STAGING MANUAL

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WISCONSIN phin PUBLIC HEALTH INFORMATION NETWORK

WEDSS WI ELECTRONIC DISEASE SURVEILLANCE SYSTEM

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Contents

Purpose of this Document

The purpose of this document is to provide an overview of how to process reports from the Staging Area of the Wisconsin Electronic Disease Surveillance System (WEDSS).

What is Staging?

The Staging area is the interface between incoming electronic reports from laboratories and providers, and the live surveillance database, which contains all previously imported or created records.

The Staging area displays reports that have come into WEDSS that need to be processed.

The Staging area is accessed by clicking on the "Staging" menu option at the top of the screen in WEDSS.

This manual goes through the Staging area section by section. To view the entire Staging screen refer to Appendix B.

Locating, Editing and Deleting Records in Staging

When the Staging area is initially accessed it will display all the records to which the user has access, based on their jurisdiction and disease settings. These records are displayed in date order with the most recently received records listed first. WEDSS displays 10 records per page. If more than 10 records are available, click Next in the lower right corner of the screen to access additional results.

Locating a Record in Staging

The first section of the Staging area contains fields that are available to filter the reports shown in the Imported Results grid. This allows users to search for reports meeting their criteria and hide other incoming reports. The filters include a date range, patient name, disease or disease grouping, record ID, jurisdiction, laboratory name, accession number, HL7 file name, test name, and value. To apply a filter, enter information in one or more of the fields and click the Search button.

Imported Results Grid

The Imported Results grid shows the reports that are waiting to be processed, after applying the filtering criteria, if used.

Imported Results

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
2695593	06/12/2017	test, chris	05/16/2017	Male	Madison				INFLUENZA-ASSOCIATED HOSPITALIZATION	Training		☐
2692608	04/17/2017	TESTING-LAB, ANITA	01/01/1961	Female	Marshfield	01135609	Bordetella pertussis	NOT DETECT	PERTUSSIS (WHOOPING COUGH)	Training	*Marshfield Laboratories	☐
2675818	04/04/2017	TESTING-LAB, ERIC	01/05/1998	Male	Marshfield	02283113	Cult. Blood	Beta-hemolytic Streptococcus Group A	STREPTOCOCCAL DISEASE, INVASIVE, GROUP A	Training	*Marshfield Laboratories	☐
2665746	03/27/2017	Test, Production	02/14/1983	Female	Madison				UNUSUAL DISEASE	Training		☐
2664707	03/25/2017	test, test	09/02/2015	Male					UNKNOWN DISEASE	Training		☐
2371898	03/16/2016	TESTPATIENT, PATIENT	01/01/2016	Female	Marshfield	02896943	Anaplasma Ab	1:128	EHRLICHIOSIS/ANAPLASMOSIS, A. phagocytophilum	Training	*Marshfield Laboratories	☐

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These results fall into two categories:

- Lab Reports
- Web Reports or Electronic Case Reports (eCR)

Lab Reports are reported by laboratories. Web Reports are reports that are manually keyed into WEDSS by providers, while eCRs are Web Reports that are automatically generated by a provider's electronic health record (EHR) system. In this manual, the term "Web Reports" refers to either Web Reports or eCRs.

The difference between the two types can be distinguished visually: a laboratory result has information populated in all columns (row 2 in the above screenshot) while a Web Report does not have information displayed in the Accession Number, Resulted Test, Value, or Laboratory columns (row 1 in the above screenshot).

There are also differences in how the two types of incoming record should be processed. The most important of which is, unlike Lab Reports, **Web Reports should always be merged and never attached**.

To search for just Lab Reports, enter "%" (the wildcard character) in the "Value" field and click "Search." The imported results grid will not have any Web Reports.

To select a specific record, click on the Record ID. The record will be highlighted in yellow. The contents of a selected record can be viewed by clicking the View Patient's Lab Report at the bottom of the screen.

Note: the wording of this button changes with the type of report being viewed. When viewing a Web Report, the button wording will be "View Patient's Web Report" or "View Patient's EHR Report" for eCRs.

Editing a Record in Staging

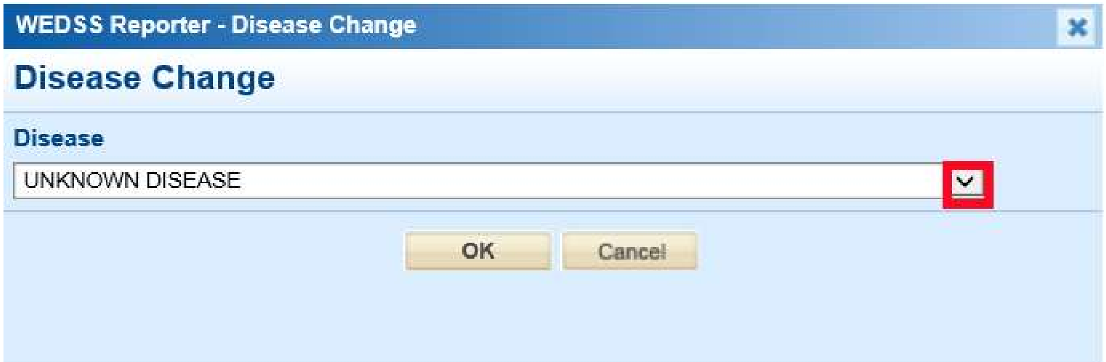
It is possible to edit two details of the record before importing it.

