Michigan Disease Surveillance System

Administration User Guide

Version 3.3

March 2011

TABLE OF CONTENTS

1 ADMINISTRATION INTRODUCTION

This guide assumes you are familiar with the MDSS Application User Guide.

The options within the **ADMINISTRATION** menu are restricted by user role. Not all users have access to this menu. Additionally, depending on your user role and permissions, the options available within the **ADMINISTRATION** menu may differ. Refer to Appendix C for a more information regarding the MDSS Role Structure.

The options in the **ADMINISTRATION** menu are:

- Users
- User Audit Search
- Admin Searches
- Pending Work Queue
- Review Replaced Patients
- Administrative Reports
- Field Record Report
- Interview Record Report
- Completeness Report

Each menu option is discussed in its own section. In order to use this guide proficiently, refer to the menu option and then the specific task you need to perform.

2 USERS

The **USERS** option provides all of the functions necessary to manage the application's users.

The following tasks can be performed using the **USERS** option:

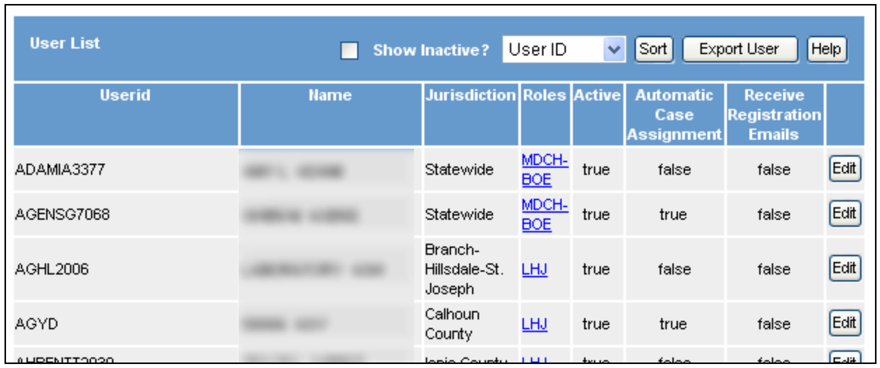
- View users
- Display user details
- Edit user accounts
- Activate/inactivate a user
- Designate which users will receive automatic case assignments
- Designate which users will receive registration emails
- Export the user list

VIEWING USERS

To view the current list of users, perform the following:

1. From the **ADMINISTRATION** menu, click the **USERS** option from the SideBar. The "User List" screen, which displays currently active users, appears:

Figure 2-1: User List



2. The fields and their descriptions are listed in the table. All of these fields are read-only and cannot be edited.

Table 2-1: User List Fields

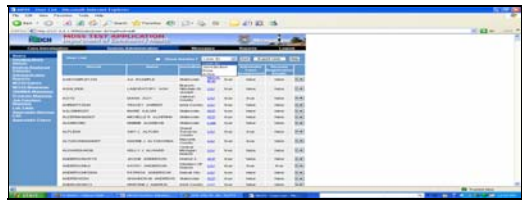
FIELD	DESCRIPTION
Userid	User Identification name of the user.
Name	Displays the name associated with the User-ID.
Jurisdiction	Displays the geographic area to which the user is assigned.
Roles	Displays the role to which the user is assigned.
Active	Indicates whether the user is active or inactive by displaying true or false, respectively.
Automatic Case Assignment	Indicates whether the user is assigned cases automatically or not by displaying true or false, respectively.
Receive Registration Emails	Indicates whether the user will receive registration emails or not by displaying true or false, respectively.

3. The users are displayed in order of *Last Name*, which is the default sort order. To select a different sort order, use the drop-down menu arrow (located at the top of the screen, to the left of the **SORT** button) to view/select a field by which you would like the users to be sorted. Click the

SORT button to initiate the sort and the "User List" screen will re-display in the order you specified.

4. To display Inactive Users, click the **SHOW INACTIVE?** checkbox. The "User List" screen will reload with both active and inactive users displayed. To display only Active Users, uncheck the box.

Figure 2-2: User List Sort and Display Inactive Users



5. The actions you can perform on the "User List" screen are:

- Display a user's role details
- Edit user accounts
- Activate/inactivate a user
- Designate which users will receive automatic case assignments
- Designate which users will receive registration emails
- Export the user list

Determine the action you want to perform and continue to the respective section below.

VIEWING A USER'S ROLE DETAILS

To view the specific role details (Data Restriction, Privileges, and Program Access) for a user, perform the following:

1. From the **ADMINISTRATION** menu, click the **USERS** option from the SideBar. The "User List" screen appears. Refer to Figure 2-1.

2. From the "User List" locate the User whose role you want to display and click on the **ROLES** hyperlink. The "User's

Role Details" appears revealing the privileges for the User ID.

Figure 2-3: User Role Details

LHJ	
Data Restriction	Local Jurisdiction
Privileges	View Case Details View Data Add/Modify Alerts, Self Modify Aggregate Cases View Reports Page Export Data Case Entry Dedup Edit Data
Program Access	General CD-STD-TB

3. The fields and their descriptions are listed in the table. All of these fields are read-only and cannot be edited.

Table 2-2: User Role Fields

FIELD	DESCRIPTION
Role	Displays the role name of the user.
Data Restriction	Displays the geographic level available to the user for viewing.
Privileges	Lists the specific permissions the user can view/access.
Program Access	Displays the disease groups to which the user has access.

4. Click on a different menu option to exit the screen.

EDITING USER/ROLE INFORMATION

To edit an existing user's User-ID or Role information, perform the following:

1. From the **ADMINISTRATION** menu, click the **USERS** option from the SideBar. The “User List” screen appears. Refer to Figure 2-1.

2. Locate the User whose information you want to edit, and click the **EDIT** button (located to the far right end of the row). The “Edit User “ screen appears:

Figure 2-4: Edit User Screen

3. The fields and their descriptions are listed below.

Table 2-3: Edit User Fields

FIELD	DESCRIPTION
First Name	First name of the user. Click and type the information.
Last Name	Last name of the user. Click and type the information.
Userid	User Identification name of the user. This field is read-only and cannot be edited.

FIELD	DESCRIPTION
Email Address	The user's email address. This field is not editable but is an HTML mail-to link. The result of clicking on the link is dependent upon the browser, but Internet Explorer will attempt to open the system's default mail client.
Roles	Displays the roles available to be assigned to the user. Click the drop-down arrow to view/select a valid choice.
Job Function	Displays the job functions available to be assigned to the user. Click the drop-down arrow to view/select a valid choice.
Program	Displays the program areas available to be assigned to the user. Click the drop-down arrow to view/select a valid choice.
Jurisdiction	Displays the jurisdictions available to be assigned to the user. Click the drop-down arrow to view/select a valid choice.
Facility	Displays the facilities available to be assigned to the user. Click the drop-down arrow to view/select a valid choice.
Secondary Jurisdiction	Displays the options available to be assigned as secondary jurisdictions for the user. Use the arrows to scroll up and down. More than one secondary jurisdiction may be selected by holding the **CTRL** key and clicking on the jurisdiction to be added.
Secondary Facility	Displays the options available to be assigned as secondary facilities for the user. Use the arrows to scroll up and down. More than one secondary facility may be selected by holding the **CTRL** key and clicking on the facility to be added. **NOTE**: A primary facility must be selected before secondary facilities will be saved.
Automatic Case Assignment	Indicates whether the user is assigned cases automatically (enabled/checked) or not (disabled/unchecked). Will display true or false on the User List.

FIELD	DESCRIPTION
Receive Registration Emails	Indicates whether the user will receive registration emails (enabled/checked) or not (disabled/unchecked). Will display true or false on the User List.
Last Login	Displays the time and date of the user's most recent login to the system. This field is read-only.
Active	Indicates whether the user is active (enabled/checked) or inactive (disabled/unchecked). Will display true or false on the User List.

Additional information on the Automatic Case Assignment, Receive Registration Emails, and Active fields is available in subsequent sections.

4. Point your mouse cursor and click (or tab) to the field that you want to change.

5. Make the necessary changes and click the **SAVE CHANGES** button. If no errors are found during the validation process, your changes will be saved.

ACTIVATING/INACTIVATING A USER

Since cases are assigned to investigators by their User-ID, users cannot be deleted from the application but can be inactivated.

To activate or inactivate a LHJ Administrator, you must contact a Regional Epidemiologist or the State MDSS Administrator.

To activate or inactivate a user, perform the following steps:

1. Follow the steps in the section titled, "Editing User/Role Information" and then perform the following:

- To inactivate a user: remove the checkmark from the *Active* field by clicking on the checkmark. The inactive user will no longer be able to access the application; however, this does not affect the user's current application session if (s)he is currently logged in.

- To activate a user: place a checkmark into the *Active* field by clicking inside the checkbox.

2. Click the **SAVE CHANGES** button.

SETTING/UNSETTING AUTOMATIC CASE ASSIGNMENT

The MDSS designates a user who receives automated case assignment as the investigator for each new case that enters the application.

Only certain roles can receive automatic case assignment. The checkbox will be disabled for ineligible roles. For more information on the MDSS Role Structure, see Appendix C.

To set or unset Automatic Case Assignment, perform the following:

1. Follow the steps in the section titled, "Editing User/Role Information" and then perform the following:

- To designate the user to receive automatic case assignments: place a checkmark in the *Automatic Case Assignment* field.
- To stop a user from receiving automatic case assignments: remove the checkmark from the *Automatic Case Assignment* field by clicking on the checkmark.

2. Click the **SUBMIT CHANGES** button.

SETTING/UNSETTING RECEIPT OF REGISTRATION EMAILS

The MDSS sends an email to users who are designated to receive registration emails when a new user applies for access to the application.

Only certain roles can receive registration emails. The checkbox will be disabled for ineligible roles. For more information on the MDSS Role Structure, see Appendix C.

To change whether a user receives registration emails, perform the following steps:

1. Follow the steps in the section titled, "Editing User/Role Information" and then perform the following:

- To designate the user to receive registration emails: place a checkmark in the *Receive Registration Emails* field.
- To stop a user from receiving registration emails: remove the checkmark from the *Receive Registration Emails* field by clicking on the checkmark.

2. Click the **SUBMIT CHANGES** button.

EXPORTING THE USER LIST

This option provides the ability to export the list of users to a Comma Separated Value (csv) report. By default, the export will include both active and inactive users.

The columns that will be exported are:

- User-ID
- Last Name
- First Name

- Email
- Jurisdiction (primary)
- Role
- Active
- Automatic Case Assignment
- Receive Registration Emails
- Last Login
- Program Area
- Primary Facility
- Job Function
- Secondary Facility (or facilities)
- Secondary Jurisdiction (or jurisdictions)

To export a list of users, perform the following steps:

1. From the “User List” window, click the **EXPORT** button. There may be a brief “waiting” interval before the file download dialog box appears. The “waiting” interval is relative to the number of users being exported.
2. The “File Download” dialog box will appear asking you to confirm your choice to download the export file. Click the **SAVE** button.
3. The “Save As” dialog box appears. Provide the location for the file and either accept the default filename or provide your own filename by typing on top of the default.
4. Click the **SAVE** button. Your exported data file will now reside on your computer in the location you specified.

