



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.



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

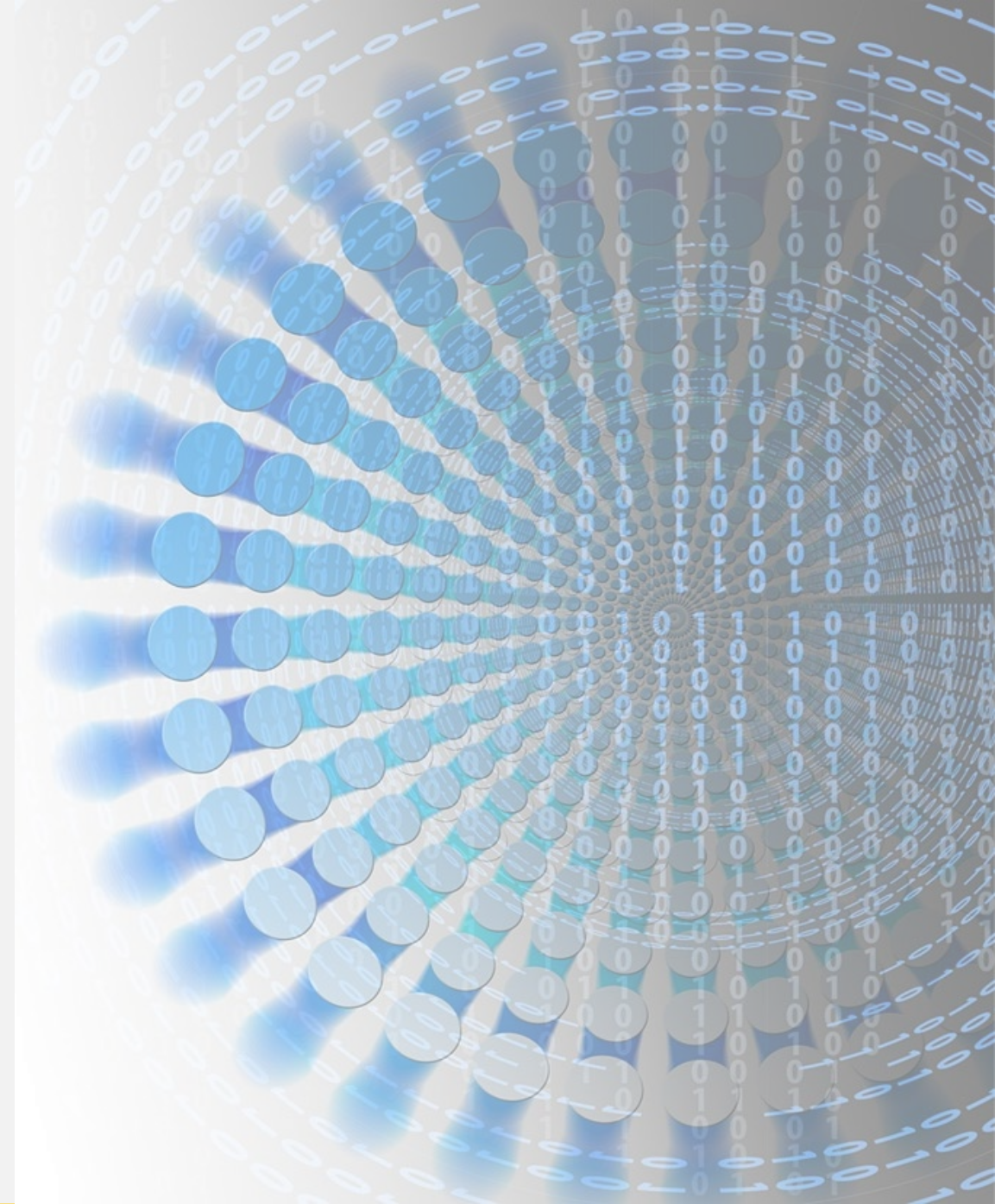
NBS: NEDSS-based system

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

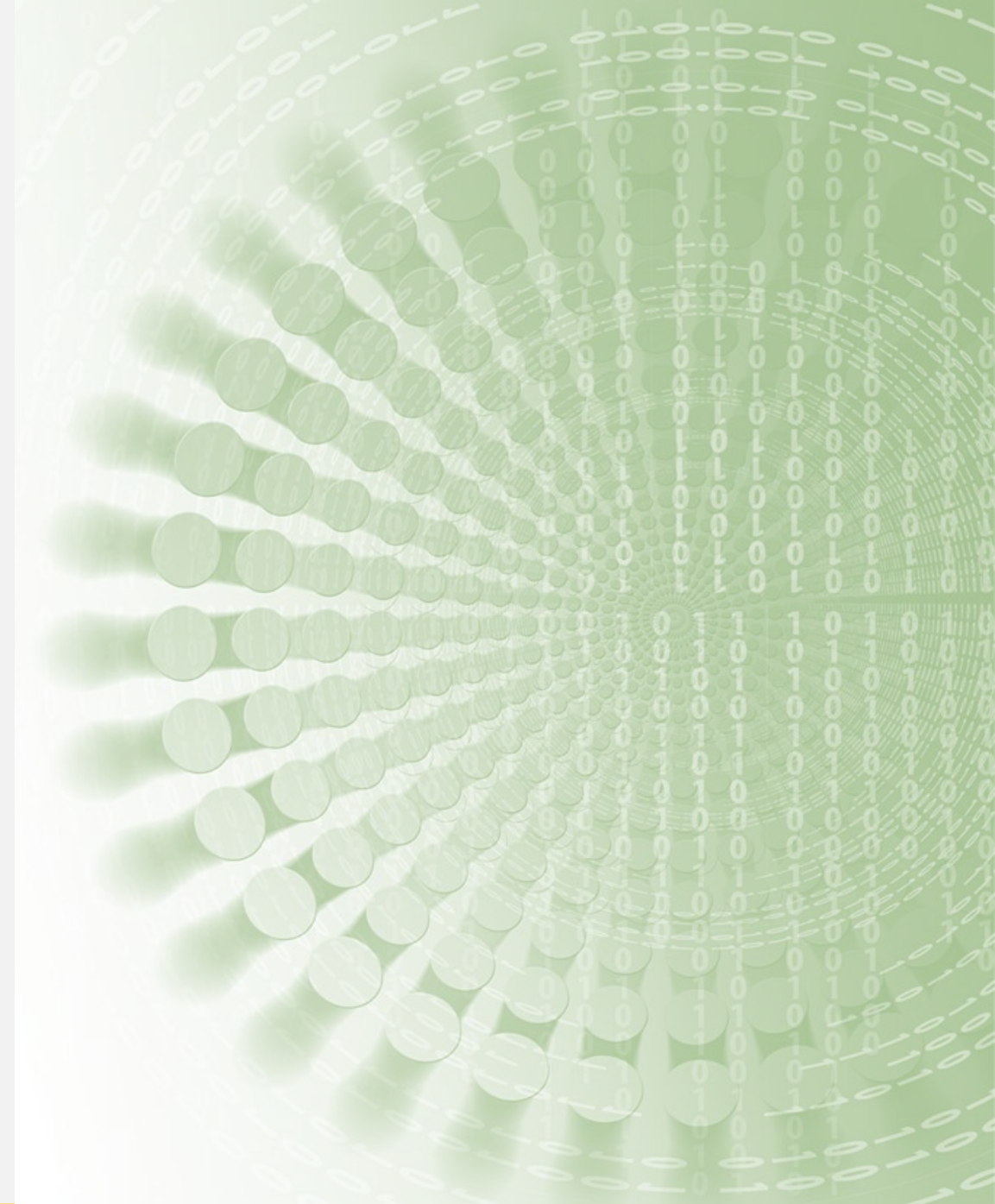
Notifications: Electronic messages sent to CDC to report a verified case of an NND



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*



[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:

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:

Password:

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](#)

Notices

Friday, December 22, 2023

... will be offline from 11:00am -11:30am for maintenance.

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.

NEDSS Homepage Dashboard

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

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

Release 6.0.14.1-GA Dashboard

User : Name here



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.*

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

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

Release 6.0.15.1-GA Dashboard

User : Name here



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)

My Queues

Default Queues

- Open Investigations
- Rejected Notifications
- Documents Requiring

Priority Custom Queues

- Open Investigations
- Open Suspect TB I

Notices

Friday, December 22, 2023

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

My Reports

There are no private reports available.

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

NEDSS Homepage Dashboard

Home | Data Entry | Open Investigations | Reports |

Help | Logout

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)

[Advanced Search](#)

My Queues

Default Queues

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

Private Custom Queues

- Open Investigations Approved
- Open Suspect TB Investigation

Notices

Friday, December 22
NEDSS Training will b

My Reports

There are no private reports available.

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

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'.
'Contains', enter % at start of text or us

Last Name:

First Name:

DOB:

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):

(Separate IDs by commas, semicolons

[Advanced Search](#)

My Queues

Default Queues

Notices

Friday, December 22, 2023

NEDSS Training will be offline from 11:00am -11:30am for maintenance.

Important information for NEDSS users will be placed in the **Notices** section by the NEDSS team.

