v19.2 Updates Training for Local Health Departments

For CMR version 19.2, revised September, 2020.

WISCONSIN **phin**
PUBLIC HEALTH INFORMATION NETWORK

WEDSS
WI ELECTRONIC DISEASE SURVEILLANCE SYSTEM

WISCONSIN DEPARTMENT *of* HEALTH SERVICES

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TRAINING INFORMATION

COURSE DESCRIPTION

In this session, we will provide training on the changes in functionality in the WEDSS version 19.2 upgrade to be released in October 2020. This course is strongly recommended for all WEDSS local health department (LHD) users.

LANDING PAGE

The top of the WEDSS screen now has a Landing Page Icon (🏠):

Clicking the Landing Page icon at any time in WEDSS will return the user to their landing page. Investigators will return to the My Caseload screen and non-Investigators will return to the Search screen.

MY PROFILE

There is a new "My Profile" button on the far right of the WEDSS menu bar:

Clicking this navigation option will take users to their profile page, where they can select the edit button to update their information.
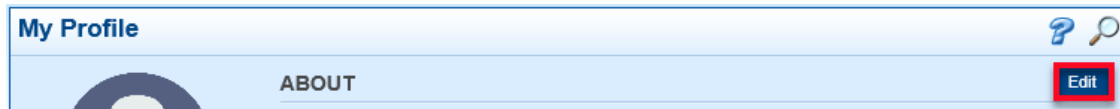
Users can update their Last and First names, email address, and phone number from this screen, clicking the Save button to retain the changes. In addition, quick links are available to help users update their password and/or security questions, as well as set their out of office status. If a user sets their status to Out of Office, anyone assigning cases to that user will receive a pop-up alert indicating that the user is out of the office.
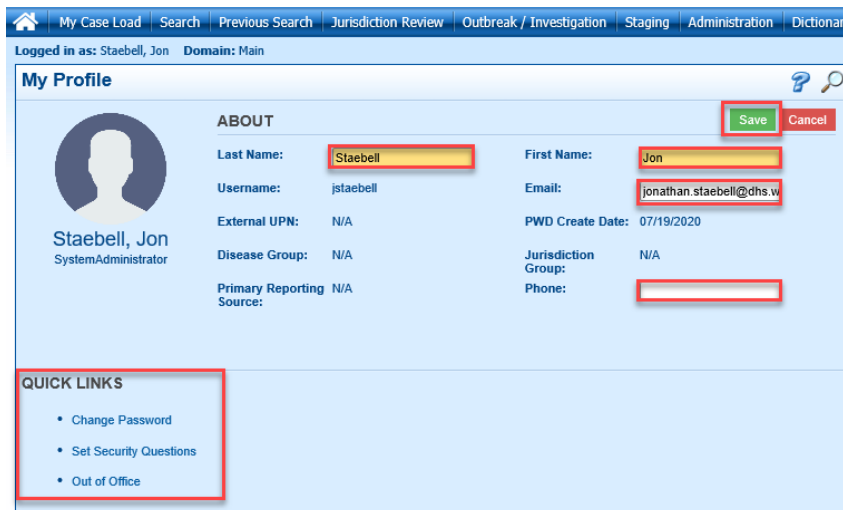
FORCED PASSWORD RESETS

There is a new feature that will force users to change their password before logging in, when it has been reset by WEDSS administration. In previous versions changing the password was encouraged but not forced.
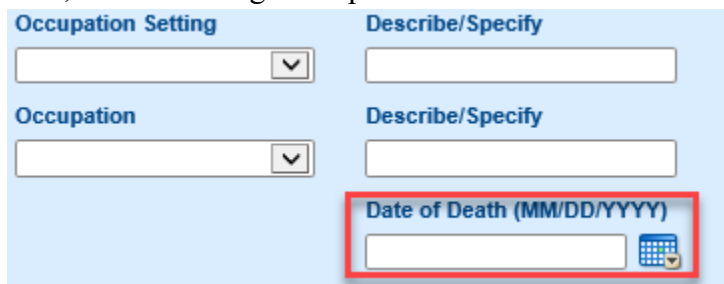
AUTO IMPORT UTILITY

One of the largest changes in v19.2 happens largely behind the scenes: there is a new capability to auto import negative COVID-19 lab results. Those negative lab results will be attached to existing cases or will create a new disease incident and be closed as "not a case", as appropriate. So, LHD users will not see as many negative COVID-19 lab results in staging. The capability could be used later for other diseases if warranted.

PATIENT DATE OF DEATH FIELD

A date of death field has been added to the Patient tab. This field is person centric rather than by Disease Incident. When this field is updated on any of a person's records to reflect that they are deceased, this information will be added to all of their records in WEDSS. When this happens, each Disease Incident will display the date of death on the Patient tab, regardless of whether they died from that disease or not.

Date of death is updated periodically by WEDSS and can also be manually updated by LHD staff, while working on a specific record.

Note that the new Patient Date of Death field is separate from the Date of Death field available in the Investigation tab of disease incidents. Changing one field does not change the other. If a user attempts to add a date of death on the Investigation tab that is different from what is listed on the Patient tab, a pop-up will appear, advising of the discrepancy.

PATIENT SEARCH CHANGES

The Patient Search Screen in v19.2 has several enhancements, including:

1) Compound person search
2) Date of birth search
3) Soundex search

COMPOUND PERSON SEARCH

Clicking the "+" sign next to the Name field on the search screen enables search by additional fields beyond name, identifier, and date of birth. With the fields expanded, search can be performed by address, phone, date of death, patient ID, medical record number, and/or date created. In previous versions of WEDSS many of these options were radio buttons that were always displayed; now they only appear when the "+" sign is clicked.