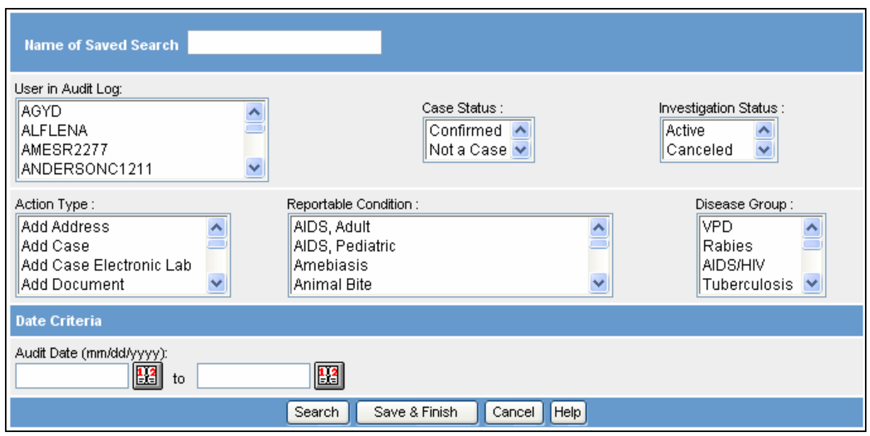
3 USER AUDIT SEARCH

The **USER AUDIT SEARCH** option allows you to search within the audit log for specific users and/or actions. More information on searches can be found in the MDSS Application User Guide in the sections titled, "How the Search Process Works (And/Or)" and "Search Methods."

To create a new user audit search, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **USER AUDIT SEARCH** option from the SideBar. The "User Audit Search" screen appears.

Figure 3-1: User Audit Search



2. The fields and their descriptions are provided in the table.

Table 3-1: User Audit Search Fields

FIELD	DESCRIPTION
Name of Saved Search	Click and type the name of the User Audit Search. This is a required field, if you want to save the search criteria.

FIELD	DESCRIPTION
User in Audit Log	User ID tracked in the audit log of the case. Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values. **NOTE**: Only active users are available for user audit searches.
Case Status	Case classification based on the CDC's "Case Definitions for Infectious Conditions Under Public Health Surveillance." Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values.
Investigation Status	Progress of the investigation. Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values.
Action Type	Name of the action performed to make the change. Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values. **NOTE**: See the section titled, "Audit Tab" in the MDSS Application User Guide for more information on *Actions Performed.*
Reportable Condition	Condition reported for the case. Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values.
Disease Group	Group of reportable conditions to which the case is assigned. Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values. **NOTE:** The *Disease Group* for a case is stored internally and is not displayed on the "Case Detail" screen. It is only used for searches and reports.

FIELD	DESCRIPTION
Audit Date (From/To)	Date on which changes tracked in the audit log were made to the case. Either type the date or click the JavaScript calendar to select a date. One or both dates can be entered to use a date range.

3. Fill in the fields to create the search criteria. Refer to the section titled, "Defining the Search Criteria" in the MDSS User Application Guide for more information.

4. Click one of the available buttons:

- **SEARCH** – Begins a validation process and if there are no errors, the search executes according to your search criteria. After the search completes, the "Case Listings" screen displays with cases that match your search criteria.

  Note: Using this method, the search criteria are not saved.

- **SAVE & FINISH** – Begins a validation process and if there are no errors, saves the search criteria and returns you to the "Saved Admin Searches" screen.
- **CANCEL** – Terminates the process of adding or editing search criteria. If you have changed any information, a "warning dialog" is displayed asking you to verify your intention to cancel.

  a) If you click the **CANCEL** button, you will return to the editing process.

  b) If you click the **OK** button, you will lose your changes and be returned to the "Saved Admin Searches" screen.

4 ADMIN SEARCHES

The **ADMIN SEARCHES** option displays a summary list of all of your saved administration searches.

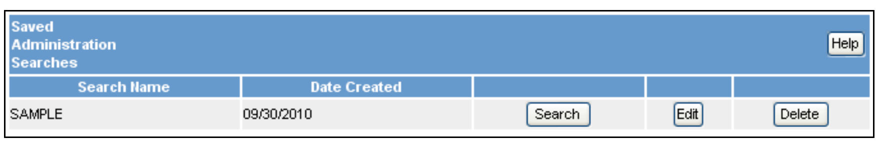
The following tasks may be completed using the **ADMIN SEARCHES** option:

- Execute a saved administration search.
- Edit a saved administration search.
- Delete a saved administration search.

To access your saved administration searches, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **ADMIN SEARCHES** option from the SideBar. The “Saved Administration Searches” screen appears.

Figure 4-1: Saved Administration Search



Saved Administration Searches				Help
Search Name	Date Created			
SAMPLE	09/30/2010	Search	Edit	Delete

2. Descriptions for each field on the screen are provided in the table. All of these fields are read-only and cannot be edited on this screen.

Table 4-1: Saved Administration Search Fields

FIELD	DESCRIPTION
Search Name	Name of the saved administration search.
Date Created	Creation date of the saved administration search.

3. To perform a task, click one of the available buttons:

- **SEARCH** – executes the saved administration search. Continue to the section titled, "Executing a Saved Administration Search."
- **EDIT** – edits the saved administration search. Continue to the section titled, "Editing a Saved Administration Search."
- **DELETE** – deletes the saved administration search (excluding the default). Continue to the section titled, "Deleting a Saved Administration Search."

EXECUTING A SAVED ADMINISTRATION SEARCH

To execute a saved administration search, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **ADMIN SEARCHES** option from the SideBar. The "Saved Administration Searches" screen appears. Refer to Figure 4-1.

2. Locate the saved administration search you want to execute and click the **SEARCH** button on the same row. The "Case Listings" screen appears, displaying the cases matching the search criteria.

Note: In addition to executing a saved search as outlined above, you can also execute a saved search by clicking the **SEARCH** button while editing the search or from the "Case Listings" screen. More information is available in the subsequent section titled, "Editing a Saved Search," and in the MDSS Application Guide section titled, "Cases," respectively.

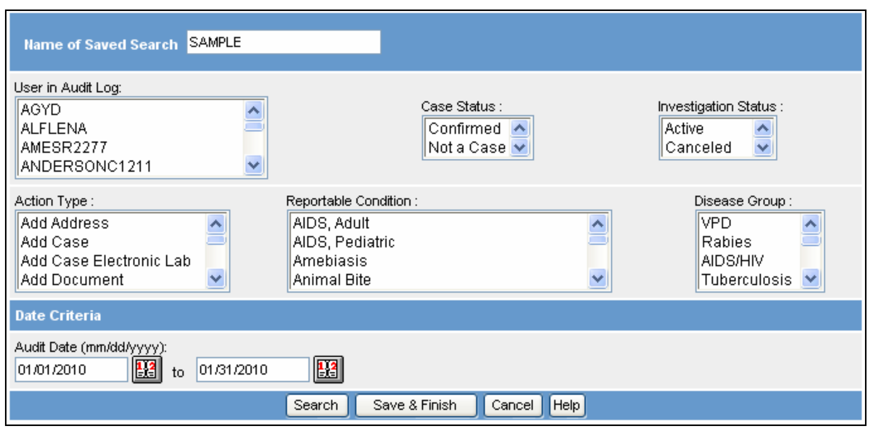
EDITING SAVED ADMINISTRATION SEARCHES

To edit a saved administration search, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **ADMIN SEARCHES** option from the SideBar. The “Saved Administration Searches” screen appears. Refer to Figure 4-1.

2. Locate the specific saved administration search you want to edit, and click the **EDIT** button (located to the right of the saved search summary row). The “User Audit Search” screen appears.

Figure 4-2 Editing User Audit Search



3. The fields and their descriptions are listed in the section titled, “User Audit Search.”

4. Edit the fields by typing/selecting from the drop-down menus, and press one of the available buttons:

- **SEARCH** – Begins a validation process and if there are no errors, the search begins to execute (**but does not save**) with any changes that you may have made. After the search executes, the results appear on the "Case Listings" screen.

- **SAVE & FINISH** – Begins a validation process and if there are no errors, saves the changes that you made to the search, and returns you to the "Saved Administration Searches" screen.
- **CANCEL** – Terminates the process of adding or editing and returns you to the "Saved Administration Searches" screen. If you have changed any information, a "warning dialog" is displayed asking you to verify your intention to cancel.

  a) If you click the **CANCEL** button, you will return to the Edit process.

  b) If you click the **OK** button, you will lose your changes.

DELETING A SAVED ADMINISTRATION SEARCH

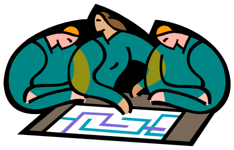
To delete a saved administration search, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **ADMIN SEARCHES** option from the SideBar. The "Saved Administration Searches" screen appears. Refer to Figure 4-1.

2. Locate the specific saved administration search you want to delete, and click the **DELETE** button (located on the right of the saved search summary row).

3. A "warning dialog" is displayed asking you to verify your intention to delete this saved search.

- If you click the **OK** button, your saved search will be deleted and you will return to the "Saved Administration Searches" screen.



- If you click the **CANCEL** button, you will return to the “Saved Administration Searches” screen and your search will not be deleted.

5 PENDING WORK QUEUE

The **PENDING WORK QUEUE** option provides all of the functions necessary to resolve deferred duplicate patient and case records.

Patients and cases are automatically identified for deduplication (or matched) by the application at the time of new case entry to reduce duplicate entries for patients and cases; thus, improving the data quality. However, there are instances when the application allows the processing of these possible duplicate records to be postponed. These instances are:

- New cases that are entered users assigned to a laboratory or healthcare provider role.
- Cases created from Electronic Laboratory Reports. Refer to the section titled, “View /Editing Case Details – Lab Reports Tab – Electronic Lab Reports” for more information.
- Patient or case records that have been deferred during the deduplication process. Refer to the section titled, “New Case (Adding) - Background Processing when Saving Cases - Deduplication.”

When deduplication is postponed, the record is placed into the Queue to resolve later.