- Disease Designation
- Jurisdiction

Disease Designation

To change the disease designation of a record, click on the Disease name for that record.

WEDSS will display a popup allowing a new disease to be selected from a drop-down list.



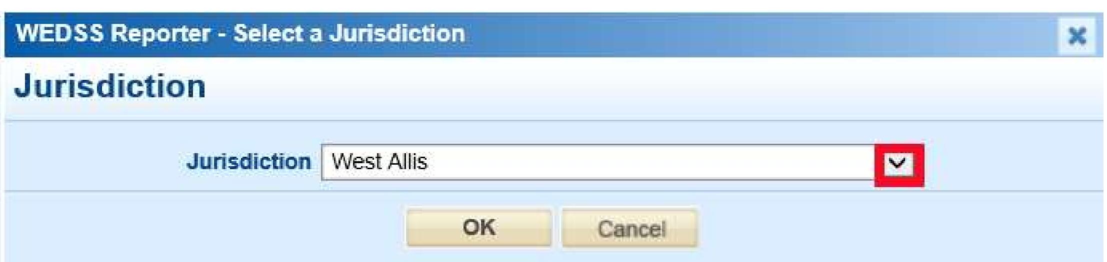
The disease should be changed if:

1. A record comes in as Unknown Disease but the record itself contains enough information to determine the correct disease.
2. A record needs to be merged with an existing disease incident and the disease name of the new record doesn't match the existing incident exactly (e.g., Hepatitis C and Hepatitis C, Chronic).

Jurisdiction

To change the Jurisdiction of a record, click the record ID (WEDSS will highlight the row in yellow), then click the button at the bottom of the screen with the already assigned jurisdiction's name on it, e.g., "West Allis".

WEDSS will display a popup allowing a new jurisdiction to be selected from a drop-down list.



The jurisdiction assignment should be changed if it is incorrect. WEDSS assigns jurisdiction using the following criteria:

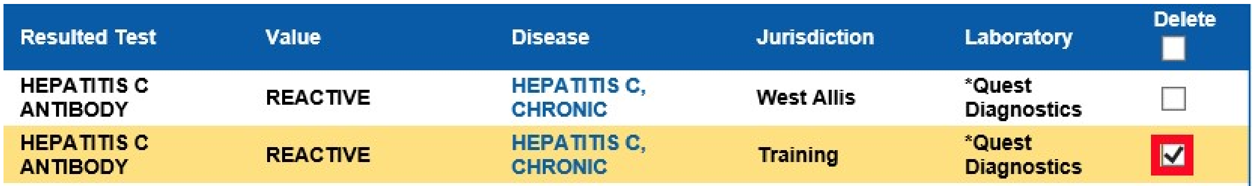
- Patient address
- Patient's last known jurisdiction
- Provider address (if patient address is unlisted or cannot be geocoded)
- Unknown (if provider address is also unlisted or cannot be geocoded)

If the jurisdiction is set to Unknown, it will be manually assigned by state staff.

Deleting a Record from Staging

A record can also be deleted from Staging. To do so:

1. Check the Delete checkbox in the last column of the row for that record.



Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
HEPATITIS C ANTIBODY	REACTIVE	HEPATITIS C, CHRONIC	West Allis	*Quest Diagnostics	
HEPATITIS C ANTIBODY	REACTIVE	HEPATITIS C, CHRONIC	Training	*Quest Diagnostics	

IMPORTANT: *Do NOT use the Delete checkbox in the table header. This will select ALL of the records in your staging area that meet the filter criteria and mark ALL of them to be deleted, including records on subsequent pages of the Staging area.*

2. Click the Delete button at the bottom of the screen, and OK to confirm that all of the selected records should be deleted.

It is possible to undelete records; however, this action can only be completed one record at a time.

Importing Reports from Staging

WEDSS will display potential matching patients and potential matching Disease Incidents for the incoming record that is currently highlighted. To choose a different record, use the filtering options to located it and click on the record ID, to highlight the row.

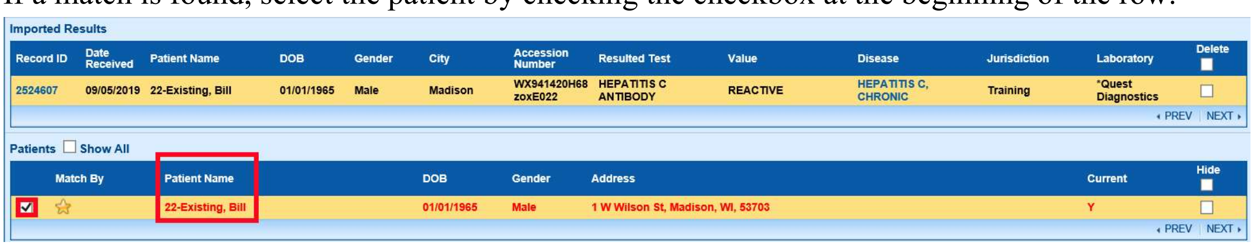
Patients Grid

The Patients grid shows a list of potential patients in WEDSS that match the record selected in the Imported Results section.

