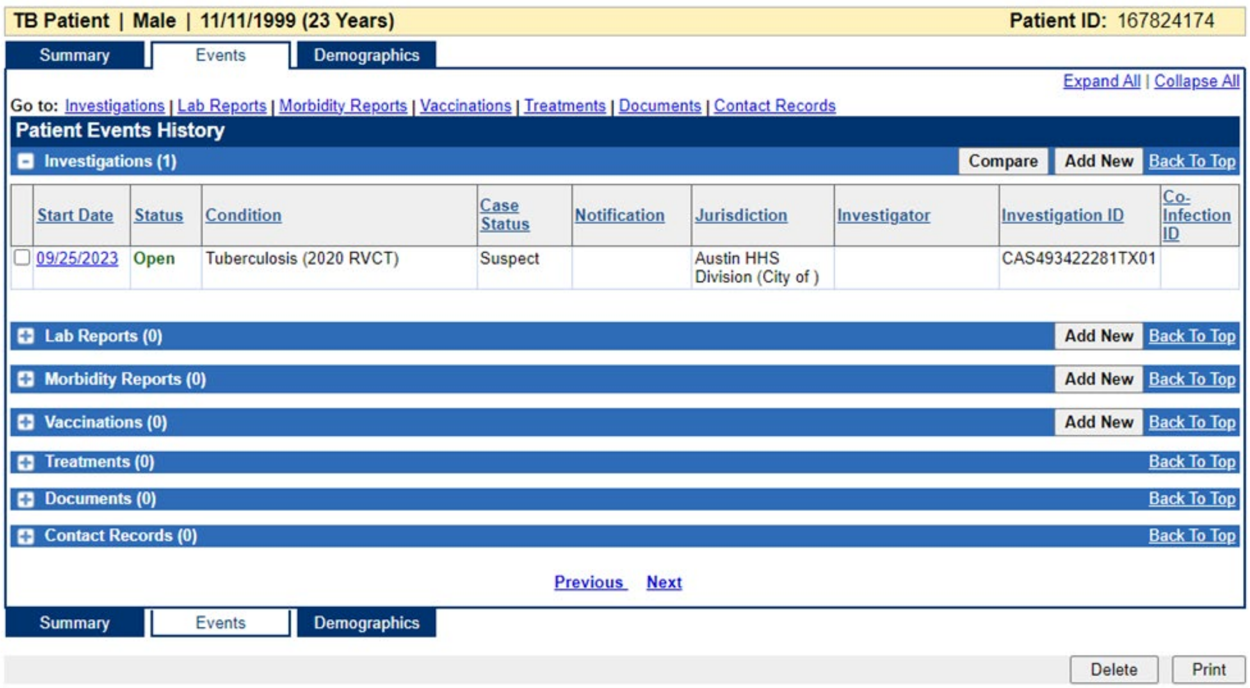
5. The Custom Queue will appear in the My Queues section on the main dashboard under “Private Custom Queues”.
    a. The system will refresh the queue each time it is accessed.
    b. Custom Queues will display up to 100 results based on the selected criteria.


My Queues
Default Queues
Open Investigations (794)
Rejected Notifications Queue (1)
Documents Requiring Review (17)
Private Custom Queues
Search for private custom queue
Case Pending Approval and SCN
Open Investigations Approved
Open Suspect TB Investigation

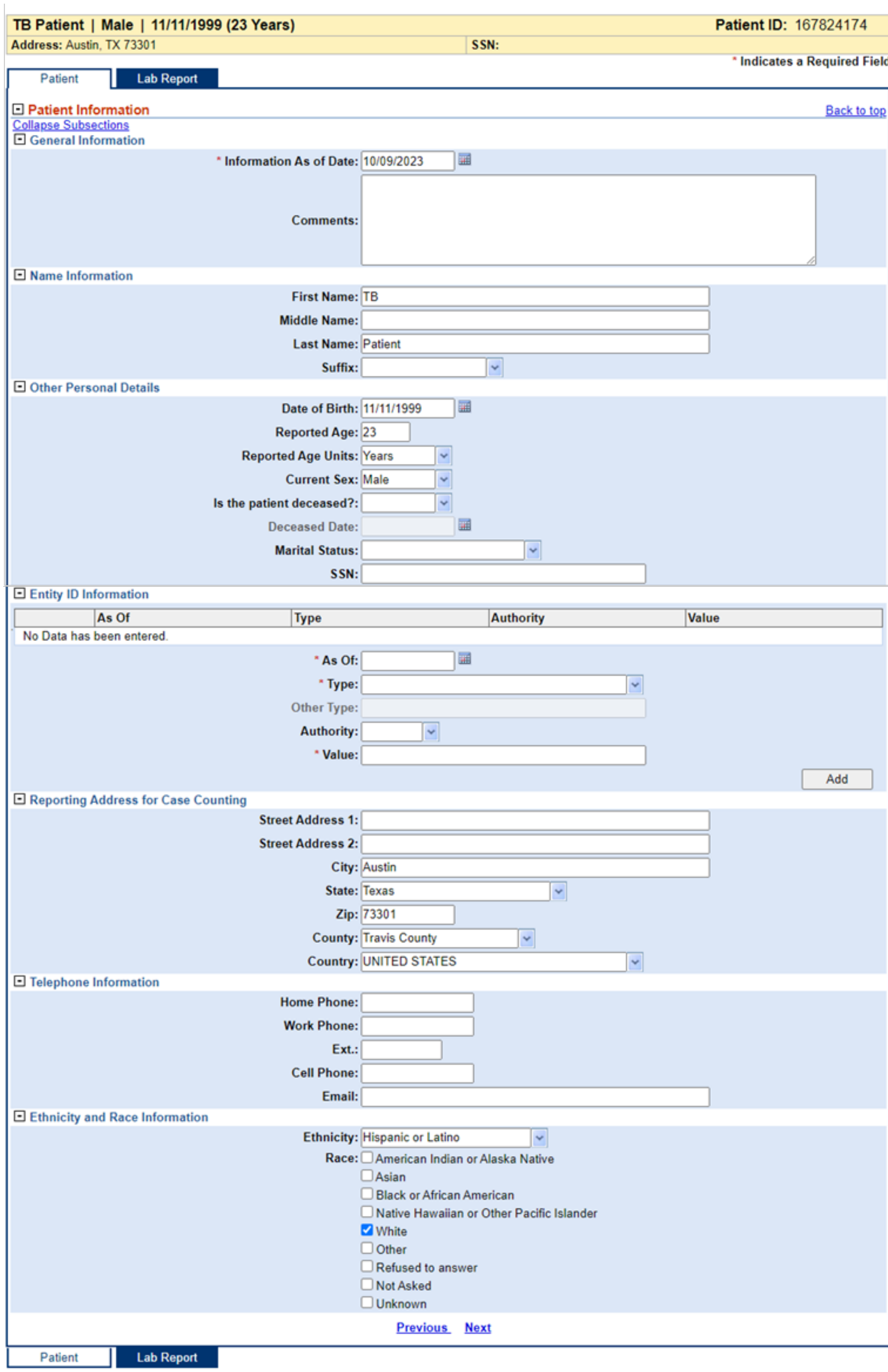
Laboratory Management

How to Enter a Laboratory Report from a Patient File

1. Start by conducting a patient search and creating a new Patient File if necessary.
2. In the Events Tab of the Patient File click the ‘Add New’ button on the Lab Reports banner.



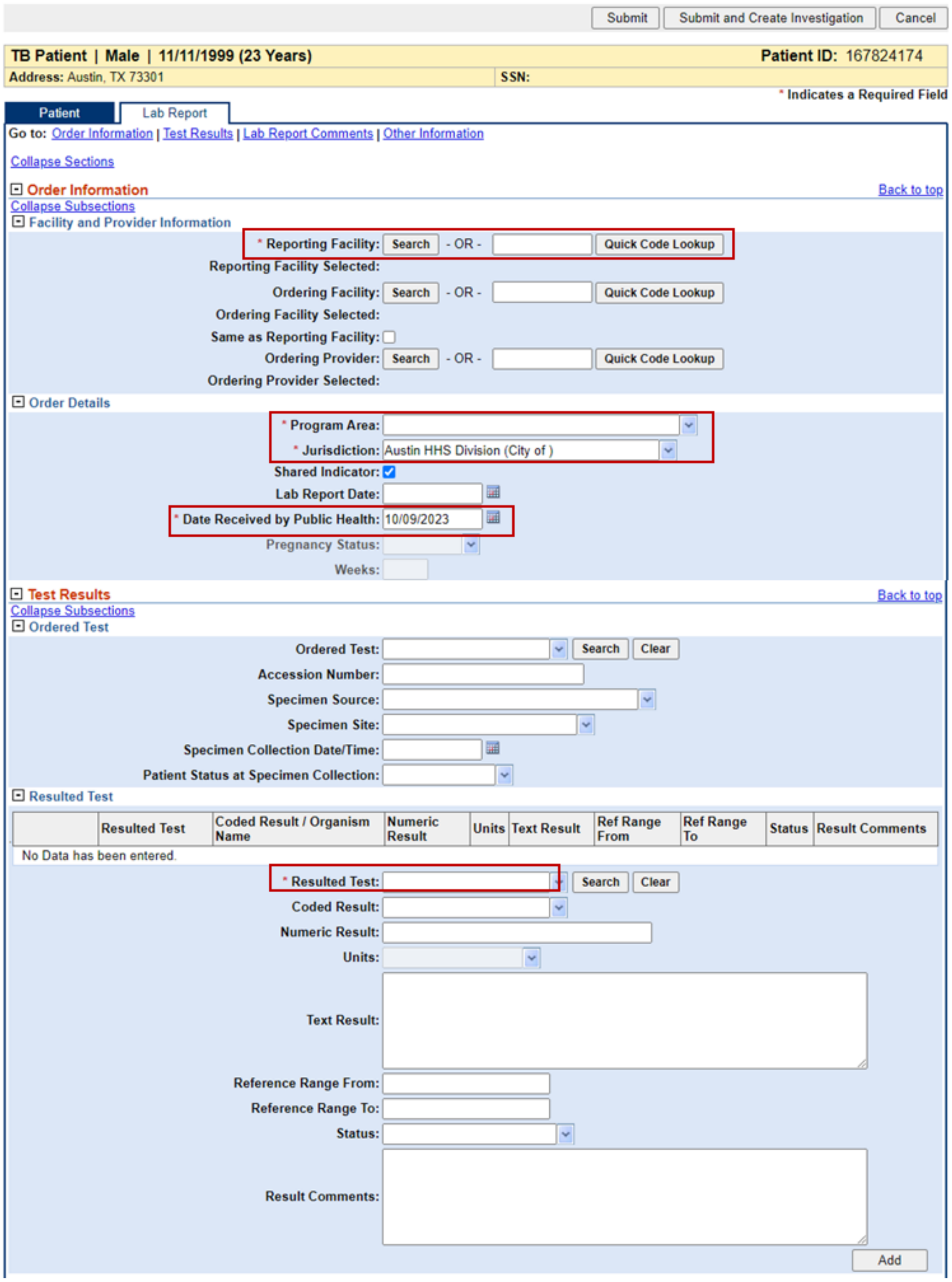
3. The information in the Patient tab will be pre-populated with the current data available for each field; update information if necessary.