The following tasks can be performed with the **PENDING WORK QUEUE** option:

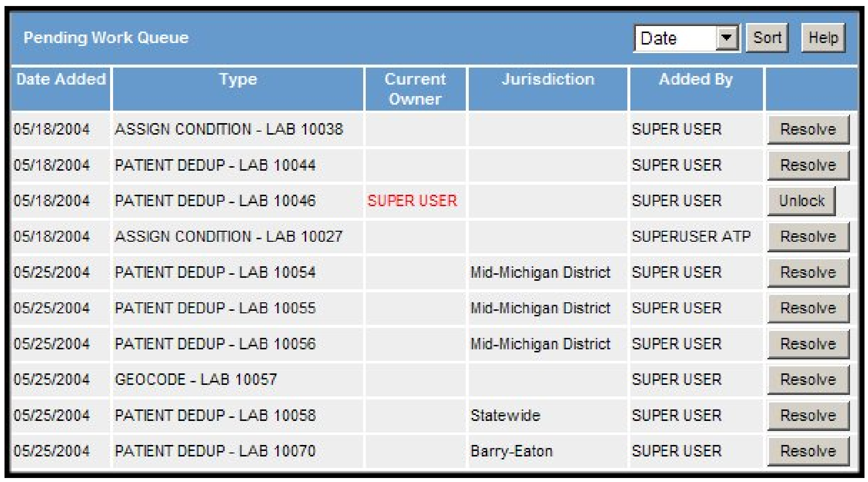
- Select a different sort order
- Resolving Queue records
- Unlocking Queue records

ACCESSING THE PENDING WORK QUEUE

To access the Queue, perform the following:

1. From the **ADMINISTRATION** menu, click the **PENDING WORK QUEUE** option from the SideBar. The "Pending Work Queue" list appears:

Figure 5-1: Pending Work Queue List



Pending Work Queue — Date | Sort | Help

Date Added	Type	Current Owner	Jurisdiction	Added By	
05/18/2004	ASSIGN CONDITION - LAB 10038			SUPER USER	Resolve
05/18/2004	PATIENT DEDUP - LAB 10044			SUPER USER	Resolve
05/18/2004	PATIENT DEDUP - LAB 10046	SUPER USER		SUPER USER	Unlock
05/18/2004	ASSIGN CONDITION - LAB 10027			SUPERUSER ATP	Resolve
05/25/2004	PATIENT DEDUP - LAB 10054		Mid-Michigan District	SUPER USER	Resolve
05/25/2004	PATIENT DEDUP - LAB 10055		Mid-Michigan District	SUPER USER	Resolve
05/25/2004	PATIENT DEDUP - LAB 10056		Mid-Michigan District	SUPER USER	Resolve
05/25/2004	GEOCODE - LAB 10057			SUPER USER	Resolve
05/25/2004	PATIENT DEDUP - LAB 10058		Statewide	SUPER USER	Resolve
05/25/2004	PATIENT DEDUP - LAB 10070		Barry-Eaton	SUPER USER	Resolve

2. The fields/columns and their descriptions are listed in the table:

Table 5-1: Pending Work Queue Columns

FIELD/COLUMN	DESCRIPTION
Date Added	Date the Patient or Case record entered the Queue.
Type	Category of the Patient/ Case record waiting in the Queue.
Current Owner	Owner of the Patient/ Case record.
Jurisdiction	Geographic area of the Patient/ Case record.
Added By	User-ID that added the Patient/ Case record to the Queue.

3. Determine the action you want to perform and continue to its respective section below. The actions that can be performed are:
   - Selecting a different sort order
   - Resolving Queue records
   - Unlocking Queue records

SELECTING A DIFFERENT SORT ORDER

To select a different sort order, perform the following steps:

1. Click the drop-down menu arrow (located at the top of the screen, to the left of the **SORT** button.) to view/select a field by which you would like the Queue records to be sorted.

Figure 5-2: Pending Work Queue Sort

2. Click the **SORT** button to initiate the sort and the Queue records will display in the order you specified.

RESOLVING PATIENT /CASE DEDUPLICATIONS

To resolve Queue records, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **PENDING WORK QUEUE** option from the SideBar. The “Pending Work Queue” list screen appears. Refer to Figure 5-1.
2. Locate the record you want to resolve and click the **RESOLVE** button (located on the far right end of the row).

3. Refer to the section titled, "New Case (Adding) – Background Processing when Saving Cases – Deduplication" in the MDSS Application User Guide for complete instructions.

UNLOCKING PENDING WORK QUEUE ITEMS

When resolving a Queue record, the record is locked so other users cannot concurrently access the record. This lock is not released until the record is resolved. Thus, this record is unavailable to everyone.

To force the unlocking of a Queue record, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **PENDING WORK QUEUE** option from the SideBar. The "Pending Work Queue" list screen appears. Refer to Figure 5-1.

2. Locate the record you want to unlock and click the **UNLOCK** button (located on the far right end of the row). Any processing that has occurred to this record since it was locked will be lost, but the record will now be available to use.

Note: The **UNLOCK** button is visible to the user holding the lock and to system administrators.

6 REVIEW REPLACED PATIENTS

The **REVIEW REPLACED PATIENTS** option displays a history for all merged patients in the system. It can be used to review merged patients and unmerge them if the two were not the same person.

ABOUT THE UNMERGE PROCESS

Occasionally, two patient records that were thought to be for the same patient and therefore deduplicated (merged) turn out to be unique patients after all. When this happens, the data for the two patients must be unmerged and the original two patients restored.

Directly before two patients are merged, their individual data are archived. This archived data will be used when case unmerging becomes necessary. After the unmerge process**,** all data collected before the merge is restored automatically; however, any data added after the merge must be assigned to one of the two patients during the unmerge process.

In general, the user must assign each data element (lab reports, addresses, investigations) to only one patient. The exception to this rule is for addresses. It is valid to assign an address to both patients during the unmerge process; however, this leads to another issue.

Each patient in the system can be associated to any number of residence addresses and the time periods during which the patient lived at those addresses. A patient cannot live in two places at the same time, so when unmerging, if assigning an address to a patient causes such a conflict, the application requires the user to edit the address date ranges to resolve the conflicts before completing the unmerge process.

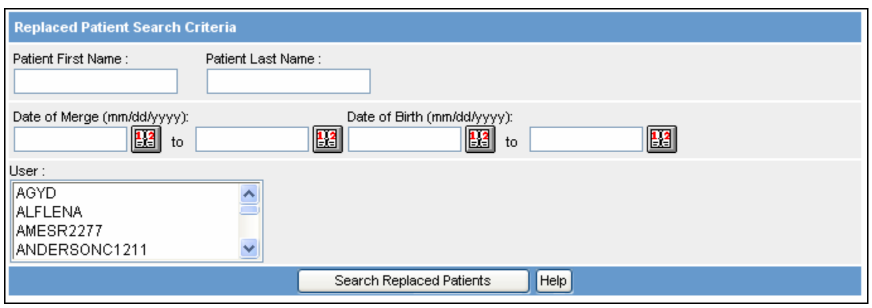
Note: Unmerge listings are not filtered by Geographic Access.

UNMERGING PATIENT INFORMATION

To unmerge patient information, perform the following steps:

1. From the **ADMINISTRATION** menu, click the **REVIEW REPLACED PATIENTS** option from the SideBar. The "Replaced Patient Search Criteria" screen appears.

Figure 6-1: Replaced Patient Search Criteria



2. The fields and their descriptions are provided in the table.

Table 6-1: Replaced Patient Search Fields

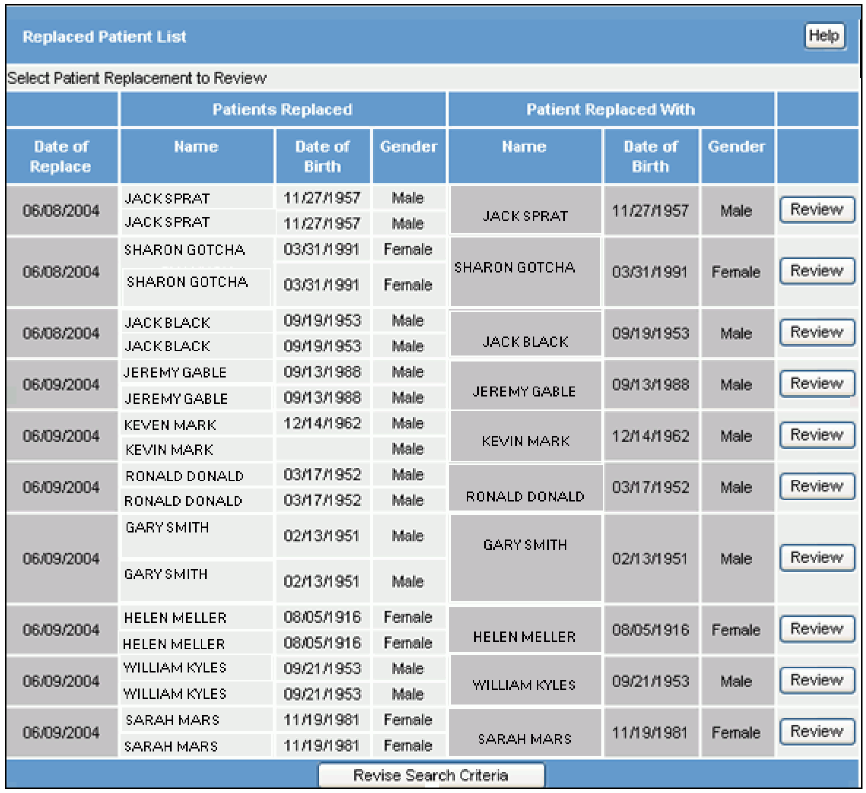
FIELD	DESCRIPTION
Patient First Name	First name of the patient. Click and type the name, using the wildcard (*) symbol as needed.
Patient Last Name	Last name of the patient. Click and type the name, using the wildcard (*) symbol as needed.
Date of Merge (From / To)	Date on which the patient merge was performed. Either type the date or click the JavaScript calendar to select a date. One or both dates can be entered to use a date range.

FIELD	DESCRIPTION
Date of Birth (From / To)	Patient's date of birth. Either type the date or click the JavaScript calendar to select a date. One or both dates can be entered to use a date range.
User	*User ID* of the person who performed the merge. Use the scroll button to view the available options. Click (using **SHIFT** and/or **CTRL** as needed) to select the desired values.

3. Fill in the fields to create the search criteria. Refer to the sections titled, "How the Search Process Works (And/Or)" and "Defining the Search Criteria" in the MDSS Application User guide for additional information.

4. Click the **SEARCH REPLACED PATIENTS** button. The "Replaced Patient List" appears.

Figure 6-2: Replaced Patient List



Replaced Patient List Help

Select Patient Replacement to Review

	Patients Replaced			Patient Replaced With			
Date of Replace	Name	Date of Birth	Gender	Name	Date of Birth	Gender	
06/08/2004	JACK SPRAT JACK SPRAT	11/27/1957 11/27/1957	Male Male	JACK SPRAT	11/27/1957	Male	Review
06/08/2004	SHARON GOTCHA SHARON GOTCHA	03/31/1991 03/31/1991	Female Female	SHARON GOTCHA	03/31/1991	Female	Review
06/08/2004	JACK BLACK JACK BLACK	09/19/1953 09/19/1953	Male Male	JACK BLACK	09/19/1953	Male	Review
06/09/2004	JEREMY GABLE JEREMY GABLE	09/13/1988 09/13/1988	Male Male	JEREMY GABLE	09/13/1988	Male	Review
06/09/2004	KEVEN MARK KEVIN MARK	12/14/1962	Male Male	KEVIN MARK	12/14/1962	Male	Review
06/09/2004	RONALD DONALD RONALD DONALD	03/17/1952 03/17/1952	Male Male	RONALD DONALD	03/17/1952	Male	Review
06/09/2004	GARY SMITH GARY SMITH	02/13/1951 02/13/1951	Male Male	GARY SMITH	02/13/1951	Male	Review
06/09/2004	HELEN MELLER HELEN MELLER	08/05/1916 08/05/1916	Female Female	HELEN MELLER	08/05/1916	Female	Review
06/09/2004	WILLIAM KYLES WILLIAM KYLES	09/21/1953 09/21/1953	Male Male	WILLIAM KYLES	09/21/1953	Male	Review
06/09/2004	SARAH MARS SARAH MARS	11/19/1981 11/19/1981	Female Female	SARAH MARS	11/19/1981	Female	Review

Revise Search Criteria

5. The fields and their descriptions are listed in the table. All of these fields are read-only and cannot be edited.

Table 6-2: Replaced Patient List Fields/Columns

FIELD	DESCRIPTION
Date of Replace	Date on which the merge was performed.
PATIENTS REPLACED	
Name	Name of the patient that was replaced.
Date of Birth	Birth date of the patient that was replaced.
Gender	Sex of the patient that was replaced.
PATIENT REPLACED WITH	
Name	Name(s) of the patient that replaced those listed in the “Patients Replaced” column.
Date of Birth	Birth date of the patient that replaced those listed in the “Patients Replaced” column.
Gender	Sex of the patient that replaced those listed in the “Patients Replaced” column.