If a potential patient is listed, that patient matches the new record on all of these fields:

- Last Name;
- Soundex of the First Name (Soundex means "sound alike", for example the Soundex for John would include Jon. However, Soundex does not include names with a different first letter, so, for example: Chris would not include Kris);
- Gender (or blank entry) but NOT unknown;
- DOB (or blank entry) but NOT unknown

If a match is found, select the patient by checking the checkbox at the beginning of the row.



Imported Results

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
2524607	09/05/2019	22-Existing, Bill	01/01/1965	Male	Madison	WX941420H68 zoxE022	HEPATITIS C ANTIBODY	REACTIVE	HEPATITIS C, CHRONIC	Training	*Quest Diagnostics	

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Patients Show All

	Match By	Patient Name	DOB	Gender	Address	Current	Hide
		22-Existing, Bill	01/01/1965	Male	1 W Wilson St, Madison, WI, 53703	Y	

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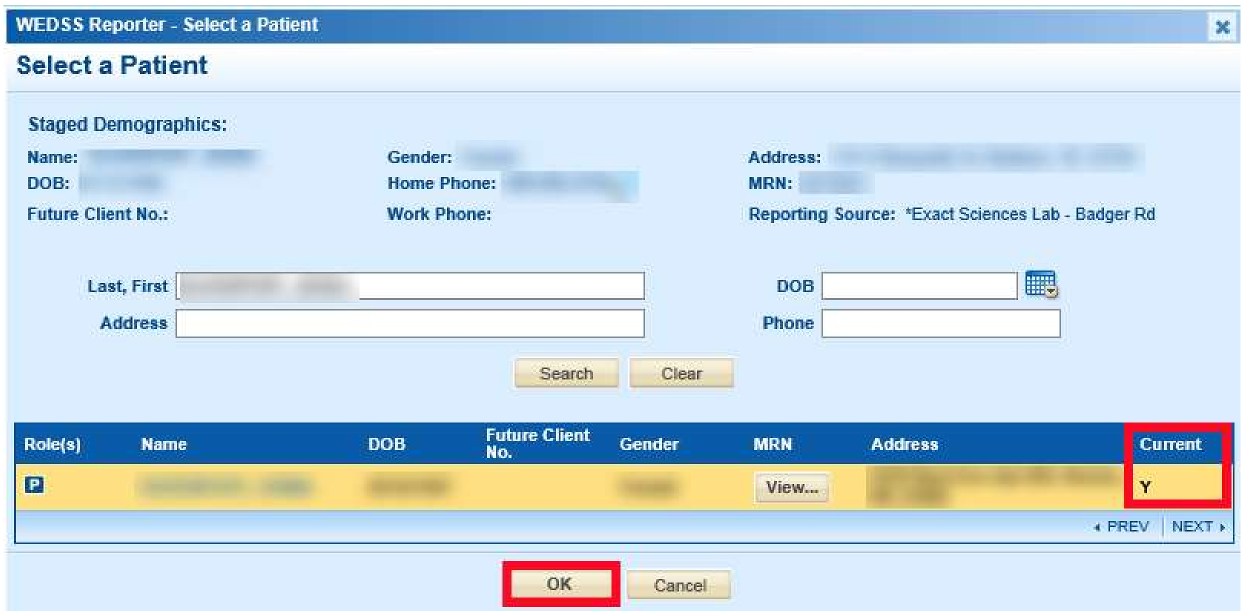
If a patient's demographics match exactly, the listed patient's information will be displayed in black text. If they are a partial match, the text will be red.

If there are no potential matched patients listed, click the Select Patient button at the bottom of the screen to search WEDSS to find potential matches.

Sometimes, WEDSS will display a potential patient match immediately. The criteria used within the Select Patient popup window is less strict than in the Staging Window, so it is important to compare matches provided carefully.

If it appears to be the same patient, select the matched record by clicking the patient name (the row will be highlighted in yellow). Be sure to select the row with a Y in the current column and click OK on the popup.