4. The Lab Report tab is where users will enter laboratory information.
    a. Any field that is red and has an asterisk (*), is a REQUIRED field.

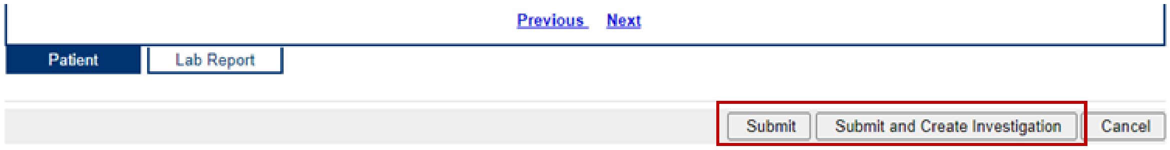
b. Some of these fields, such as the Jurisdiction, may be pre-populated based on the entered Patient information.

c. In order for the Ordered and Resulted test dropdowns to populate, Reporting Facility, Program Area, and Jurisdiction must be completed.



d. Additional information can be entered into the Comments.

e. When finished reviewing and/or entering data, click 'Submit' or 'Submit and Create Investigation'.



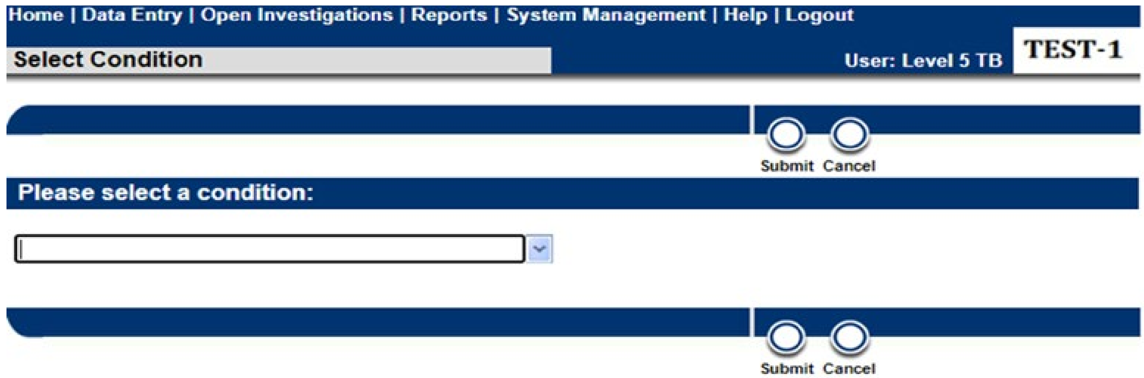
i. If 'Submit' is selected, the laboratory report will be saved in the Patient file and be available in Documents Requiring Review Queue (DRRQ).

ii. Only select 'Submit and Create Investigation' if the user has confirmed there is not an existing investigation to associate the lab report to. The user will be brought to the initial page of creating an investigation and should follow the steps outlined in How to Create an Investigation.

Investigation Management

How to Create an Investigation

1. Before creating an investigation, users must have at minimum the patient's first name, last name, and date of birth (DOB)
2. There are three methods to create an investigation:
    a. From Events Tab within the Patient File:
        i. Click 'Add New' in the Investigations banner create a new investigation in NEDSS.
    b. From system generated laboratory reports:
        i. System generated labs are frequently found in the Document Requiring Review queue and are created from incoming electronic Laboratory Reports (ELRs).
    c. From manually entered laboratory reports:
        i. After manually entering a laboratory report, click 'Submit and Create Investigation.'
3. Regardless of the method in which an investigation is created, a new screen will appear to Select a Condition. The condition selected will control the questions presented in the investigation.
4. Select the condition from the drop-down menu and click Submit.
    a. Select 'Tuberculosis (2020 RVCT)' as the condition for all patients unless 'Latent TB Infection (LTBI)' diagnosis has already been confirmed at the time of data entry.
    b. Select Latent Tuberculosis Infection (2020 TBLISS) as the condition for all patients with confirmed Latent TB Infection (LTBI) diagnosis at the time of data entry.



5. The Add Investigation screen will open.
6. Complete data fields as completely as possible. Review the Texas NEDSS Data Entry Guide for Tuberculosis Programs for detailed instructions.
    a. Always verify the Jurisdiction before clicking submit.
7. Click submit and the investigation will be listed in the Patient File.

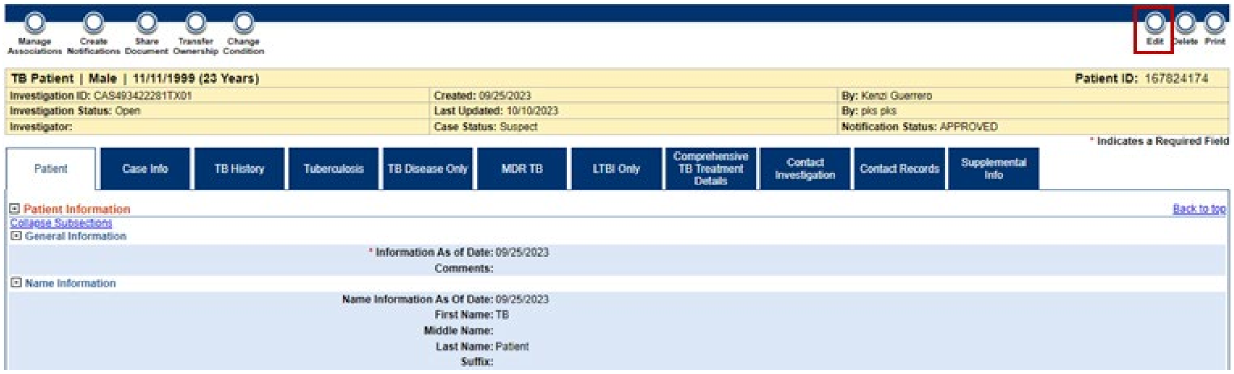
How to View Investigations

1. Navigate to the Patient File page using a Patient Search, Open Investigations Queue, or Custom Queue:
    a. the Summary Tab displays all Open Investigations
    b. the Event Tab displays all Open and Closed Investigations
2. Click the hyperlinked Start Date to open the Investigation.

How to Edit Investigations

1. To edit an investigation, first, open the investigation using the procedure described in "How to View Investigations".

2. Click the Edit button in the upper right corner of the investigation page.



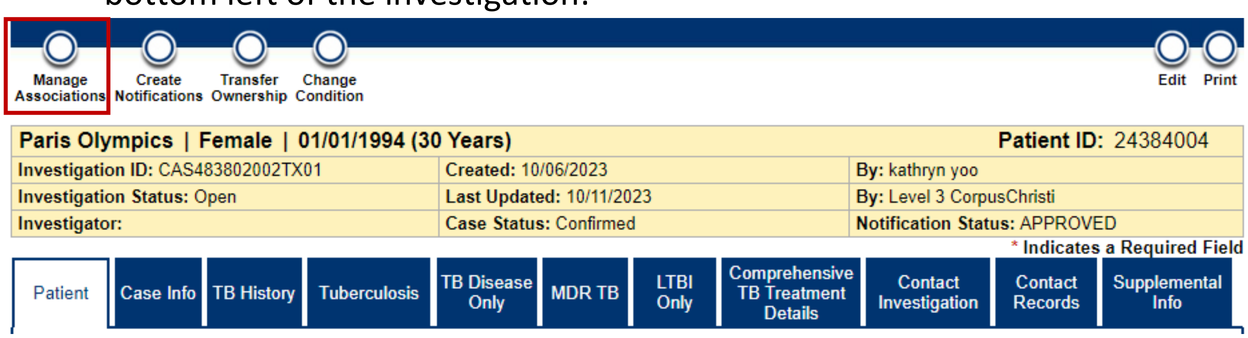
3. NEDSS will display the Edit Investigation page. Make the required edits to data elements on the investigation and click Submit.
    a. Reminder: NEDSS will time out after 20 minutes of inactivity. It is recommended to click submit regularly while entering/editing information.

Managing Associations

In NEDSS, an association is the link between an event - like a laboratory report - to an investigation.

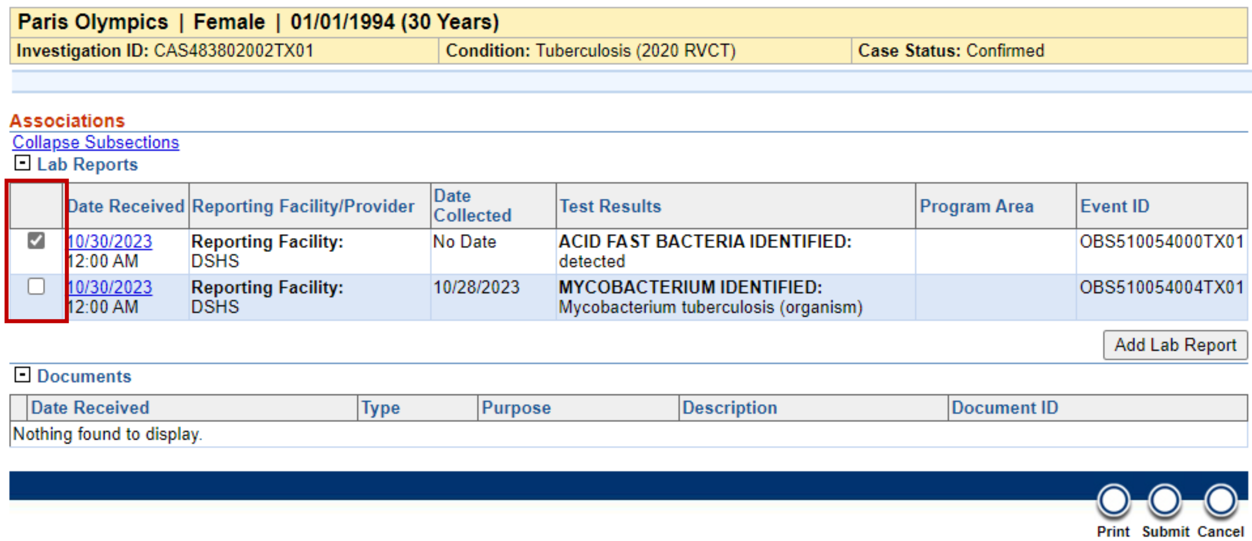
There are multiple methods to 'Associate' a laboratory report to an investigation:

1. From the investigation
    a. This method is recommended when an investigation has already been created or association needs to be removed.
    b. When the investigation is in View mode (data elements are not editable), the Manage Associations button is available at the top and bottom left of the investigation:



    c. All events, i.e., laboratory reports, in the patient file will be displayed on the page after clicking on Manage Associations. Use the check boxes to indicate one or more events that should be associated with the investigation; the checkbox can also be removed to “break” the link between the event and the investigation.