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)

[Advanced Search](#)

My Queues

Default Queues

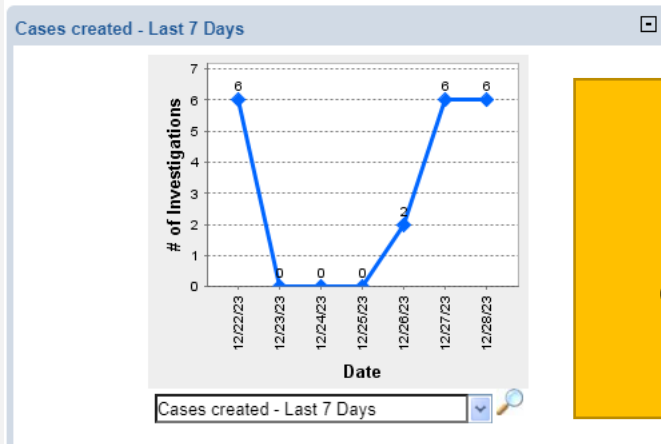
- Open Investigations (737)
- Rejected Notifications Queue (0)
- Documents Requiring Review (17)

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)

[Advanced Search](#)

My Queues

Default Queues

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

Private Custom Queues

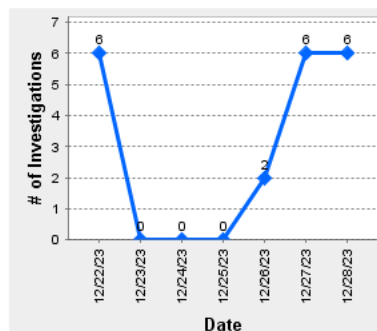
- Open Investigations Approved
- Open Suspect TB Investigation

Notices

Friday, December 22, 2023

NEDSS Training will be offline from 11:00am -11:30am for maintenance.

Cases created - Last 7 Days




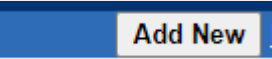


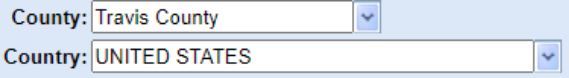
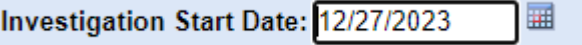
Cases created - Last 7 Days

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



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):

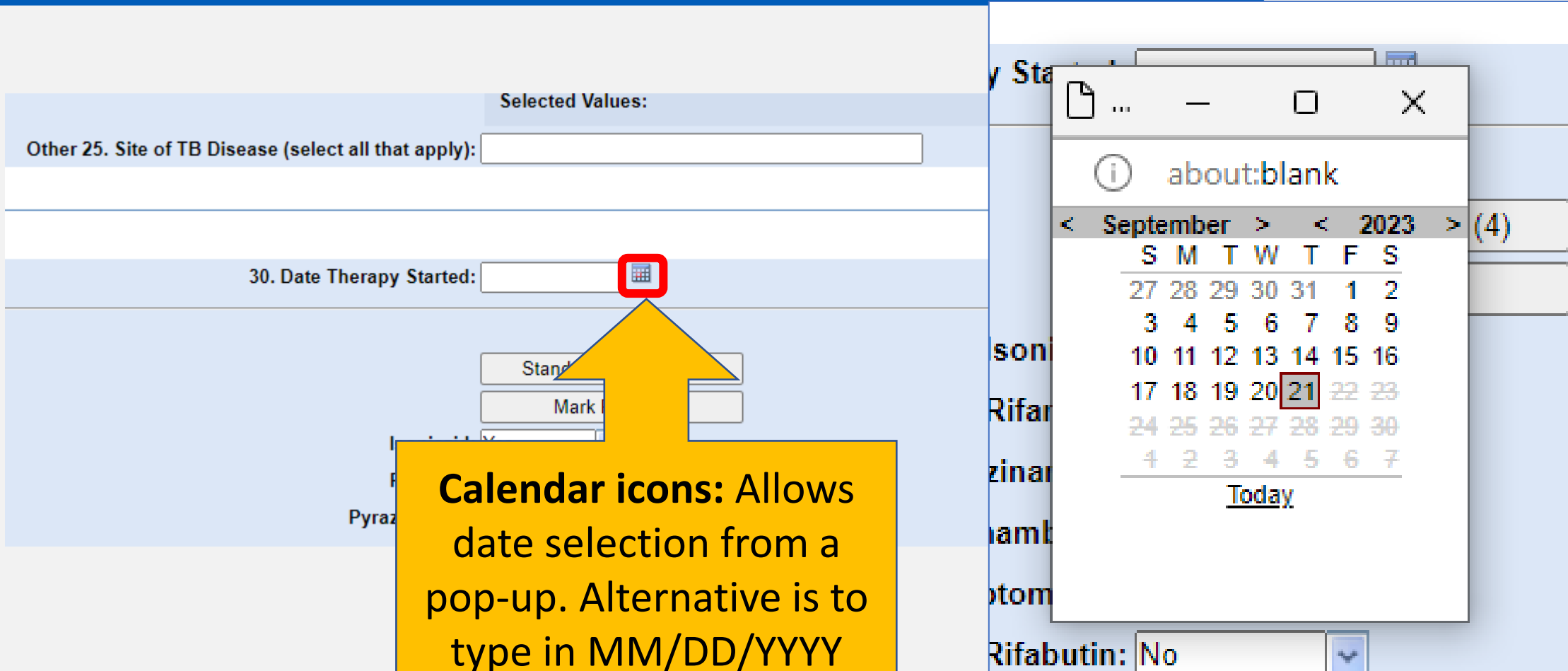
30. Date Therapy Started:

Standard

Mark

Pyraz

Rifabutin: No



The image shows a screenshot of a web-based form with several input fields. A red square icon with a calendar grid is positioned over the 'Date Therapy Started' field. A yellow arrow points from a text box below to this icon. To the right, a calendar pop-up window is displayed, showing the month of September 2023. The date '21' is highlighted with a red box. The calendar window has a title bar with standard window controls and a title 'about:blank'. The calendar grid shows days of the week (S, M, T, W, T, F, S) and dates from 27 to 7. The word 'Today' is centered below the grid.

S	M	T	W	T	F	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
4	2	3	4	5	6	7

Today

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

NEDSS Icons and Features

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


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](#)

<u>Patient ID</u>	<u>Name</u>	<u>Age/DOB/Sex</u>	<u>Address</u>	<u>Phone/Email</u>	<u>ID</u>
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	

NEDSS Icons and Features

Patient File User: Name here 

[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 [Back To Top](#)

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

Race
American Indian or Alaska Native
Ethnicity
Hispanic or Latino

Open Investigations (1) [Back To Top](#)

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

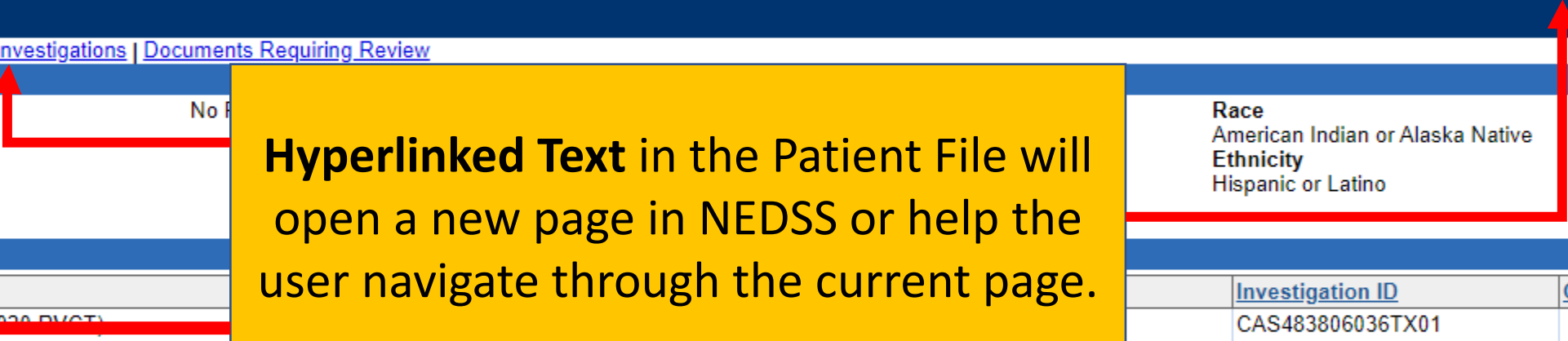
Documents Requiring Review (0) [Back To Top](#)

[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

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](#)

[+ Risk Factors](#)

[+ Diagnostic Testing](#)

[+ Chest Imaging](#)

[+ Additional Imaging](#)

[+ Epidemiologic Investigation](#)

[Back to top](#)

[Back to top](#)

[Back to top](#)

[Back to top](#)


[Back to top](#)

[Back to top](#)






Hyperlinked Text in an Investigation or Laboratory Report will help the user navigate through the page or return the user to the Patient File or Queue.

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

NEDSS Icons and Features

View Investigation: Tuberculosis (2020 RVCT) User Name here 

[Return to File: Summary](#)

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](#)

Colored Text:
Red text in an Investigation or Laboratory Report indicates a Section Header.
Dark blue text indicates a Subsection Header.

NEDSS Icons and Features

View Investigation: Tuberculosis (2020 RVCT) User Name here 

[Return to File: Summary](#)

Manage Associations Create Notifications Transfer Ownership

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](#)

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

NEDSS Icons and Features

View Investigation: Tuberculosis (2020 RVCT)

User : Name here



[Return to File: Summary](#)

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):

