IDSS

USER MANUAL

USER
REFERENCE
GUIDE

LOCAL
PUBLIC
HEALTH

CADE
DIVISION

TABLE OF CONTENTS

AN INTRODUCTION TO IDSS

IDSS is the program that holds the data for HHS Reportable Disease Records. There are three basic components to this information: the Record, Event, and Investigation. This manual will walk you through the Workflow, or process, of accurately recording and navigating this information. Additionally, this manual will guide you through the Tasks of the Workflow, which is in the most efficient way to complete the steps in the system.

   NOTE: This manual is designed to guide you through inputting the Investigation information into IDSS. *This manual assumes an individual has had previous training on HHS policies and procedures, as well as prior practice in Investigations.*

RECORD

EVENT

INVESTIGATION

All Investigation and Event information will be in a Record, but not all Record information will show in an Event or Investigation. This is because the Record includes historical information that is not needed for current Investigations.

TERMS

Record: An individual person and all the information and history we have on that person; including an entire history of demographics, diseases, Events, and Investigations.

Event: A reported disease

Investigation: The Workflow – or process – of getting information about the disease from health providers and cases (patients).   In some cases, an Investigation could cover more than 1 event. An example of this would be simultaneous reports for HUS and E.coli.

Workflow: The process of completing steps (Tasks) to properly capture disease information in IDSS.

Tasks: The steps required in each stage of the Workflow process.

SECTION 1: GETTING STARTED

1.1 LOG IN

IDSS is a web-based (cloud-based) system.

To log into IDSS:

1.   Go to website: https://idss.hhs.iowa.gov/
2.   Click on the Okta button
3.   Use your Okta credentials to log in (See Section 6.3 for details to request Okta access)
4.   When log in is successful, you will see the welcome screen:

Welcome Back,

Dashboard: Interview Team ▾   **Make Default**

1.2 BASIC NAVIGATION

Here is an overview of the different areas of the main page of IDSS, also known as your Dashboard.

Welcome Back,

Dashboard: Interview Team ▾   **Make Default**

1. Your name will appear at the top of the page to confirm correct log in.
2. Clicking on this IDSS symbol will return you to this Dashboard (main page) at any point during any navigation in IDSS.
3. Account information is accessed by either clicking "Account" or the profile symbol. Account information is limited and only includes your User Profile (what access level you have) and log out button.   Other profile information is found directly in Okta.

1.3 MENU BAR NAVIGATION

IDSS   Records   Search ▾   Reports ▾   Account ▾ 🧑

Welcome Back,

Dashboard: Interview Team ▾   **Make Default**

The menu bar will remain at the top of your screen at all times. Menu bar options include:

1. Records – search for any Record (Person); results are limited by user level and jurisdiction.
2. Search – Aside from Records (Person), you can directly search for Lab Results and Investigations by using a variety of criteria, as seen below.
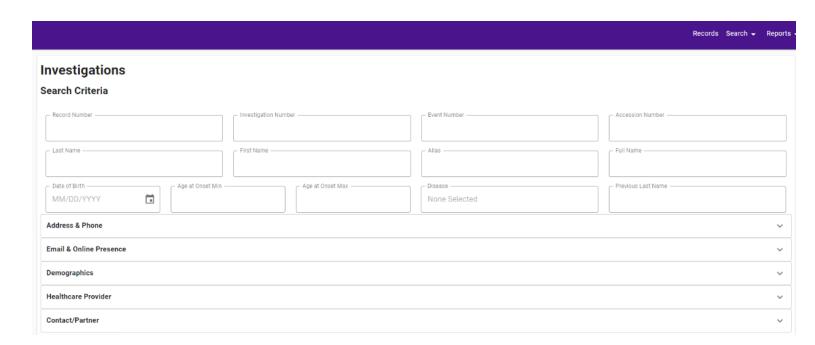3. Reports – Reports can be accessed here; access is limited by user level. Most information that has been historically gathered through reports, will be readily available on the My Dashboard.

Records   Search ▾   Reports ▾

Investigations

Search Criteria

Record Number	Investigation Number	Event Number	Accession Number
Last Name	First Name	Alias	Full Name
Date of Birth MM/DD/YYYY 📅	Age at Onset Min	Age at Onset Max	Disease None Selected	Previous Last Name

Address & Phone ⌄

Email & Online Presence ⌄

Demographics ⌄

Healthcare Provider ⌄

Contact/Partner ⌄

Section 1 GTKs (Good to Know)

- IDSS is linked with your Okta Account
- Changing your Okta password automatically changes your IDSS password
- Clicking on "IDSS" in the upper left corner will return you to your Dashboard (main page)
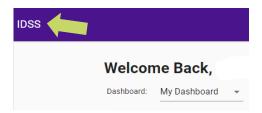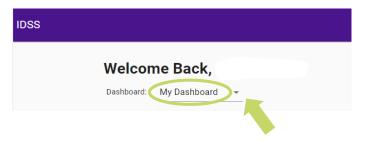
SECTION 2: DASHBOARDS

2.1 INTRODUCTION TO DASHBOARDS

IDSS will use Dashboards as the primary launch point for most activities at the Local Public Health Level; whether searching for a Record, looking for an Event, or starting and continuing an Investigation.

1. **Location**: Dashboards are your main page and can be accessed at any time by clicking the IDSS symbol in the upper left corner, as indicated by the arrow.

2. **Drop Down List**: according to your User Role, you may have more than one option for different Dashboards that can be seen in the drop-down list, as indicated by the arrow. "My Dashboard" is the recommended default Dashboard.

3. **Default Option**: Click the "make default" button to make the current dashboard your default. You can change the default Dashboard by selecting a different dashboard from the drop-down menu and then clicking the "make default" button. If there is no default button, then the dashboard you are on is your current default dashboard.

4. **Tiles**: on each dashboard, you will see Tiles (or boxes) of information. Most Tiles contain lists of Investigations. The title of Tile specifies what information is included and how it is presented.

5. **User Role Specific**: Dashboards and Tiles are User Role specific, so some variance from department and location is to be expected.

2.2 KEY NAVIGATION POINTS

There are a few basics to know about navigating the Dashboard (main page).

1. **Sorting arrow**: Any time you see a sorting arrow, you can sort by that column

2. **Number of Cases Viewed**: At the bottom of each Tile, you can see how many total cases are in that Tile. You can (1) expand how many rows you see in the Tile by using the drop-down box to view more 'rows per page' **or** (2) navigate to the next page within the Tile by clicking "Next".

Rows per page: 25 ▾   1-25 of 50   1   2   Next ›

3. **Scroll Bars**: If there are several rows on the Tile (box), the Tile size will not expand or change. Instead, you will see a new, small scroll bar open to the side of the Tile as indicated by the green arrow in the image to the right. This scroll bar will only navigate the lines within that specific Tile. The larger scroll bar to the left will continue to move the entire page up and down, as indicated by the blue arrow.

4. **Customization**: Tiles are pre-set and can't be hidden, minimized, or changed.

5. **Access**: To access or choose a case, you can either (1) click on the arrow at the end of a row or (2) hover anywhere in the line of the case and when it turns gray, click to select.

6. **Hyperlinks**: Hyperlinks do not access Records. Hyperlinks are rare and will not be seen often; they are *not* the primary mode of navigation in a Tile. Some information may be formatted to hyperlink. These links have the typical bright blue font and underlined when available. If you do click on a hyperlink, you can simply click the back arrow to return to the previous page.
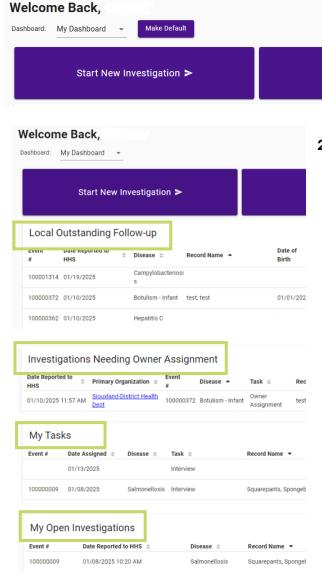
2.3 MY DASHBOARD

"My Dashboard" will be your initial default Dashboard. This Dashboard has the Tiles and functions to start Tasks most frequently used. Tiles displayed are according to User Roles.

1. **Launch Buttons**: each of these buttons will open to another process; we will cover details of navigating these processes in following Sections.

Welcome Back,

Dashboard: My Dashboard ▼   Make Default

| Start New Investigation ➤ | Search Records ➤ | Search Labs ➤ |

Welcome Back,

Dashboard: My Dashboard ▼

| Start New Investigation ➤ | |

Local Outstanding Follow-up

Event #	Date Reported to HHS	Disease	Record Name ▲	Date of Birth
100001314	01/19/2025	Campylobacteriosis		
100000372	01/10/2025	Botulism - Infant	test, test	01/01/202
100000362	01/10/2025	Hepatitis C		

Investigations Needing Owner Assignment

Date Reported to HHS	Primary Organization	Event #	Disease ▲	Task	Rec
01/10/2025 11:57 AM	Siouxland-District Health Dept	100000372	Botulism - Infant	Owner Assignment	test

My Tasks

| Event #	Date Assigned	Disease	Task	Record Name ▼
	01/13/2025		Interview	
100000009	01/08/2025	Salmonellosis	Interview	Squarepants, Spongeb

My Open Investigations

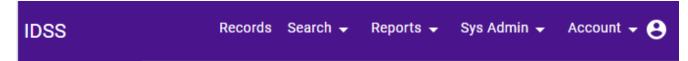| Event #	Date Reported to HHS	Disease	Record Name ▼
100000009	01/08/2025 10:20 AM	Salmonellosis	Squarepants, Spongel

2. **Tiles:** Most Tiles have a list of Investigations. These Tiles have headers to explain which Investigations are listed. This is designed to help you easily find cases specific to your role. The most common Tiles found on My Dashboard will be:

A. <u>Local Outstanding Follow-up</u>: County-wide list of open Investigations of all reportable diseases, lists displayed are according to your User Role.

B. <u>Investigations Needing Owner Assignment</u>: County-wide list of Investigations that haven't yet been assigned. These can either be claimed by you or assigned to someone else on the team. We will cover this process in detail in Section 3.2.

C. <u>Open Investigations by Owner</u>: Chart of total Investigations each worker in your county currently has been assigned or claimed.

D. <u>My Tasks</u>: A list of *your* Tasks that need to be completed. Tasks are steps that are claimed and completed through the Workflow process; which will be explained in detail in Section 3.

E. <u>My Recent Labs</u>: Last 14 days of labs of assigned cases, open or complete.

F. <u>My Open Investigations</u>: list of all Investigations that are currently open and owned by you. This would include cases that you have submitted for closure, but are waiting for a statuser to evaluate. This differs from the "My Tasks" Tile because it does not list the progress of Tasks

3. **Navigation**: the top navigation bar will always be present, including when you are on My Dashboard.

4. **User Role Specific Displays**: IDSS is now more locked down on confidential information through your User Role; meaning not all Investigations can be seen by everyone with access to IDSS. All LPH will be able to see all Records (individual people), but you will only be able see specific Investigations according to your specific User Role. In other words, your User Role will determine what Investigations are displayed on your Dashboard. You will not be able to see Investigations outside of your LPH role or jurisdiction. For example, if you do not work with STI diseases, you will not have access to those Investigations. We will cover how to request access to Investigations outside your User Role and transfer Investigations to other Counties in Section 6.3.

Section 2 GTKs (Good to Know)

- "My Dashboard" will probably be your default dashboard
- You can change your default Dashboard anytime
- You can't change, hide, or move tiles on Dashboards
- Clicking anywhere on the line of the case or the arrow at the end will move you into the Workflow
- To get back to Dashboards at any time, just click "IDSS" in the upper left corner
- Due to stricter confidentiality guidelines, you will not be able to see Investigations in Counties you do not have jurisdiction.

The Workflow of Tasks is the **primary way** in which an Investigation will be handled, from beginning to end. The Workflow is a series of Tasks that help move the Investigation through the proper process. This Section shows the progression of Tasks and helps you know what the next stage of the Investigation is.

3.1   WORKFLOW OF TASKS OVERVIEW FOR INVESTIGATIONS

In this section, we will have a quick, basic overview of the Workflow and helpful definitions. Then we will break apart each step for a detailed look at the particular Tasks and all the options in that Task. Finally, we will provide helpful hints and a summarized review of the entire Workflow and Tasks process.

IDSS is designed to be a helpful tool to use while you are conducting the interview, making the HHS surveillance process easier.