For example, entering "54911" in the Zip Code field and clicking Find locates all patients in that zip code. Multiple search fields can be used to conduct a compound search. For example, entering "test" for name, "%/%/2001" for date of birth (DOB), and "53703" for Zip Code will find all patients with the name "test" who were born in the year 2001 and have an address in the 53703 zip code:

The new Date of Death (DOD) field in the patient record can be used to filter searches. Note the DOD icon can be clicked to enable a range of dates to be used:

SEARCH BY DATE OF BIRTH OR AGE

A patient search can be conducted using an exact date of birth, a partial date of birth, or a range of birth dates. To search by the exact date of birth, enter it in the DOB field and click Find.

To search by partial date of birth, use the wildcard character (**%**). For example, "**%**/**%**/2001" will match every date of birth in the year 2001. "08/**%**/2015" will match every date of birth for August 2015.

To search by a range of dates of birth, click the calendar icon next to Date of Birth (DOB). Doing so will open a "To" date field in the search:

From there, enter a beginning date in the "From" field and an ending date in the "To" field. For example, to find patients with birthdates in August and September 2015 search with a From date of "08/01/2015" and a To date of "09/30/2015." Note that some records in WEDSS may not contain a DOB.

To search for records that do not have a Date of Birth entered, use the Age field. Although the Age field can also be expanded to use a ranged search, use of the Age field for searching will *only* return records with **no** date of birth entered; it does not return the records of people with a date of birth that matches the age requested. Users are advised to only use the Age field after a search using a DOB range has not yielded the desired results.

SEARCHING USING SOUNDEX

Soundex is a search option that allows "sound alike" matches that works on both first and last names. For example, if the Soundex option is enabled, searching for "Smith, John" will also return patients with last names such as Smith, Smithe, and Smythe, and first names "Jon" as well as "John."

Without Soundex enabled:

With Soundex enabled:

Note that Soundex only works if the first letter of the name matches – "Chris" does NOT match "Kris," for example.

DISEASE INCIDENT SEARCH ENHANCEMENTS

RECENTLY VIEWED

When searching by Disease Incidents, there is a new "Recently Viewed" option. Selecting that option will open From and To date fields. Leaving the date fields blank and clicking Find will return all DIs that have been viewed by the user within the last seven (7) days.

To further refine the Recently Viewed results, users can enter dates in the From and To fields and click Find. For example, entering "t-2" in the From field and "t-1" in the To field will display disease incidents viewed in the two days prior to today. Note: recently viewed searches are limited to the last seven (7) days, even when using the From and To fields.

CHANGE DISPLAY FOR DISEASE INCIDENT SEARCH

When searching for Disease Incidents, click the Disease radio button and select the diseases to search. Before clicking Find, click the grid icon on the far right of the screen to change the output fields:

Clicking the grid Icon will bring up a pop-up window which will allow changes in the information that will be displayed:

Check or uncheck items in the Select column to display or not display those columns (in the example above "Current" will display but "Age" will not). Note that some columns, such as ID and Type, are mandatory and cannot be unselected.

To change the order in which columns display, click on a row and then click Up or Down to move column left or right in the output display. The width of the display column can also be changed to either a fixed number of pixels or "auto." Clicking the Save button will save the view for future Disease Incidents searches for the selected disease. Clicking the Default button will revert the output view to the default WEDSS settings.

STAGING AREA SEARCH ENHANCEMENTS

In v19.2, search can be filtered by disease group as well as by disease. For example, click the Grouping button and select "All diseases except HIV and TB" and click Search to exclude human immunodeficiency virus (HIV) and tuberculosis (TB) from the staging list:

Search can also be limited to test results with a desired result, and can be combined with other search criteria. For example, to find incoming staging lab results that are positive for coronavirus disease, novel 2019 (COVID-19), enter:

Note: when using the Value field, remember that different labs may return different values. For example, one lab may return a value of "Positive" for a positive result while another lab returns a value of "Detected." Multiple searches may need to be run to catch all combinations.

At the bottom of the Staging screen, the "Create a New Person and Disease Incident Record" check box has been moved to a more prominent position. Also, when importing, users can assign an Investigator in the bottom right of the staging screen:

To use the Routing option first select an import option. Then click the Routing search icon , enter the name, click search, and select the Investigator.

Select the Import and Demographic options, and then click Import Selected Results. When the case is imported, it will be assigned to the selected Investigator.

JURISDICTION REVIEW ENHANCEMENTS

Enhancements to Jurisdiction Review in v19.2 include:
1) Changing the position of Record Type radio buttons
2) Ability to filter records by Date of Death
3) Enabling selection of multiple options when searching many fields

RECORD TYPE BUTTONS

To improve readability, the Record Type buttons have been moved to the top of the Jurisdiction Review search screen:

FILTER BY DATE OF DEATH

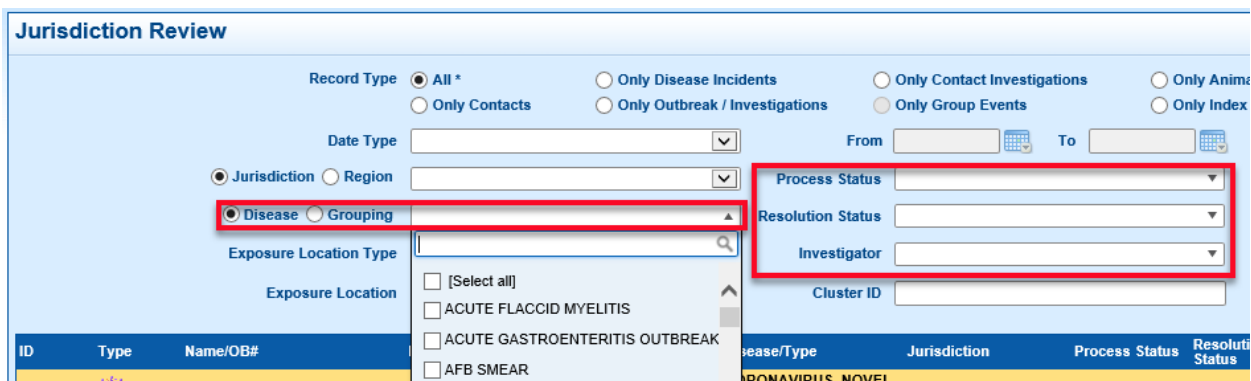In the Date Type drop down list, a new option for selecting a date range for date of death is now available:

The Date of Death field on the Investigation tab is used when filtering in Jurisdiction Review.

MULTI-SELECT OPTION

To enable more precise filtering of records in Jurisdiction Review searches, the following fields can include multiple selections:

- Disease
- Process Status
- Resolution Status
- Investigator

For each of these fields, opening the drop down list will allow for multiple selections. As an example, opening the Disease drop down list allows for individual diseases to be selected. Multiple options can be combined (e.g. both Disease and Process Status) to limit the search. For example, the disease drop down list could be set to "Hepatitis A; Hepatitis B, Acute; Hepatitis B, Chronic; and Hepatitis B, Perinatal":

In addition, the Process Status drop down list could be set to "New; Ongoing Investigation":

Clicking the Find button after selecting multiple search criteria will find those records in Jurisdiction Review that match all the criteria:

JURISDICTION ASSIGNMENT ENHANCEMENTS

Several enhancements to jurisdiction assignment are available in v19.2.

AUTOMATIC ASSIGNMENT TO OUT OF STATE JURISDICTION

In v19.2, incoming records such as lab results with an out of state address will be assigned to Non-Wisconsin jurisdiction. In previous versions of WEDSS, these records would be assigned to the jurisdiction of the provider, forcing LHD users to change the jurisdiction. With v19.2, LHD users should no longer see these results in staging, as they will automatically go to the Non-Wisconsin jurisdiction.

JURISDICTION ASSIGNMENT TO MOST RECENT

In v19.2, incoming records such as lab results with no patient address will be assigned to the patient's last known jurisdiction if there is a patient match. This means there may be more records in staging with no address, but in your jurisdiction. If the patient belongs in another jurisdiction, reassign the case in the Investigation tab.

SECONDARY JURISDICTION READ AND EDIT, INSTEAD OF READ ONLY

Just as in previous versions, when the Primary jurisdiction of a disease incident is changed, the former Primary jurisdiction will be set as the Secondary jurisdiction. In v19.2 authorized users in the Secondary jurisdiction will have read and edit capability, instead of the read-only capability they had in previous versions. For example, a user in Brown County may add Calumet County as the secondary jurisdiction because the patient lives in Brown County but works in Calumet County. In v19.2, authorized users in both jurisdictions will be able to read and edit the case.

AUDIT REVIEW SEARCH

Several search enhancements are available in Audit Review. Users can access Audit Review two ways: from the main WEDSS Menu via Administration – Audit Review.
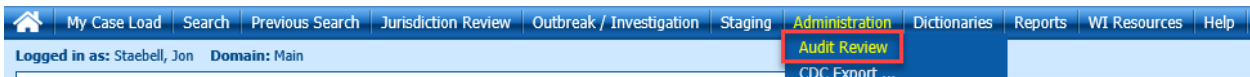
When accessed this way, the user needs to enter the record number they're looking for and click Find:

If the user is already in a record and wants to audit changes, they can simply click on the Audit Review icon.