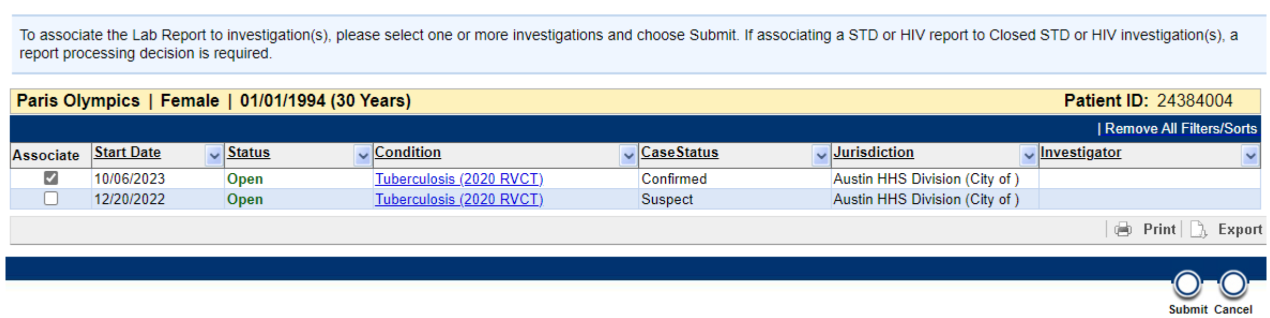
d. Click Submit when complete.



2. From the laboratory report:

   a. A specific laboratory report can also be associated with one or more investigations by selecting Associate Investigations from the View Lab Report Page.

   b. Use the check boxes to associate the laboratory report with the appropriate investigations. Click Submit when complete.

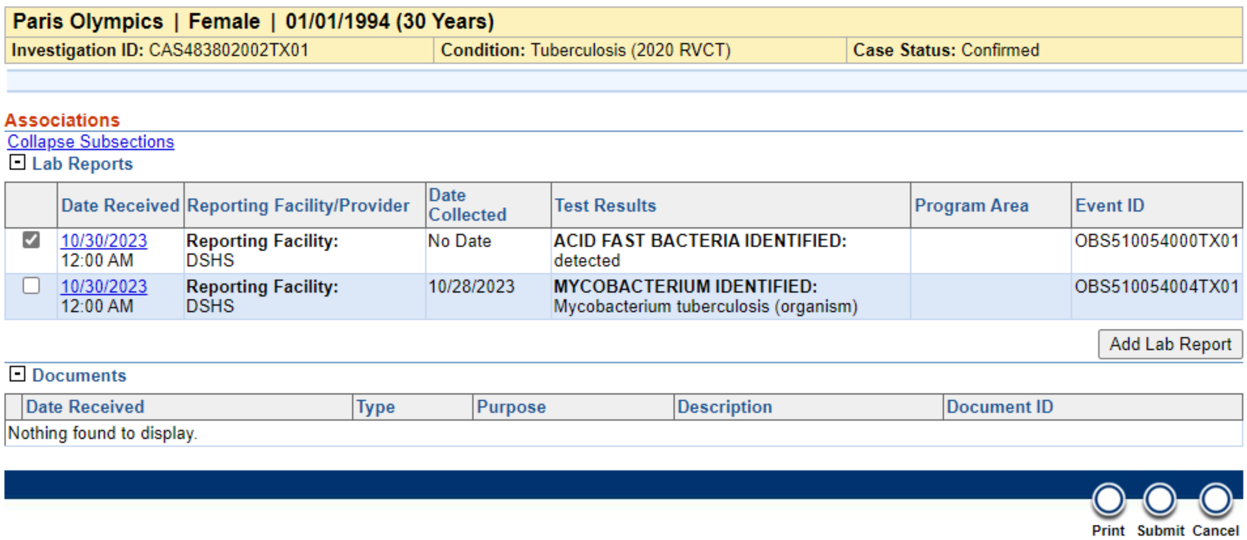


3. Auto-Association:

   a. When an investigation is created directly from a laboratory report, that laboratory report is auto associated to the investigation. As a reminder, this can be done by selecting ‘Create Investigation’ when viewing a laboratory report.

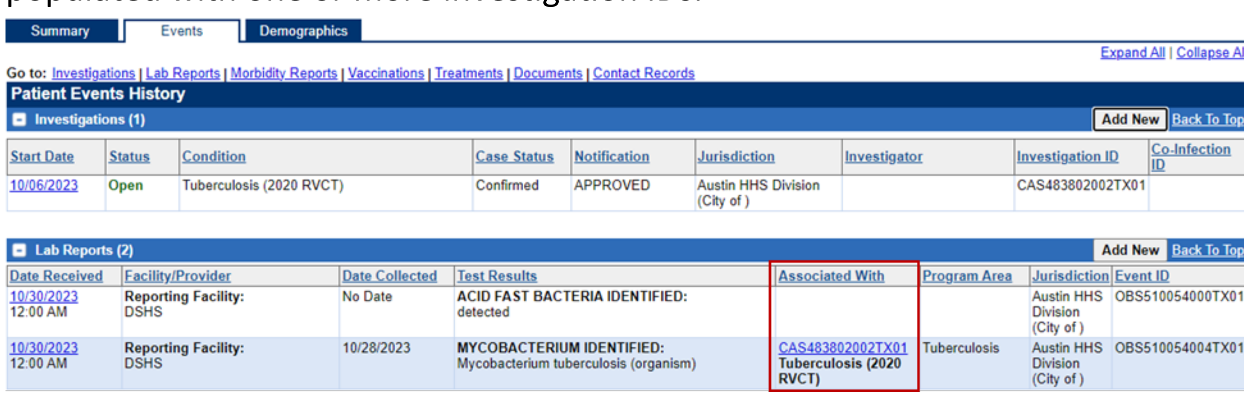
Events can be disassociated from investigations.

1. To remove associations/disassociate events from an investigation, open the investigation and click Manage Associations.
2. Use the check boxes to disassociate events from the investigation (e.g., the opposite of what is done to associate events from an investigation).
3. Click Submit when complete.

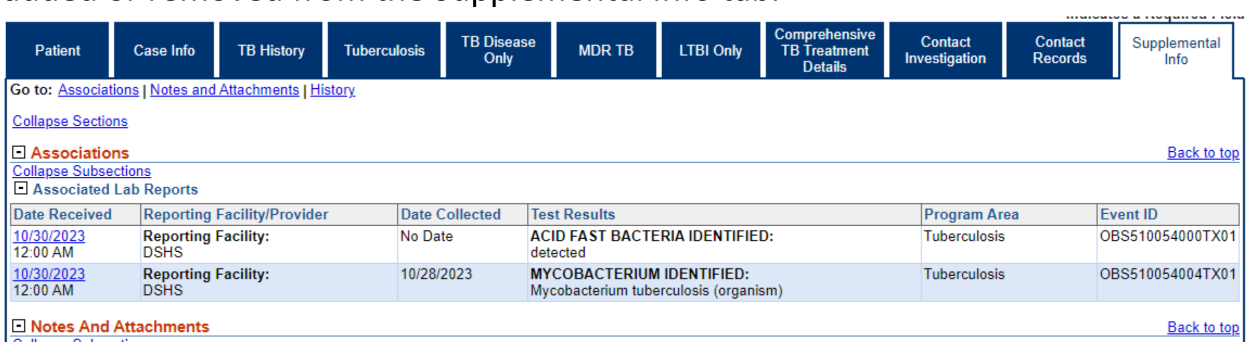


Associations can be viewed from the Patient File and within an Investigation.

1. From the Patient File:
   a. Open the Patient File and navigate to the Events tab.
   b. The 'Associated With' column provides the ability to quickly determine if an event is associated to an investigation. If the event is associated to an investigation, the 'Associated With' column will be populated with one or more investigation IDs.



2. From the Investigation:
    a. Open the investigation and navigate to the Supplemental Info tab while in view mode.
    b. Any events that are currently associated with the investigation will be displayed in the Associations section. Associations cannot be added or removed from the Supplemental Info tab.



Notification Management/Requesting a TB/LTBI State Case Number (SCN)

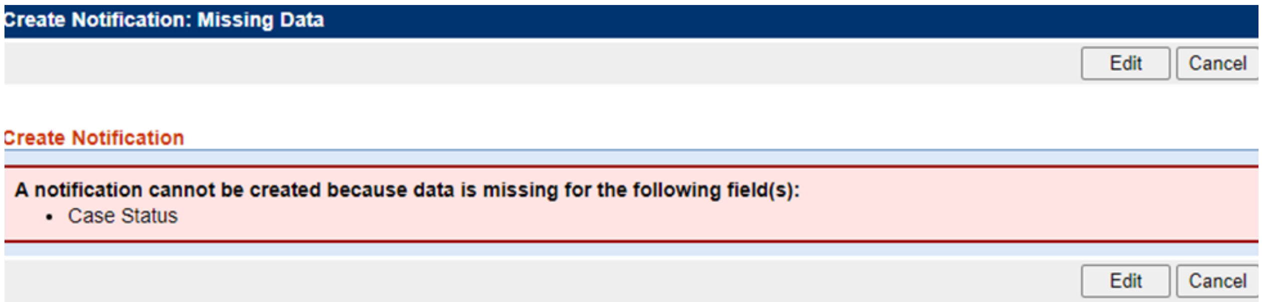
NEDSS utilizes the functionality of notifications to report cases to CDC. Notifications submitted by R/LHD are reviewed by the TB Unit Surveillance Team prior to approval and submission to CDC for case counting.

Submitting Initial Notifications

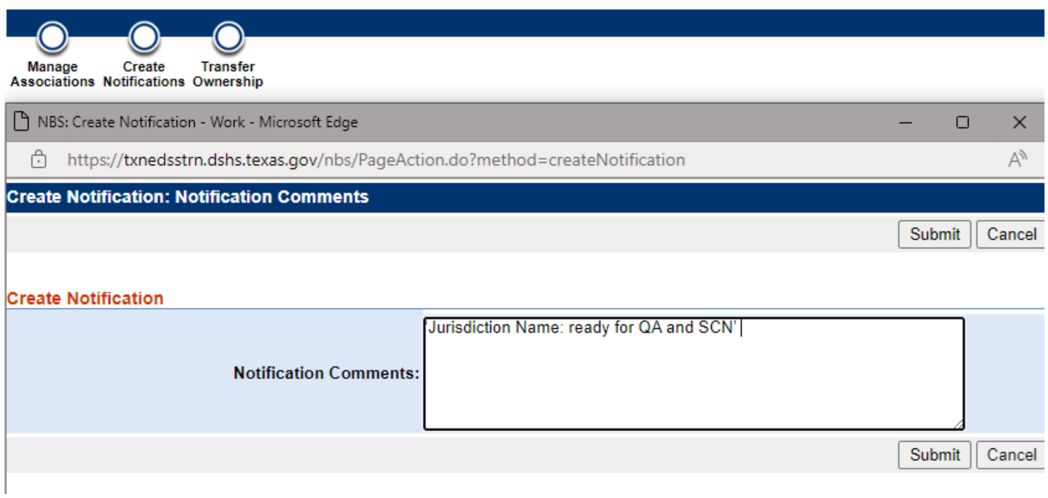
1. When the investigation is ready to be reviewed by the TB Unit and have an SCN assigned, click the 'Create Notification' button at the top of the investigation while in view mode.

2. The system will conduct a check to make sure all system required fields, marked with a red asterisk(*) are filled out. If a field is blank, the system will alert the user and require the fields to be populated.