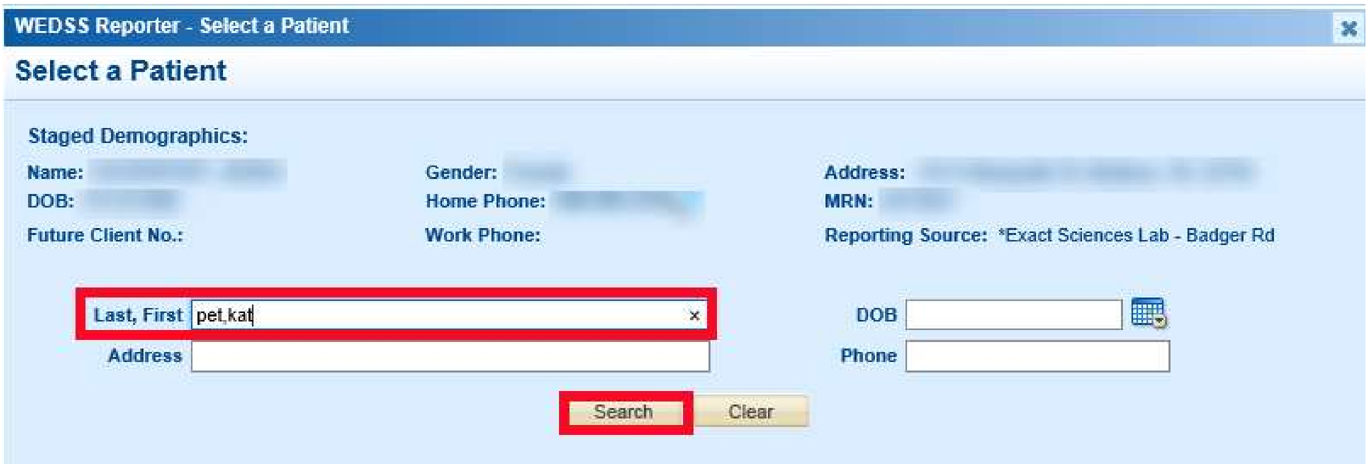


Sometimes there is no patient match in the Select a Patient pop-up. In this case, you should do additional searches to see if there is an existing patient. Some ideas for searches include:

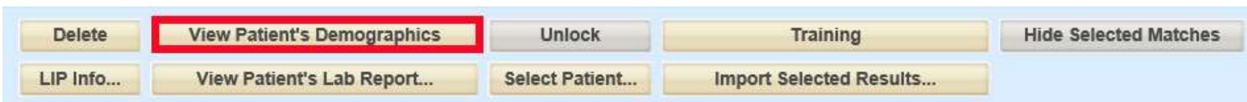
- Edit the last name if the person has a hyphenated last name. For example, if the last name is “Hyde-Pearce,” try searching for “Hyde” and “Pearce.”
- You could try alternate spellings or abbreviations of names (Cathy/Kathy, Chris/Kris) or using a wildcard character % which can fill in any letters of the name that you aren’t certain of. For example, for the name Peterson, you could search Peters%n. Or to locate a patient who may be entered as LopezGarcia, Lopez-Garcia, Lopez Garcia, etc. you could use Lopez%Garcia.
- You could also try searching by DOB only, with the name field left blank.

If you locate a match, compare the details and select the line with a Y in the current column. If it appears to be the same person click OK.

If you don’t locate a match, click Cancel.



The demographic information of the selected patient can be compared with the selected record in the Imported Results grid by clicking the View Patient's Demographics button at the bottom of the screen.



Records Grid

The Records grid shows the Disease Incidents and Contact Investigations that are associated with the patient selected in the Patients grid. Determine whether the incoming report should be associated with an existing Disease Incident. If so, select the appropriate Disease Incident by checking the checkbox at the beginning of the row.

Unlocking a Record

A selected patient may have Disease Incidents or Contact Investigations that are assigned to Jurisdictions that are outside a user's normal WEDSS access. If those records are within a user's assigned disease security group, a message will appear above the Records grid indicating that there are additional records for the patient.

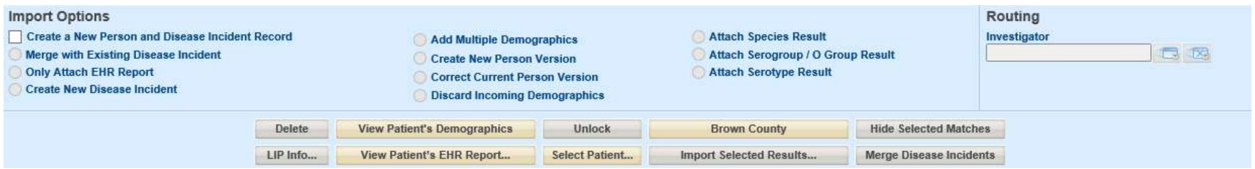
To unmask those records, click the Unlock button at the bottom of the screen.

The Unlock button should be used if there is a need to view the complete history of a person to determine if a new incident should be created from a new record or just attached to an existing record (e.g., Hepatitis C, Chronic).

If a matched person in WEDSS shows no diseases and the Unlock button is not available, that person may be in WEDSS for other reasons. For example, the person may only be listed as a contact, or have a disease that is outside of a user's disease security group.

Import Options

The Import Options area displays options for the final processing of the selected record in the Records grid.



- The left column specifies whether WEDSS will create a new patient and/or disease incident, or whether WEDSS will attach the incoming record to an existing disease incident.
- The second column specifies how WEDSS will treat the Demographic options of the incoming record (See below for a description of the four options and examples of when to use them).
- The third column of options is not used.
- At the far right is an option to assign an investigator to work the record after import. This is optional, as investigators can also be assigned later.
- When a record is ready to be imported, the record will be highlighted in green.

Imported Results

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
2524626	01/08/2020	Hayward, Sally	05/19/1995	Female	Woodruff				LYME DISEASE (B.BURGDORFERI)	Training		☐
2524624	01/08/2020	Woodruff, Billy	10/10/2019	Male	Woodruff				LYME DISEASE (B.BURGDORFERI)	Training		☐

Steps to Import a Record from Staging

Records in the Staging area may be for new patients or more information for existing patients.

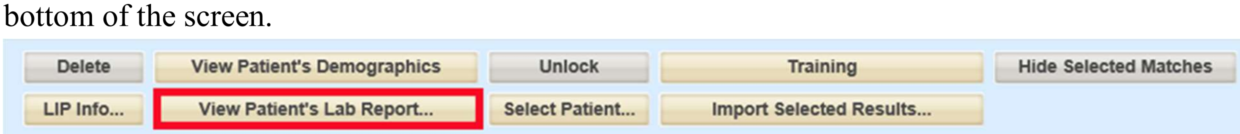
Here are the steps to import reports from Staging.