A popup window will open enabling results to be filtered.
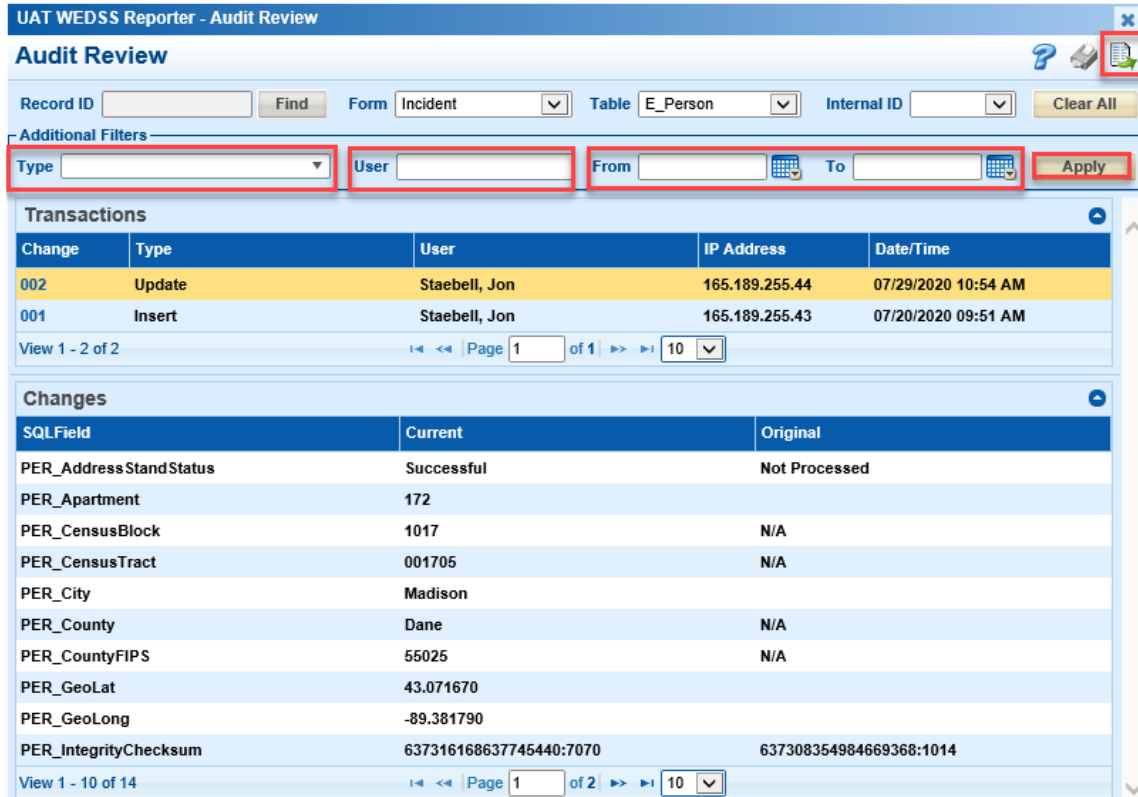
The new filtering options include:

1. **Type**: A multi-select dropdown enabling the user to filter record transactions according to the transaction type. For example, a user might wish to see just the merge and unmerge transactions for a record:
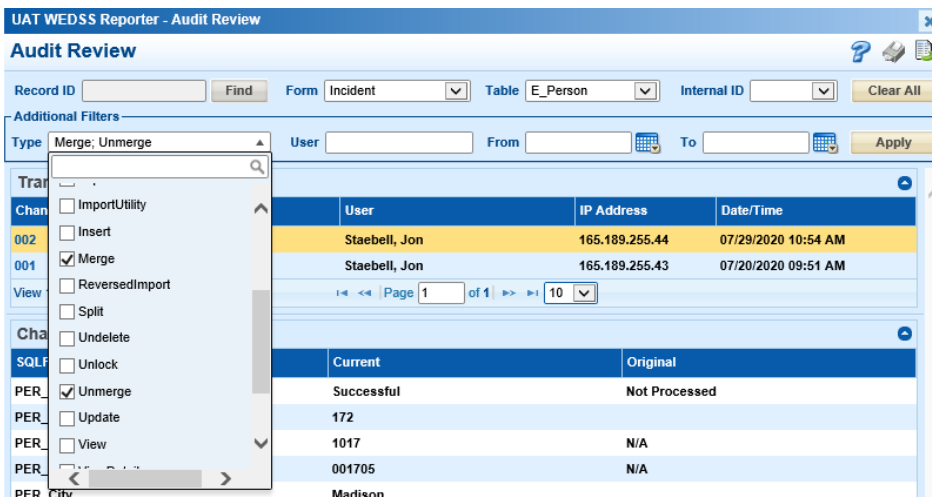
2. **User**: A "Lastname, Firstname" search similar to that on the Person Search tab. This will allow users to filter transactions performed by specific users.

3. **Date fields**: allows users to retrieve transactions within a specific date range.

Filter fields can be combined. For example, a user might search for all merge or unmerge transactions performed by a specified person in July of 2020:

In addition, audit results can be exported to Microsoft Excel in v19.2 using the Instant Export icon ( ) in the upper right of Audit Review.

NEW ALERT OPTION

A new option allows configuration of an alert based on changes to the resolution status. For example, LHD users can receive a WEDSS alert when the status of a case is changed to "confirmed."

Alerts can also be generated under the following conditions:

- A new record appears in staging.
- A new record is created (from staging or manually entered).
- A record is updated in any way.
- A record has something added to the filing cabinet.
- A record has a specific field that is set a particular way, such as the "STD Treated" field being set to "No."
- A record has its process status changed (recommended for "Returned to LHD").

Each of the above alerts can be configured for specific disease, gender, and age groups.

To create a new alert, contact the WEDSS Team at DHSWEDSS@wisconsin.gov.

ELR ENHANCEMENT

An enhancement has been made to Electronic Lab Reports (ELRs) that will impact LHD reports.

A "Reason For Study field" has been added. This new field helps to identify the reason why a test was ordered, for example: a hepatitis B virus (HBV) test may be ordered for a pregnant patient who is infected with hepatitis B, so that their infant may receive a vaccination to prevent the transmission of HBV. This field is available in reports, custom export, and Jurisdiction Review advanced search.

VIEWING ELECTRONIC CASE REPORT

VIEWING ELECTRONIC CASE REPORTS IN STAGING

In the Staging area of v16, users can view a PDF-rendered version of the staged electronic case report (eCR) by clicking on the "View Patient's EHR Report" button, as shown below:

In the PDF-rendered report, users can print and scroll through the report to see information contained on the various tabs of the report.

In the v19.2 Staging area, the same "View Patient's EHR Report" button is available, and the same information in the eCR will be available, but the rendered view of the report will look a bit different, as shown below:

Instead of scrolling down through the report, the user can click on the section headers on the left menu to navigate to different sections of the eCR. Upon importing from Staging, the information will continue to be parsed into the WEDSS forms, just as it does in v16.