Clear

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

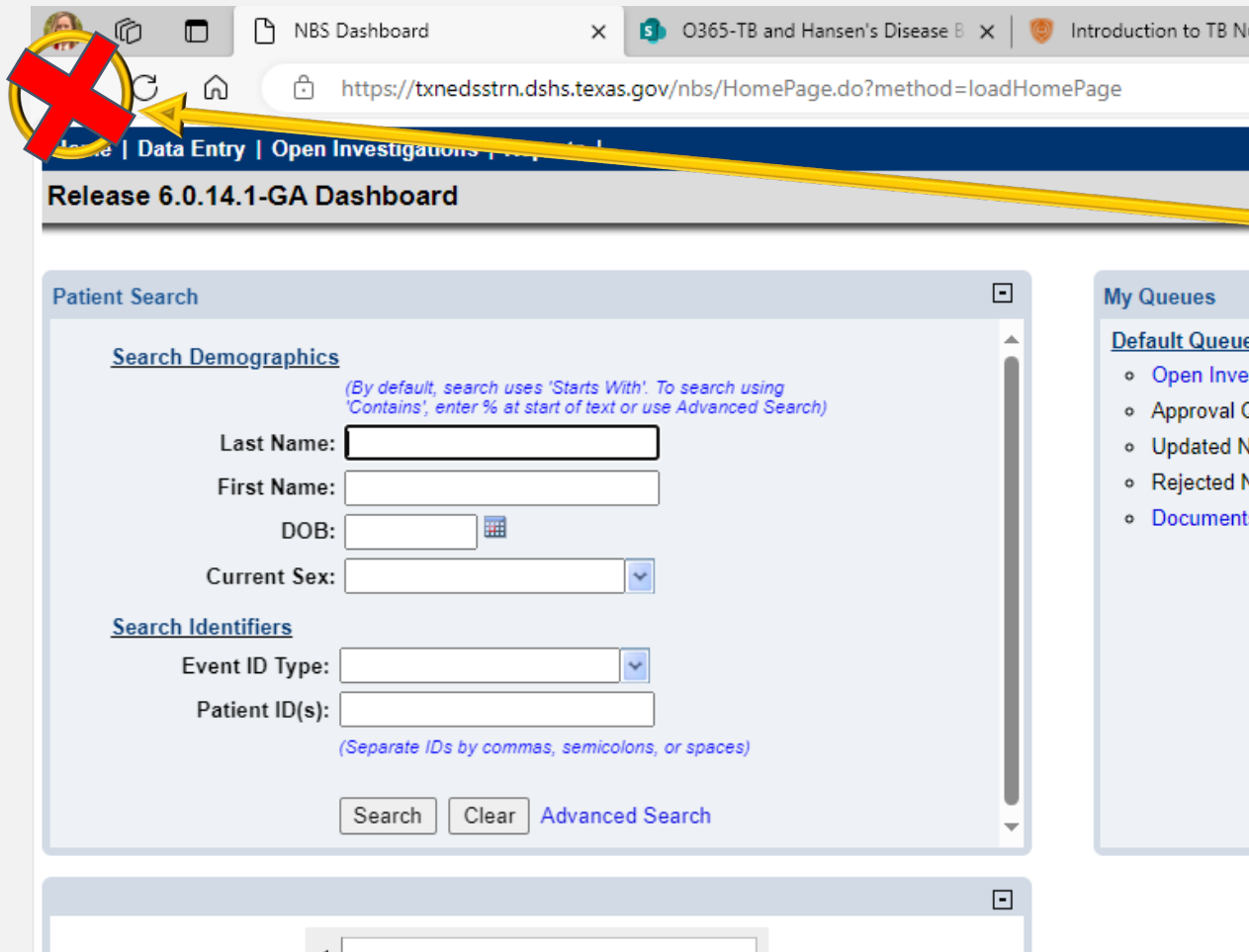


Use Microsoft Edge if possible. It is most compatible with using NEDSS.



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).

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.



NEDSS Homepage Dashboard

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**.

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)

Cases created - Last 7 Days

Day	# of Investigations
1	167
2	147
3	159
4	143
5	144
6	144
7	144

My Queues

Open Investigations (957)

Documents Requiring Re

My Reports

There are no private reports available.

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)

- 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.

Search for a Patient File



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Report of Case and Patient Services

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

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 Department Name of person completing this form: _____

Facility responsible for patient care: Public Health Hospital Other (specify): _____

Signs/Symptoms at DX (Check all that apply)

- Fever Weight Loss ($\geq 10\%$)
- Chills Other: _____
- Cough Productive Cough
- Hemoptysis
- Night Sweat

Date of earliest onset _____

Chronic New
 If Absent If Present

11/2/2023
Unknown
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.

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)

Search

Clear

Advanced Search

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.



Situation 1: The search yields multiple results.