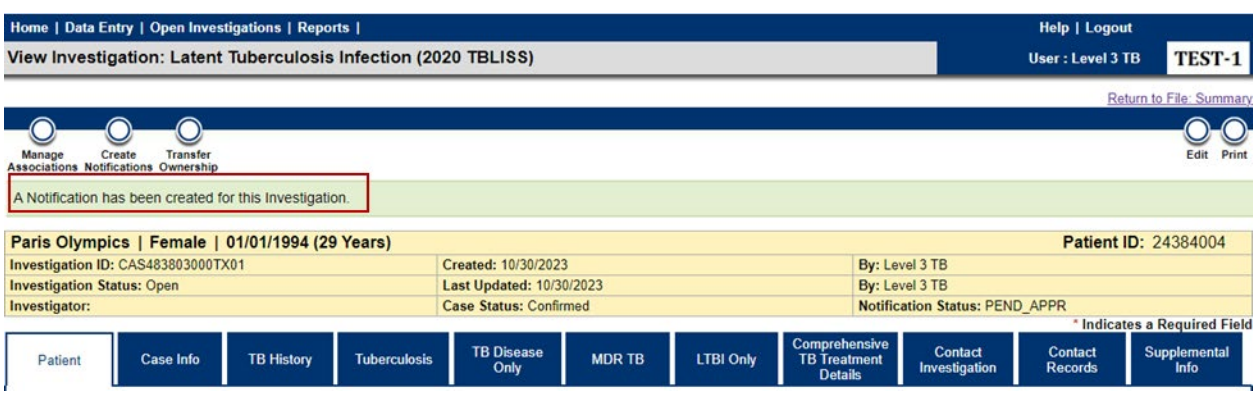
a. The Edit button can be used to open the investigation to populate the missing fields, and then the notification can be resubmitted.



3. A Notification Comments box will appear for notes to the approver. Enter appropriate information and click Submit.
   a. A proper notification must include the jurisdiction and be in the following format: *'Jurisdiction Name: ready for QA and SCN'*



4. A banner will appear confirming that the Notification has been successfully created.

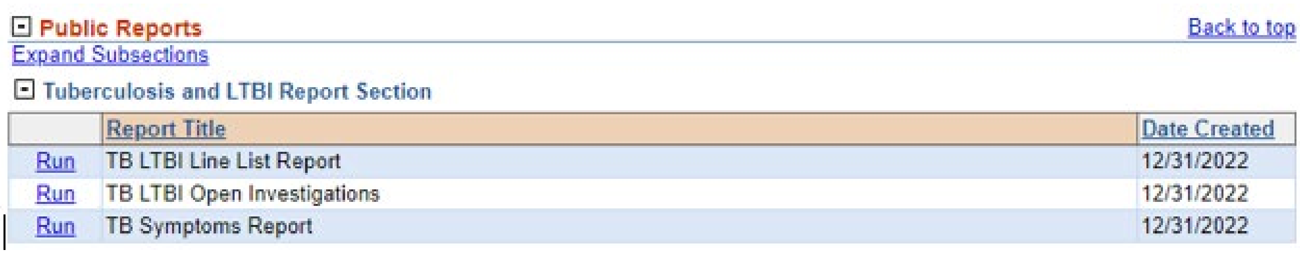


5. This notification will be sent to TB Unit staff for review. The notification will either be approved or rejected.
    a. If rejected, the investigation will be in the [Rejected Notifications Queue](#).

Report Management

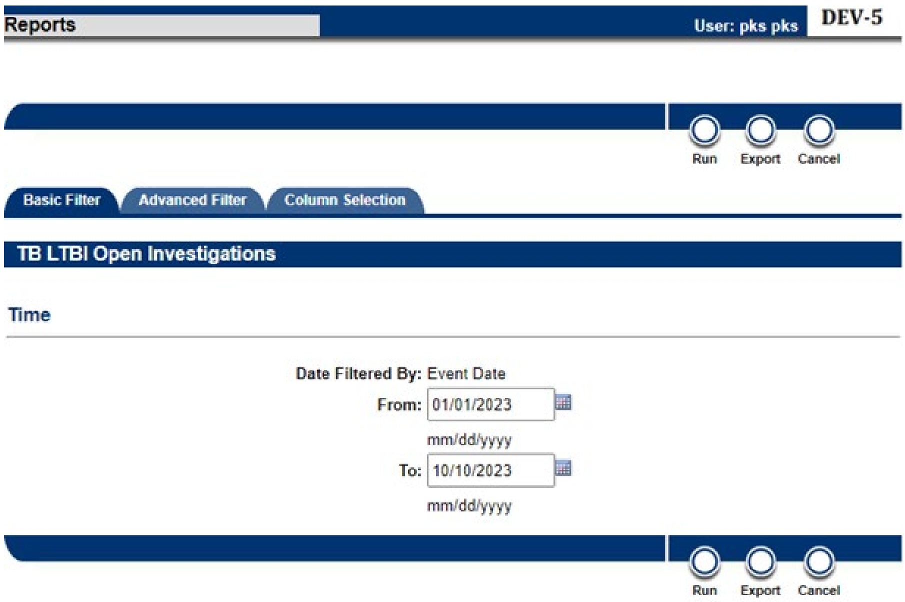
Running Reports

1. To run reports, click on Reports from the navigation bar on the top of the NEDSS Home Page.
2. The reports module screen will contain three main sections (Private Reports, Public Reports, and Template Reports). The subsections within these sections and the reports users have access to will vary based on the NEDSS environment and user permission levels. Tuberculosis users should only run reports specific to Tuberculosis or Latent Tuberculosis infection.
    a. Private Reports: Reports that are saved by the user and only available to be run by the user.
    b. Public Reports: Reports that have been created by the system or TB Unit staff and made available for all users to run.
    c. Template Reports: Reports that serve as templates for creating pre-configured reports that can then be made available in Public Reports. Should only be used by TB Unit staff.
3. To run Public Reports, navigate to a subsection (e.g. the "Tuberculosis and LTBI Report Section") underneath "Public Reports". Click Run beside the report you would like to run.

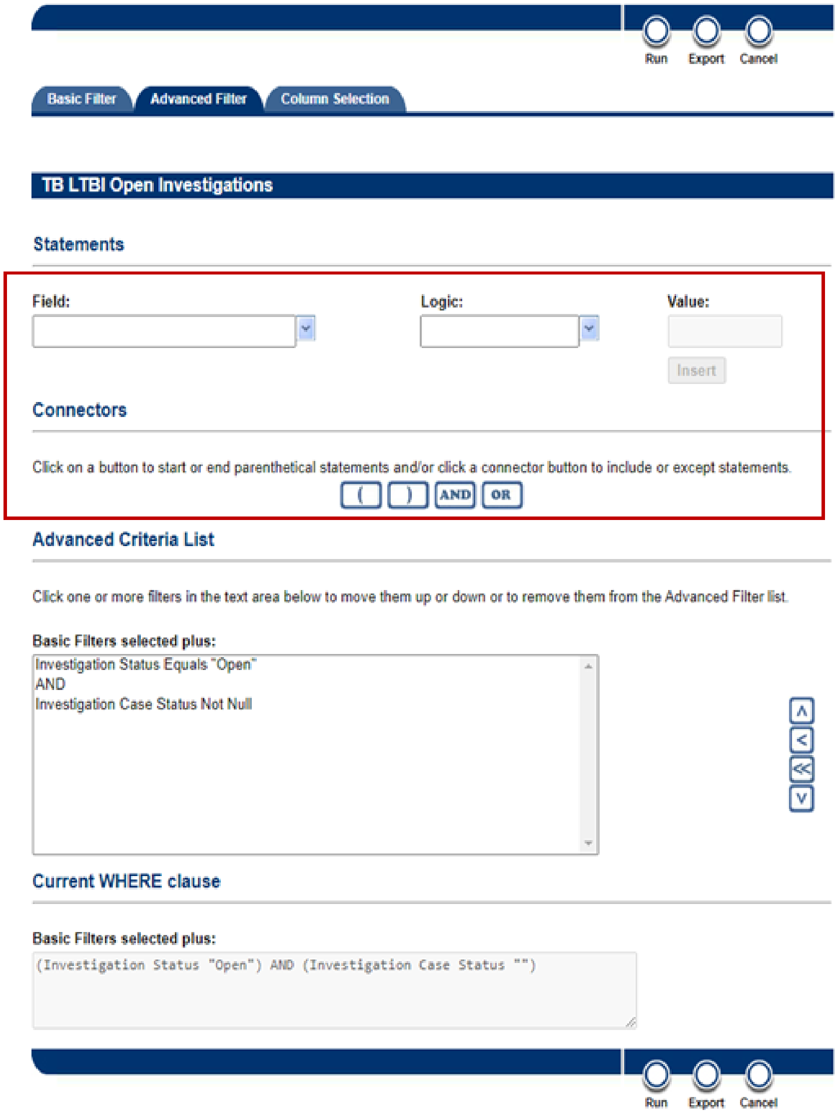

Public Reports   Back to top
Expand Subsections
Tuberculosis and LTBI Report Section

	Report Title	Date Created
Run	TB LTBI Line List Report	12/31/2022
Run	TB LTBI Open Investigations	12/31/2022
Run	TB Symptoms Report	12/31/2022

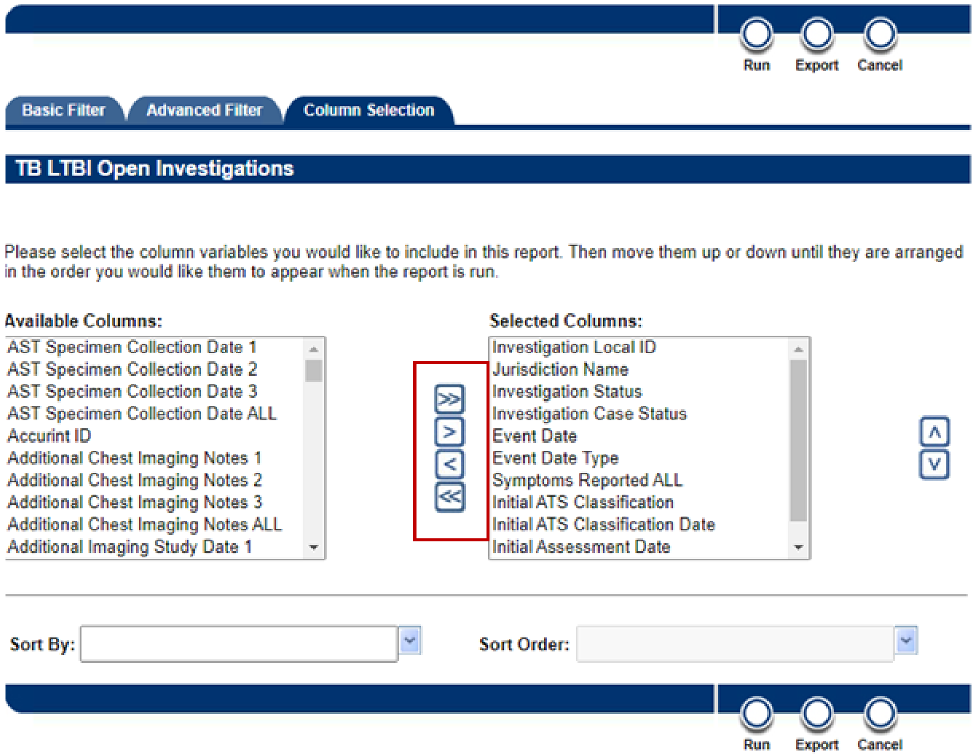
4. The report will open on the Basic Filter page. While basic filters will vary by report, most reports will have date ranges. Enter in basic filter criteria to apply to the data.