1. Select a report from the Imported Results section of the Staging area by clicking on the Record ID number.

Imported Results

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value
2524622	09/06/2019	21-HEPPOS, TIM	07/02/1963	Male	Green Bay	WX941420H68 zoxE021	HEPATITIS C ANTIBODY	REACTIVE

The report can be viewed by clicking the View Patient's Lab/Web/EHR Report button at the bottom of the screen.



2. WEDSS will automatically search for matching patients in the system. Select a patient from the Patients section of the Staging area by checking the box near their name.

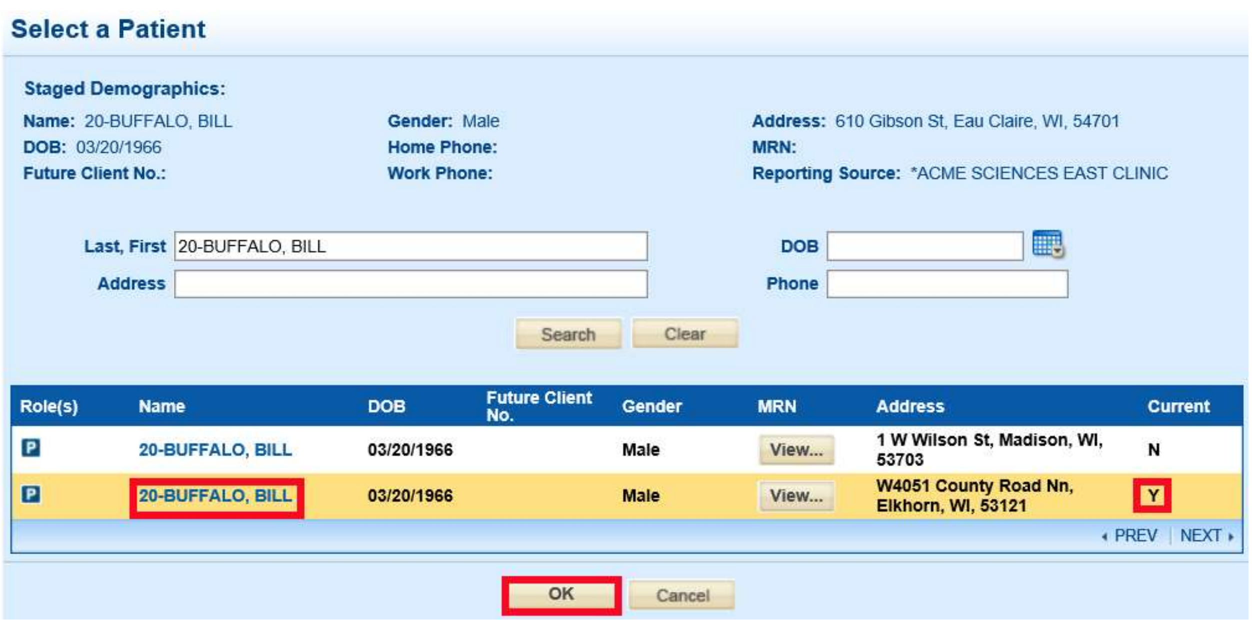
	Match By	Patient Name	DOB	Gender	Address
☑	☆	21-Heppos, Tim	07/02/1963	Male	101 E Wilson St, Madison, WI, 53703

a. If no patient matches are found, click the Select Patient button.

The Select a Patient search is helpful to find patients matching an incoming report that may have an error in their name, DOB, or gender, or if their information has changed since a previously reported Disease Incident. We recommend trying some searches using a partial name or DOB as explained above.

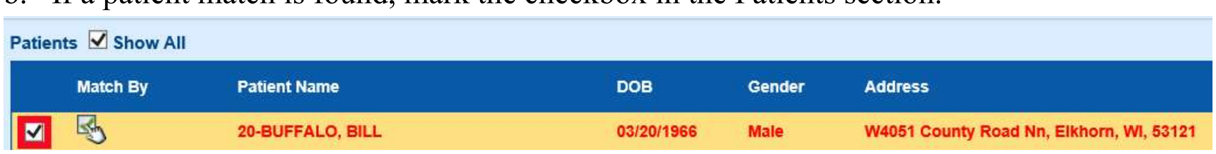
1) If a match is found, highlight the patient by clicking on their name and click the OK button. If more than one match is available choose the one which has the current demographics, indicated by a Y in the current column.

   The patient will then appear in the Patient section of the Staging area for selection.

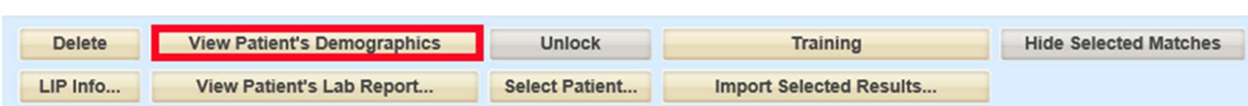


2) If a match cannot be found, the patient is new to WEDSS; proceed to step 3 below.

b. If a patient match is found, mark the checkbox in the Patients section.



c. Then compare the demographics on the incoming report to the demographics of the existing patient by clicking the View Patient's Demographics button at the bottom of the screen.