6. Locate the patient whose records you want to review and click the corresponding **REVIEW** button. The “Review Replaced Patients” screen appears.

Note: If you don’t want to review any of the records, either click **REVISE SEARCH CRITERIA** to return to the search screen or click another menu or option to exit.

Figure 6-3: Review Replaced Patients

	PATIENT A	PATIENT B	PATIENT C
Review Replaced Patients			
Source	Replaced Patient	Replaced Patient	Merge Result Patient
Patient ID	688118	59016	688117
Created Date	06/08/2004	06/08/2004	06/08/2004
Last Modified Date	06/08/2004	06/08/2004	06/08/2004
Patient Status	OUTPATIENT	OUTPATIENT	OUTPATIENT
First Name	JACK	JACK	JACK
Middle Name			
Last Name	WEAK	WEAK	WEAK
Date of Birth	11/27/1957	11/27/1957	11/27/1957
Gender	MALE	MALE	MALE
Race	CAUCASIAN	CAUCASIAN	CAUCASIAN
Ethnicity	NOT HISPANIC OR LATINO	UNKNOWN	NOT HISPANIC OR LATINO
Home Phone			
Other Phone			
Parent/Guardian First Name			
Parent/Guardian Middle Name			
Parent/Guardian Last Name			
Patient Addresses			
Adresses	1 NABISCO ALLEY IONIA, MI 48846 IONIA COUNTY	1 NABISCO ALLEY IONIA, MI 48846 IONIA COUNTY	1 NABISCO ALLEY IONIA, MI 48846 IONIA COUNTY

Continue Back

7. There are three columns containing demographic and case information for the two originally entered patients (Patient A and Patient B) and the final merged patient (Patient C).

8. Compare each field to determine if these patients should be unmerged and click one of the available buttons:

- **BACK** – to return to the "Replaced Patient List."
- **CONTINUE** – to go forward and continue with the unmerge process and display the "Unmerge Confirmation" screen.

Figure 6-4: Unmerge Confirmation

UnMerge Confirmation

Please review the following sections of information before continuing and finalizing the UnMerge process.

Review Replaced Patients

Merged Patient Record #688117 will be permanently lost.
Patient Records #59016 and #688118 will be recovered.

Outcome	Will be Recovered	Will be Recovered	Will be Lost
Patient ID	688118	59016	688117
Created Date	06/08/2004	06/08/2004	06/08/2004
Last Modified Date	06/08/2004	06/08/2004	06/08/2004
Patient Status	OUTPATIENT	OUTPATIENT	OUTPATIENT
First Name	JACK	JACK	JACK
Middle Name			
Last Name	WEAK	WEAK	WEAK
Date of Birth	11/27/1957	11/27/1957	11/27/1957
Gender	MALE	MALE	MALE
Race	CAUCASIAN	CAUCASIAN	CAUCASIAN
Ethnicity	NOT HISPANIC OR LATINO	UNKNOWN	NOT HISPANIC OR LATINO
Home Phone			
Other Phone			
Parent/Guardian First Name			
Parent/Guardian Middle Name			
Parent/Guardian Last Name			

Patient Addresses

Addresses	1 NABISCO ALLEY IONIA, MI 48846 IONIA COUNTY	1 NABISCO ALLEY IONIA, MI 48846 IONIA COUNTY	1 NABISCO ALLEY IONIA, MI 48846 IONIA COUNTY

Complete UnMerge | Back | Cancel

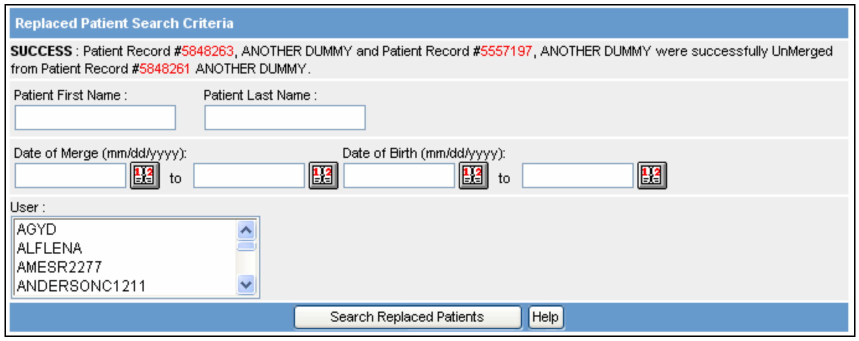
9. Review the patient information to confirm the records should be unmerged.

Note: It may be helpful to make a note of the Patient IDs that will be recovered and that which will be lost**.**

10. Click one of the available buttons:

- **BACK** – to return to the “Review Replaced Patients” screen.
- **CANCEL** – to not continue and return to the “Replaced Patient List” screen.
- **COMPLETE UNMERGE** – to continue with the unmerge process. The “Replaced Patients Search Criteria” screen reappears with a confirmation message in the upper left corner.

Figure 6-5: Replaced Patient Search - Unmerge Success Message



11. This completes the unmerge process. Click a different menu or option to exit.

7 ADMINISTRATIVE REPORTS

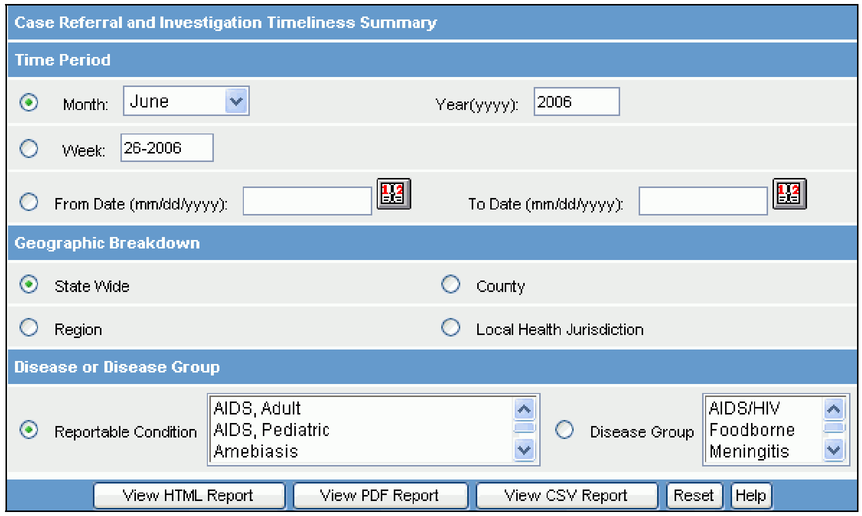
This "Case Referral and Investigation Timeliness Summary" report calculates timeliness statistics for cases of the specified disease(s) or disease group(s) that fall within the specified time period as defined by the report parameters. The statistics can be further broken down by geography by selecting the appropriate geographic breakdown radio button.

Access to the **ADMINISTRATIVE REPORTS** option is limited to certain roles and permissions. Additionally, Local Health Jurisdiction Users who have access to the report are restricted to geographic levels within their Local Health Jurisdiction and the data from their jurisdiction. Statewide users have no geographic level restrictions.

To run the report, perform the following steps:

1. From the SideBar of the **ADMINISTRATION** menu, point and click the **ADMINISTRATIVE REPORTS** option. The report's limitations/selections screen appears.

Figure 7-1: Administrative Report Limitations/Selections



2. Refer to the table for a list of the parameters you can use to select cases for inclusion in the report.

Table 7-1: Administrative Report Parameters

PARAMETER	DESCRIPTION
Time Period	Selects that date range of cases to be included in the report. Each radio button is exclusive of the other options. The *Onset Date* for a case must fall within the specified Time Period range to be included in the report. If the *Onset Date* is unavailable for a case, the system will compare against the *Referral Date.* The entries for Time Period can be: Month—limits the report to cases within the month selected. If the *Month* radio button is selected you must select a month from the drop-down menu. Year—limits the report to cases within the year provided. If the *Year* radio button is selected, you must provide 4-digit year that is not greater than the current year. Week—limits the report to cases within the MMWR Week provided. If the *Week* radio button is selected, you must provide a valid MMWR week in the format of a two-digit week and a four-digit year (i.e., 23-2005). From Date – To Date – limits the report to cases within the date range provided. If the *From Date – To Date* radio button is selected, you must provide a valid date range. Type the date using the format mm/dd/yyyy or select the date from the JavaScript Calendar.

PARAMETER	DESCRIPTION
Geographic Breakdown	Controls the level of detail in the report by breaking down the count or rate information in the report into columns. Each radio button is exclusive of the other options. Region – information is presented for each region in the state. County – information is presented for each county in the state. Statewide – information from the whole state is presented. Local Health Jurisdiction – information is presented for each local health jurisdiction in the state.
Disease or Disease Group	Selects the *Reportable Condition* or the *Disease Group* of the cases included in the report. Each radio button is exclusive of the other options. Multiple disease or disease group selections are allowed using the **SHIFT** and **CTRL** keys. No selection indicates all diseases or disease groups.

3. Type or select the values for the report parameters.

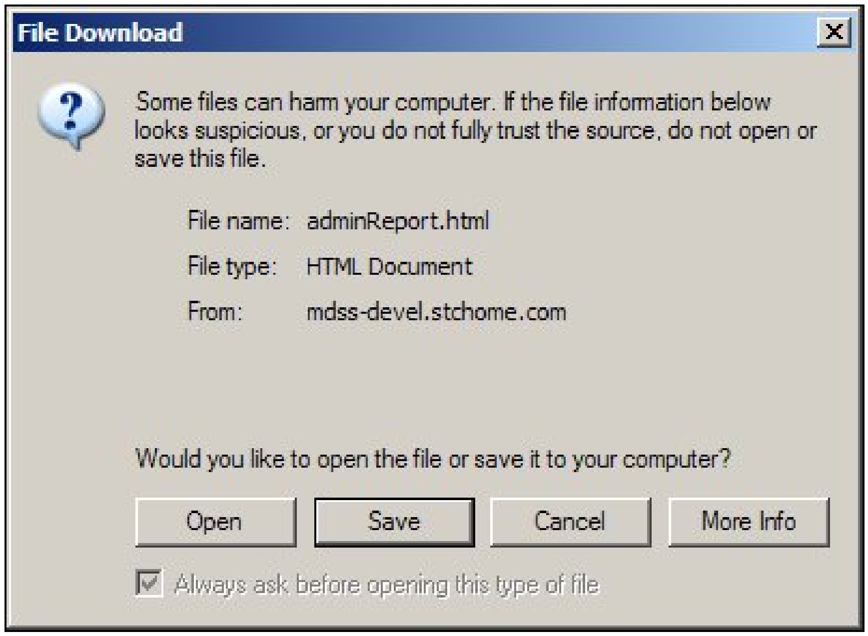
4. When you are finished selecting and defining the parameters, click one of the following buttons:

- **VIEW HTML REPORT** – displays the report in HTML format.
- **VIEW PDF REPORT** – displays the report in PDF format.
- **VIEW CSV REPORT** – displays the report in CSV format.
- **RESET** – Erases the values that you have supplied for the report parameters.