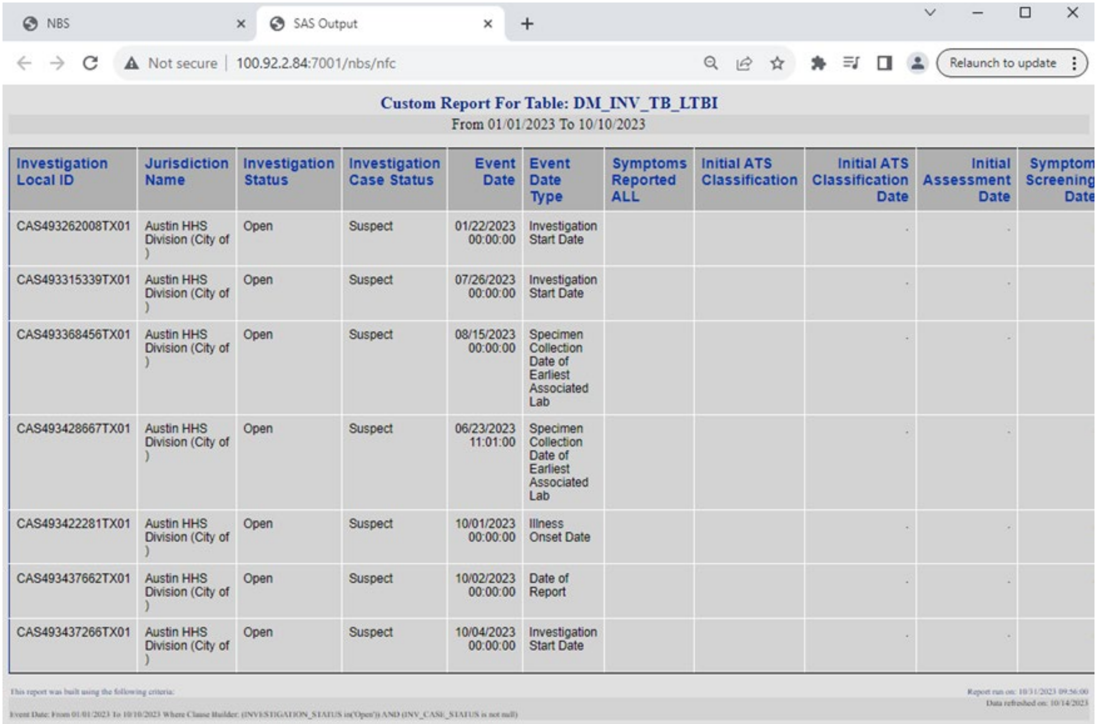
5. An Advanced Filter tab may also be available. This tab allows further criteria to be applied to the report utilizing specific data elements in the underlying records. These criteria are optional.
    a. Advanced filters are applied by selecting the Field, Logic, and Value and clicking Insert. Each additional filter will appear in the Advanced Criteria list. Connectors can also be utilized to connect multiple advanced criteria together.



6. The Column Selection tab is utilized to select the columns that will be made available in the report. Only columns moved to the Selected Columns section will be available in the report.
    a. Double arrows can be used to move ALL columns between the Available and Selected Columns sections.
    b. Single arrows can be used to move selected columns between the Available and Selected Columns sections.
        i. Multiple columns can be selected by holding down the CTRL button.
    c. The report output can be sorted by one data element by selecting it in the Sort By and Sort Order fields.



7. Once the columns have been added, click Run to open the report in a browser tab. This is done to verify that the report is populated with data and confirm the layout of the report. It is recommended that this step always be taken to ensure that the report is run successfully.



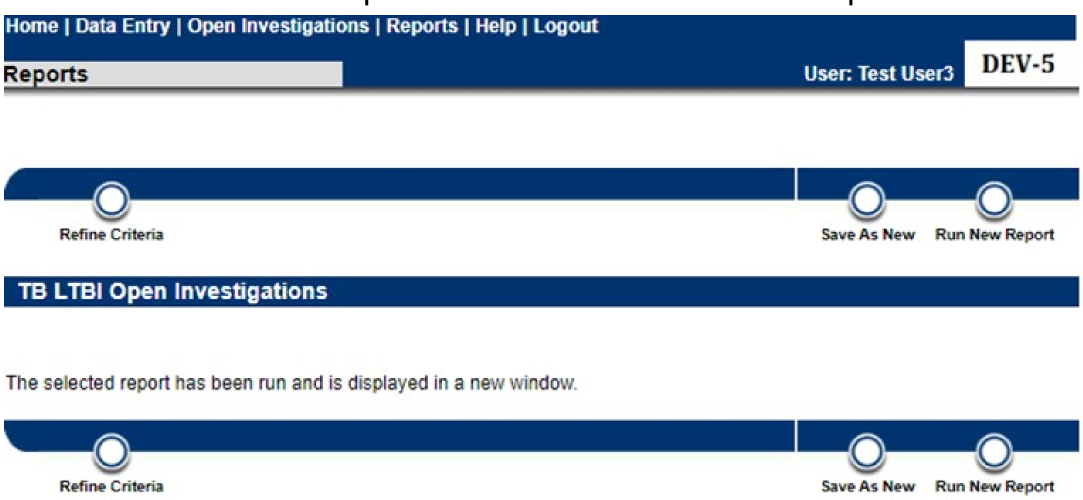
Custom Report For Table: DM_INV_TB_LTBI
From 01/01/2023 To 10/10/2023

Investigation Local ID	Jurisdiction Name	Investigation Status	Investigation Case Status	Event Date	Event Date Type	Symptoms Reported ALL	Initial ATS Classification	Initial ATS Classification Date	Initial Assessment Date	Symptom Screening Date
CAS493262008TX01	Austin HHS Division (City of)	Open	Suspect	01/22/2023 00:00:00	Investigation Start Date			.	.	
CAS493315339TX01	Austin HHS Division (City of)	Open	Suspect	07/26/2023 00:00:00	Investigation Start Date			.	.	
CAS493368456TX01	Austin HHS Division (City of)	Open	Suspect	08/15/2023 00:00:00	Specimen Collection Date of Earliest Associated Lab			.	.	
CAS493428667TX01	Austin HHS Division (City of)	Open	Suspect	06/23/2023 11:01:00	Specimen Collection Date of Earliest Associated Lab			.	.	
CAS493422281TX01	Austin HHS Division (City of)	Open	Suspect	10/01/2023 00:00:00	Illness Onset Date			.	.	
CAS493437662TX01	Austin HHS Division (City of)	Open	Suspect	10/02/2023 00:00:00	Date of Report			.	.	
CAS493437266TX01	Austin HHS Division (City of)	Open	Suspect	10/04/2023 00:00:00	Investigation Start Date			.	.	

This report was built using the following criteria:
Event Date: From 01/01/2023 To 10/10/2023 Where Clause Builder: (INVESTIGATION_STATUS in('Open')) AND (INV_CASE_STATUS is not null)

Report run on: 10/31/2023 09:56:00
Data refreshed on: 10/14/2023

8. Once the HTML tab has been viewed and report is confirmed, if the received an error, or the user want to modify the report, close the tab to return to NEDSS. On the updated screen there are three options:

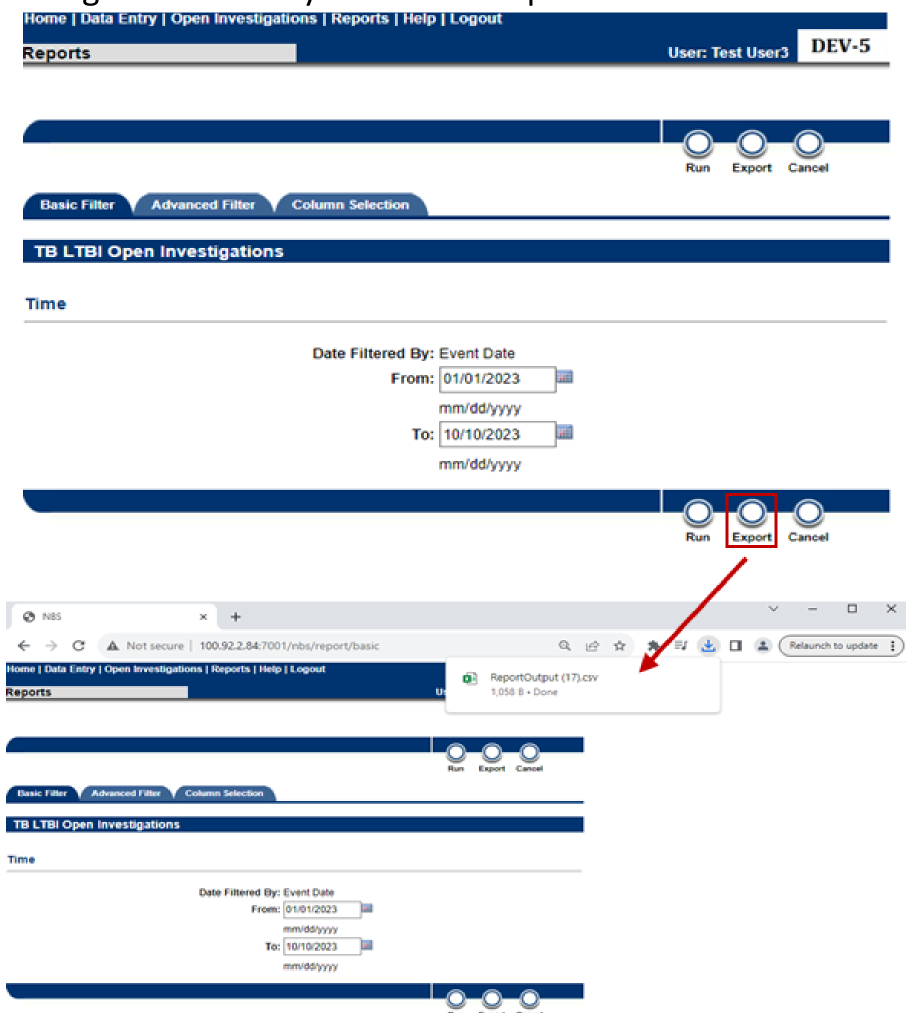


   a. <u>Refine Criteria</u>: Return to the report configuration screen to change filters or column selection. Also used to return to the configuration screen to export the file as a CSV.
   b. <u>Save as New</u>: Save the current set of filters and columns as a New Report. Recommended if you have configured a report from Public

Reports and would like to save the report as a private report. This step is covered in the next section.