WORKFLOW TERMS

Workflow: The process in which we will enter information from the Investigation of an Event

Assigned: Someone (other than yourself) has designated a Task or an Investigation is your responsibility

Claimed: You have taken ownership of a Task or an Investigation. Claiming is often how you move through the different Tasks of a Workflow.

Task: Steps taken in each portion of the Workflow. Each Task must be Claimed and then completed; it can't be skipped. Tasks are used to track the Investigation's progress towards completion.

Task Summary: A Tile (box) inside an Investigation that keeps a list of *all* the completed Workflow Tasks for that specific Investigation. This summary includes Tasks you've completed as well as Tasks that have been Assigned to someone else to complete for that specific Investigation.

Stage: The most current *completed* Task (step) in the Workflow of the Investigation.

Save (in a task): Save the information entered but remain on the Task.

Complete: Saves the information entered and closes the Task.

Back To Workflow: Takes you back to the Task Summary tile without saving changes.
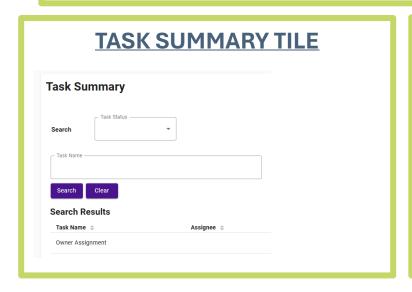
Cancel: Cancels the current action and takes you back to the Task Summary tile.

WORKFLOW OVERVIEW

The Workflow has 4 over-all steps:

Owner Assign-ment → Health Provider Follow Up → Case Interview → Close Investi-gation
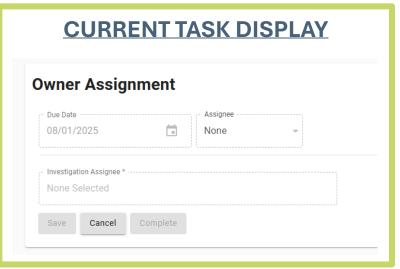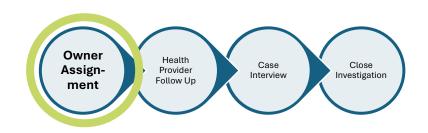
WORKFLOW LOCATION

The Workflow is a series of Tasks. This series of Tasks is found inside an Investigation, in the Task Summary tile (box). When you click on a Task, the Tile changes to the current Task (step) you are completing. Each has different information displayed and the below boxes demonstrate those differences.
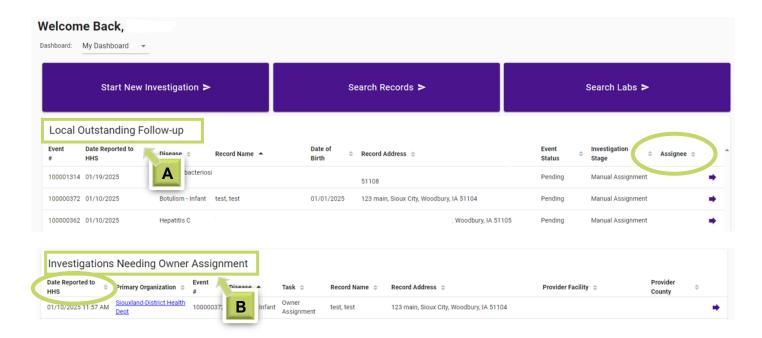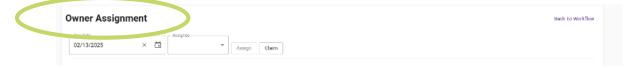
TASK SUMMARY TILE

Task Summary

Search   Task Status
          [▾]

Task Name
[   ]

[Search] [Clear]

Search Results

Task Name ⇕	Assignee ⇕
Owner Assignment	

CURRENT TASK DISPLAY

Owner Assignment

Due Date   Assignee
08/01/2025   📅   None   ▾

Investigation Assignee *
None Selected

[Save] [Cancel] [Complete]

3.2 ASSIGNING or CLAIMING CASES

The first Task of the Workflow is to own a case. In order to do that, an Investigation needs to be **Assigned or Claimed**. Usually, cases to be Assigned or Claimed and are found on My Dashboard in either the Local Outstanding Follow-Up Tile or the Investigations Needing Owner Assignment Tile.

1. **Locating Cases to Claim/Assign**
   A. Email Notification
      i. New Investigations will often prompt an automatic notification email
      ii. Click the link in the email to go directly to the first Workflow assignment

   B. Local Outstanding Follow-up Tile
      i. Sort by "Assignee" – if the area is blank, those cases are available
      ii. Click on the line or the arrow of the case to enter the Workflow

   C. Investigations Needing Owner Assignment Tile
      i. Sort by Date Reported to HHS to bring up oldest cases first
      ii. Click on the line or arrow of the case to enter the Workflow

2. **Workflow Task:** Either process opens the first Task of the Workflow: Owner Assignment

3. Task: Owner Assignment

A. Claiming an Investigation

    i. If you would like to claim the
Investigation for yourself, simply click
"Claim" and all required fields will fill in.

Owner Assignment

Due Date		Assignee		
02/13/2025	✕ 📅		▾	Assign **Claim**

    ii. Click "Complete"   **Complete**

   iii. This Task is now complete, and the Tile will change to the Task Summary.

B. Assigning an Investigation

    i. To assign an Investigation to another person,
chose a person from the drop-down menu
under Assignee and click "Assign"

Owner Assignment

Due Date		Assignee		
02/13/2025	✕ 📅		▾	**Assign** Claim

Investigation Assignee *
YOUR NAME

Save   Cancel   **Complete**

    ii. You will see it retains your information as the
person that completed this Task in
"Investigation Assignee"

    iii. Click "Complete"   **Complete**

    iv. This Task is now complete, and the Tile will change to the Task Summary

C. Reassign Investigation: To assign the Investigation
Task to another person after the Investigation has
been assigned to you; go into Task Summary and
click "Reassign Investigation" and follow the above steps for
Assigning an Investigation.

Investigation Notification   **Reassign Investigation**

D. Investigation Notification: To send a message to another IDSS user about the Investigation, you can
click "Investigation Notification" and select another user(s) to message. Entering a message in the
Investigation Notification Task will be stored in the Workflow.

E. Task Review: To return to My Dashboard, click on "IDSS" in the upper left corner. Now in the My
Open Investigations Tile, the Case is listed. In this Tile, the Investigation Stage column shows the
last completed Task in the Workflow. In this situation, the case has been successfully Assigned,
which is the last completed Task.

My Open Investigations

Event #	Date Reported to HHS	Disease	Record Name	Date of Birth	Event Status	Investigation Stage	Assignee	
100003820	02/13/2025 3:02 PM	Salmonellosis	Squarepants, Spongebob	01/01/2001	Pending	Assigned	YOUR NAME	➡

3.3   INVESTIGATION: OVERVIEW OF INVESTIGATION PAGE

Now that the case is Claimed, the Investigation can continue; but first, let's get familiar with terms of the Investigation page to make navigation and explanation easier.

1. **Tiles** – are the main blocks of information, separated by a gray line. 3 tiles are usually shown:

   A. Record Summary Tile   B. Task Summary Tile   C. Investigation Tile
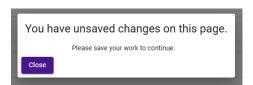
2. **Features** – features of the Investigation are numbered below:

   1. Tabs (Vertical Navigation)   2. Investigation Status   3. Workflow (Tasks)

A

Record ID: 100000169
Record Name: Squarepants, Spongebob
Record DOB: 01/01/2001
County: Woodbury
Event ID: 100003820
Primary Organization: Siouxland-District Health Dept

B

Task Summary   Close ✕

Investigation Notification   Reassign Investigation   Refer Investigation

Search   ┌ Task Status ┐
            └   ▼┘

┌ Task Name ──────────────────────────┐
│   │
└──────────────────────────────────────┘

Search   Clear

Search Results

Task Name ⇕	Assignee ⇕	Created Date ⇕	Completed Date ▼	Outcome ⇕	
Provider Followup	Tyler Brock	02/18/2025			➡
Owner Assignment	Tyler Brock	02/13/2025	02/18/2025	Complete	➡

3

Rows per page: 25 ▾   1-3 of 3

C

Investigation: Squarepants, Spongebob 01/01/2001: Salmonellosis

┌ Status ┐   ┌ End Date ┐   ┌ Last Updated Date ┐
│ Pending │   │ MM/DD/YYYY hh:mm aa 📅│ │ 02/18/2025 06:26 PM 📅│

┌ Stage ┐   ┌ Assigned Date ┐
│ Assigned │   │ 02/18/2025 📅 │   **2**

Was the Patient Educated on Disease Control and Prevention Measures?
○Yes ○No ○Unknown

	Healthcare Provider
Demographics	Aware of positive test result
Events	○Yes ○No ○Unknown
Healthcare Provider	┌ What are the patients symptoms ┐
Clinical Info & Diagnosis	
Treatment	┌ Symptom Onset Date ┐
Visit/Hospitalization	│ MM/DD/YYYY 📅 │
Risk Factors	Was the patient hospitalized?
Childcare, School, and Occupation	○Yes ○No ○Unknown
Labs	Treatment prescribed
Epi-Links	○Yes ○No ○Unknown
Clusters/Outbreaks	┌ Travel history ┐
Documents	
Notes	Has the patient been notified of the positive result?
Admin	○Yes ○No ○Unknown
	┌ Patient notified notes ┐

1

Healthcare Providers

Healthcare Provider   Address   Facility   Email   Primary Phone   Ext

3. Other Basic Functions in an Investigation

A. <u>Saving</u>: Saving is **not automatic**, to keep your work, click "Save" before closing

   i. Buttons: there are two Save buttons options; one at the top
and one at the bottom of the Investigation Tile.

Save 💾

Save 💾

   ii. Prompts: you may be prompted to save your work before
continuing to another tab or Tile, *but not always*. To avoid
losing information, save your work.

> You have unsaved changes on this page.
> Please save your work to continue.
> Close

B. <u>Editing</u>: there are different ways to add information, depending on the area

   i. Create +: Allows you to add detailed information to an established table in a
Tile; this is the most common way to add complex information.

Create +

   ii. Add Row +: Allows you to add a row of information to a table; most often
seen in the Demographics Tab.

Add Row +

   iii. Open Boxes: Allows you to type-in information with any
character, up to 75 characters.

Describe Native Nation Affiliation
Meskwaki

   iv. Drop Down Boxes: Allows you to choose from a
pre-determined list of options.

- At times, you may be able to choose more than one option
- Depending on your selection, additional boxes may appear
- To remove or de-select an option, click the "x"

Race

Record Races
Select values

African-American/Black
American Indian/Alaskan Native
Asian
Native Hawaiian/Pacific Islander
White
Unknown

Race

Record Races
African-American/Black ⊗
American Indian/Alaskan Native ⊗   Asian ⊗
Native Hawaiian/Pacific Islander ⊗   White ⊗   Sel...

Describe Native Nation Affiliation
Meskwaki

Asian Races
Other Asian ⊗   Select values

Hawaiian Pacific Races
Other Pacific Islander ⊗   Select values

African American Races
Select values

Native Races
Select values

vi. Checkboxes/Radio Buttons: Allows you to choose from a simple list (usually less than 3 options). It is important to note that as with drop-down boxes, certain selections may open more areas for editing.

☐ Guardian Information Needed

In State Travel
○ Yes ○ No ○ Unknown

vii. Dotted/Grayed-Out Boxes: Can't be edited in the current location.

Last Updated Date
02/22/2025 03:37 PM 📅

viii. ELR Only: these areas can't be edited

Next of Kin (ELR Only)

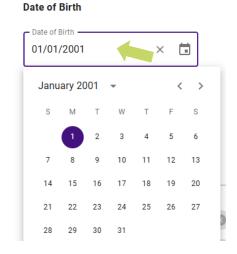Next of Kin
Name   Relationship
No data available

C. View/Edit Toggle: At times, you will see the Investigation in "View" mode, usually after you save information. Edits can't take place during "view" mode; so to continue editing, simply click "Edit" or the pencil symbol.

Edit ✏️

To return to View mode, click "View" or the eye symbol.

View ◉

Date of Birth

D. Calendar: When dates are required, there is an option to use the pop-up calendar or input the dates manually in MM/DD/YYYY format.

Date of Birth
01/01/2001 ✕ 📅

January 2001 ▼   < >

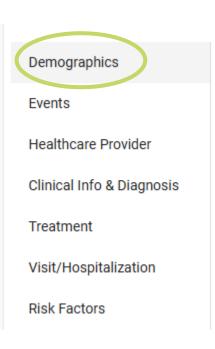| S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Section 3.3 GTKs (Good to Know)

- The Workflow begins by Claiming or being Assigned an Investigation
- Save often, work is not automatically saved.
- Editing some information may open more prompts
- Even if an Investigation has not been claimed/assigned to you; if the Investigation falls within your User Role purview (County) you will be able to see the Investigation and the progress.