5. When you click one of the view report buttons, the “File Download” dialog will appear asking you to confirm your choice to download the report output file.

Note: There may be a short waiting period before the "File Download" dialog appears. The waiting period is relative to the number of cases contained in the report output file.

Figure 7-2: File Download Dialog

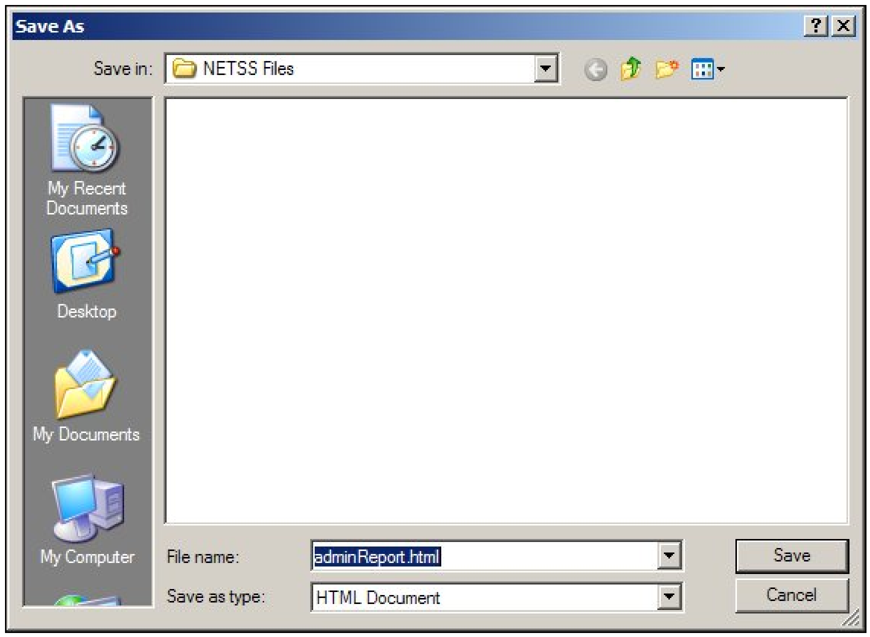


6. Click one of the available buttons:

- **OPEN** – Opens a new window to display the report output as appropriate for the report format selected. You may view and print your report output from this new window. When you are finished, you can close the window by clicking the close button located in the top, right-hand corner.
- **SAVE** – Allows you to save the report output on your PC in the format selected. Continue to the next step.
- **CANCEL** – Terminates the process of running and viewing the report and returns you to the report parameter screen.
- **MORE INFO** – Opens helpful information about downloading a file.

7. If you selected to save your report output file, you will be asked to select a location on your computer to store the report output file and a file name.

Figure 7-3: Save File Dialog



8. Once you have entered the requested information, click the **SAVE** button. Your report output file will now reside on your computer in the location that you specified.

9. The table below contains the list of output variables contained in the report.

Table 7-2: Administrative Report Output Variables

VARIABLE	DESCRIPTION
Time from Onset to Referral (Days)	Statistics for the number of days between *Onset Date* and *Referral Date*. **NOTE**: *Onset Date* is not a required field; therefore, not all cases will be included in the calculation.
N, Average, Median, Maximum	N is the total number of cases used for the calculation of the statistics: average number of days, median number of days, and the maximum number of days.
Time from Referral to Entry (Days)	Statistics for the number of days between *Referral Date* and *Case Entry Date*.
N, Average, Median, Maximum	N is the total number of cases used for the calculation of the statistics: average number of days, median number of days, and the maximum number of days.
Time from Referral to Completion (Days)	Statistics for the number of days between *Referral Date* and *Completion Date*. **NOTE**: Cases are not assigned a *Completion Date* until the *Case Status* has been set to `Completed`; therefore, not all cases will be included in the calculation.
N, Average, Median, Maximum	N is the total number of cases used for the calculation of the statistics: average number of days, median number of days, and the maximum number of days.
Total time Onset to Completion (Days)	Statistics for the number of days between *Onset Date* and *Completion Date*. **NOTE**: *Onset Date* is not a required field and cases are not assigned a *Completion Date* until the *Case Status* has been set to `Completed`; therefore, not all cases will be included in the calculation.
N, Average, Median, Maximum	N is the total number of cases used for the calculation of the statistics: average number of days, median number of days, and the maximum number of days.

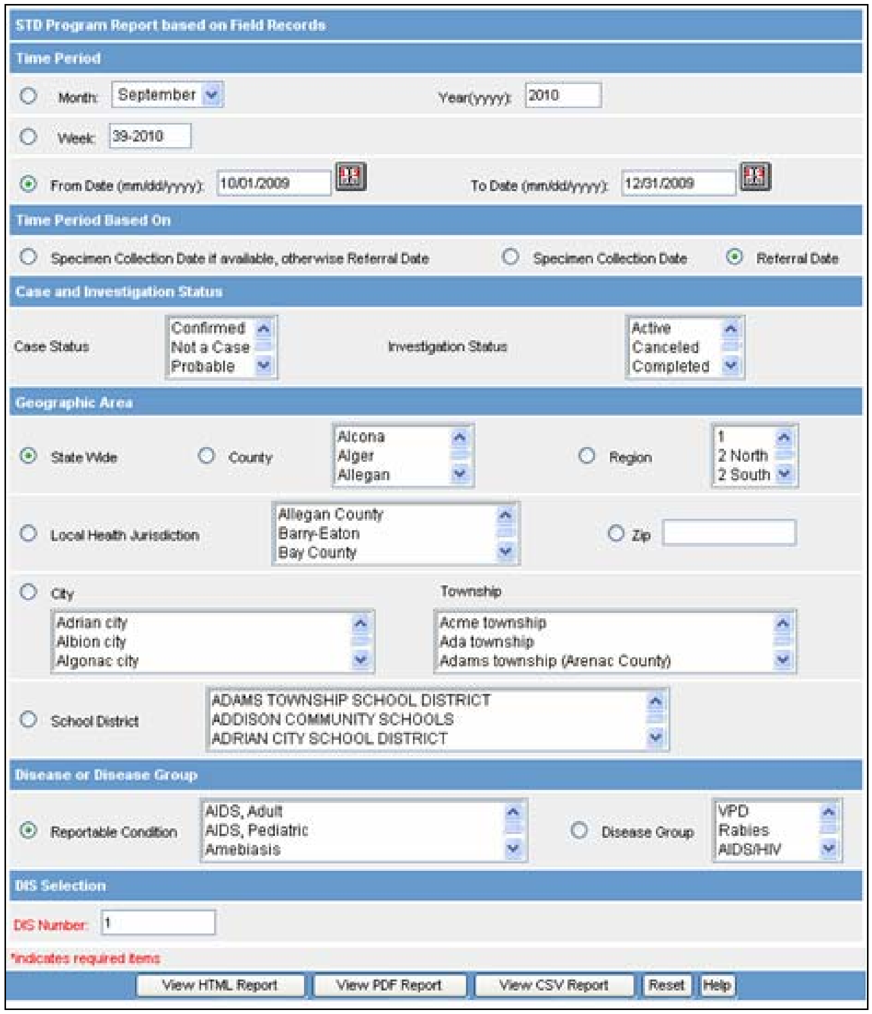
8 FIELD RECORD REPORT

The “STD Program Report based on Field Records” report calculates performance statistics for field records assigned to a selected Disease Intervention Specialist (DIS) within the specified time period as defined by the report parameters. A DIS number is required to run the report. The statistics can be further broken down by geography by selecting the appropriate geographic breakdown radio button. Access to the **FIELD RECORD REPORT** option is limited to certain roles and permissions.

To run the report, perform the following steps:

1. From the SideBar of the **ADMINISTRATION** menu, point and click the **FIELD RECORD REPORT** option. The report's limitations/selections screen appears.

Figure 8-1: Field Record Report Limitations/Selections



2. Refer to the table for a list of the parameters you can use to select cases for inclusion in the report.

Table 8-1: Field Record Report Parameters

PARAMETER	DESCRIPTION
Time Period	Selects that date range of cases to be included in the report. Each radio button is exclusive of the other options. The entries for Time Period can be: Month—limits the report to cases within the month selected. If the *Month* radio button is selected you must select a month from the drop-down menu. Year—limits the report to cases within the year provided. If the *Year* radio button is selected, you must provide 4-digit year that is not greater than the current year. Week—limits the report to cases within the MMWR Week provided. If the *Week* radio button is selected, you must provide a valid MMWR week in the format of a two-digit week and a four-digit year (i.e., 23-2005). From Date – To Date – limits the report to cases within the date range provided. If the *From Date – To Date* button is selected, you must provide a valid date range. Type the date using the format mm/dd/yyyy or select the date from the JavaScript Calendar.

PARAMETER	DESCRIPTION
Time Period Based On	Selects the date field used to determine if a case should be included on the report. Each radio button is exclusive of the other options. Specimen Collection Date if available; otherwise, Referral Date – limits the report to cases within the Time Period entered using *Specimen Collection Date* if available; otherwise, *Referral Date* will be used. Specimen Collection Date – limits the report to cases within the Time Period entered using *Specimen Collection Date* only. This option excludes cases that do not have a *Specimen Collection Date*. Referral Date – limits the report to cases within the Time Period entered using *Referral Date* only. This option is the default selection. **NOTE**: *Referral Date* is a required field and is available for all cases. *Specimen Collection Date* is not a required field and is only available if the information has been entered.
Case and Investigation Status	Selects the *Case Status* and/or *Investigation Status* of cases included in the report. More than one selection can be made using the **SHIFT** and **CTRL** keys.

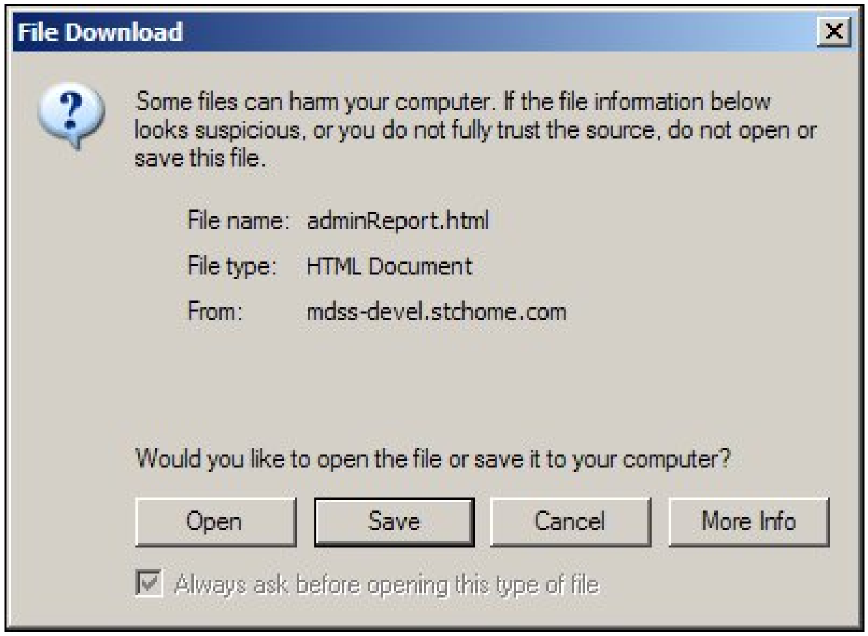
PARAMETER	DESCRIPTION
Geographic Area	Selects the geographic boundaries of cases included in the report. Each radio button is exclusive of the other options. The geographic information selected will compare against the Investigation Address of the case. Statewide – cases reported within the state will be included on the report. County – cases reported within the selected county(ies) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. If no county is selected, then data for all counties are reported. Region **–** cases reported within the selected region(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all regions. Local Health Jurisdiction – cases reported within the selected jurisdiction(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all jurisdictions. Zip – cases reported within the listed ZIP code will be included on the report. Multiple ZIP code selections are allowed by separating them with commas. Range of ZIP code selection is allowed by delimiting the starting range from the ending range using a colon (e.g., 48100:48199). The last 4-digits of a 9-character ZIP code are ignored in range searches. No entry indicates all zip codes. City/Township – cases reported within the selected city/township(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all cities/townships. School District – cases reported within the selected school district(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all school districts. **NOTE:** Selecting Zip, City/Township or School District will exclude cases that are not Geocoded to the chosen level. ***** The Geographic Area section of the Aggregate Case Report is different and operates in the same manner as the Geographic Breakdown section.