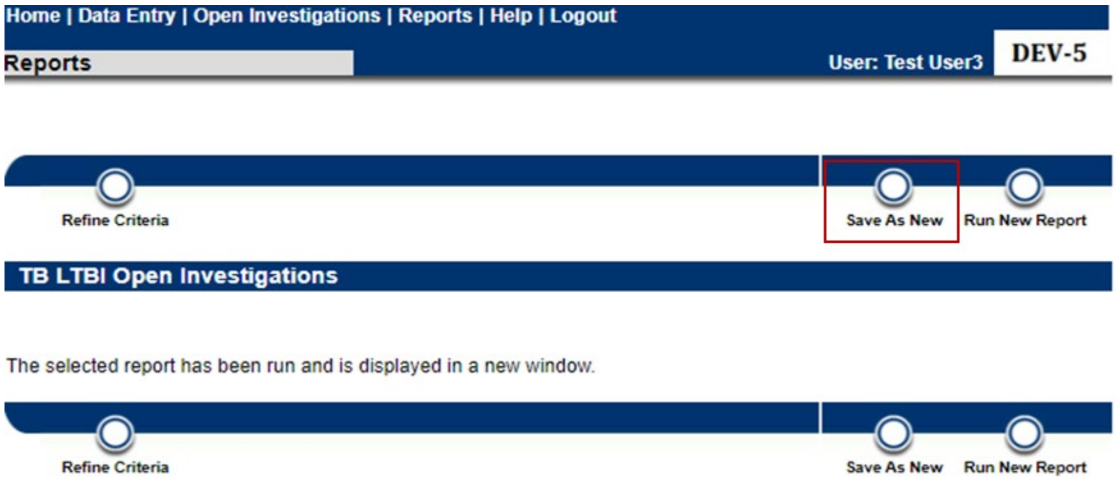
c. Run New Report: Does not save and returns you to the main Reports page.

9. When Refine Criteria is selected, the configurations that were set to run the report are saved. On this screen you can change the filters and selected columns and run the report again (steps 4-8) or you can also click on Export to download the report to your computer as a .csv file. When you click export, the system will download the report to your Downloads folder with a file name of ReportOutput(x).csv – where X is an integer starting with 1 and increasing in number if you have multiple files with the same name.

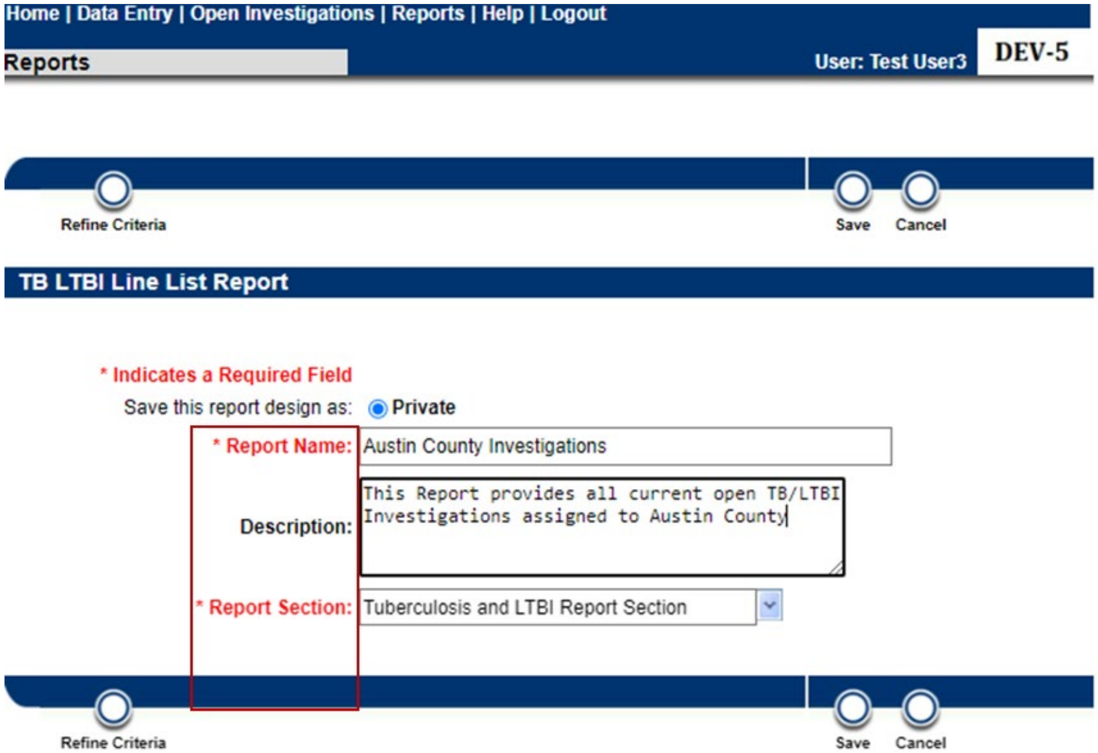


Creating Private Reports

1. To create a Private Report, an existing report from within the Reports module must first be configured and run. Follow Steps 1-8 in the Running Public Reports section.
2. Once the HTLM tab is closed, select Save As New.



3. On the next screen, you can provide a Report Name, Description of the report, and a Report Section to make the report available to you in Private Reports. Note: Some users will also be able to save reports in Public Reports, but by default Private Reports will be selected.



4. Click on Save to save the report. The main Reports screen will appear, and the saved report will appear in the Private Reports section and Subsection that was selected.
    a. Private Reports will also display in the My Reports section of the NEDSS home page. Clicking Run on the home screen will open the report for criteria selection.

Contact Management

Persons identified as having been exposed to an active TB case during a contact or source case investigation (CI) must be entered in NEDSS. A new TB/LTBI investigation must be created for everyone named during the CI, if the minimum demographic details (i.e. first name, last name, and date of birth) for the contact are available. The TB/LTBI investigation should be used to record all relevant demographic information, medical and social risk history and factors, and TB evaluation results.

After the TB/LTBI investigation is created, a contact record should be created for each contact. The contact record allows users to link contacts to source/index cases.

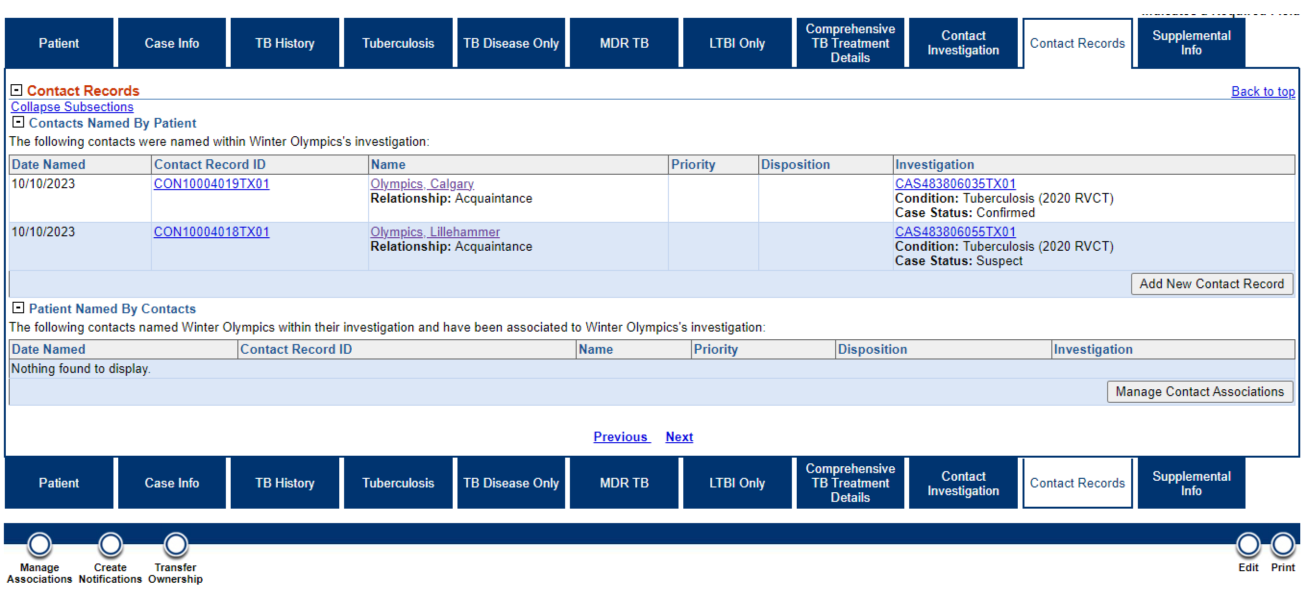
Contact records should also be created for individuals named on a CI for whom the minimum demographic details are not available.

Table 2. TB/LTBI Investigations for Named Contacts versus Contact Records

TB or LTBI Investigation	Contact Record
Used to create a patient record for named contacts with known first name, last name, and DOB.	Used to record named contacts without enough information to create a TB/LTBI investigation.
Used to enter named contact's demographics, TB history, and screening results.	Used to link named contact's investigation to index/source case.

Creating Contact Records

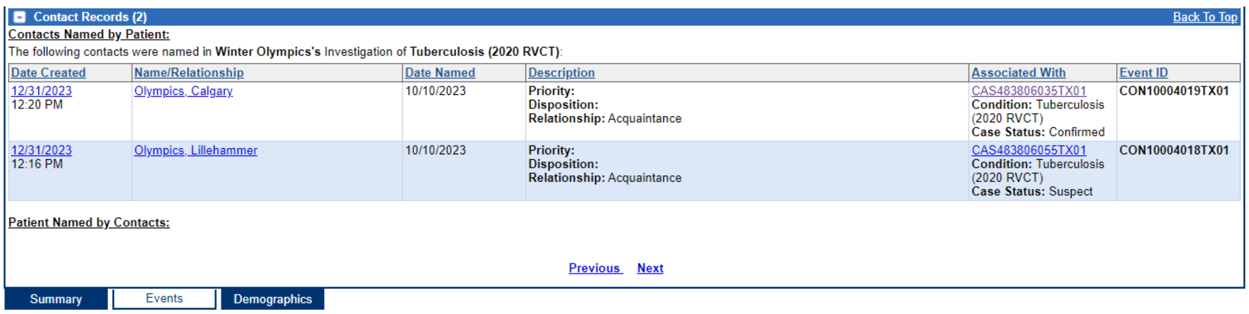
Contact Records are added to Investigations via the Contact Records tab. **This tab is only accessible when the Investigation is in View mode**. There are two sections within this tab:



1. Contacts Named by Patient:
    a. Link investigations for named contacts that the patient named during the CI; and
    b. Enter other individuals named as a contact by the patient during the CI for whom demographic informaiton is missing.

2. Patient Named by Contacts: Allows users to see information about person who named the patient as a contact during their CI (i.e. the source/index case for the current patient).

The Evens Tab within a Patient File will also display all the contact records that have been created for the patient.