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: mer

First Name: ari

DOB: 11/17/1989

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):

(Separate IDs by commas, semi-colons, or spaces)

Search

Clear

Advanced Search

Enter:

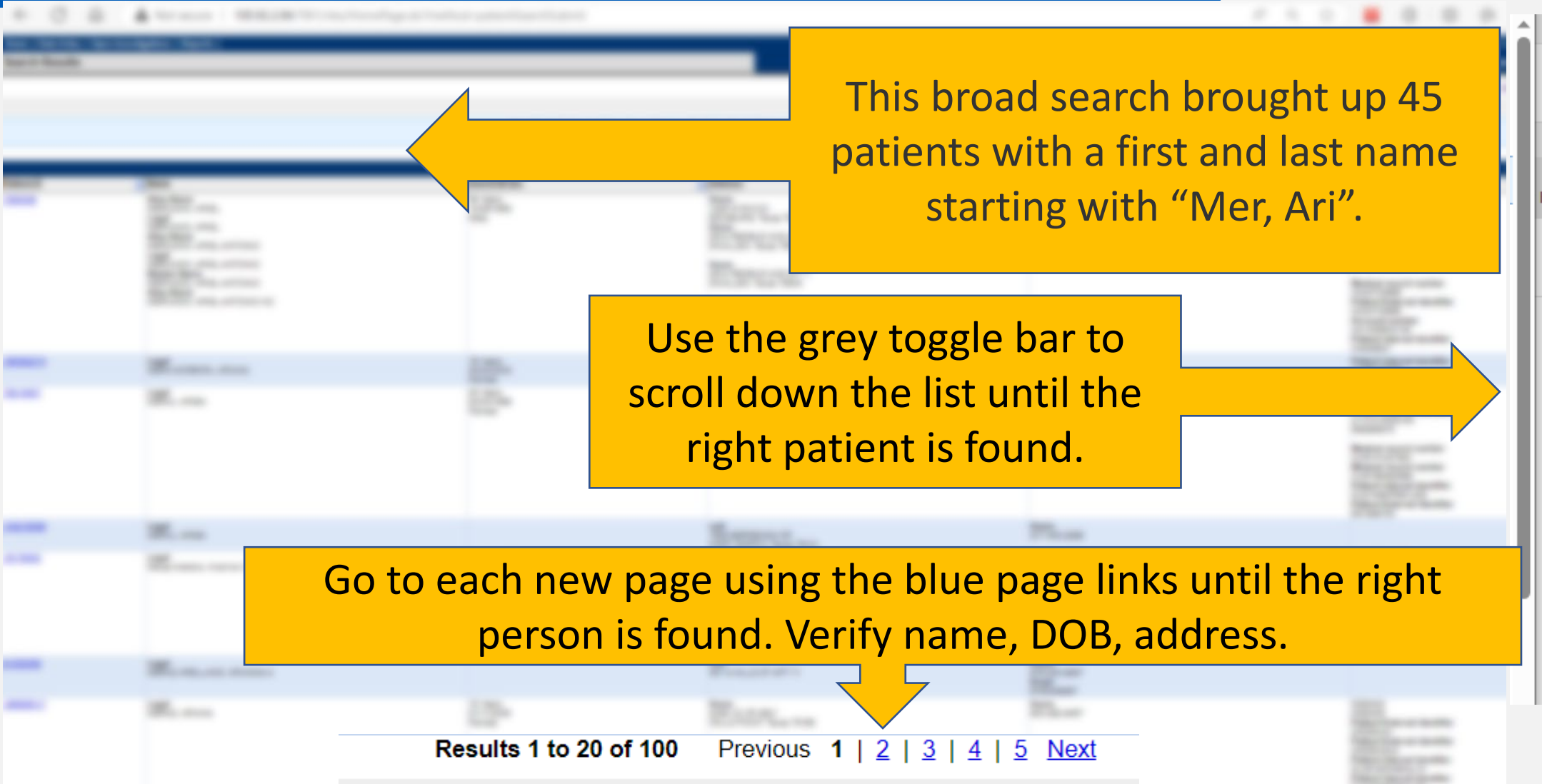
Last Name: **Mer**

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".

The screenshot shows a search results page with a table of patient records. A yellow callout box with an arrow points to the top of the table. Another yellow callout box with an arrow points to the right side of the table, indicating scrolling. A third yellow callout box with an arrow points to the pagination links at the bottom of the page.

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

[24360630](#)

Legal

Mermaid, Ariel
Alias Name
Little Mermaid, Ariel

38 years

Temp

Mckir

number

When the right patient is found, select their blue patient ID on the left side of their name.

Situation 1: Multiple Results

[Home](#) | [Data Entry](#) | [Merge Patients](#) | [Open Investigations](#) | [Reports](#) | [System Management](#)

Patient File

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

User: Name here



Delete

Print

Ariel Mermaid | Female | 01/01/1985 (38 Years)

Patient ID: 24384002

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 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.