PARAMETER	DESCRIPTION
Disease or Disease Group	Selects the *Reportable Condition* or the *Disease Group* of the cases included in the report. Each radio button is exclusive of the other options. Multiple disease or disease group selections are allowed using the **SHIFT** and **CTRL** keys. No selection indicates all diseases or disease groups.
DIS Selection	Selects the *DIS Number* of the field records in the report. Click and type the three digit number. This is a required field.

3. Type or select the values for the report parameters.
4. When you are finished selecting and defining the parameters, click one of the following buttons:
   - **VIEW HTML REPORT** – displays the report in HTML format.
   - **VIEW PDF REPORT** – displays the report in PDF format.
   - **VIEW CSV REPORT** – displays the report in CSV format.
   - **RESET** – Erases the values that you have supplied for the report parameters.
5. When you click one of the view report buttons, the “File Download” dialog will appear asking you to confirm your choice to download the report output file.

Note: There may be a short waiting period before the “File Download” dialog appears. The waiting period is relative to the number of cases contained in the report output file.

Figure 8-2: File Download Dialog

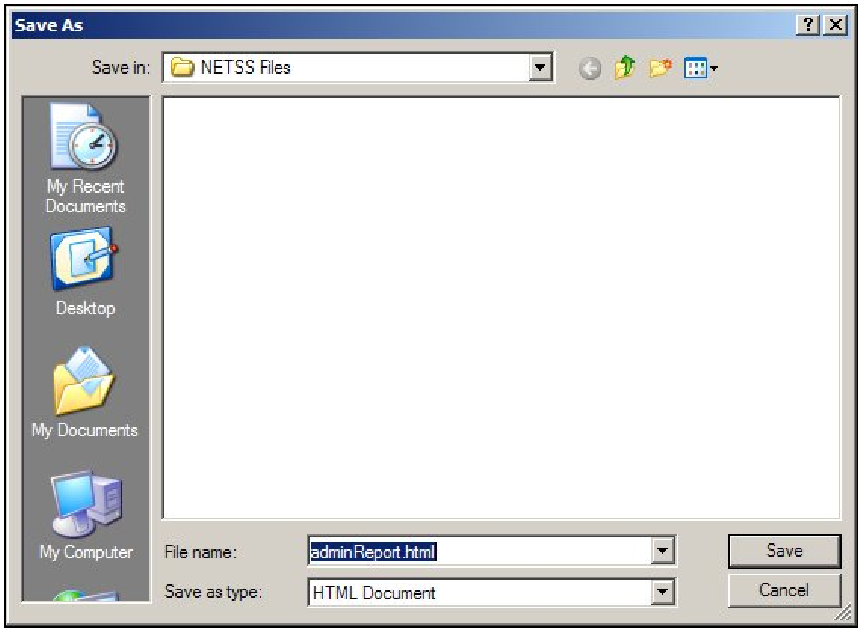


6. Click one of the available buttons:

- **OPEN** – Opens a new window to display the report output as appropriate for the report format selected. You may view and print your report output from this new window. When you are finished, you can close the window by clicking the close button located in the top, right-hand corner.
- **SAVE** – Allows you to save the report output on your PC in the format selected. Continue to the next step.
- **CANCEL** – Terminates the process of running and viewing the report and returns you to the report parameter screen.
- **MORE INFO** – Opens helpful information about downloading a file.

7. If you selected to save your report output file, you will be asked to select a location on your computer to store the report output file and a file name.

Figure 8-3: Save File Dialog



8. Once you have entered the requested information, click the **SAVE** button. Your report output file will now reside on your computer in the location that you specified.

9. The table below contains the list of output variables contained in the report.

Table 8-2: Field Record Report Output Variables

VARIABLE	DESCRIPTION
FRs Assigned	Number of field records assigned to the selected DIS and used for the subsequent analysis.
FRs Open	Number of field records currently without an assigned disposition.
FRs Dispo'd	Number of field records currently assigned a disposition.
FRs Dispo'd Within 7 Days	Number of field records assigned a disposition date within 7 days of the *Date Initiated*.
FRs Dispo'd Within 14 Days	Number of field records assigned a disposition date within 14 days of the *Date Initiated*.

VARIABLE	DESCRIPTION
FRs Dispo'd Within 30 Days	Number of field records assigned a disposition date within 30 days of the *Date Initiated*.
Dispo A **…** **Dispo L**	Number of FRs with the value of `A-Preventative Treatment` in the *Disposition* field. … Number of FRs with the value of `L-Other` in the *Disposition* field.

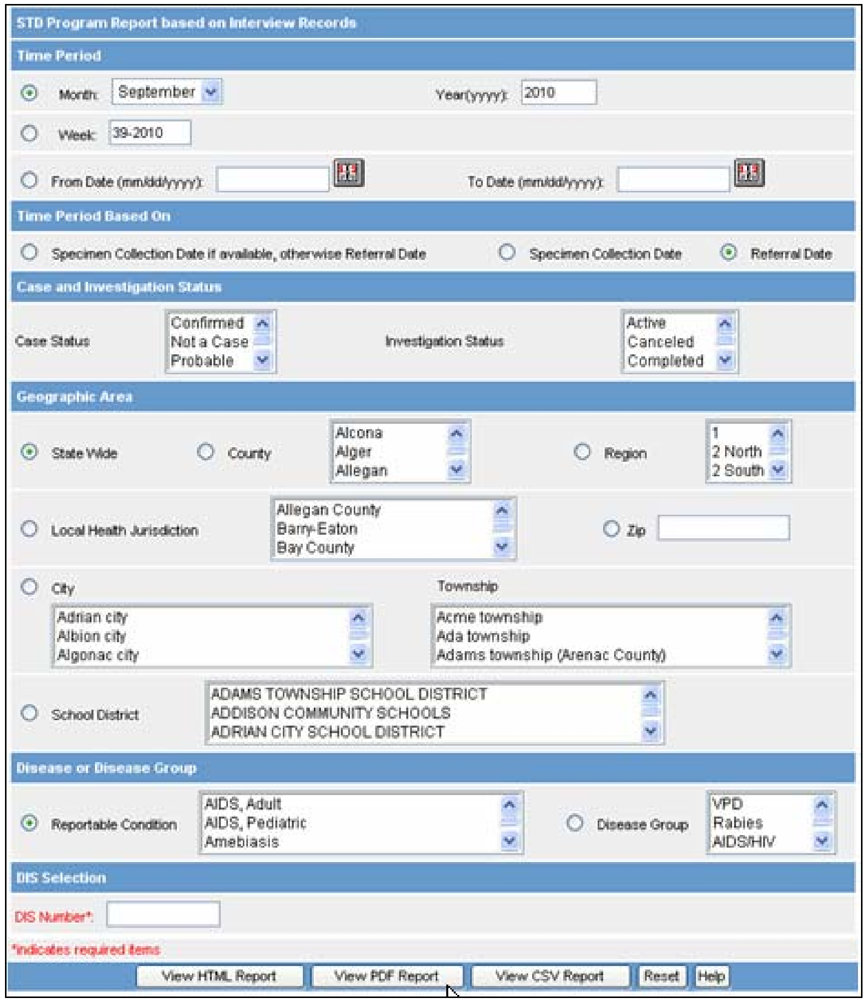
9 INTERVIEW RECORD REPORT

The “STD Program Report based on Interview Records” report calculates performance statistics for interview records assigned to a selected Disease Intervention Specialist (DIS) within the specified time period as defined by the report parameters. A DIS number is required to run the report. The statistics can be further broken down by geography by selecting the appropriate geographic breakdown radio button. Access to the **INTERVIEW RECORD REPORT** option is limited to certain roles and permissions.

To run the report, perform the following steps:

1. From the SideBar of the **ADMINISTRATION** menu, point and click the **INTERVIEW RECORD REPORT** option. The report's limitations/selections screen appears.

Figure 9-1: Interview Record Report Limitations/Selections



2. Refer to the table for a list of the parameters you can use to select cases for inclusion in the report.

Table 9-1: Interview Record Report Parameters

PARAMETER	DESCRIPTION
Time Period	Selects that date range of cases to be included in the report. Each radio button is exclusive of the other options. The entries for Time Period can be: Month—limits the report to cases within the month selected. If the *month* radio button is selected you must select a month from the drop-down menu. Year—limits the report to cases within the year provided. If the *Year* radio button is selected, you must provide 4-digit year that is not greater than the current year. Week—limits the report to cases within the MMWR Week provided. If the *Week* radio button is selected, you must provide a valid MMWR week in the format of a two-digit week and a four-digit year (i.e., 23-2005). From Date – To Date – limits the report to cases within the date range provided. If the *From Date – To Date* button is selected, you must provide a valid date range. Type the date using the format mm/dd/yyyy or select the date from the JavaScript Calendar.

PARAMETER	DESCRIPTION
Time Period Based On	Selects the date field used to determine if a case should be included on the report. Each radio button is exclusive of the other options. Specimen Collection Date if available; otherwise, Referral Date – limits the report to cases within the Time Period entered using *Specimen Collection Date* if available; otherwise, *Referral Date* will be used. Specimen Collection Date – limits the report to cases within the Time Period entered using *Specimen Collection Date* only. This option excludes cases that do not have a *Specimen Collection Date*. Referral Date – limits the report to cases within the Time Period entered using *Referral Date* only. This option is the default selection. **NOTE**: *Referral Date* is a required field and is available for all cases. *Specimen Collection Date* is not a required field and is only available if the information has been entered.
Case and Investigation Status	Selects the *Case Status* and/or *Investigation Status* of cases included in the report. More than one selection can be made using the **SHIFT** and **CTRL** keys.