VIEWING ELECTRONIC CASE REPORTS IN A DISEASE INCIDENT

Currently, information from an electronic case report is parsed and populates the forms in the Disease Incident. The original eCR is rendered as a PDF and filed in the electronic filing cabinet (EFC). When a user wishes to view the report in the EFC, the report appears similar to this:

State of Wisconsin Department of Health Services – Communicable Disease Reporting System
WEDSS Reporter
9/16/2020   10:52:55AM

Patient Name:		**Incident ID:**	4757645
Today's Date:	9/16/2020		
Disease:	CORONAVIRUS, NOVEL 2019 (COVID-19)	**Jurisdiction:**	County

Name:					
D.O.B.:	8/10/1994	**Age:**	26	**Record #:**	
Gender:	Male	**Pregnant:**		**Create Date:**	9/15/2020
Future Client No.:		**Delivery Date:**		**Closed Date:**	
Home Phone:	+1-608-	**E-mail Address:**			
Cellular Phone / Pager :		**Other Electronic Contact Information :**			

In the v19.2 EFC, the user will still be able to see a rendering of the original eCR in the EFC, but the report will look the same as when viewed in the Staging area, as shown below:

The user can click on the section headers on the left menu to navigate to different sections of the eCR.

SOCIAL NETWORK DIAGRAM

Note: the Social Network Diagram may not be available when v19.2 goes live, but will be available shortly thereafter.

Users can click on the Social Network Diagram icon (⬚) in a Disease Incident, Contact Investigation, Outbreak, or Group Event to see a diagram of contacts.

Note that the Network Diagram only shows linked contacts with a CI or DI. A linked contact that is neither a CI nor a DI will not appear on a network diagram. Newly linked records may not appear instantly in the Network Diagram.

The Network Diagram works with the Google Chrome, Safari, and Edge Chromium web browsers. The Network Diagram is currently unavailable in Internet Explorer 11, Edge (other than Chromium), and Firefox.

Users may need to zoom in or out with the mouse scroll button to see the entire Network Diagram. Different nodes represent the relationships between different record types, and locations or events. Nodes are differentiated by color coding and label (Record Type, ID, Icon, Symptomatic/Asymptomatic). Node types include Disease Incident, Contact Investigation, Outbreak, Group Event, and Exposure Location. When a Node is clicked, a dialog will open on the top left corner with brief record details regarding the Node:

The relationship between the Nodes are denoted by bold or dotted lines. There is a legend on the bottom left of the Network Diagram: a bold line indicates a household contact and a dotted line indicates a contact other than household.

There is a filter section on the right side of the Network Diagram page, which can be used to filter the relationships of the record chosen as the Diagram Context. Users can change the number of levels displayed, select or hide node labels, select types of nodes to display, and filter by date range, jurisdiction, and contact type. Users may need to scroll down to see all available filters.

CONTACT TRACING

ADDING CONTACTS

Users may continue to add contacts in the same way as in previous versions of WEDSS.

1. Open the case and select the "2019-nCoV Intervention" tab. Then click on the plus sign next to "Contacts (system)".

2. Next, click the ADD button.

A pop-up window will open.

3. Before entering the contact's data, click the Link Patient icon to search for the contact within WEDSS.

Another pop-up window will open.

4. Enter some of the contact's information into one or more of the search fields and click search.

If WEDSS does not display any matches, proceed as:

a. Manually enter their demographics in the pop-up window.
b. Click Add to enter an additional contact or OK to close the pop-up window.
c. End.

If WEDSS does display matches, proceed as:

a. Review the matches and click on the row containing the contact's demographic information. Then click OK.

Note: If WEDSS displays more than one record for the contact, choose the one with a Y in the Current column.

b. WEDSS will populate the Contacts (system) pop-up window with the demographics of the person selected.

c. Edit the contact's details if necessary and click Add to enter an additional contact or click OK to close the pop-up window.

5. Scroll down and click Save at the bottom of the Intervention tab.

6. If any of the contacts added via the Link Patient process were edited a popup window will open showing each contact that was edited.

Click the plus (+) icon to expand each patient or contact.

Compare both the original and modified demographic information.

Decide which action is appropriate: New Version, Correction, or Discard and select the corresponding radio button for each affected patient or contact.

- Select the **New Version** radio button when a patient changes their name, address, or other demographic information.
- Select the **Correction** radio button to apply modified demographic information to records for the affected person version.
- Select the **Discard** radio button to keep the original demographic information.

Click the Save button.

CONVERTING A CONTACT INTO A CONTACT INVESTIGATION

Most COVID-19 Contacts should be converted to Contact Investigations. To do so:

1. Open the Contact record by clicking on the ID number.

2. Then click the Create Investigation button

3. Click OK on the popup window.

Message from webpage

? Please confirm that you want to turn this Contact into an
Investigation

[OK] Cancel

4. Respond to the popup window about person versioning. To ensure data is not lost or overwritten, choose Yes to create a new person version in all cases.

TRAINING WEDSS Reporter - New Person Version

New Person Version

Do you want to create a new version of the person?