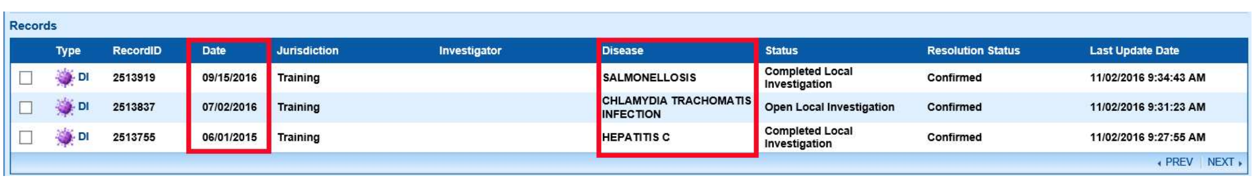


d. The Demographics window will open, allowing a side-by-side comparison of the information. If necessary, multiple demographics can be viewed for the selected patient by clicking on the buttons  next to the Name and Address fields.

3. Determine the correct import option near the bottom of the Staging area.

   a. If the patient is new, mark the Create a New Person and Disease Incident Record checkbox.

   b. If a matching patient was found in step 2, view the matched patient's existing Disease Incidents in the Records section to determine the correct import option.



   Use the following as a guide:

   1) If the incoming report is for a new incident, select the Create New Disease Incident option. Use this option when the incoming report is not supplying more information for an existing incident, either because it is the first time the disease is being reported for the patient or it should be considered a new incident due to the length of time since the previous report for that disease.

   2) When a matching Disease Incident exists, and the incoming report is supplying more information for the Disease Incident:

      a) If the incoming report is a laboratory report, select the Disease Incident by marking the checkbox near its Record ID number and select the Only Attach Lab Report option.

b) If the incoming report is a Web Report, select the Disease Incident by marking the checkbox near its Record ID number and select the Merge with Existing Incident option.

Important: NEVER attach a Web Report, since it only places a PDF copy of the Web Report in the electronic file cabinet and the information will **not** populate on the individual tabs of the Disease Incident or carry over any documents uploaded by the provider.

4. Determine the correct demographic import option from the guidance below:

   a. The **Add Multiple Demographics** option will not affect the demographic information on the Patient tab, but will add the incoming staging demographics as Multiple Demographics. Use the Add Multiple Demographics option if:

      1) The patient resides at multiple residences (e.g., college students, persons that reside with separate parents or guardians).

      2) The original address of the Disease Incident should be kept on that Patient tab, but the new information is still relevant (e.g., Hepatitis C cases).

   b. The **Create New Person Version** option will create a new person version based on the incoming staging demographics and update the demographics of the existing Disease Incident. Use the Create New Person Version option for:

      1) A change of address.

      2) A change of name.

      3) Any other substantial changes from past demographics.

   c. The **Correct Current Person Version** option will overwrite current demographics in WEDSS with the information in the staged report. (**Exception**: Incoming demographics that are blank will not overwrite current demographics.) This option will affect all Disease Incidents associated with the person version and should only be used on a current person version. Use this option only when:

      1) Incoming demographics are correcting an error in the previously reported demographics.

      2) Current demographics are blank.

   d. The **Discard Demographics** option will associate the incoming record with the selected Disease Incident without affecting any demographic information stored in the existing WEDSS record. Use this option when incoming demographics are:

      1) The same as what is already in WEDSS.

      2) Incomplete.

5. After the selections have been made, click the Import Selected Results or Merge Incidents button as applicable.

Merging Web Reports

When merging an incoming Web Report with an existing Disease Incident, it is strongly recommended to review the Disease Incident prior to merging. To do this, open the incident in a separate browser session (not just a second tab). To open a second browser session, refer to Appendix A.

When comparing the Web Report and Disease Incident side by side, remember that information is retained at the tab level and that any data in the discarded tab (the one **not** chosen during the merge) will not be retained in the final Disease Incident. Also note that data cannot be copied from one incident to the other while merging. Therefore, to prevent data loss, relevant data should be copied from one incident to the other before starting the merge.

Keep in mind the following notes:

- Each selection is at the tab level, not the individual sections level.
- If different data elements exist in the same tabs (some in the existing incident and others in the incoming incident), copy and paste the data from the less complete Disease Incident tab to the other.
- Any data in a system section, such as the Laboratory Information w/Provider & Facility (system) section, or uploaded documents in the electronic filing cabinet, will be kept from *both* Disease Incidents during a merge.
- If the existing Disease Incident is in a jurisdiction outside of the user's jurisdiction grouping access, the user will not be able to complete the merge; in this case, contact DHSWEDSS@wisconsin.gov.