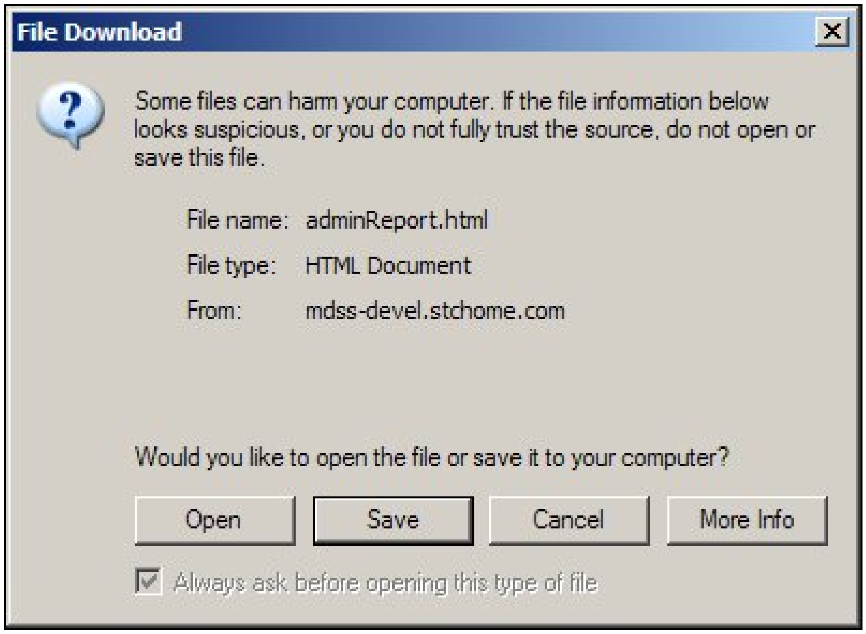
PARAMETER	DESCRIPTION
Geographic Area	Selects the geographic boundaries of cases included in the report. Each radio button is exclusive of the other options. The geographic information selected will compare against the Investigation Address of the case. Statewide – cases reported within the state will be included on the report. County – cases reported within the selected county(ies) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. If no county is selected, then data for all counties are reported. Region **–** cases reported within the selected region(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all regions. Local Health Jurisdiction – cases reported within the selected jurisdiction(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all jurisdictions. Zip – cases reported within the listed ZIP code will be included on the report. Multiple ZIP code selections are allowed by separating them with commas. Range of ZIP code selection is allowed by delimiting the starting range from the ending range using a colon (e.g., 48100:48199). The last 4-digits of a 9-character ZIP code are ignored in range searches. No entry indicates all zip codes. City/Township – cases reported within the selected city/township(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all cities/townships. School District – cases reported within the selected school district(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all school districts. **NOTE:** Selecting Zip, City/Township or School District will exclude cases that are not Geocoded to the chosen level. ***** The Geographic Area section of the Aggregate Case Report is different and operates in the same manner as the Geographic Breakdown section.

PARAMETER	DESCRIPTION
Disease or Disease Group	Selects the *Reportable Condition* or the *Disease Group* of the cases included in the report. Each radio button is exclusive of the other options. Multiple disease or disease group selections are allowed using the **SHIFT** and **CTRL** keys. No selection indicates all diseases or disease groups.
DIS Selection	Selects the *DIS Number* of the field records in the report. Click and type the three digit number. This is a required field.

3. Type or select the values for the report parameters.
4. When you are finished selecting and defining the parameters, click one of the following buttons:
    - **VIEW HTML REPORT** – displays the report in HTML format.
    - **VIEW PDF REPORT** – displays the report in PDF format.
    - **VIEW CSV REPORT** – displays the report in CSV format.
    - **RESET** – Erases the values that you have supplied for the report parameters.
5. When you click one of the view report buttons, the “File Download” dialog will appear asking you to confirm your choice to download the report output file.

Note: There may be a short waiting period before the “File Download” dialog appears. The waiting period is relative to the number of cases contained in the report output file.

Figure 9-2: File Download Dialog

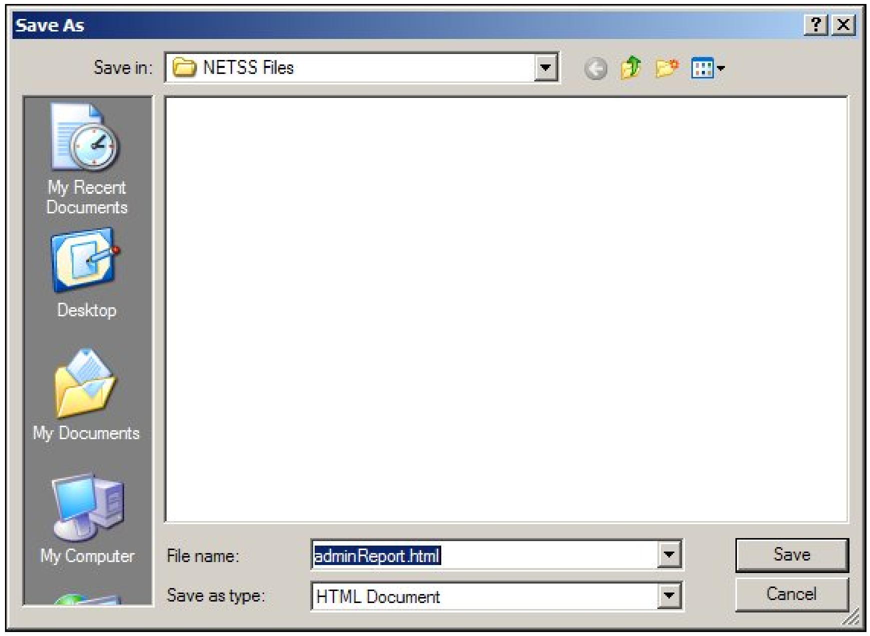


6. Click one of the available buttons:

   - **OPEN** – Opens a new window to display the report output as appropriate for the report format selected. You may view and print your report output from this new window. When you are finished, you can close the window by clicking the close button located in the top, right-hand corner.
   - **SAVE** – Allows you to save the report output on your PC in the format selected. Continue to the next step.
   - **CANCEL** – Terminates the process of running and viewing the report and returns you to the report parameter screen.
   - **MORE INFO** – Opens helpful information about downloading a file.

7. If you selected to save your report output file, you will be asked to select a location on your computer to store the report output file and a file name.

Figure 9-3: Save File Dialog



8. Once you have entered the requested information, click the **SAVE** button. Your report output file will now reside on your computer in the location that you specified.

9. The table below contains the list of output variables and their descriptions contained in the report. All fields listed are found in the Interview Record.

Table 9-2: Interview Record Report Output Variables

VARIABLE	DESCRIPTION
IRs Assigned	Number of interview records (IRs) initially assigned to the selected DIS (the first DIS number field (*Worker*) in the Condition Reporting Information section).
Cases Interviewed	Number of IRs where the original interview is completed by the selected DIS (the second DIS number field (*Worker*) in the Condition Reporting Information section).

VARIABLE	DESCRIPTION
Cases Closed	Number of IRs where the case is closed by the selected DIS (the third DIS number field (*Worker*) in the Condition Reporting Information section).
Cases Opened	Number of IRs where the original interview is completed by the selected DIS (the second DIS number field (*Worker*)) and the DIS number field associated with the *Date Case Closed* field is blank in the Condition Reporting Information section.
Int within 7 Days	When the original interview is completed by the selected DIS (the second DIS number field (*Worker*)), the number of interviews conducted with 7 or fewer days between the *Laboratory Report Date* and the *Date of Original Interview* in the Condition Reporting Information section.
Int within 14 Days	When the original interview is completed by the selected DIS (the second DIS number field (*Worker*)), the number of interviews conducted with 14 or fewer days between the *Laboratory Report Date* and the *Date of Original Interview* in the Condition Reporting Information section.
Int within 30 Days	When the original interview is completed by the selected DIS (the second DIS number field (*Worker*)), the number of interviews conducted with 30 or fewer days between the *Laboratory Report Date* and the *Date of Original Interview* in the Condition Reporting Information section.
Partners Init	When the selected DIS is listed under *DIS Number,* the number of partners listed where the value for *Partner/Cluster* is `P1 - Sex Partner` in the Partner Cluster Information section.
New within 7	When the selected DIS is listed under *DIS Number* and the *Disposition* is `A – Preventative Treatment` or `C – Infected, Brought to Treatment`, the number of partner dispositions completed with 7 or fewer days between the *Interview Date* and the *Disposition Date* in the Partner Cluster Information section.

VARIABLE	DESCRIPTION
New within 14	When the selected DIS is listed under *DIS Number* and the *Disposition* is `A – Preventative Treatment` or `C – Infected, Brought to Treatment`, the number of partner dispositions completed with 14 or fewer days between the *Interview Date* and the *Disposition Date* in the Partner Cluster Information section.
New within 30	When the selected DIS is listed under *DIS Number* and the *Disposition* is `A – Preventative Treatment` or `C – Infected, Brought to Treatment`, the number of partner dispositions completed with 30 or fewer days between the *Interview Date* and the *Disposition Date* in the Partner Cluster Information section.
Contact Index	When the selected DIS is initially assigned to the interview (the first DIS number field (*Worker*) in the Condition Reporting Information section), the number of sex partners listed in the Partner Cluster Information section divided by the number of assigned interviews in the Condition Reporting Information section.
NCI	When the selected DIS is initially assigned to the interview (the first DIS number field (*Worker*) in the Condition Reporting Information section), the number of IRs with no partners listed in the Partner Cluster Information section divided by the total number of assigned interviews in the Condition Reporting Information section.
Cluster Index	When the selected DIS is initially assigned to the interview (the first DIS number field (*Worker*) in the Condition Reporting Information section), the number of associates or suspects named in the Partner Cluster Information section (the value for *Partner/Cluster* is not `P1 - Sex Partner`) divided by the total number of assigned interviews in the Condition Reporting Information section.

VARIABLE	DESCRIPTION
Dispo A **…** **Dispo L**	When the original interview is completed by the selected DIS (the second DIS number field (*Worker*) in the Cluster Information Section), the total number of partners listed in the Partner Cluster Information section with the value `of A-Preventative Treatment` in the *Disposition* field. … When the original interview is completed by the selected DIS (the second DIS number field (*Worker*) in the Cluster Information Section), the total number of partners listed in the Partner Cluster Information section with the value of `L-Other` in the *Disposition* field.