3.4   INVESTIGATION: HEALTH CARE PROVIDER FOLLOW UP

Continuing on with the Workflow of the Investigation, the next Task is to obtain information from the Health Care Provider (HCP). The information gathered will be entered into the Investigation by using the Tab Bar to the left, as seen below. This Workflow is designed to be a tool during the Investigation call and will help you navigate through the different Tasks. Below are the tabs from the vertical navigation bar you will most often use for the Health Provider Follow Up.

1. Demographics: Basic information on the Case

A. Record: The Record's name and DOB will be displayed here.

i. Name Change: To change or add additional information on the name, click on the "eye" and a new box will pop-up.

- Click "Edit"   Edit ✏
- Enter corrected or new information
- Click "Save"   Save 💾

ii. Record-level name changes: In addition to first and last name, there are other specifics found in this box that can be edited: Suffix, Previous Last Name, Alias, Deceased status.

    NOTE: closing the box without saving will lose all changes

iii. Contacts: Record contacts in this box are parents, care takers, POA, etc. To add Guardian or afore mentioned persons, return to the Demographics tab and click on the checkbox (as shown) or return to the Record level and enter in the Contacts tab.

☐ Guardian Information Needed

B. Address
    i. Reporting Address: this is the address submitted from ELR information. Note the grayed-out/dotted boxes indicate changes can't be made in this current area.
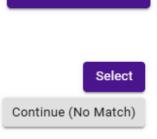
ii. **Address Changes**: To change or add additional information:

- Click "Update Address"

Update Address

- Enter corrected or new information

- Click on "Verify Address"

Verify Address

- Click either "Select" to choose corrected address information or click "Continue (No Match)"

Select

Continue (No Match)

- Enter any facility information (as noted by the green arrow in the image below)

- Enter any notes about the address

NOTE: if you change the address to a different county, be aware that the Investigation will no longer be available to you, since the Investigation will now be outside of your jurisdiction. Be sure to add any information and notes **before** saving the new address in IDSS, as the Investigation will be automatically transferred to the appropriate county once the address is updated.

Update Address

Address Line 1	Address Line 2	ZIP	ZIP +4
123 Seahorse Lane		51104	

City	State	County
Sioux City ✕	IA ✕	Woodbury ✕

Verify Address

123 Seahorse Lane, Sioux City, IA, 51104   **Select**

Continue (No Match)

Facility Type	Facility Name
Long Term Care Resident ✕	Ocean Care Assisted Living

Address Note
Moved to LTC 2/15/25

Cancel   **Complete**

iii. **Address History**: The history of all the addresses for this person – not just this Investigation – can be viewed by clicking on "View Address History".
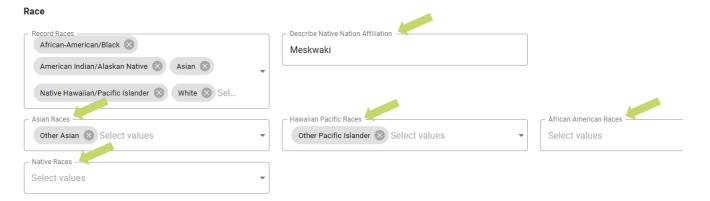
View Address History

C. Phone:

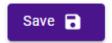 i. Update: to update a current phone number click on the arrow; make updates; save; and

     close.

  ii. New Number: to add a phone number, click on "Add Row +" and enter new

     information. Hit "Save" at the top or bottom of the Investigation Tile.

  iii. Inactive: for phone numbers that are no longer active, click on the arrow;

     mark "Inactive"; save; and close.

      NOTE: Remember to save. Clicking the red "x" will close the box without saving any information.

E. Guardian: to add Guardian information, click on the box and enter information. This would include

   parents, care takers, POAs, and others.

F. Email Address: to enter an email address, click "Add Row +" and enter

   information. This is currently not a required field; but if known, it should be

   added. As with phone numbers, email addresses can be marked 'inactive'. Several email

   addresses can be added with a note differentiating the purpose (i.e.: work, personal)

G. Race: more than 1 race can be entered from the drop-down menu; when some options are selected,

   another drop-down box may appear. In several instances, there are sub-groups and if this

   information is known, it should be added. Several examples of this are shown below.
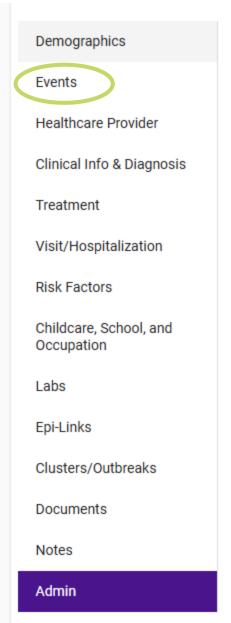
H. Next of Kin: This field is designated through ELR only and can't be edited

I. Save: remember to save work often and before navigating to different areas
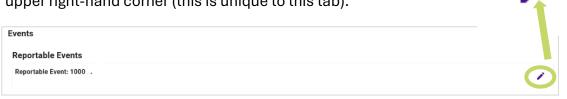
J. Other Fields: fields not specifically mentioned are not required. However, if information is known, it

   should be added.

2. Events

To edit information in this particular tab, click on the 'pencil' in the upper right-hand corner (this is unique to this tab).

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Childcare, School, and Occupation

Labs

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin

Events

Reportable Events

Reportable Event: 1000 .

A. Onset Date: Date when the condition or symptoms began; if the date is unknown, leave this blank.

B. Diagnosis Date: Date case was diagnosed from HCP

C. Outcome: select outcome from drop-down list. To change outcome, click the 'x' to remove the selection and choose new option.

D. Lab Results: added Lab results from the HCP should be added here (not in the Lab tab). Details on how to add Labs is located in Section 4.3.

E. Other Fields: These fields will not be updated or changed
   i. Data Source: this is an automatic field and does not need to be updated.
   ii. Status Date: this is for statusers only; it is equivalent to "evaluation date" and will be updated during review by the statuser.

D. Save: click "Save" before navigating away from this tab. Closing without saving will not automatically save and the data will need to be re-entered.

Save 🖫   Close ✕

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Childcare, School, and Occupation

Labs

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin

3. Healthcare Provider

This tab is for information gathered directly from HCP.

A. <u>Test Result</u>: Confirm if HCP is aware of test result (top of page) and if patient has been notified of the test result (bottom of page).

Has the patient been notified of the positive result?
◉ Yes ○ No ○ Unknown
Patient notified notes

B. <u>Symptoms</u>: enter any provided information from HCP. This is an open-box, and any information can be added, even if the symptom isn't usually attributed to the Investigation disease.

NOTE: this differs from the specific information you will gather directly from the patient, so this information *will not* automatically carry over to other tabs.

C. <u>Hospitalization</u>: enter any hospitalization information here;

i. Click the "yes" radio button

ii. Click "Create +" and a pop-up box will appear, allowing you to enter Hospital, admission, and discharge information. Notes pertaining to Hospitalization can also be added in this section.

Create +

iii. Click "Save".

NOTE: Data here *will* automatically copy over to the Visit/Hospitalization tab; it will not need to be entered twice.

D. <u>Treatment</u>: enter treatment information here;

i. Click the "yes" radio button.

ii. Click "Create +" and a pop-up box will appear, allowing you to enter prescription, dates, and dosing information.

Create +

iii. Click "Save".
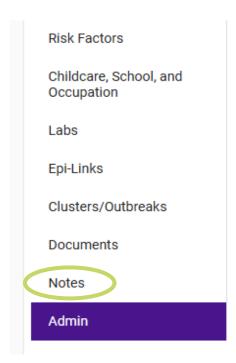
NOTE: Data here *will* automatically copy over to Treatment tab; it will not need to be entered twice.

E. <u>Travel</u>: enter any information provided from HCP. This is an open-box, and any pertinent information can be added. Travel history provided by the Case will be gathered in a different tab.

Travel history
Went to Secrets Resort in Mexico beginning of February

F. <u>Providers</u>: Additional Healthcare Providers can be added here. An example of this would be if a case visited an Emergency Room but had a different Health Care professional once admitted.

Risk Factors

Childcare, School, and
Occupation

Labs

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin
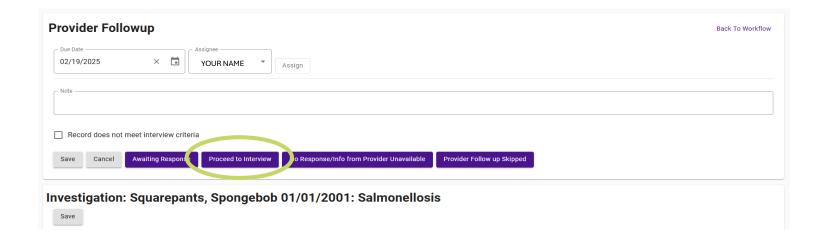
4. Notes

Notes from *any* stage of the Workflow that have been entered are listed here. Notes can be created, edited and viewed from this tab.

A. Create a Note
   i. Click on "Create +"   Create +
   ii. Enter any note information (source is not a required field)
   iii. Save and Close

B. Edit a Note : Notes can be edited by clicking on the arrow and updating information directly in the Note box. (Reminder: grayed-out boxes can't be edited).

C. View a Note: Notes can be viewed on the Note tab, regardless of Task they were entered on

5. Other Tabs: Tabs not yet mentioned are not required for the HCP call and will be covered in following Workflow Tasks.

> *NOTE: As you can see, the first two Tabs are the only required tabs for the HCP call. The tabs are ordered in such a way as to provide a visual flow of the progression of the Investigation.*

6. Task Complete: Since we have gathered the required information for this Task, we can close the Provider Followup Task in the Workflow. This is done by going up to the Workflow tile (box) and selecting the *next* Task: Proceed to Interview. All Tasks outcomes are discussed next.

Provider Followup   Back To Workflow

Due Date
02/19/2025   ✕ 📅   Assignee
                          YOUR NAME ▼   Assign

Note

☐ Record does not meet interview criteria

Save   Cancel   Awaiting Respons⬚   Proceed to Interview   ⬚o Response/Info from Provider Unavailable   Provider Follow up Skipped

Investigation: Squarepants, Spongebob 01/01/2001: Salmonellosis
Save

7. **Task Flow Outcomes**

   Each Task has an outcome, even if the Task wasn't completed as was shown previously in this section. After each attempt at a Task, there are multiple choices that will track the progress of the Investigation, as seen below. You may have multiple outcomes for each Task, depending on the outcome. For each HCP call, there are 4 possible outcome options:

1) Awaiting Response: HCP contact been made and you are waiting for a response back; make notes and close current Task. A new Task with the same name will generate in the Workflow.

2) Proceed to Interview: HCP information has been gathered and entered; the Task is complete and ready for the next Task in the Workflow.

3) No Response/Info from Provider: Unable to reach HCP after multiple attempts or the provider is unable to be identified; the Task is complete and ready for the next Task in the Workflow.

4) Provider Follow up Skipped: Provider follow up not done; the Task is complete and ready for the next Task in the Workflow.