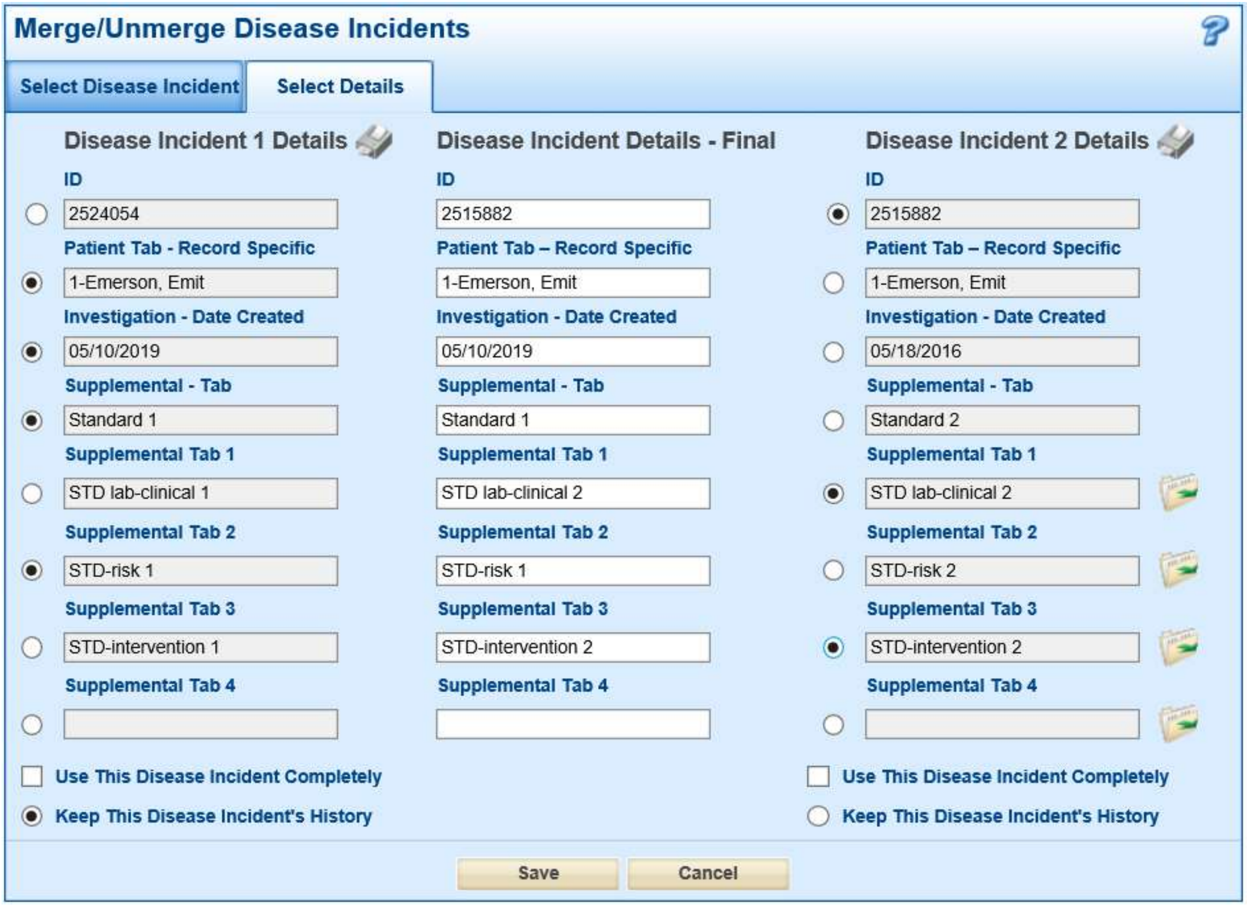
To merge a Web Report:

1. Click the Merge Disease Incidents button to begin the merge process for the selected Web Report.

2. A popup window will open. Click OK to continue with the merge.

   (Clicking Cancel will abort the merge and leave the Web Report in staging.)

3. The Merge/Unmerge Disease Incidents screen will then appear. The existing Disease Incident marked for merge will appear on the left as Disease Incident 1. The incoming Web Report marked for merge will appear on the right as Disease Incident 2. The center column, Disease Incident – Final, will be populated with the information chosen during the merge and will become the final Disease Incident.



Information on the Patient and Investigation tab for each Disease Incident can be viewed during the merging process by clicking on the printer icon located near the column headers. Disease-specific tabs for both Disease Incidents can be viewed by clicking on the file folder icons as shown above. These will display as shown below.

Note: The information on the Patient tab is determined by the Demographic options selected prior to merging. Unless Create New Person Version is selected, select the version that should appear on the Patient tab.

4. To make the final selections, select the radio button next to each of the rows.

   Items can be selected from either column.

   Near the bottom of each column is a Use this Disease Incident Completely checkbox that will select all of the radio buttons in that column. The individual selections can still be edited after checking this checkbox.

   > **Note:** It is best practice when merging Disease Incidents to select the lowest ID number and the earliest Investigation-Date Created to appear in the final Disease Incident.

5. At the bottom of each column is a set of radio buttons labeled Keep this Incident's History.

The radio button selected determines from which incident the merged record will retain the following data:

- Jurisdiction Assignment
- Process Status
- Resolution Status
- Nurse Investigator
- Notes
- Date Information (except for Create Date and Collection Date)
- Report Sources
- Hospitalization Information
- Final Disposition
- Audit Data
- Condition History
- Jurisdiction History
- Link to Animal Report
- Medical Record Numbers
- Process Status History
- Record Level Alerts
- Resolution Status History
- Task Lists and Associated Data
- User-defined sections on the Demographics and Investigation tabs
- Version History
- Shared sections

6. When all of the selections have been made, click the Save button to finalize the merge.

7. Two popups will appear, one asking for confirmation to proceed with the merge and one indicating that the merge was completed. Click OK on both of them.