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: mer

First Name: ari

DOB: 11/17/1989

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):

(Separate IDs by commas, semi-colons)

Search

Clear

Advanced Search

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

Search Results User: Name here 


[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

[New Search](#)

Your Search Criteria: Last Name Starts With 'olympics', resulted in 15 possible matches. Would you like to 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	<input type="text"/>
First Name:	Starts With	<input type="text"/>
Date of Birth:	Equal	<input type="text"/> <input type="text"/> <input type="text"/>
Current Sex:		<input type="text"/> <input type="text"/>
Street Address:	Equal	<input type="text"/>
City:	Equal	<input type="text"/>
State:		<input type="text"/> <input type="text"/>
Zip:		<input type="text"/>
Patient ID(s):		<input type="text"/> <small>(Separate IDs by commas, semicolons, or s</small>

Advanced Search

Patient Search | Event 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.*

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

Find Patient

User : Kathryn Yoo

DEV-5

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

Search Criteria

Last Name:	<input type="text"/>	<input type="text"/>
First Name:	<input type="text"/>	<input type="text"/>

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	

'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:

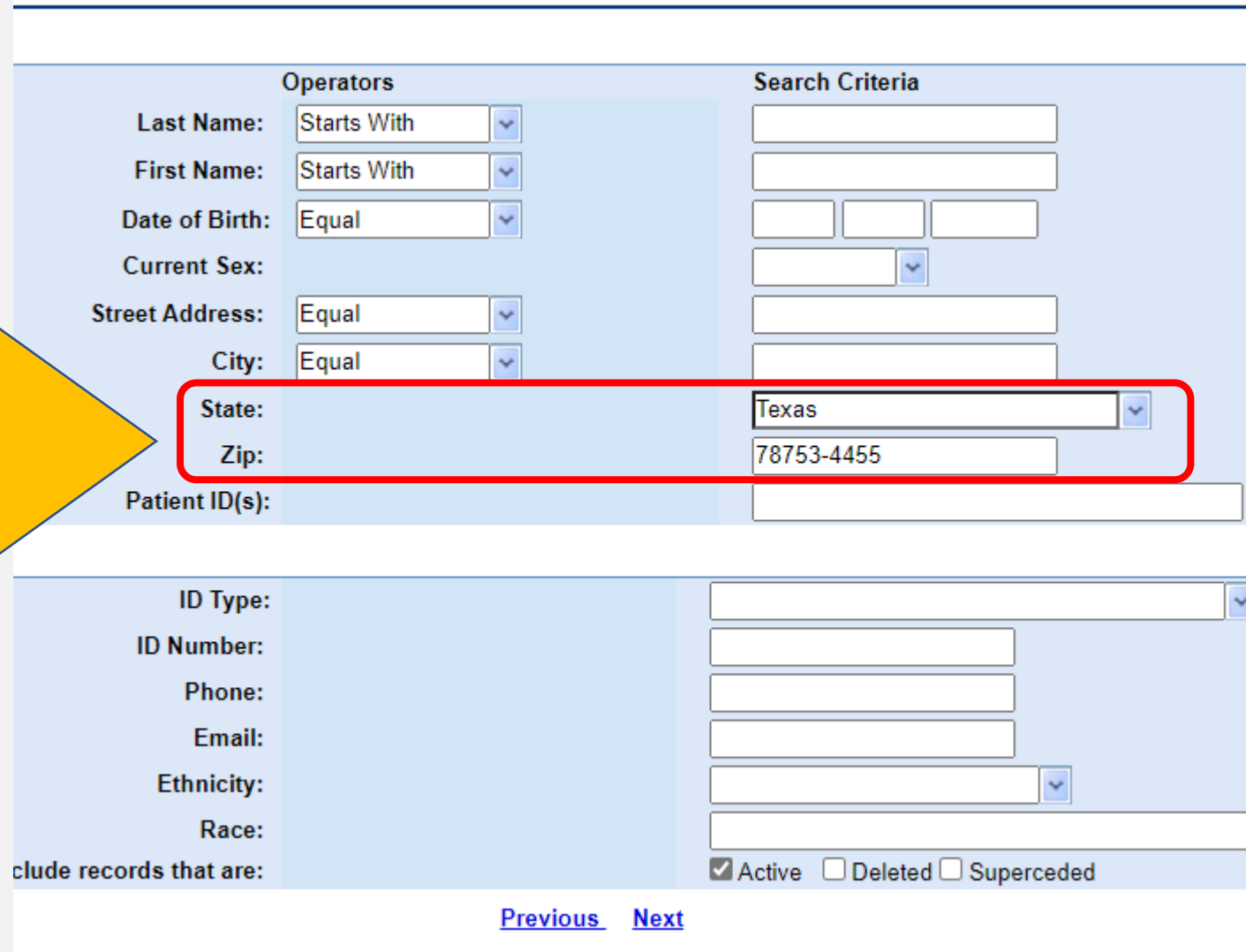
1. **'Contains'** option can be used when user has a partial address, i.e., the street number but not street name.
2. **'Equal'** is used when user has the full address.
3. **'Not Equal'** should not be used.