[Yes] No
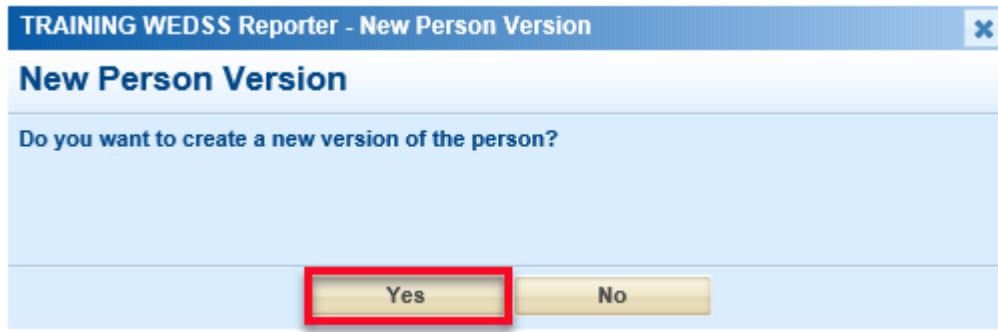
5. Click Cancel or OK to exit the contact record. **Note**: WEDSS will show the newly created Contact Investigation (CI) ID.

TRAINING WEDSS Reporter - Section Instance

Contacts (system)

ID-002
* Last Name: Duck
* First Name: Donald
Middle Name:
Name Suffix:
DOB: 01/01/1950
Age: 70
Gender: Male
Phone Number:

Street Address: 1000 S Whitney Way
Apartment:
City: Madison
State: WI
Zip: 53711
Jurisdiction:
Investigator:

Race
☐ American Indian or Alaska Native   ☐ Asian   ☐ Black or African American   ☐ Native Hawaiian or Other Pacific Islander   ☐ Other   ☐ Unknown   ☐ White

Type of Contact:
Date of Contact:
Exposure Event:
Cluster ID:

Priority:
Status:
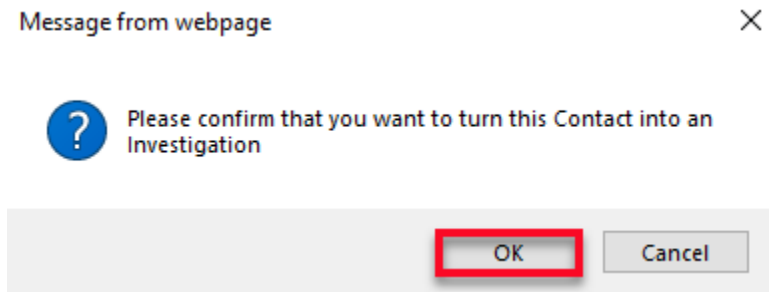Medication Used:
E-mail Address:
Other Electronic Contact Information:

CI 4950584

Link Patient

Create Disease Incident   Create Investigation   Delete

OK   Cancel   Add

Converting the Contact to a Contact Investigation automatically makes the contact accessible in the Contact Tracing Interface.

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GETTING TO THE NEW CONTACT TRACING INTERFACE

The new v19.2 Contact Tracing module can be accessed within a disease incident record. It can also be accessed from the main WEDSS Menu via WI Resources > Contact Tracing Worklist:
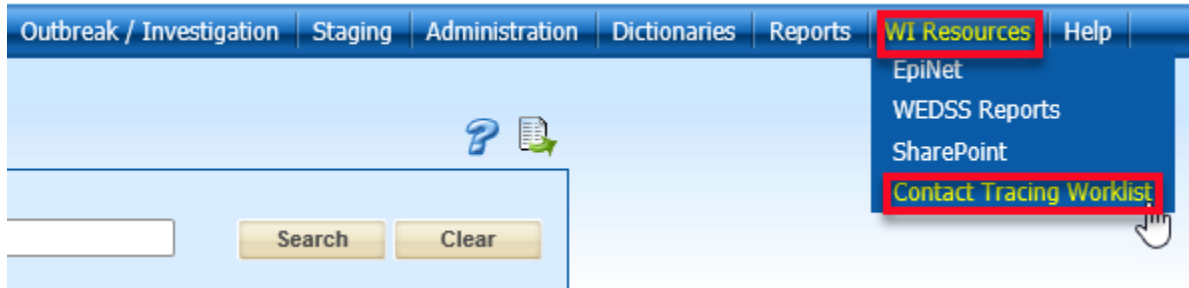
ADDING A CONTACT IN THE NEW CONTACT TRACING INTERFACE

Although it is possible to add a contact directly into the Contact Tracing Interface, it is not possible to link an *existing* contact from within the interface at this time. Therefore, only use the new contact tracing module to add contacts that are **not** already in WEDSS. If a contact is added that is already in WEDSS, a duplicate will be created and will need to be merged with the original record.

To create a contact for an individual being added to WEDSS for the first time:

1. Navigate to the Intervention tab, expand the Contact Tracer User Interface section and click the Open Contact Tracing UI button.

The new Contact Tracing Interface will open in a pop-up window:

2. Enter the Contact's details, including: last and first names address, the type of contact, and contact method. Also enter the jurisdiction in the "Investigation Details" section of the Contact. If jurisdiction is unknown, use your jurisdiction.

3. After each contact is entered, click the Submit All Contacts button, to save the entry.

   Continue clicking either Add Household Contact or Add New Contact until all the patient's contacts have been entered. Note: if "Household" is selected for the type of contact, the patient's address will be copied to the Contact's address.

   Finally, close the Contact Module by clicking the Cancel button in the lower left.

   The Contact Module pop-up screen will close and WEDSS will return to the Intervention tab of the case.