   Clicking Cancel will cause the Web Report to be imported as a new Disease Incident. It will not return the Web Report to the Staging area.

ALERTS

Alerts allow you to receive notifications about specific diseases and reports directly to your inbox. To request Alerts, email DHSWEDSS@wisconsin.gov.

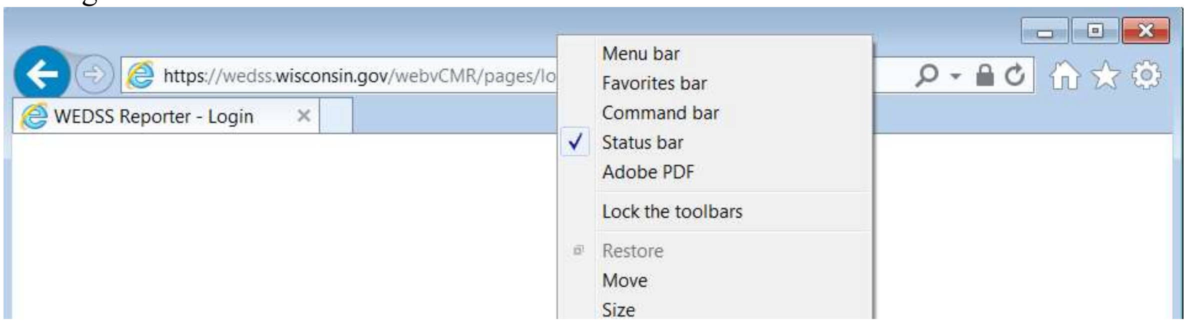
Alerts can be generated when:

- A new record (Lab Report or Web Report) appears in staging.
- A new record (Disease Incident, Outbreak or Animal Report) is imported or directly entered into the system.
- A record (Disease Incident, Outbreak or Animal Report) is in any way modified.
- A record (Disease Incident, Outbreak or Animal Report) has content added to the filing cabinet.
- A record’s (Disease Incident, Outbreak or Animal Report) process status changes.
- A specific field on a disease-specific form is filled in with a particular response.
- The number of reports exceeds a defined limit.

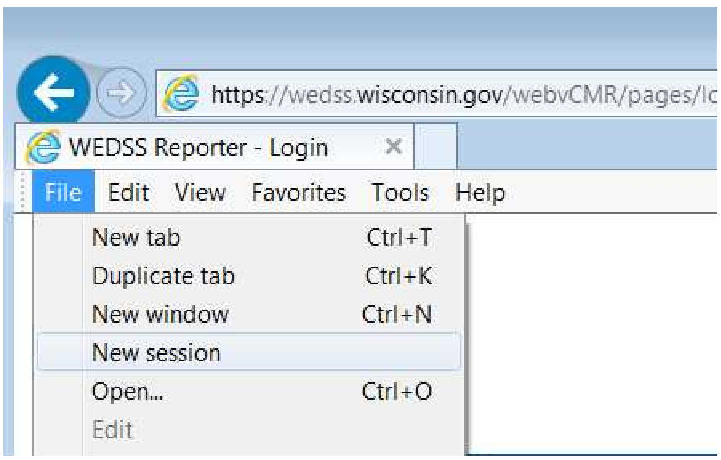
Appendix A: Opening a Second Browser Session

Internet Explorer

1. Open Internet Explorer.
2. Right click in the area near the address bar.

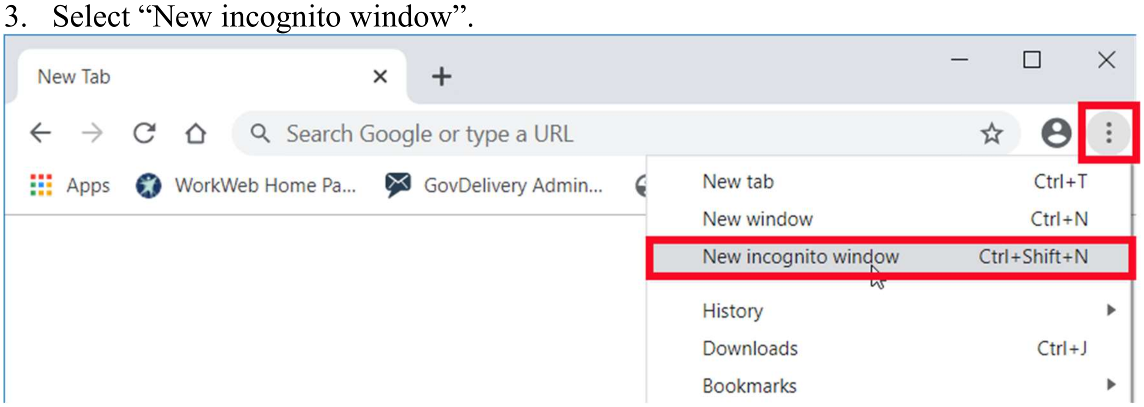


3. Select “Menu bar” in the dropdown list.
4. Go to File and select New Session.



Google Chrome

1. Open Google Chrome.
2. Click on the three dots in the upper right
3. Select “New incognito window”.



APPENDIX B: STAGING SCREEN