Provider Followup   Back To Workflow

| Due Date | Assignee | |
| 02/19/2025 ✕ 📅 | YOUR NAME ▼ | Assign |

Note

☐ Record does not meet interview criteria

| Save | Cancel | **Awaiting Response** | **Proceed to Interview** | **No Response/Info from Provider Unavailable** | **Provider Follow up Skipped** |

Investigation: Squarepants, Spongebob 01/01/2001: Salmonellosis

Save

Section 3.4 GTKs (Good to Know)
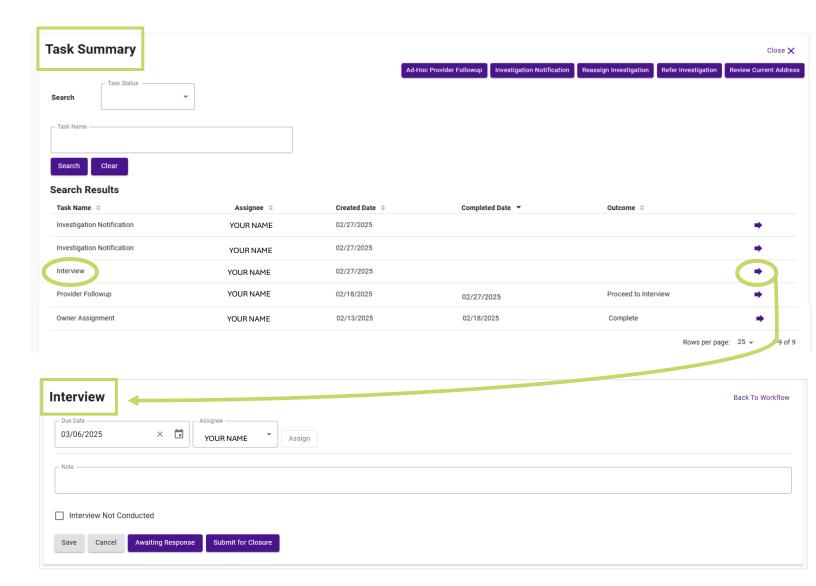
- Save, Save, Save! System time-outs will not keep unsaved work/data
- Most of the complex data will be entered with the "Create +" function
- Hospitalization and Treatment information will automatically be transferred to other tabs
- Living facility information (LTC, prison, etc) is entered in the Demographics tab under "update address"
- Grayed-out demographic boxes *may* be able to be edited elsewhere in the Record (like address) **or** may be restricted according to your User Role.
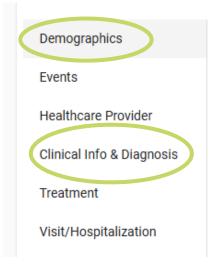
3.5 INVESTIGATION: CASE INTERVIEW

Now that the Health Provider Follow up is completed, the Investigation can continue to the next Task in the Workflow: Interview. Below is the progress of the Investigation as seen in the Task Summary (second Tile (box) on the Investigation page). To begin the next Task of the Workflow - the Case Interview - click on the arrow at the end of the "Interview" line.

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization
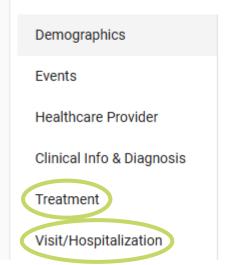
1. **Demographics**: Review demographic information and add any additional information provided from the patient directly.

2. **Clinical Info & Diagnosis**: Enter symptom information provided from the patient.

A. <u>Disease Specific</u>: Symptom information gathered and recorded will vary according to disease

B. <u>Additional Information</u>: As radio buttons are selected, additional boxes may be displayed to enter in detail about the information.

Clinical Info & Diagnosis

Diagnosis

Symptoms

Symptoms ongoing at time of interview
◉Yes ◯No ◯Unknown

Abdominal Pain or Cramps
◉Yes ◯No ◯Unknown

Diarrhea (3 or more loose stools in 24 hours prior)
◉Yes ◯No ◯Unknown

Diarrhea Onset
MM/DD/YYYY 📅

Diarrhea D

C. <u>Patient Information</u>: this is information gathered from the patient. Health Care Provider information on Symptoms should be recorded in the Healthcare Provider tab

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization
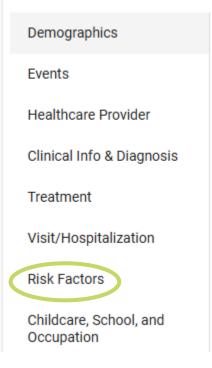
3. **Treatment:** Prescribed medications are listed here. Add any additional prescribed medications the patient has taken regarding this specific disease that has not already been disclosed by the HCP.

> NOTE: Treatment information will carry over from Healthcare Provider tab previously entered and will not need to be entered again; just verified. Any corrections made will change the information in both locations.

4. **Visit/Hospitalization**: Hospitalizations are listed here. Add any additional Hospitalization information gathered from the Patient that has not been disclosed by the HCP.

> NOTE: Hospitalization information will carry over from Healthcare Provider tab previously entered and will not need to be entered again; just verified. Any corrections made will change the information in both locations.

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Childcare, School, and
Occupation

5. Risk Factors: Review all listed factors and questions with the case

Some overall tips for this section are:

A. Disease Dependent: Information listed for Risk Factors will vary, depending on the disease.

B. Affirmative Answers

Risk Factors

Travel in the 10 days prior to onset of symptoms

In State Travel
◯ Yes ◯ No ◯ Unknown
Travel within U.S.
◯ Yes ◯ No ◯ Unknown
Travel outside U.S.
◯ Yes ◯ No ◯ Unknown

Risk Factors

Travel in the 10 days prior to onset of symptoms

In State Travel
◉ Yes ◯ No ◯ Unknown

In State Travel
City   Departure Date
No data available

Create +

i. Selecting Yes: Most of the time, clicking on "yes" radio buttons will often open more areas to enter details.

ii. Create +: Often, information will be added by clicking "Create +"   Create +

C. Searching: In some cases, there is pre-loaded information that can be searched and added (ex: Restaurant). Search by clicking on the magnifying glass. A new box will open up and you can enter the search criteria. In most cases, 'less is more' and partial names will yield more results. For example, 'McDonald's' could be entered McDonalds, Mc Donalds, Mc Donald's, etc. For more details on searching options, see Section 3.7.2.

   i. If establishment is found, click on the "+" button on the line of the correct location. It will auto-fill the information. Click "Save".

   ii. If establishment not found after thorough searching, you will click "Create +" in the upper right corner of the box. Enter all known information; "verify address"; and "Save".

       *NOTE: Newly created information will be added to the database and be searchable by **all**. Please ensure accuracy to avoid duplication.*

   iii. Outside US: Currently, IDSS does not allow for Out of Country information to be created. Information can be added to Establishment Name line or Address Line 1 in these cases

Restaurants

Create +   ✕   **b**

Search Criteria

Establishment Name
CULV

DIAL Facility ID

Address Line 1

Address Line 2

State
None selected

City
sioux city

[Search] [Clear]

Search Results

Establishment Name	DIAL Facility ID	Address Line 1	Address Line 2	City	State		
Culvers		7979 Hamburger Alley		Sioux City	IA	👁	+
CULVERS	81147	3102 SINGING HILLS BLVD		SIOUX CITY	IA	👁	+ **a**

Rows per page: 10 ▾   1-2 of 2

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Childcare, School, and Occupation

Labs

Epi-Links

Clusters/Outbreaks

Documents

Notes

6.   Childcare, School, and Occupation

Enter school, childcare, and employment information.   Create +

NOTE: In some diseases, more follow-up for Health Orders may be needed. Health Orders are covered in detail in Section 3.8.2.

7.   Labs: All labs are listed in this tab.

Reminder: Lab results related to the current investigation should be added in the Events tab – not the Labs tab. The following note is listed:

WARNING: Lab results related to the current investigation should be added in the Events tab.

8.   Epi-Links: Epi-link contacts are added in this tab. Each disease has varying requirements for what constitutes a qualified contact. If a contact qualifies:

A. Create: to add an Epi-Link, click "Create +"   Create +

B. Search: Search IDSS to determine if there is a previous using the record by clicking on the magnifying glass.

C. Record Found: if a previous record in IDSS is found (for any disease):
   i.   Click on the "plus sign" at the end of the row   +
   ii. Enter known information. The Epi-Link will process with just the name and County if no other information is known.
   iii. Click "save"; a new box will open with another option to add known Demographics. When completed, click "Save" and then "Close"   Save 🖫

D.   Record *Not* Found:
   i.   Click on the "Create +" in the upper right corner to create a new record   Create +
   ii. Required fields are: First Name, Last Name, age (estimated age is available), and County.
   iii. Highly Recommended fields are: Address and Phone Number.
   iv. Click "Save"; a new box will open with another option to add known Demographics.   Save 🖫
        When completed, click "Save" and then "Close"
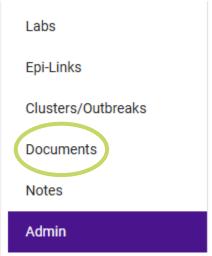
E.   Editing: You will now see the Epi-Linked contacts listed in the tab. To edit any information; click on the arrow at the end of the row.

NOTE: This process creates an Investigation for the Epi-Link and the Investigation will need to be Claimed - as any other Investigation. It is helpful to enter at least a County for the address so that the Investigation will appear on the correct Dashboard of the County to be Claimed.

Labs

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin

WARNING: Only symptomatic contacts should be added. New investigations will be automatically created for each contact.

Contacts

First Name ⇳	Last Name ⇳	Suffix ⇳	Date of Birth ⇳	Symptomatic ⇳	Status ⇳	Investigation Number ⇳	
Billy	Squarepants		01/01/2001	Symptomatic			➡
Starr	Phish		01/01/2000	Symptomatic			➡

Create +   Rows per page: 10 ▾   1-2 of 2

Labs

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin

9. Documents: Additional documents pertaining to the investigation will be attached and added here.

A. Click "Create +" to choose a file to add   Create +

B. Click "Choose File" to locate file   Choose File

C. Choose from the drop-down list of eligible document type

D. Notes: add any needed notes describing the attachment

E. Click "Save" and then "Close"

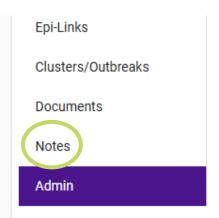**Create Document**

Document

(B) Choose File   No file chosen

Supported file types are .png, .tiff, .jpg, .jpeg, .gif, .pdf

Document Type (C)

Note (D)

Save   Close ✕

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin

10. Notes: All notes pertaining to the investigation are listed here.

A. Click "Create +" to open the note box   Create +

B. Enter Note in the open-field box.

C. "Source" is not required in the Note tab.
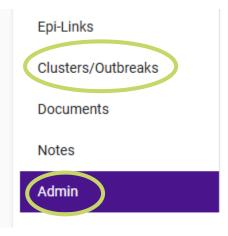
> NOTE: Source will be automatically filled out in other places in which notes are auto-generated. An example would be a note generated from a completed task (see below).

D. Click "Save" and then "Close"

E. To edit any note; click on the arrow at the end of the row.

Notes

Notes

Created Date ▼	Created By ⇕	Last Modified Date ⇕	Note	Source ⇕	
03/11/2025 12:38 PM	YOUR NAME	03/11/2025 12:38 PM	Investigation Call with Case completed		➡
03/05/2025 11:58 AM	YOUR NAME	03/05/2025 11:58 AM	HCP Call 2/22/2025 complete	Provider Followup	➡
02/27/2025 12:41 PM	YOUR NAME	02/27/2025 12:41 PM	IDSS 2.0 Investigation Notification (test)	Investigation Notification	➡
02/27/2025 12:38 PM	YOUR NAME	02/27/2025 12:38 PM	IDSS 2.0 Investigation Notification (test)	Investigation Notification	➡
02/25/2025 5:18 PM	YOUR NAME	02/25/2025 5:21 PM	LVM HCP #1 - RN Sandy		➡

Create +

Rows per page: 10 ▾   1-5 of 5

Epi-Links

Clusters/Outbreaks

Documents

Notes

Admin

11. Other Tabs: Some tabs will not be regularly used during the Investigation Workflow.

A. Admin: This is not part of the regular Workflow; the Admin tab keeps a log of Activities and no action required.

B. Clusters/Outbreaks: This is not a part of the regular workflow. If this is required for an Investigation, this will be specifically requested by the field Epi and detailed instruction given.

12. Task Flow: Outcome of Interview

Each task has an outcome. After each attempt, there are multiple choices that will track the progress of the Investigation. For each Interview attempt, there are 3 outcome options: Awaiting Response, Interview Complete, and Interview Not Conducted. A note explaining outcomes can be entered in this section.

Interview

Task Name
Interview

Note

☐ Interview Not Conducted

Save   Cancel   Awaiting Response   Interview Complete

1. Awaiting Response: contact has been attempted, and you are waiting for a response back; make notes and close current Task. A new Task with the same name will generate in the Workflow.

2. Interview Not Conducted: Unable to reach the Case after multiple attempts or the Interview is not required; the Task is complete and ready for the next Task in the Workflow.

3. Interview Complete: Interview is completed and information entered; the Task is complete and leads to the next Task in the Workflow.

Section 3.5 GTKs (Good to Know)

- Save! System time-outs will not keep unsaved work/data
- Workflow is the process of the Investigation progressing
- The Tab bar will help you efficiently document information through the Investigation
- Epi-Links created (according to specific disease criteria) will automatically create a new Investigation and thereby start a new Workflow for a new Investigation.
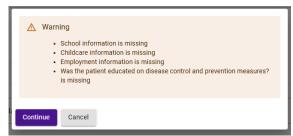
3.6 INVESTIGATION: CLOSE INVESTIGATION

When the Investigation is complete, the next Task in the Workflow is to submit the Investigation for closure.

1. **Review**: Once you select "Interview Complete", IDSS will check for missing information; you may receive a message to correct areas (see example). Hit "cancel" to go back and correct the areas. Hit "continue" to send the case to Statusing without making corrections.