Notes:

1) Be sure to click the Submit All Contacts button after adding each contact. If the connection to the Contacts Module drops unexpectedly, all Contacts entered since last clicking the Submit All Contacts button will be lost. So, be sure to click Submit All Contacts frequently.

2) If a Contact is entered in error, but the Submit All Contacts button has not yet been clicked, the entry can be deleted by clicking the "X" in the top right corner of the Contact card.
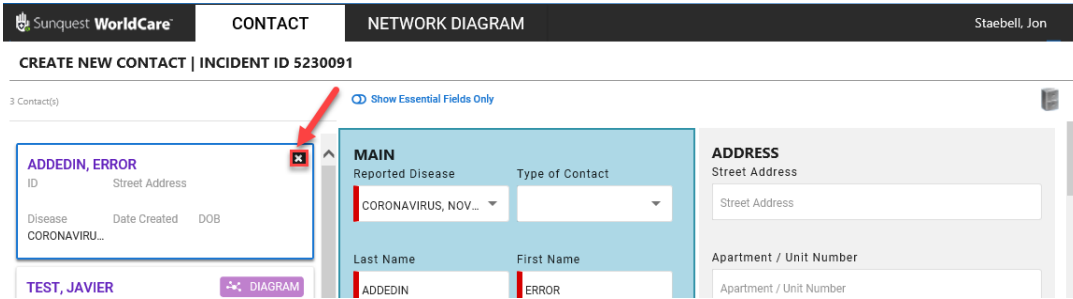
3) The "LINK Existing Contact" buttons are not functional in the first release of WEDSS v19.2. Clicking those buttons will result in an error message. This capability is planned for an update in the near future.
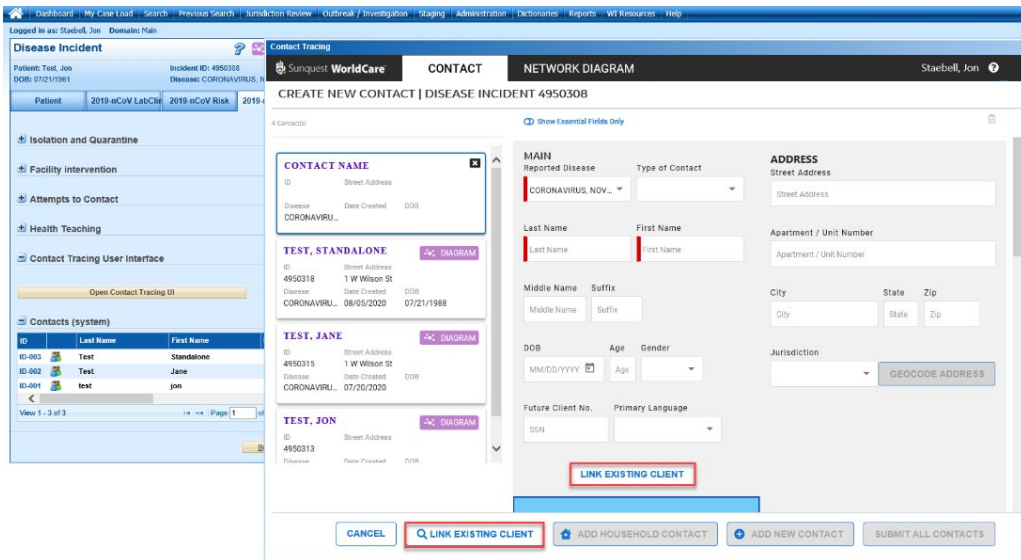
AUTOMATIC CREATION OF CONTACT INVESTIGATIONS

IMPORTANT: All Contacts added in the new interface will *automatically* become Contact Investigations. So, there is no need to convert a Contact into a Contact Investigation.

VIEWING CONTACTS

When the user opens the Contacts Tracing module from a case, all of the Contacts previously entered (if any) will be displayed. The left column in the Contacts Tracing module will be a series of contact "cards," one for each contact. The information in the right columns will be the information for the selected contact "card." For example, the case below has two contacts, "Test, Javier" and "Test, Jane." The contact card for Test, Javier is highlighted, meaning it is selected, so the information in the two right columns are for Test, Javier.

To see the contact information for Test, Jane, the user would have to click on the second contact card in the left column.
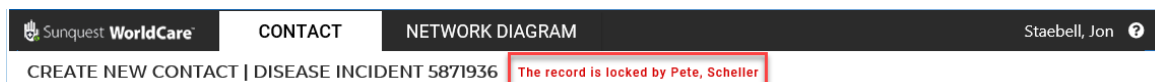
EDITING AN EXISTING CONTACT

Note: In the new contact tracing module, do not edit any contact fields that already have information in them. If fields have information to be edited, use the legacy contact module (described above) to edit the field. In the new contact tracing module, only edit fields that are blank. For example, if a phone number field is blank it can be edited in the new contact tracing module. If there is an existing phone number that needs to be corrected, edit it in the legacy contacts interface, not the new contacts tracing module.

To edit a contact, first select the correct contact card from the list of contact cards on the left side of the screen. Then, enter the revised information in the fields in the two right columns. Remember to make sure "Show Essential Fields Only" is not selected if information in a non-essential field needs to be edited.

For more information on the fields in the Contact record, and how to record information from Contact interviews, see the "Contact Tracers" section below.

When done editing a contact, click the Submit All Contacts button and the close the Contact Module by clicking Cancel.

Note: if an attempt is made to edit a contact that is being accessed by another user, the user receives a message that the record is locked. Wait until the other user has exited the contact record to edit it.