Contact Records (2) Back To Top

Contacts Named by Patient:

The following contacts were named in **Winter Olympics's** Investigation of **Tuberculosis (2020 RVCT)**:

Date Created	Name/Relationship	Date Named	Description	Associated With	Event ID
12/31/2023 12:20 PM	Olympics, Calgary	10/10/2023	**Priority:** **Disposition:** **Relationship:** Acquaintance	CAS483806035TX01 **Condition:** Tuberculosis (2020 RVCT) **Case Status:** Confirmed	CON10004019TX01
12/31/2023 12:16 PM	Olympics, Lillehammer	10/10/2023	**Priority:** **Disposition:** **Relationship:** Acquaintance	CAS483806055TX01 **Condition:** Tuberculosis (2020 RVCT) **Case Status:** Suspect	CON10004018TX01

Patient Named by Contacts:

Previous Next

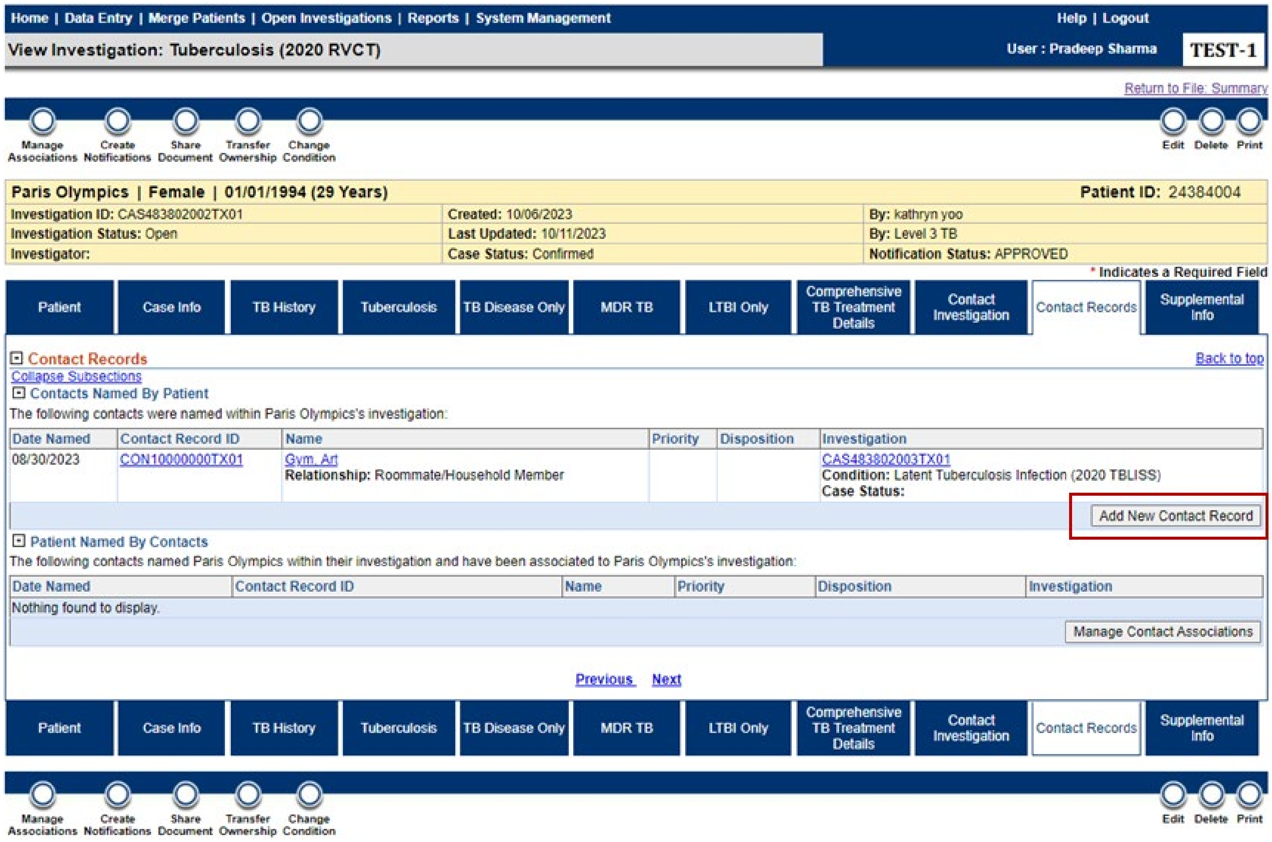
Summary Events Demographics

Linking Contacts to Index Case

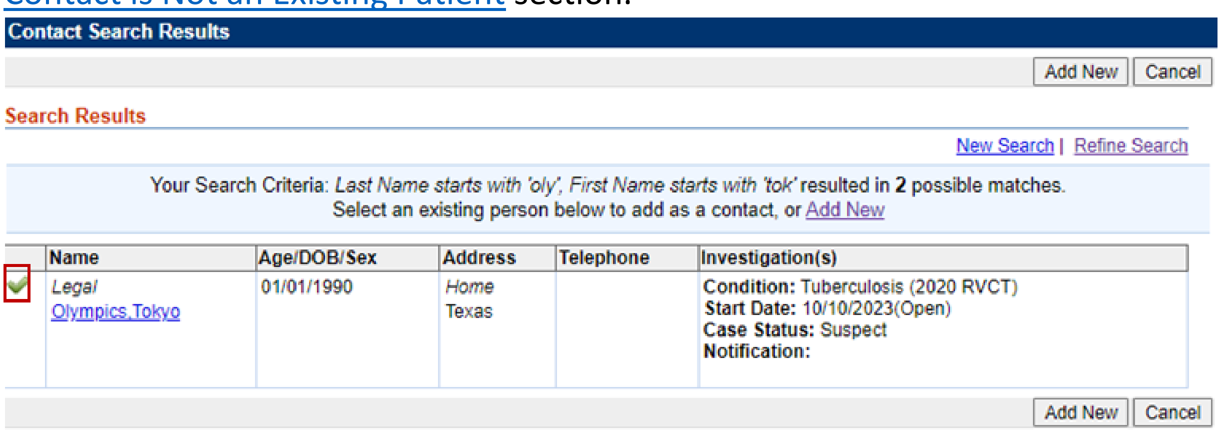
For persons named as a contact during a CI for whom a first name, last name, and date of birth is available, users should create a TB or LTBI investigation prior to creating contact records. The contact record will be used to link the contact's investigation to the index/source case investigation.

To link the contact's investigation to the source case:

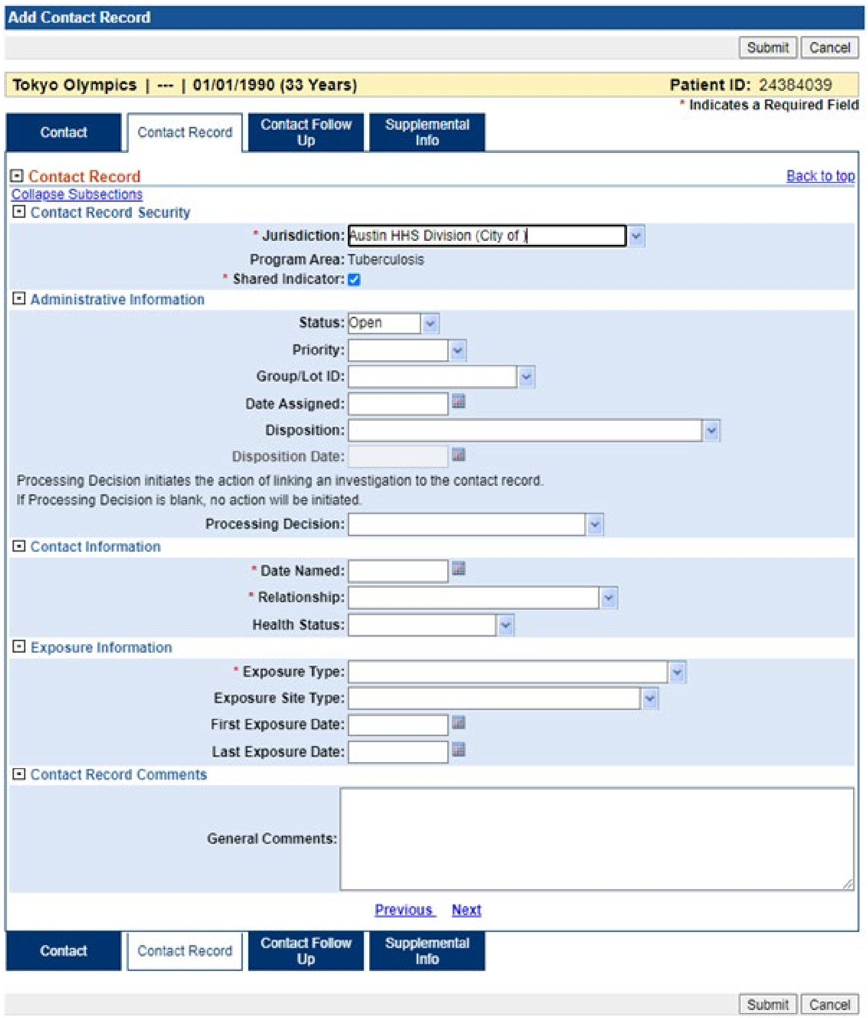
1. From view mode within the Index patient's investigation, navigate to the Contact Records tab and click Add New Contact Record.



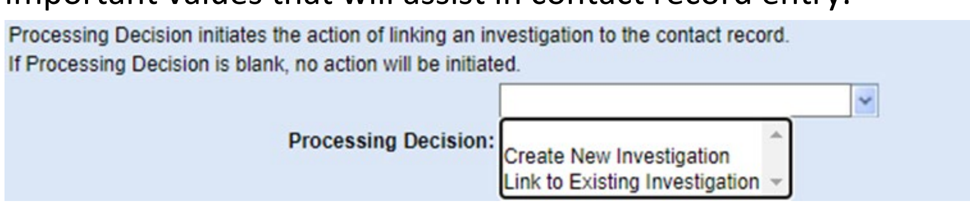
2. A Contact search window will open to prompt a search for an existing patient file in the system. Enter the search criteria and click Search.
3. In the search results, click the checkmark beside the correct patient to select the patient. If multiple patients are returned, use the supplied data to select the correct patient or refine the search to help narrow down results. Clicking on patient name will open a popup window displaying the patient file to help in determining if the patient is correct. If the patient does not exist, see Step 3 within the [Linking Contacts to Source Case – Contact is Not an Existing Patient](#) section.



4. A Contact Record pop-up box will be displayed. The most current known demographic information for the patient will be populated on the Contact tab. This should be updated as needed. In addition, there are required fields, marked by a red asterisk (*), that should be entered prior to clicking submit.



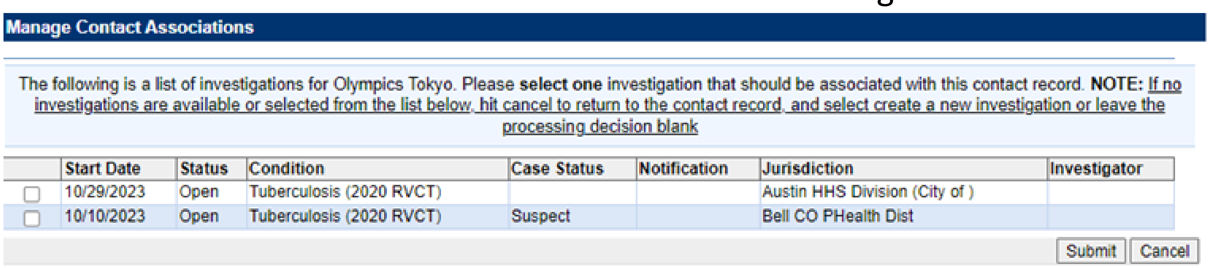
a. While selecting a Processing Decision is not required, there are two important values that will assist in contact record entry.