> NOTE: Once the above Task "Interview Complete" is selected; the task "Review Investigation for Closure" is automatically generated. This Task is for **state statusers, not local users** (See 3.6.3). If an investigation is reopened by a statuser, this will generate a different Task called "Review Investigation for Submission".

2. **Corrections:** If you choose to make corrections; once corrections are completed, return to the Task Summary Tile and select task "Submit for Closure".

3. **Statusing:** The Task Summary shows "Review Investigation for Closure" for the next Task. This Task will be Claimed by a Statuser (**not you**).

4. **Pending:** The Workflow for the Investigation is now pending while waiting for Review. Since your Tasks are complete, the Investigation is removed from "My Tasks" tile on My Dashboard. However, the case will remain on the "My Open Investigations" tile until the case is closed by a Statuser. This will allow you to track the progress of the case until reviewed and closed by the State. It is helpful to review the "My Tasks" Tile on your Dashboard often to ensure no Tasks for the Investigation need to be completed.

5. **Statusing Corrections/Re-Opened Case**: If corrections are requested by the Statuser, you will receive an Investigation notification via email, as well as an open Task on "My Tasks" tile on My Dashboard named "Review Investigation for Submission". This Task means your Investigation has been re-opened

and is not closed. Once corrections are addressed, follow Step 1 above to close the Investigation again.

6. **Approved/Evaluated/Closed**: Once the Investigation is closed by the Statuser, the Investigation is removed from all Dashboards, as you will no longer have Tasks with the case.

Section 3.6 GTKs (Good to Know)

- The Task "Review Investigation for **Closure**" is for a state statusers; the Task "Review Investigation for **Submission**" is for local users and requires action.   They are very similar Task names.
- The Investigation will appear on your Dashboard in the "My Investigation" tile until closed by the State. However, it will **not** appear in your "My Tasks" tile once you close it. This is because your Tasks with the Investigation are done, and it has moved to a statuser's dashboard for review.
- After closing, if you see the Investigation show back up on your "My Task" tile, that is an indication the Investigation has been re-opened and there are actions to take.
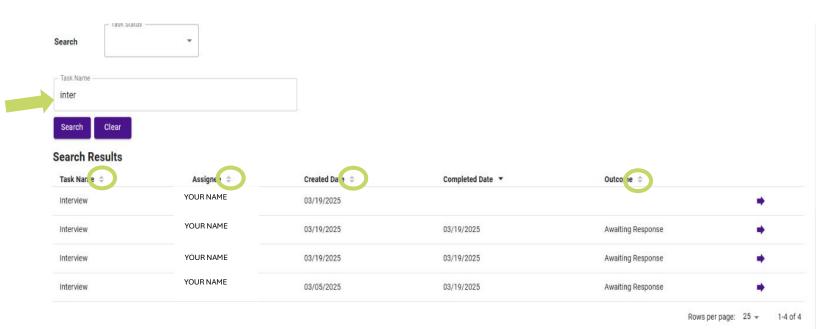
3.7 INVESTIGATION: GENERAL REMINDERS

1. Task Summary Tile Reminders

A. <u>Workflow Tasks</u>: the Task Summary is the Tile in an Investigation that shows all the of the Tasks initiated as start of the Investigation.

B. <u>Viewing Tasks</u>: to view or go into a Task, you can click on the line or the arrow at the end of the line. To return to the Task Summary, click "Back to Workflow" in the upper right corner of the Tile.

Back To Workflow

C. <u>Team Access</u>: In some situations, Tasks may be Claimed by someone else, or you may Assign a Task to someone else. Example: a team member is asked to help with an Investigation while the original investigator is out of the office. The team member can go into the Investigation and Claim a *task* to complete. Though the *ownership* of the Investigation will not change, the flexibility to complete certain Tasks by others will keep the Investigation progressing.

D. <u>Task Sorting/Searching</u>: depending on the actions taken during the Investigation, the list of Tasks may start to get long. You can limit the Tasks shown in the Task Summary Tile by searching for Task Name or Task Status. You can also sort by using the sorting arrows located by any column header.

Search

Task Name
inter

Search   Clear

Search Results

Task Name	Assigne	Created Date	Completed Date	Outcome	
Interview	YOUR NAME	03/19/2025			➡
Interview	YOUR NAME	03/19/2025	03/19/2025	Awaiting Response	➡
Interview	YOUR NAME	03/19/2025	03/19/2025	Awaiting Response	➡
Interview	YOUR NAME	03/05/2025	03/19/2025	Awaiting Response	➡

Rows per page: 25 ▼   1-4 of 4

2. IDSS Searching Reminders

Whether searching Records or pre-loaded information (such as Providers, Restaurants, etc), here are some reminders and additional searching tips:

A. "Less is More" - partial names or information **will** yield more results, and in many cases provide the information desired without having to Create the information.

B. Partial Data: Entering *any* part of the name will yield results. For example, in searching for St. Luke's, it's not known if it's listed as "Saint or St"; skip that part of the name all together and enter "Luke". This will avoid any punctuation or abbreviations that may or may not be in the name in IDSS.

C. Wild Card Feature: Utilize "wild card" feature with the use of an asterisk. In the example to the right, using *uk* to search for all records with "uk" anywhere in the last name, regardless if the "uk" shows up at the beginning, middle or end of the last name. The wild card feature can be used in any data searching field, including phone number and full name fields.

Records
Search Criteria

Record Number

Investigati

Last Name
*uk

First Name

Search Results

Record # ▼	Event #	Disease Names	Record Name ⇕
1000	100	I	DUKE,
1000			RUK

D. Full Name: In searching for names, using the "Full Name" box will search for names that are flipped or similar.

Full Name
jane doe

E. <u>Undo Search</u>: When searching, sometimes the criteria will yield so many results the system is unable to complete the task. In these massive data searches, you will see a spinning circle and no results. To exit out of this 'stuck' search, simply add more criteria to the search and click "Search" again.

F. <u>Duplicate Entries</u>: Be wary of entering new searchable data for well-known locations or providers. As seen below, when searching for "St. Luke's" there are several erroneous duplicate entries caused by slight changes to the name or punctuation.

Name			Address	City	State
ST LUKES FAMILY HEALTH CENTER - CEDAR RAPIDS			4251 RIVER CENTER CT	CEDAR RAPIDS	IA
St Luke's Hospital			1026 A Ave NE	Cedar Rapids	IA
ST LUKES HOSPITAL			PO Box 3026	Cedar Rapids	IA
St. Luke's Hospital	16D0386919	2.16.840.1.113883.3.2885.1	1026 'A' Avenue NE	Cedar Rapids	IA
ST. LUKE"S HOSPITAL		2.16.840.1.113883.3.	1026 A Ave NE	Cedar Rapids	IA

Section 3.7 GTKs (Good to Know)

- Other team members can work on an Investigation through Claiming or being Assigned Tasks. The ownership of the Investigation will not change.
- Avoid duplication - thoroughly search before adding or creating new places or people to IDSS
- Workflow is the process in which the Investigation progresses, and each step can be tracked

3.8 INVESTIGATION: HEALTH ORDERS

The previous Workflow is not disease-specific. Therefore, it does not cover all possible areas that need to be covered during some Investigations. Depending on the disease, there may be some other steps to take. In this Section, we will look at Exclusions and Health Orders.

1. **Exclusions**: Health Orders are activated by exclusion information entered into the Childcare, School, and Occupation Tab on specific diseases.

A. <u>Childcare</u>:
   i. If chilcare attendee, click "yes"
   ii. Click "Create +" and enter establishment information.
   iii. Click "Save" at the bottom of the pop-up box to save Childcare information.
   iv. Click "Save" at the bottom of the Tabs to save the entire Investigation
   v. The Health Order button will now will available in the Task Summary tile in upper right corner.

   > NOTE: if you see "Back to Workflow" in the upper right corner, click that to return to the Task Summary tile. See Section 3.1 for information about the two different tiles.

B. Underline: Employment:

    i.   If employed, click "yes"

    ii.   Click "Create +" and enter known information

    iii.   Answer question "Does the case work in childcare, healthcare, or food service therefore needing to be excluded?

> Does the case work in childcare, healthcare, or food service therefore needing to be excluded?
> ○ Yes ○ No ○ Unknown
>
> Worked after symptoms began?
> ○ Yes ○ No ○ Unknown
>
> **Save** 💾   **Close** ✕

    iv.   Click "Save" at the bottom of the pop-up box to save Childcare information.

    v.   Click "Save" at the bottom of the Tabs to save the entire Investigation

    vi.   If "yes" has been selected to the above question, The Health Order button will now will available in the Task Summary tile in upper right corner.
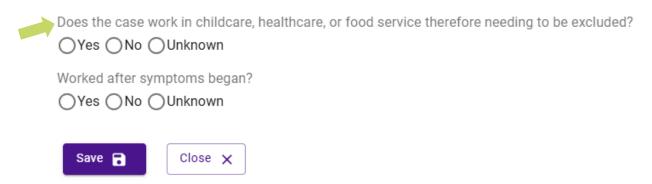
        NOTE: if you see "Back to Workflow" in the upper right corner, click that to return to the Task Summary tile. See Section 3.1 for information about the two different tiles.
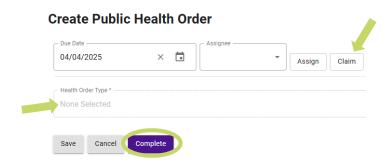
> **Task Summary**   Close ✕
>
> **Create Public Health Order**   **Investigation Notification**

2. Health Order – Create an Order: If the above information warrants a Health Order, this will become part of the Workflow; Tasks will need to be assigned/claimed to complete an Order. Here, we will go through the steps of creating, requesting, executing, and ending and Order.

A. <u>Create Order</u>: Click on the button in the upper right of the Task Summary box (Workflow): Create Public Health Order.

Close X

Create Public Health Order   Investigation Notification

B. <u>Claim Task</u>: Claim or Assign this task. Choose Health Order Type; click "Complete".

Create Public Health Order

Due Date
04/04/2025   X 📅

Assignee
▼   Assign   Claim

Health Order Type *
None Selected

Save   Cancel   Complete

C. <u>Approve Health Order</u>: this task will automatically be assigned to the Disease Manager; in this case, the E.coli Manager. The address, names, and other information provided in the Investigation will automatically populate onto the order.

Task Name ⇅	Assignee ⇅	Created Date ⇅
Approve Public Health Order - E. coli (Childcare Worker)	EColi Manager	04/04/2025

D. <u>Issue Public Health Order</u>: this Task will be automatically assigned to Senior or Field Epidemiologist to review, sign and return.

E. <u>Alert</u>: An Investigation alert will be sent to the owner of the Investigation when the "Issue Order Task" is complete and ready to be served.

F. <u>Serve Public Health Order – Claim Task</u>: Click on the Serve Public Health Order line in the Task Summary of the Investigation to Claim the Task.
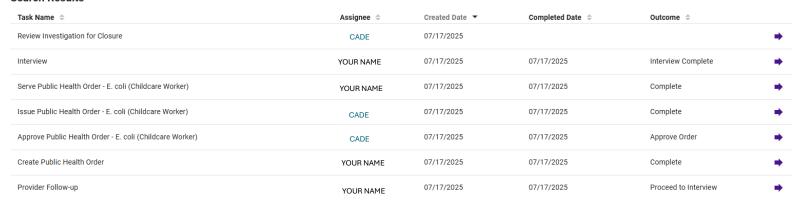
Serve Public Health Order - E. coli

G. <u>Serve Public Health Order</u>: The signed order will be available in PDF form to serve. Click "Complete" to finish the Task.

Serve Public Health Order - E. coli

Task Name	Completed Date	Scheduled Date	Outcome	Assignee
Serve Public Health Order - E. coli	02/25/2025	MM/DD/YYYY hh:mm aa		YOUR NAME

Health Order Type
E. coli 👁

Signed Order
Public Health Order - 0009 - E. coli (Healthcare Worker).pdf

H. <u>Task Complete: Serve Public Health Order</u>. At the end of this process, the Workflow for Creating a Health Order will look something close to this:

Search Results

Task Name	Assignee	Created Date	Completed Date	Outcome	
Review Investigation for Closure	CADE	07/17/2025			➡
Interview	YOUR NAME	07/17/2025	07/17/2025	Interview Complete	➡
Serve Public Health Order - E. coli (Childcare Worker)	YOUR NAME	07/17/2025	07/17/2025	Complete	➡
Issue Public Health Order - E. coli (Childcare Worker)	CADE	07/17/2025	07/17/2025	Complete	➡
Approve Public Health Order - E. coli (Childcare Worker)	CADE	07/17/2025	07/17/2025	Approve Order	➡
Create Public Health Order	YOUR NAME	07/17/2025	07/17/2025	Complete	➡
Provider Follow-up	YOUR NAME	07/17/2025	07/17/2025	Proceed to Interview	➡

2. **Health Order – Release an Order**
    A. Notification: You will receive an email alert when two negative stools, 24 hours apart, are received through ELR. This will prompt you that the individual may be eligible for release from the Health Order. Notifications outside this logic will not send an alert and will need to be monitored manually.