DELETING AN EXISTING CONTACT

Users do not have the ability to delete a contact. If a Contact has been entered in error and the Submit All Contacts button has been clicked, users should email DHSWEDSS@wisconsin.gov with the Contact ID and request it be deleted by the WEDSS team. Please update the contact name to "REMOVE ME" for easy identification for deletion by the WEDSS team.

CLOSING THE CONTACTS MODULE

When done accessing the case's contacts, click the Cancel button in the lower left corner of the Contacts Module pop-up screen. The Contact Module pop-up screen will close and WEDSS will return to the Intervention tab of the case.

CONTACT TRACER WORKFLOW

Users who are only doing contact notification will be routed directly to the new interface upon logging into WEDSS.

MY WORKLIST

Upon logging in, the user's My Worklist tab will be displayed. This shows the contacts currently assigned to the user.

The contacts in My Worklist are sorted by name when first accessed, but can be sorted by clicking on the arrow next to any of the column headings. For example, sorting by address is useful to consolidate calls to get information from all contacts living together. The column to the left of Name, indicates a priority (e.g. high, low, etc.), if one has been assigned to the contact.

- Users can click on a hyperlinked name to access the contact record or click on the clipboard to access a questionnaire.
- Users can see how many contacts are currently assigned to them and can change the number of items displayed per page (10, 20, or 30) at the bottom of the page.
- Users can unclaim a contact by clicking on the Unclaim button. This will return the contact to the unassigned list so another Contact Tracer can claim it.

The column labelled "Follow up" is currently not used and should be ignored.

UNASSIGNED

The Unassigned tab displays all the unassigned contacts within the user's jurisdiction.

The Unassigned listing is sorted by oldest created when accessed. It can be sorted by any of the columns by clicking the arrow next to the header. The total number of unassigned contacts is

displayed in the lower right corner, and the number of items per page can be changed with the drop-down immediately to the left.

Users must claim a contact before they are allowed to edit it. The Claim button allows the user to claim a contact. Upon claiming a contact, the contact entry moves to the user's worklist.

EDITING CONTACTS

In the My Worklist tab, click on the contact name to access the contact's record. This will display in a popup window.

Scroll down the contact record to access all the sections of the record:

- Main
- Address
- Race & Ethnicity
- Contact Method
- Investigation Details
- Medication
- Notes & Unable to Reach

From this view, users can edit the contact, access the questionnaire and utilize the new Script feature, providing talking points to guide the conversation. Once the required items are finished, they can be marked complete by checking the checkbox. This will turn the script box green.

Note: do not edit any contact fields that already have information in them. If fields have existing information to be edited, put the newer information in the Notes field. Blank fields can, however, be edited. For example, if a phone number field is blank it can be edited when the contact's phone number is discovered. However, if there is an existing phone number that needs to be corrected, enter the new phone number in the Notes field along with a brief explanation.

Be sure to click the Submit Contact button after any changes to save the updates.

INTERVIEWING A CONTACT

The new Contact Module has two new features to help facilitate interviewing COVID-19 contacts: 1) Checklists, and 2) Questionnaires. These features can be accessed when a contact is open for viewing.

CHECKLISTS

When viewing a contact, the right side of the screen will have different checklists to facilitate contact interviews. In this example, the large rectangular area on the right has multiple checklists for the interviewer to follow:

The first checklist item, "Confirm Identity…" is green because the interviewer has marked it complete by checking the box next to it. The other checklist items are yellow because they have not been marked complete. The interviewer can click the "View Script" link to view talking points to use when interviewing the contact. Note: Scripts may not be available for all checklist items.

QUESTIONNAIRE

Interviewers can also access the WEDSS COVID-19 Questionnaire from the contact by clicking the clipboard icon (📋) in the upper right of the contact. Doing so will open a pop-up window with the WEDSS COVID-19 Questionnaire:

Users can fill out the questionnaire while interviewing the contact. Scrolling down to the bottom of the questionnaire, there are two buttons: Save and Print. The interviewer should click the Save button frequently during data entry to prevent accidental data loss.
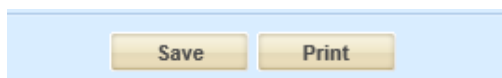
A pop-up screen labelled "Edit Description" may appear when save is clicked; if so, click Save in the pop-up to continue:

When the interview information is completely entered, the interviewer should click the "X" in the upper right corner of the questionnaire to close the pop-up window and return to the contact.

Note that the questionnaire has different sections that can be opened and closed as needed. In the example above, the "2019-nCoV Signs and Symptoms" section is open, as indicated by the minus sign next to the section title. If the interviewer doesn't need to complete that section, the minus sign can be clicked to collapse that section so the questions don't appear on the screen. Collapsed sections have a plus sign next to the section title, and can be expanded by clicking the plus sign. For example, the interviewer could click the plus sign next to "Attempts to Contact" section above to view previous attempts to contact, or to add a new attempt.

When the checklists and questionnaires are complete, the interviewer should click the Submit button on the bottom right of the contact screen to save the information.

CLOSING A CONTACT RECORD

To close a contact, scroll within the record to the Investigation Details section. Then update the Process Status to "Closed" and click the Submit Contact button. The contact will no longer appear in the "My Worklist" tab.

If the contact is unable to be interviewed, make notes in the "Notes and Unable to Reach" section of the contact but do not change the Process Status. It will remain in the worklist for follow up later.

LOGGING OUT OF THE CONTACT MODULE

To log out of the Contact Module, click on the username in the top right corner of the screen and select Log Out.