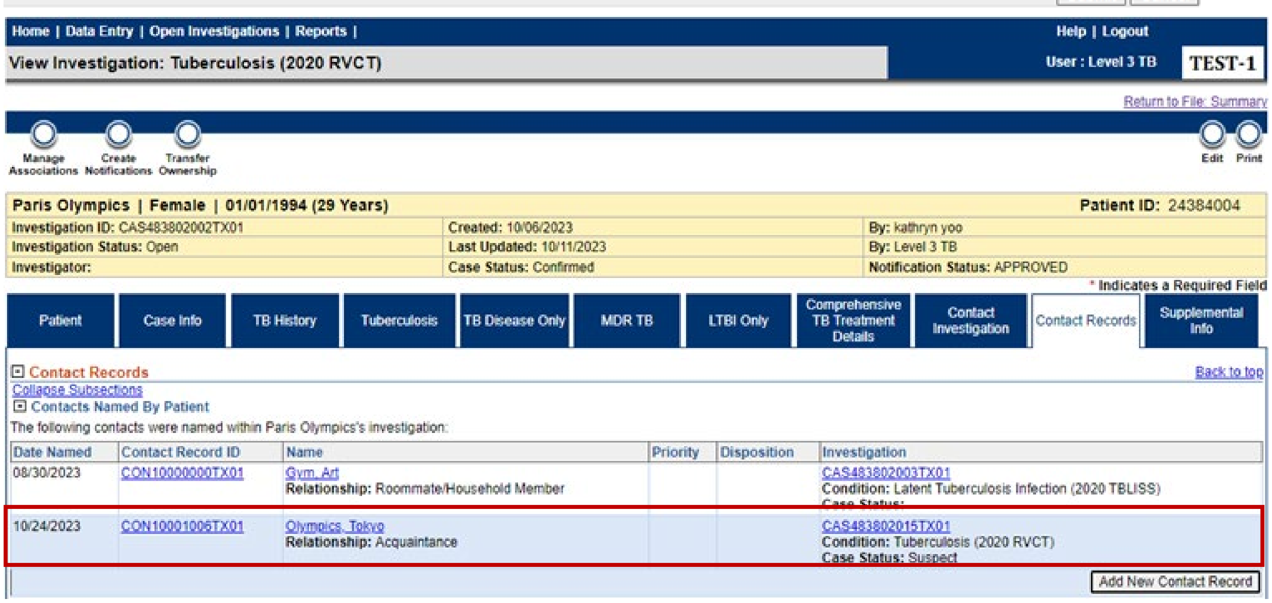


i. Create New Investigation: Users should not select this option. Users should only create new investigations after conducting a thorough patient search.

ii. Link to Existing Investigation: Once the Contact Record is submitted the system will prompt the user to select the investigation that the newly created contact record should be associated with. After selecting one investigation click Submit; the system will link the newly created contact record to both the index case and contact case investigation.

5. Once the contact record has been submitted, the record will appear in view mode. From here the user can click on Edit to edit the record, or Close to go back to the index case investigation.
6. On the index case investigation, the Contact Records tab will be updated to include the new contact record that was created. If a processing decision was selected, the Investigation column will display the investigation ID of the contact's new investigation or the contact's existing investigation and the contact record will also be associated with this investigation.



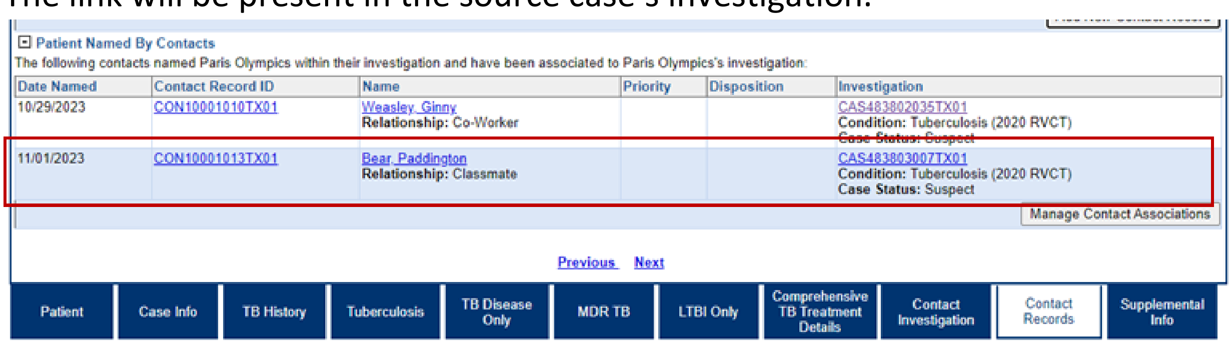


Patient Named by Contact

1. From the Contact Records tab, it is possible to make a link between a contact’s investigation and the patient, if the contact has named the patient in the context of their investigation. This can be done by clicking on Manage Contact Associations from the Patient Named by Contacts section.

2. In the pop-up users will be able to see a list of patients who have named the current patient as a contact for the specific condition. Check the box next to the contact that should be linked to the investigation and click Submit. If there is already a check, it indicates the record has already been linked. Unchecking the box will remove the association.

3. The link will be present in the source case’s investigation.



Transferring Ownership

Transferring ownership is the act of changing the Jurisdiction and/or Program Area that the Investigation, Laboratory Report, and/or Contact Record is assigned to.

Transferring Jurisdiction

Once the jurisdiction is transferred, the Investigation, Laboratory Report, and/or Contact Record, can no longer be edited by the originating jurisdiction. Example: If an investigation is assigned to Public Health Region 4/5N but is transferred to Public Health Region 8, the Public Health Region 4/5N user will no longer be able to edit data, manage associations, or create notifications but will still be able to view the investigation; the edit access will be provided to Public Health Region 8 users who previously were only able to view the investigation.

Transferring ownership will be done by the TB Unit Surveillance team and does not replace the Interjurisdictional Notification (IJN) process. Users should contact the TB Unit Surveillance team (TBHDSurveillance@dshs.texas.gov) if the jurisdiction of an investigation or laboratory report needs to be transferred.

Transferring Program Area

Electronic laboratory reports (ELRs) may be automatically assigned a program Area, Tuberculosis, Hepatitis, Hansens Disease, etc. If a user identifies a lab report that was incorrectly assigned to Tuberculosis, they should contact the TB Unit Surveillance team (TBHDSurveillance@dshs.texas.gov).

Lab Reports

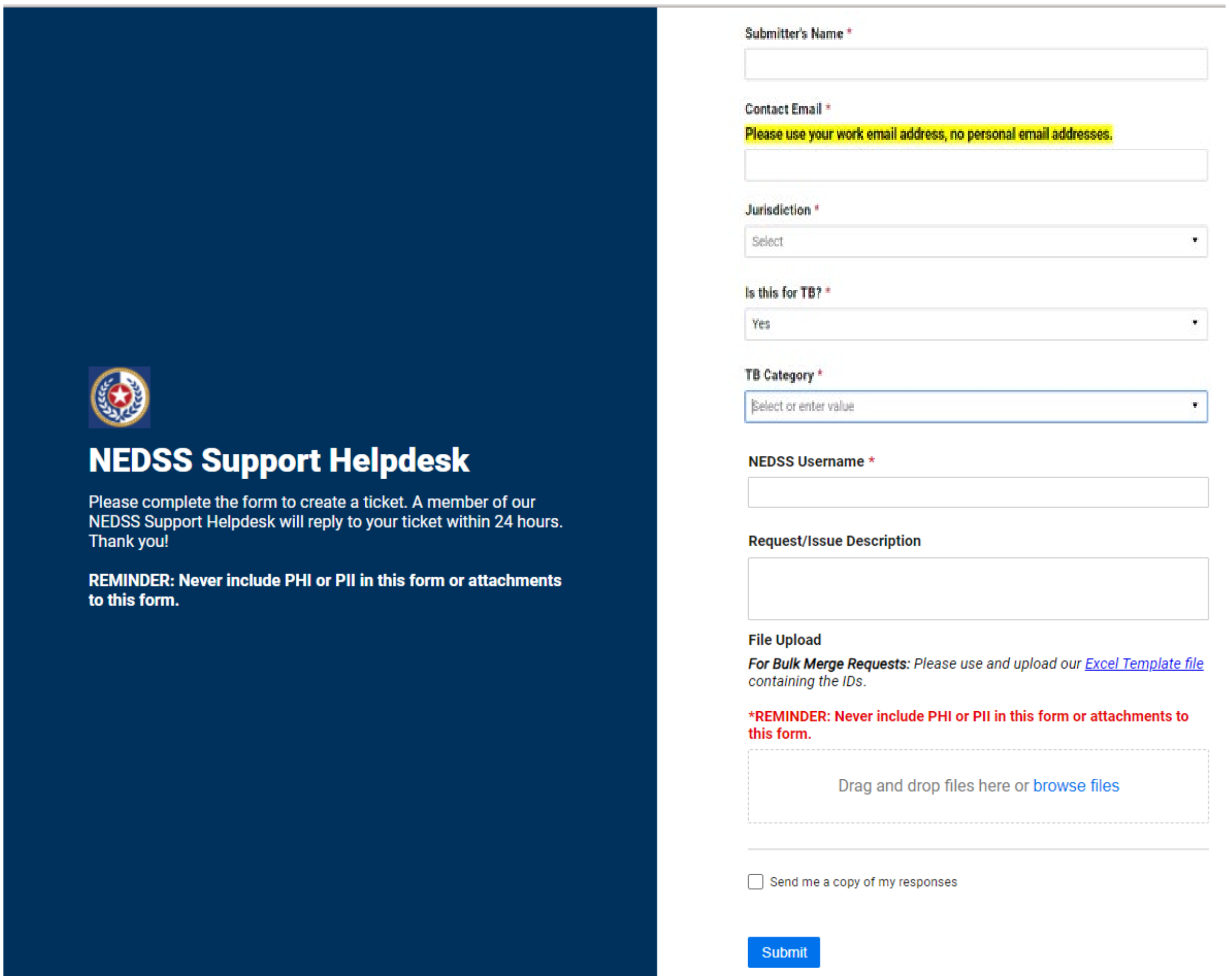
When an investigation is transferred to another jurisdiction, all laboratory reports associated with an investigation will automatically be transferred to the new jurisdiction.

Individual laboratory reports can be transferred to jurisdictions. However, if the laboratory report is associated to an investigation, the recommendation is to transfer the investigation (so the laboratory report is automatically transferred).

Reporting NEDSS Issues

For support with NEDSS, users will submit tickets to the NEDSS Helpdesk: NEDSS Support Helpdesk (smartsheet.com).

To submit a NEDSS Helpdesk ticket users will enter their name, email, jurisdiction, indicate if the request is related to TB, and select a TB request category.



NEDSS Support Helpdesk

Please complete the form to create a ticket. A member of our NEDSS Support Helpdesk will reply to your ticket within 24 hours. Thank you!

REMINDER: Never include PHI or PII in this form or attachments to this form.

Submitter's Name *

Contact Email *

Please use your work email address, no personal email addresses.

Jurisdiction *

Select

Is this for TB? *

Yes

TB Category *

Select or enter value

NEDSS Username *

Request/Issue Description

File Upload

For Bulk Merge Requests: *Please use and upload our Excel Template file containing the IDs.*

***REMINDER: Never include PHI or PII in this form or attachments to this form.**

Drag and drop files here or browse files

Send me a copy of my responses

Submit

NEDSS Helpdesk ticket request categories will include:

- Unlock Account/Password Reset
- NEDSS Report Issues
- NEDSS Error/Slowness
- Connection/Accessibility Issues
- NEDSS General Questions
- Patient merge/deduplication
- ELR questions or issues
- Transfer Jurisdictions
- Investigation Merges
- Contact Deletion
- Epidemiology Concerns
- Surveillance & Other General Questions

Requesting Password Resets

Password resets should be requested via the NEDSS Support Helpdesk: NEDSS Support Helpdesk (smartsheet.com)

Enter required fields and select “Unlock Account and/or Password Reset”.