    B. Release Public Health Order: Click on the Release Public Health Order button and complete needed information.

    C. Claim Task: Claim or Assign this task

    D. Approve Health Order Release: this task will automatically be assigned to the E.coli Manager

    E. Issue Public Health Order Release: this Task will be automatically assigned to Senior or Field Epidemiologist to review, sign and return

    F. Alert: An Investigation alert will be sent to the owner of the Investigation when the Release Task is complete.

    G. Serve Public Health Order Release- Claim Task: Click on the Release Public Health Order Task. The release will be available in PDF form.

    H. Serve Public Health Order Release: The signed order will be available in PDF form to serve. Click "Complete" to finish the Task.

Serve Public Health Order Release - E. coli

Task Name	Comple
Serve Public Health Order Release - E. coli	02/25

Health Order to Release	Health Order Type
0009 - E. coli (Healthcare Worker) started on 02/25/2025	E. coli

Signed Order

Public Health Order Release - 0009 - E. coli (Healthcare Worker) - Release.pdf

Section 3.8 GTKs (Good to Know)

- Health Order Tasks need to be Claimed/Assigned to be completed for local users. Tasks for Disease Managers or field epis will be automatically notified and assigned.
- Alerts will be sent via email, as well as the Tasks appear on your Dashboard in the My Tasks tile.
- If the system recognizes the same person receives 2 negative results at least 24 hours apart, you will receive an alert that the case is potentially eligible for release.

3.9 INVESTIGATION: DISEASE SPECIFICS

Section 3 instructions are not disease specific. Therefore, this manual does not cover all possible areas that need to be covered during some Investigations. Depending on the disease, the questions will vary and there may be some other steps to take.

The IDSS Workflow is designed to be intuitive for each disease Interview and lead you through the correct process per disease.

However, if you have questions, please reach out to CADE 1.800.362.2736.

For diseases outside of CADE, refer to Section 7 for more details.

Most information is added by "creating"; usually through the "Create +" function seen in the Workflow on existing Records and Investigations. However, there are rare times when new Records, Investigations, and Lab Results will need to be created; this section will focus on how to create that new information in IDSS.
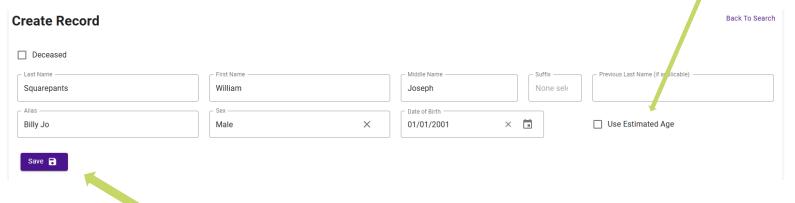
4.1   CREATING A NEW RECORD

Most of the time, a new Record will be created by an ELR or Epi-Link process.   In situations when a Record is not located in IDSS, a new Record will need to be created.

1. Search: before Creating a new Record, ***thoroughly*** search all Records in IDSS, keeping in mind partial names can be used to widen search results.

A. Dashboard – click the "Search Records" button on your Dashboard.

B. Criteria – Use any known information for the Record. Remember 'less is more' and using partial names or information will produce more results to avoid duplication.

2. Create: If results do not produce a match, a new Record will be created.

A. Create - click on the "Create +" in the upper right corner.

B. Complete – Fill in all known information for the new Record.

- i. Required fields: First Name and Last Name; but all known information should be entered.
- ii. Birthdate: If birthdate is not known, check the box for "Use Estimated Age" and enter the estimated age.
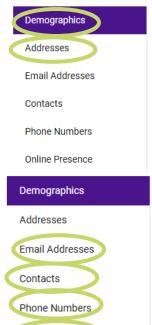- iii. Address: will be added later

C. Save – Click "Save"

3. New Record Information: A new Record will appear with Tabs to the bottom left.
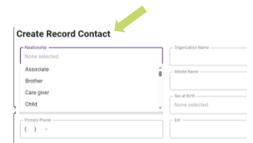
A. <u>Demographics</u>: complete all known demographics; if unknown, leave blank.

Create **+**

B. <u>Address</u>: this section is for adding historical information; a start and end date is required. More than likely, you will not add an address here.

NOTE: *The current address for the Investigation will be entered in a later step, not here.*

C. <u>Email Addresses</u>: Click on "Add Row +" and enter any known email addresses. NOTE: clicking the red "x" will delete the information.

D. <u>Contacts</u>: Information for family members, POAs, caretakers, and guardians can be entered and noted here.   Click on "Create +" to add additional information for someone *other* than the Record, Epi-Links, or Close Contacts. Information for those contacts will be added in a different step (See Section 3.5)

Create Record Contact

E. <u>Phone Numbers</u>: Click on "Add Row +" to enter phone numbers for the Record. NOTE: clicking the red "x" will delete the information.

F. <u>Online Presence</u>: Click on "Add Row +" to enter phone numbers for the Record. NOTE: clicking the red "x" will delete the information.

4. Save: Remember to "Save" before leaving the page; Saving is not automatic.

A. <u>Prompt</u>: sometimes, you may receive a reminder to save if you have entered information that has not been saved.

Are you sure you want to leave the current page?

⚠ The changes you have made will not be saved.

No - Stay On Page   Yes - Leave Without Saving

B. <u>Edit/View</u>: after saving, the Record will change to "View" mode. To continuing editing the Record and adding information, click "Edit" at the top of the page.

Record: Squarepants, SpongeBilly 01/01/1960 (Est.)

Edit ✏   Create New Investigation   Request Investigation Access

4.2   CREATING A NEW INVESTIGATION

Most of the time, an Investigation will be automatically created by an ELR or Epi-Link process and will only need to be Claimed/Assigned and not Created.   In rare situations outside of this process, a *new* Investigation will need to be created.
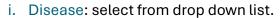
Note: This process will start a Workflow.

1. Create Investigation from Newly Created Record: After creating a new Record (as outlined in Section 4.1), you can go directly into creating a new Investigation. To Create a new Investigation directly from the Record in this process, click on "Create New Investigation" at the top of the page

Record: Squarepants, SpongeBilly 01/01/1960 (Est.)

Edit ✏   Create New Investigation   Request Investigation Access

Start New Investigation

A. Complete Investigation Information: unlike Claimed or Assigned Investigations that are added through ELR, when an Investigation is created there is missing information that needs to be completed.
  i. Disease: select from drop down list.
  ii. Address: Complete known address information
        NOTE: State and County is the minimum information required for address. *It is important to include this, so that the Investigation will show on your Dashboard*.

B. Complete Lab Information**:** Select the checkbox to add lab results.

☐ Select the checkbox to add lab results to the investigation.

  i. Add known Lab information (see Section 4.3 for detailed instructions)
  ii. Remember to attach any lab documentation to the Investigation after the Investigation creation is completed. Unfortunately, documents can't be added during the creation process.

2. Create Investigation from My Dashboard: While on your Dashboard, you can click on the "Create New Investigation" button at the top of the page.

A. Complete Investigation Information: unlike Claimed or Assigned Investigations that are added through ELR, when an Investigation is created there is missing information that needs to be completed.
   i. Disease: select from drop down list.
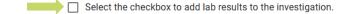   ii. Search Records (existing Record): Click on the magnifying glass and enter search criteria.
   iii. Address: Complete known address information

   NOTE: State and County is the minimum information required for address. *It is important to include this, so that the Investigation will show on your Dashboard.*

B. Complete Lab Information: Select the checkbox to add lab results.

   ☐ Select the checkbox to add lab results to the investigation.

   i. Add known Lab information (see Section 4.3 for detailed instructions)
   ii. Reminder: attach any lab documentation to the Investigation after the Investigation has been completely created. Unfortunately, documents can't be added during the creation process.

Either process above will open a new Workflow and start an Investigation.

3. Claim or Assign Investigation:
The Investigation still needs to be Claimed, as discussed in Section 3. By default, your name will appear as the Assignee when you start a new Investigation.

4.3   CREATING LAB RESULTS

Most of the time, Lab Results will be created by an ELR. In situations when an additional Lab or a new Investigation has been created, the lab information will need to be manually added. Adding Lab Results to an existing Investigation:

1. **Adding Lab Results to an existing Investigation**
   A. Go to Event Tab
      (Reminder: Labs are entered into the Event Tab and not the Lab Tab)

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Childcare, School, and Occupation

Labs

   B. Basic Lab Information
      i. Required Fields: must enter to proceed and are denoted by an asterisk*
         • Lab test
            NOTE: narrow options by typing the first part of the test name

         • Test result

Lab Data *

Test*
None Selected

Result*
None Selected

Numeric Result Value

      ii. Optional Fields: complete if known. A soft warning will appear if any of these fields are blank
         • Collection date
         • Specimen type
         • Performing facility

Collection Date
MM/DD/YYYY
Specimen Collection Date

Received Date
MM/DD/YYYY
Specimen Received Date

Specimen Result Date
MM/DD/YYYY

Accession #

Specimen Type
None Selected

Source Site

Performing Facility

Ordering Facility

   C. Additional Lab Results
      To add more lab results, copy the row by clicking the "+" or "Add New Lab Result +"

Add New Lab Result +

D. Facility Information
    i. Required Fields: must enter to proceed
       • Performing Facility
         NOTE: narrow options by typing a partial name

    ii. Optional Fields: complete if known
       • Ordering Facility
       • Ordering Provider Type
       • Ordering Provider First Name/Middle Name/Last Name
       • Ordering Provider Phone/Address/City/State/County/Zip

E. **Complete**
   A. Click "Save" - if there is missing information, an error message will appear
   B. Click "Complete" to close the Lab Results box.

2. Adding Lab Results to a newly Created Investigation:

Start New Investigation

Due Date
07/21/2025

Assignee
Rose Marie Scott   Assign

Disease*
Salmonellosis   ✕ 👁

Search Records*
Squarepants, Bobby Jo 01/01/2001

Address Line 1
1515 State St   Address Line

City
Sioux City   ✕

State
IA

Verify Address

Address Note

☐ Select the checkbox to add lab results to the investigation.

Save   Cancel   **Complete**

A. Select Checkbox

☐ Select the checkbox to add lab results to the investigation.

B. Basic Lab Information
   i. Required Fields: must enter to proceed and are denoted by an asterisk*
      • Lab test
        NOTE: narrow options by typing the first part of the test name

      • Test result

Lab Data *

Test*
None Selected

Result*
None Selected

Numeric Result Value

   ii. Optional Fields: complete if known. A soft warning will appear if any of these fields are blank
      • Collection date
      • Specimen type
      • Performing facility

Collection Date
MM/DD/YYYY 📅
Specimen Collection Date

Received Date
MM/DD/YYYY 📅
Specimen Received Date

Specimen Result Date
MM/DD/YYYY 📅

Accession #

Specimen Type
None Selected

Source Site

Performing Facility   🔍

Ordering Facility   🔍

C. Additional Lab Results

To add more lab results, copy the row by clicking the "+"

or "Add New Lab Result +"
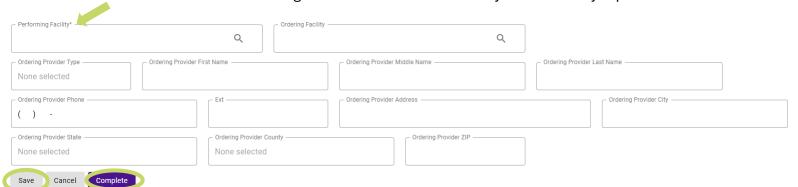
Add New Lab Result +