The screenshot shows a search interface with two main sections: 'Operators' and 'Search Criteria'. The 'Operators' section includes dropdown menus for 'Last Name', 'First Name', 'Date of Birth', 'Current Sex', 'Street Address', and 'City'. The 'Search Criteria' section includes text input fields for each of these categories. A red box highlights the 'Street Address' and 'City' dropdown menus, which are currently set to 'Equal'. The 'Street Address' dropdown menu is open, showing three options: 'Contains', 'Equal', and 'Not Equal'. Below the 'Street Address' and 'City' fields are 'State', 'Zip', and 'Patient ID(s)' fields. The bottom section of the form includes 'ID Type', 'ID Number', 'Phone', 'Email', 'Ethnicity', and 'Race' fields, along with a checkbox for 'Include records that are:' with options for 'Active', 'Deleted', and 'Superseded'. At the bottom right, there are links for 'Previous' and '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 two main sections: 'Operators' and 'Search Criteria'. The 'Operators' section includes fields for Last Name, First Name, Date of Birth, Current Sex, Street Address, and City, each with a dropdown menu for the operator type (e.g., 'Starts With', 'Equal'). The 'Search Criteria' section includes text input fields for the corresponding search terms. A red box highlights the 'State' dropdown menu, which is currently set to 'Texas', and the 'Zip' text input field, which contains '78753-4455'. Below these fields is a 'Patient ID(s):' text input field. The bottom section of the form includes fields for ID Type, ID Number, Phone, Email, Ethnicity, and Race, along with a 'Patient ID(s):' field. At the bottom right, there are checkboxes for 'Active', 'Deleted', and 'Superseded', with 'Active' checked. Navigation links for 'Previous' and 'Next' are located at the bottom center.

Operators	Search Criteria
Last Name: Starts With	
First Name: Starts With	
Date of Birth: Equal	
Current Sex:	
Street Address: Equal	
City: Equal	
State: Texas	
Zip: 78753-4455	
Patient ID(s):	

ID Type:	
ID Number:	
Phone:	
Email:	
Ethnicity:	
Race:	
Patient ID(s):	

include records that are: Active Deleted Superseded

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

Searching by Patient ID(s)

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

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 displays an advanced search form with the following elements:

- ID Type:** A dropdown menu with a list of options: Account number, Alternate person number, CHIP Identification number, Driver's license number, and ImmTrac ID.
- ID Number:** A text input field.
- Phone:** A text input field.
- Email:** A text input field.
- Ethnicity:** A dropdown menu.
- Race:** A dropdown menu.
- Include records that are:** A section with three checkboxes: Active, Deleted, and Superseded.
- Navigation:** [Previous](#) and [Next](#) links.

Practice Searching for a Patient



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



Creating a Patient File

Start with a Search

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

Click **Search**

Search


Clear

Advanced Search

Creating a Patient File

Start with a Search

Home | Data Entry | Open Investigations | Reports | Help | Logout

Search Results User : kathryn yoo 

[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](#) ?

<u>Patient ID</u>	<u>Name</u>	<u>Age/DOB/Sex</u>	<u>Address</u>	<u>ID</u>
Nothing found to display.				

| Remove All Filters/Sorts 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 web form for entering patient data. The form is organized into sections with expandable/collapsible headers:

- Basic Demographic Data** (Collapsed)
 - General Information**
 - Information As of Date: 01/11/2024 (with a calendar icon)
 - Comments: (Text area)
 - Name Information**
 - Last Name: Mer
 - First Name: Ari
 - Middle Name: (Empty)
 - Suffix: (Dropdown menu)
 - Other Personal Details**
 - DOB: 11/11/1989 (with a calendar icon)
 - Current Age: 34 Years
 - Current Sex: (Dropdown menu)
 - Birth Sex: (Dropdown menu)
 - Is the patient deceased?: (Dropdown menu)
 - Date of Death: (with a calendar icon)
 - Marital Status: (Dropdown menu)
 - State HIV Case ID: (Text field)
 - Address**
 - Street Address 1: (Text field)
 - Street Address 2: (Text field)
 - City: (Text field)
 - State: Texas (Dropdown menu)
 - Zip: (Text field)
 - County: (Dropdown menu)
 - Census Tract: (Text field)
 - Country: United States (Dropdown menu)
 - Telephone** (Collapsed)
 - Ethnicity and Race Information**
 - Ethnicity: (Dropdown menu)
 - Race: (List of radio buttons)
 - American Indian or Alaska Native
 - Asian
 - Black or African American
 - Native Hawaiian or Other Pacific Islander
 - White
 - Other
 - Refused to answer
 - Not Asked
 - Unknown
 - Identification** (Collapsed)

At the bottom of the form, there are three buttons: **Submit** (highlighted with a red box), **Cancel**, and **Add** (partially visible).

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

Congratulations! You have successfully created a new 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](#)

Print

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

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 Home null	No ID Info Available	Race Asian, Black or African American Ethnicity Not Hispanic or Latino
---	--	-----------------------------	---

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

[Print](#)

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

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

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

Patient Summary [Back To Top](#)

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

Administrative [Back To Top](#)

Name [Back To Top](#)

	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*

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

Questions?

End of NEDSS TB Training, Course 1