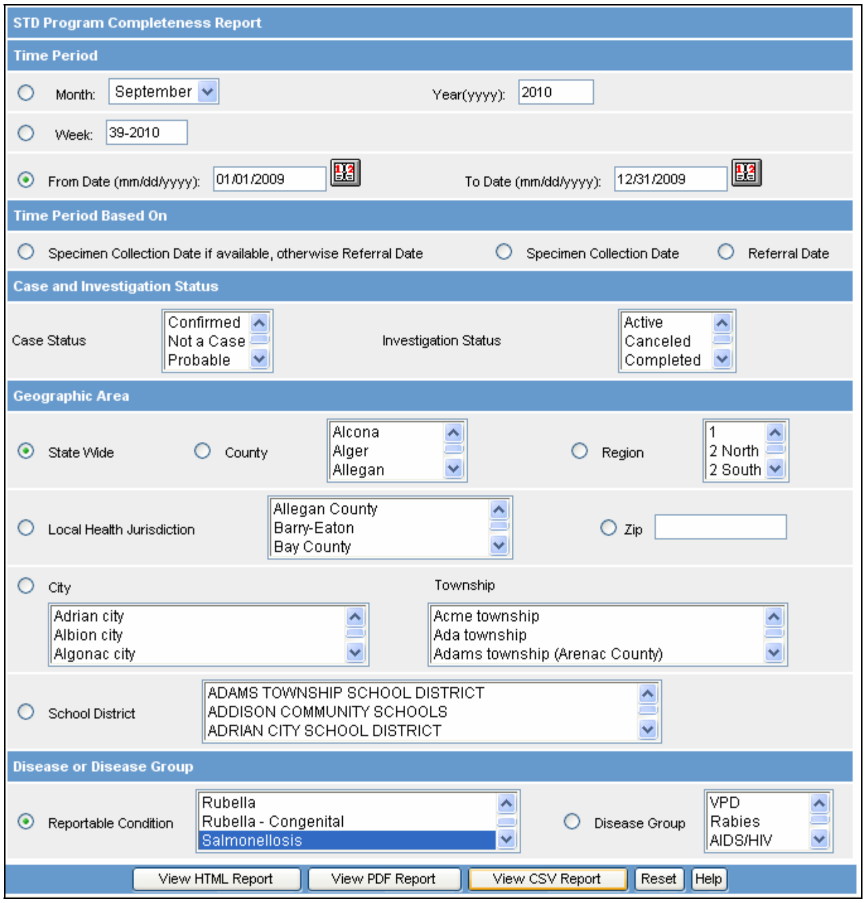
10 COMPLETENESS REPORT

The "STD Program Completeness Report" calculates completeness statistics for cases within the specified time period as defined by the report parameters. The statistics can be further broken down by geography by selecting the appropriate geographic breakdown radio button. Access to the **COMPLETENESS REPORT** option is limited to certain roles and permissions.

To run the report, perform the following steps:

1. From the SideBar of the **ADMINISTRATION** menu, point and click the **COMPLETENESS REPORT** option. The report's limitations/selections screen appears.

Figure 10-1: Completeness Report Limitations/Selections



2. Refer to the table for a list of the parameters you can use to select cases for inclusion in the report.

Table 10-1: Completeness Report Parameters

PARAMETER	DESCRIPTION
Time Period	Selects that date range of cases to be included in the report. Each radio button is exclusive of the other options. The entries for Time Period can be: Month—limits the report to cases within the month selected. If the *Month* radio button is selected you must select a month from the drop-down menu. Year—limits the report to cases within the year provided. If the *Year* radio button is selected, you must provide 4-digit year that is not greater than the current year. Week—limits the report to cases within the MMWR Week provided. If the *Week* radio button is selected, you must provide a valid MMWR week in the format of a two-digit week and a four-digit year (i.e., 23-2005). From Date – To Date – limits the report to cases within the date range provided. If the *From Date – To Date* radio button is selected, you must provide a valid date range. Type the date using the format mm/dd/yyyy or select the date from the JavaScript Calendar.

PARAMETER	DESCRIPTION
Time Period Based On	Selects the date field used to determine if a case should be included on the report. Each radio button is exclusive of the other options. Specimen Collection Date if available; otherwise, Referral Date – limits the report to cases within the Time Period entered using *Specimen Collection Date* if available; otherwise, *Referral Date* will be used. Specimen Collection Date – limits the report to cases within the Time Period entered using *Specimen Collection Date* only. This option excludes cases that do not have a *Specimen Collection Date*. Referral Date – limits the report to cases within the Time Period entered using *Referral Date* only. This option is the default selection. **NOTE**: *Referral Date* is a required field and is available for all cases. *Specimen Collection Date* is not a required field and is only available if the information has been entered.
Case and Investigation Status	Selects the *Case Status* and/or *Investigation Status* of cases included in the report. More than one selection can be made using the **SHIFT** and **CTRL** keys.

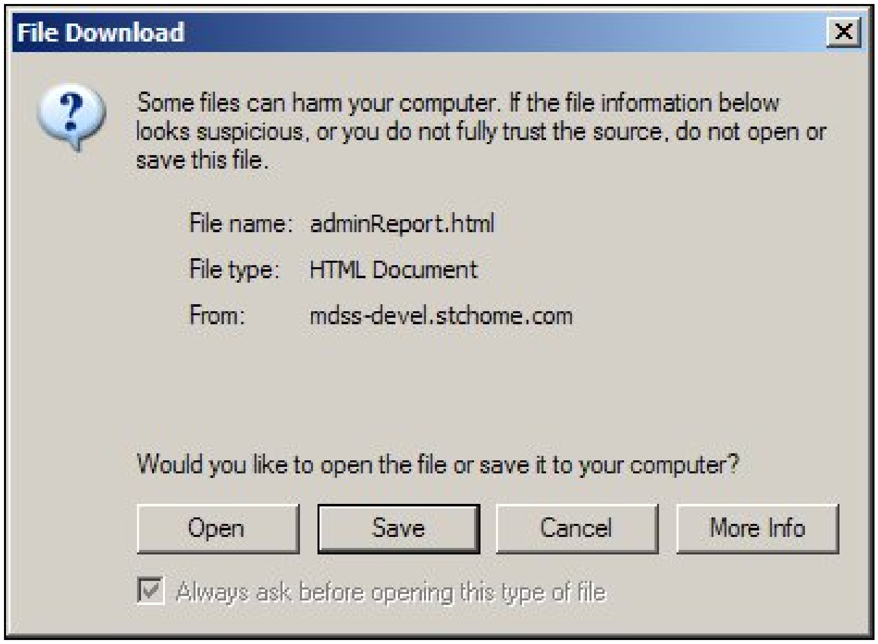
PARAMETER	DESCRIPTION
Geographic Area	Selects the geographic boundaries of cases included in the report. Each radio button is exclusive of the other options. The geographic information selected will compare against the Investigation Address of the case. Statewide – cases reported within the state will be included on the report. County – cases reported within the selected county(ies) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. If no county is selected, then data for all counties are reported. Region **–** cases reported within the selected region(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all regions. Local Health Jurisdiction – cases reported within the selected jurisdiction(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all jurisdictions. Zip – cases reported within the listed ZIP code will be included on the report. Multiple ZIP code selections are allowed by separating them with commas. Range of ZIP code selection is allowed by delimiting the starting range from the ending range using a colon (e.g., 48100:48199). The last 4-digits of a 9-character ZIP code are ignored in range searches. No entry indicates all zip codes. City/Township – cases reported within the selected city/township(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all cities/townships. School District – cases reported within the selected school district(s) will be included on the report. More than one selection can be made using the **SHIFT** and **CTRL** keys. No selection indicates all school districts. **NOTE:** Selecting Zip, City/Township or School District will exclude cases that are not Geocoded to the chosen level. ***** The Geographic Area section of the Aggregate Case Report is different and operates in the same manner as the Geographic Breakdown section.

PARAMETER	DESCRIPTION
Disease or Disease Group	Selects the *Reportable Condition* or the *Disease Group* of the cases included in the report. Each radio button is exclusive of the other options. Multiple disease or disease group selections are allowed using the **SHIFT** and **CTRL** keys. No selection indicates all diseases or disease groups.

3. Type or select the values for the report parameters.
4. When you are finished selecting and defining the parameters, click one of the following buttons:
   - **VIEW HTML REPORT** – displays the report in HTML format.
   - **VIEW PDF REPORT** – displays the report in PDF format.
   - **VIEW CSV REPORT** – displays the report in CSV format.
   - **RESET** – Erases the values that you have supplied for the report parameters.
5. When you click one of the view report buttons, the “File Download” dialog will appear asking you to confirm your choice to download the report output file.

Note: There may be a short waiting period before the “File Download” dialog appears. The waiting period is relative to the number of cases contained in the report output file.

Figure 10-2: File Download Dialog

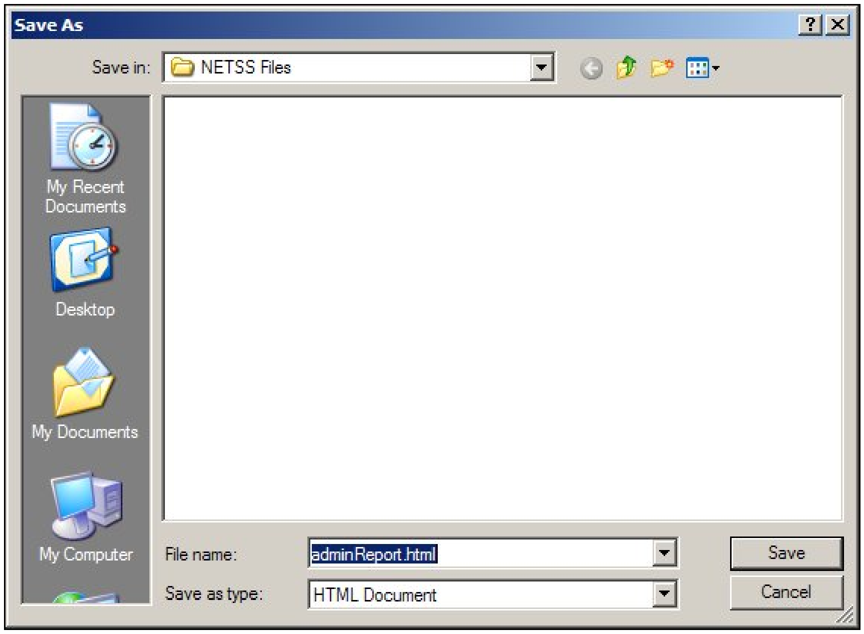


6. Click one of the available buttons:

- **OPEN** – Opens a new window to display the report output as appropriate for the report format selected. You may view and print your report output from this new window. When you are finished, you can close the window by clicking the close button located in the top, right-hand corner.
- **SAVE** – Allows you to save the report output on your PC in the format selected. Continue to the next step.
- **CANCEL** – Terminates the process of running and viewing the report and returns you to the report parameter screen.
- **MORE INFO** – Opens helpful information about downloading a file.

7. If you selected to save your report output file, you will be asked to select a location on your computer to store the report output file and a file name.

Figure 10-3: Save File Dialog



8. Once you have entered the requested information, click the **SAVE** button. Your report output file will now reside on your computer in the location that you specified.

9. The table below contains the list of output variables contained in the report.

Table 10-2: Completeness Report Output Variables

VARIABLE	DESCRIPTION
Cases	Total number of cases used for the subsequent analysis.
Patient Sex % Complete	Percent of cases where *Patient Sex* is not `Unknown`.
Patient Age % Complete	Percent of cases where the patient's age is not missing.
Ethnicity % Complete	Percent of cases where *Hispanic Ethnicity* is not `Unknown`.

VARIABLE	DESCRIPTION
Race % Complete	Percent of cases where *Race* is not `Unknown`.
Info Source % Complete	Percent of cases where *Information Source* from the case detail (PDF) form is not missing. **NOTE**: not all *Reportable Conditions* have this question.
Spec Coll Date % Complete	Percent of cases where *Date Specimen Taken* from the case detail (PDF) form is not missing. **NOTE**: not all *Reportable Conditions* have this question.
Treatment Date % Complete	Percent of cases where *If Yes, Date of Treatment* from the case detail (PDF) form is not missing. **NOTE**: not all *Reportable Conditions* have this question.
Sex with M/F % Complete	Percent of cases where both *Has the patient had sex with a male within the past 12 months?* and *Has the patient had sex with a female within the past 12 months?* from the case detail (PDF) form are not *Refused to Answer, Didn't Ask*, or missing (one of the fields must have a value of `Yes` or `No` to be considered complete). **NOTE**: not all *Reportable Conditions* have this question.

INDEX