D. Facility Information

   i. Required Fields: must enter to proceed
      • Performing Facility
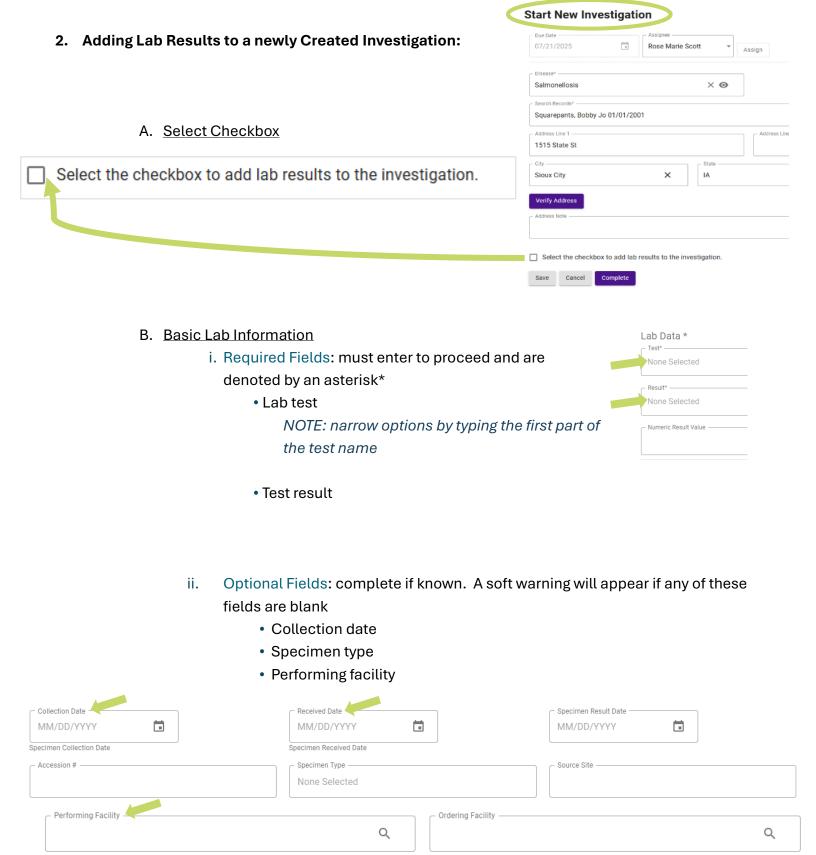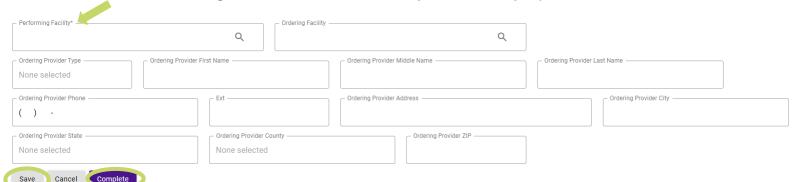   NOTE: narrow options by typing a partial name

  ii. Optional Fields: complete if known
      • Ordering Facility
      • Ordering Provider Type
      • Ordering Provider First Name/Middle Name/Last Name
      • Ordering Provider Phone/Address/City/State/County/Zip

Performing Facility*	Ordering Facility
🔍	🔍

Ordering Provider Type	Ordering Provider First Name	Ordering Provider Middle Name	Ordering Provider Last Name
None selected			

Ordering Provider Phone	Ext	Ordering Provider Address	Ordering Provider City
( ) -			

Ordering Provider State	Ordering Provider County	Ordering Provider ZIP	
None selected	None selected		

Save   Cancel   Complete

E. **Complete**
   A. Click "Save" - if there is missing information, an error message will appear
   B. Click "Complete" to close the Lab Results box.

Section 4 GTKs (Good to Know)

• Thoroughly search before adding a new Record. Name changes, misspellings, and incorrect DOBs are all possible.
• Remember 'less is more' when searching.
• Required Information for new Records or Investigations are noted with an asterisk

Reports are found in the top right corner of the IDSS bar. Click on the "Reports" and one options will be seen: General. To access the Report list, hover over the arrow to see options and select.

Records   Search ▾   Reports ▾   Sys Admin ▾   Account ▾ ☺

General Reports ▸

5.1 BASIC REPORT INFORMATION

A. Reports are listed alphabetically

B. When a report has parameters entered that will yield no results the report should show the Title, Parameters, text that reads "No Data Available".

C. Reports can be output as PDF by choosing the Report followed by (PDF); otherwise, reports will be generated in Excel.

Disease Query Report

Disease Query Report (PDF)

D. The results will be based on input parameters selected. If no input is given for a particular field, all options will be considered in the run. (Ex: if no Disease Type is specified, all diseases will be pulled)

5.2 GENERAL REPORTS

Disease Query Report

Disease Query Report (PDF)

Epidemiologically Linked Events Report

Epidemiologically Linked Events Report (PDF)

Local Outstanding Follow-up Report

Local Outstanding Follow-up Report (PDF)

Public Health Performance Report

Public Health Performance Report (PDF)

1. Disease Query Report: list of Records grouped by counties and their associated disease(s). It is used in various ways, from data analysis, workflow, etc. This report is applicable to all disease classes (i.e. STI, TB, CADE, LPH)

2. Epidemiologically Linked Events Reports: The result will be based on input parameters selected. This report is applicable to all disease classes (i.e. STI, TB, CADE, LPH)

3. Local Outstanding Follow-up Report: This report will be used to identify outstanding events so that the local agencies may follow up on their open events.

4. Public Health Performance Report: This report identifies how many days each Task of the Workflow took to complete; including an option for a broad overlook of days between notification and close of Investigation. All days displayed for the Task time requested (through parameters set) are calculated based on notification date.

Section 5 GTKs (Good to Know)

- If you currently request Reports to Regional Field Epis, you may continue to do so
- Report-like data for Investigation counts in the county is found on My Dashboard; not Reports
- My Dashboard has many report-like features (eg: Local Outstanding Report). This enables a quick view of LPH Investigations and statuses without a cumbersome report process.
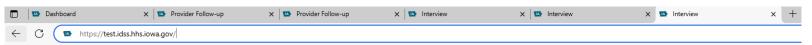
There are key features with IDSS that address some of the concerns with previous surveillance systems used before. This section will highlight some of the most useful features.
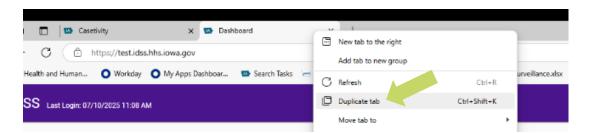
6.1 NAVIGATION

1. **Multiple Cases:** IDSS can can have multiple cases open at once in the same *browser*, so you can work on several Investigations simultaneously. Currently, there is no limit to the amount of tabs you can have open for IDSS. In the image below, there are 6 IDSS tabs open. The Dashboard, 2 Provider Follow-Ups, and 3 Interviews are simultaneously open.

2. **Duplicate Tabs:** One of the ways to quickly open up a case that is linked to a case you are currently in is to Duplicate the tab.

   A. Shortcut: White the Investigation is up, press and hold "Control+Shift" and tap "K". A browser window with the same Investigation will open and you can navigate to other Sidebar Tabs that contain Contacts, Partners, ect; while leaving the primary case open in the first window.

   OR
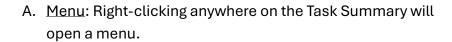
   B. Menu: On the current Investigation, right-click on the top tab of your browser
   C. Choose "Duplicate tab"
   D. Another tab will open and mirror the Investigation you are currently on
   E. Navigate: You can then navigate to tabs with Contacts, Partners, etc and update any information on those Investigations, while leaving the primary case open in the first browser window.

3. **Sidebar:** IDSS can have multiple cases open at once in the same *screen*. This will be helpful in working with mulitple cases at once; for example, Epi-Linked cases in the same household

   A. <u>Menu</u>: Right-clicking anywhere on the Task Summary will open a menu.

   B. <u>Split</u>: Chose "Open in Sidebar" to split the current screen to navigate through multiple Investigations on the same screen. The Sidebar will always be on the right side of the screen.

   C. <u>Adjust</u>: The sidebar screen can be widened for a better viewing area by hovering over the gray slider bar until the double white arrows appear. Then click, hold, and then drag the white double arrows to the right or left to widen or shrink the sidebar window.

   D. <u>Maximize</u>: To see the sidebar in full screen, click the icon for "Open Link to New Tab" in the upper right corner. This will create new tab on your browser with the sidebar information in full screen.

   E. <u>Close</u>: To close the sidebar, **save** your completed work and then click on the "x" in the upper right corner.

![IOWA Health and Human Services Public Health]

6.2 HELPFUL TOOLS

1. **Paper Case Report:** You can now download a paper interview form for specific diseases.

    A. Go to the Reports drop-down menu

    B. Select "Download Case Report Forms"
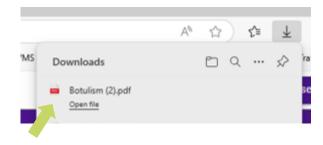
    C. Select Disease(s) and click "Search"
       NOTE: You can select more than one disease at once

    D. Select .pdf to download form

    E. Open downloaded form
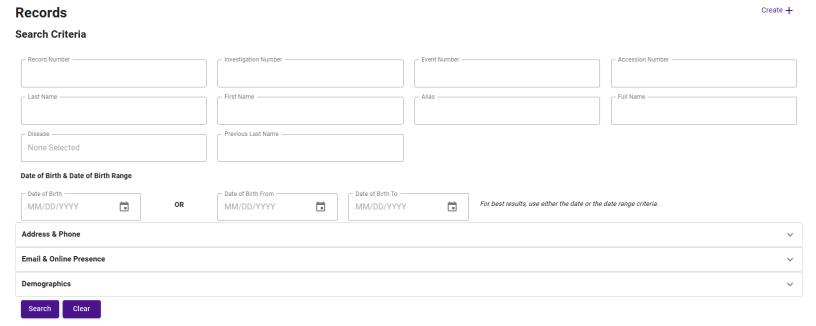
2. **IDSS Record Search**

All Records are available for viewing for all IDSS users; however, Investigations are limited to User Rule. This is a detailed look at how to search for Records. For more tips on how to enter information into Criteria fields, review Section 3.7.2.

A. Select Records: this is located on the top main bar menu

B. Criteria: enter the least amount of criteria required to locate Record. There are several fields available for searching and any combination can be used to locate a Record. The basic areas for searching are:

   i.   Record Number, Investigation Number, Event Number, or Accession Number
   ii. Name (First, Last, Alias, or Full Name)
   iii. Date of Birth (Actual DOB or range between two dates)
   iv. Disease (drop down box)
   v.   Address and Phone (full address or any part of address)
   vi. Email and Online presence
   vii. Demographics (Race or Ethnicity)

Records   Create +

Search Criteria

Record Number	Investigation Number	Event Number	Accession Number
Last Name	First Name	Alias	Full Name
Disease — None Selected	Previous Last Name		

Date of Birth & Date of Birth Range

Date of Birth — MM/DD/YYYY   OR   Date of Birth From — MM/DD/YYYY   Date of Birth To — MM/DD/YYYY   *For best results, use either the date or the date range criteria.*

Address & Phone ⌄

Email & Online Presence ⌄

Demographics ⌄

[Search] [Clear]

6.3   ACCESS PROCESSES

1. **Request Access to Okta/IDSS**

    IDSS uses the State of Iowa's ID.iowa.gov service as a single login for multiple State of Iowa applications. In order to give you access, you must first have an account with ID.iowa.gov.

    B. Sign Up: To sign up, go to https://id.iowa.gov/signin/register

    C. Instructions: For detailed instructions, see Get Started with ID.iowa.gov.

    D. Notify CADE: After you have created your account, please forward the email to jill.newland@ihhs.iowa.gov, and provide the email address you used to create your account. Jill will proceed with granting access to OKTA and then also grant access to the IDSS platform.

    E. Timeframe: Depending on office availability, access will be granted in about 2 business days from notification to Jill.

2. **Request Access to an Investigation.** Confidentiality guidelines are stricter on IDSS now. Because of this, you will not see Investigations outside of your jurisdiction or User Role. However, **all** IDSS Records are viewable for basic demographics. If you need to access an Investigation that is outside your jurisdiction, you will need to request permission.

    A. Locate the Record by conducting a Record search. Details on searching for Records is in Section 6.3.1. Select the Record by clicking the line or the arrow at the end of the line of the appropriate Record.

    B. Request: Select "Request Investigation Access"

Record: Squarepants, Sponge Billy 01/01/2000

Edit ✏   Create New Investigation   Request Investigation Access

C. Complete Required Fields:
   i. Disease (drop down selection)
   ii. Reason: (drop down selection)
      1. Assisting another jurisdiction
      2. Epi-Linked Case – out of jurisdiction
      3. Investigation is part of an outbreak in my jurisdiction
      4. Manually add a new lab result
   iii. Optional Field: notes to explain the situation further

Record: Squarepants, Sponge Billy 01/01/2000

Edit ✏ Create New Investigation Request Investigation Access

Record Number   Record Create Date
100014653   07/16/2025   ☐ Deceased

DS Base Access Additional Investigations

Disease *
Salmonellosis   ✕ 👁

Reason *
None selected

Assisting another jurisdiction
Epi-linked case - out of jurisdiction
Investigation is part of an outbreak in my jurisdiction
Manually add a new lab result

Additional Information

Cancel   Search

D. Click "Search"

[Search button]

E. Workflow: Request Investigation Access. If an Investigation is located, a Workflow of the Investigation will open.   Verify the information (if known).

Investigations

Investigation ID   Event ID   Disease Name   Onset Date
100005919   100005891   Salmonellosis

Event Status   Investigation Status Date Reported to HHS
Pending   Pending   07/16/2025   ☐ Request Access

Cancel   Request Access

☐ Request Access

F. Click on the "Request Access" checkbox of the correct Investigation, as there may be more than one Investigation listed in the Workflow initially.

G. Click "Request Access"

H. Approval: as long as the reason is a pre-approved reason to gain access, approval will be automatic. In other cases, you will be notified once approval has been granted. All the requests, pre-approved or otherwise, are visible to the State.

I. Record Search: Once approval is completed, you will need to search for the Record again; as the original Primary Organization will remain and therefore will not yet appear on your jurisdiction's dashboard.

Record ID: 100014653
Record Name: Squarepants, Sponge Billy
Record DOB: 01/01/2000
County: Polk
Event ID: 100005891
Primary Organization: NOT YOUR County Health Department

J. Select Investigation: This time when you search for the Record, you will see the Investigation is now available to select.

Record: Squarepants, Sponge Billy 01/01/2000   Back To Search

Edit ✏   Create New Investigation   Request Investigation Access

Record Number	Record Create Date						
100014653	07/16/2025	☐ Deceased					

First Name	Middle Name	Last Name	Suffix	Previous Last Name (if applicable)
Sponge Billy		Squarepants		

Investigations

Investigation #	Event #	Disease Name	Onset Date	Event Status	Investigation Status	County	Address	Has Contacts	Is Contact	Date Reported to HHS		
100005919	100005891	Salmonellosis		Pending	Manual Assignment	Polk	1515 State St			07/16/2025 5:41 PM	👁	→

Rows per page: 10 ▾   1-1 of

K. Workflow Task: Owner Assignment. You can now Claim the Investigation and continue with the Workflow as usual. *Once this Investigation has been Claimed, you will then see the Investigation on your Dashboard.*

2. **Change Address/Jurisdiction Access to Investigation**: Investigations are based on the address given by the ELR submission. On occasion, the address is incorrect and once updated, the jurisdiction changes. In these situations, the Investigation will need to be transferred to the correct Primary Organization (jurisdiction).

Clusters/Outbreaks

Documents

Notes

A. Notes Tab: make any applicable notes on the Investigation in the Notes tab.
NOTE: It is important to do this step first, as once the address is updated, you will no longer have access to the Investigation because the Investigation will no longer be in your jurisdiction.

B. Updates: enter any updates or information that has already been gathered on the Investigation.

Demographics

Events

Healthcare Provider

C. Save: once all information has been entered; Save.

Save 🖫

NOTE: As soon as the step below is completed; you will no longer have access to the Investigation, because the Investigation will no longer be in your jurisdiction. It will automatically 'disappear' from your Workflow; therefore, this next step should be the LAST action in updating any information in the case.

D. Demographics Tab: update Address by clicking on the "Update Address" button.

Update Address

There are key features with IDSS that pertain to specific diseases. The following list is the available specific User Manuals available and their designated Appendix.

All appendices assume two prerequisites:
1. **Previous training of the disease process on a former IDSS system;** *AND*
2. **Previous training on the new IDSS general disease navigation software, as covered in Sections 1-6 of the CADE User Guide.**

TABLE OF CONTENTS – SECTION 7: OTHER DISEASE APPENDICES

IDSS MANUAL

HEPATITIS

APPENDIX A

USER REFERENCE GUIDE

LOCAL PUBLIC HEALTH

HEPATITIS DIVISION

IOWA™
**Health and
Human Services
Public Health**

There are key features with IDSS that pertain to specific diseases. In this appendix, we will walk through Hepatitis B, C, Perinatal, and Maternal processes and key differences.

This Hepatitis Appendix assumes two prerequisites:

1. **Previous training of the disease process on a former IDSS system;**

   AND

2. **Previous training on IDSS 2.0 general disease navigation; such as those covered in Sections 1-6 in the IDSS 2.0 User Manual; CADE Division.**

Table of Contents

7.1 HEPATITIS B

1. **Task: Owner Assignment**
    A. <u>Notification</u>: Emails will be sent to the responsible County to Claim either through:
        i. Automatic Dispursement: most ELR cases are available on My Dashboard immediately as received from Labs
        ii. Holding Tank: ELR labs will be submitted and held for review if it does not meet the automatic assignment protocol. Labs in the holding tank will be sorted by the Hepatitis B Manager and made available to the correct County Dashboard once reviewed
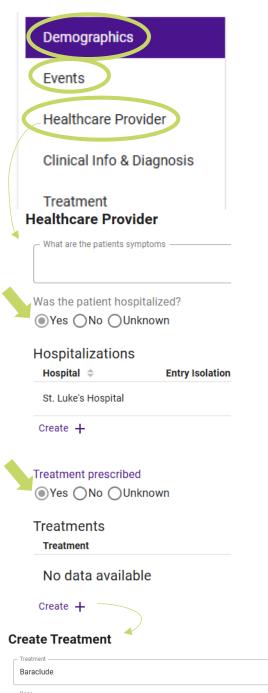
    B. <u>Claim/Assign</u>: Case can be found on My Dashboard in the Local Outstanding Followup, or through the link the afore mentioned email.

2. **Task: Status Case:** this is done first for pattern detection and workflow processes.
    A. <u>Identify Lab</u>: case/not a case

    B. <u>Events Tab</u>:
        i. Edit: Click on pencil in the upper right corner
        ii. Status Case: Probable, Confirm, Not a Case

Save   Create New Reportable Event   Split Reportable Event

Disease	Disease Type	Status
Hepatitis B 👁	Hepatitis B - type not specified ✕ 👁	Pending ✕

Event Number

Confirmed
Not a Case
Pending
Probable

C. **Task: Provider Follow-Up**

Complete all required information in applicable tabs. Items of note that differ from other dieases or will result in an alert at closing are listed below.

*Chronic – *fax* HCP for information

*Acute/New Case – *call* HCP for information

A. Demographics: complete required information
   i. Required Fields: Address, Phone, DOB, Sex, Origin, Ethnicity, Pregnancy Status
   ii. Fields of Note (often missed): Race, Ethnicity, Pregnancy Status

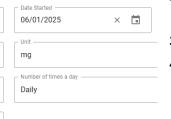B. Events Tab: click on pencil to edit (different than most tabs)
   iii. Complete Dates: Diagnosis, Onset
   iv. Outcome (if applicable)
   v. Status Date: confirmed this was previous completed in step above (2: Task: Status Case)

C. Healthcare Provider:
   i. Symptoms: this is an open box for general symptom information, even if it's a symptom not usually associated with Hepatitis B. More specific disease information will be gathered in following tabs.
   ii. Hospitalizations: click "yes" to add any information
       1. select "Create +"
       2. thoroughly search for hospital, if found, select
       3. If not found, click "Create +"in the upper right corner of the pop-up window
       4. Save and Close
          NOTE: information added here will auto-populate to Visit/Hospitalization Tab.
   iii. Treatment (NEW AREA): click "yes" to add any information:
       1. Select "Create +"
       2. Add known Treatment information, *leave any unknown details of treatment **blank**.*
       3. Click "Save"; click "Close"
       4. To Edit: click on arrow of Treatment table and edit (CURRENTLY NOT WORKING- sent to Varsha 6/24)

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Healthcare Provider

What are the patients symptoms

Was the patient hospitalized?
◉ Yes ○ No ○ Unknown

Hospitalizations

Hospital	Entry Isolation
St. Luke's Hospital	

Create +

Treatment prescribed
◉ Yes ○ No ○ Unknown

Treatments

Treatment

No data available

Create +

Create Treatment

Treatment	Date Started
Baraclude	06/01/2025

Dose	Unit
0.5	mg

Number of days	Number of times a day
30	Daily

Route
Oral

Save 🖫   Close ✕

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Vaccinations

Childcare, School, and
Occupation

Labs

Epi-Links

Clusters/Outbreaks

Exposure

Documents

Notes

Admin

C. Healthcare Provider (Con't):

    iv. Travel History: open box response from HCP; more detailed information will be entered in following tabs.

    v. Patient Notification: ensure patient has been notified before any calls are made to the patient from LPH.

D. Clinical Info & Diagnosis: complete all known information; every field should be answered either yes/no/unknown.

    Note: Marking "yes" will open up tables to add more details, usually through the "Create +" function.

E. Treatment: Treatment information will auto-populate from any information entered in the Healthcare Provider tab. However, new information can also be added here and will auto-populate to the Healthcare Provider tab.

F. Visit/Hospitalization:

    i. Hospital information will auto-populate from any information entered in the Healthcare Provider tab. New information can also be added here.

    ii. Visit information is through ELR and can't be edited or changed; only viewed.

G. Risk Factors: complete all known information; every field should be answered either yes/no/unknown.

    i. Sexual (ever in lifetime): can select more than 1 answer

    ii. Long-Term Dialysis: select if dialysis has been greater than 6 months.

    iii. Reminders:

        1. Pay close attention to the timespan of the question (6 months or lifetime)

        2. Many drop-down boxes allow for more than 1 answer

        3. Clicking "yes" may open a table in which you will add detailed information through "Create +"

H. Vaccinations: complete known information

I. Childcare, School, and Occupation: complete known information

Vaccinations

Childcare, School, and
Occupation

Labs

Epi-Links

Clusters/Outbreaks

J. Labs
   i. Labs should be added in the Events Tab. They will auto-populate this tab from there.
   ii. Current Investigation is defined as any lab needed to make a case determination
   iii. Supplemental Labs are defined as separate infections, this will be rarely used

   WARNING: Lab results related to the current investigation should be added in the Events tab.

   Add Supplemental Lab Result

K. Epi-Links: contacts as established by the HCP (not the patient)
   i. Create: to add an Epi-Link, click "Create +"

   ii. Search: Search IDSS to determine if there is a previous using the record by clicking on the magnifying glass.

   iii. Record Found: if a previous record in IDSS is found (for any disease):
      A. Click on the "plus sign" at the end of the row
      B. Enter known information. The Epi-Link will process with just the name and County if no other information is known.
      C. Click "save"; a new box will open with another option to add known Demographics. When completed, click "Save" and then "Close" Save

   iv. Record *Not* Found:
      a. Click on the "Create +" in the upper right corner to create a new record Create +
      b. Required fields are: First Name, Last Name, and age (estimated age is available)
      c. Highly Recommended fields are: County and Phone Number.
      d. Click "Save"; a new box will open with another option to add Save known Demographics. When completed, click "Save" and then "Close"
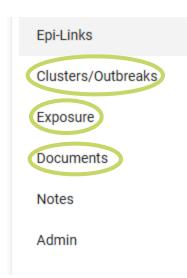
   v. Editing: You will now see the Epi-Linked contacts listed in the tab. To edit any information; click on the arrow at the end of the row.

NOTE: This process creates an Investigation for the Epi-Link and the Investigation will need to be Claimed - as any other Investigation. It is helpful to enter at least a County for the address so that the Investigation will appear on the correct Dashboard to be Claimed.

Epi-Links

Clusters/Outbreaks

Exposure

Documents

Notes

Admin

L. Exposure: complete all known information
   i. Field of Note: do not use Binational Exposures

M. Cluster/Outbreaks: *only* be used as directed from the State
   i. Click: Add to Outbreak/Cluster
   ii. Choose either Outbreak or Cluster
   iii. Search: click on magnifying glass to enter CDC Cluster Code (as provided by the State)
   iv. Select: select correct grouping
   v. Save

Clusters/Outbreaks

Search Criteria

CDC Cluster Code

Search   Clear

N. Other Tabs:
   i. Notes: add any needed notes
   ii. Documents: new faxes with pertinent information specifically to the case can be uploaded. Do not upload portions of charts that do not pertain directly to the investigation. To omit pages:
      i. Go to "print" on the document
      ii. Select "save as PDF"
      iii. Select "Custom Print" and select only pages directly relating to current investigation
      iv. Click "print"
      v. Save document in confidential location
      vi. In the Documents Tab: Click "Create +"
      vii. Choose File from confidential location
      viii. Choose Document Type and add any applicable Notes
      ix. Click "Save" and then "Close"
      x. Delete all other copies and files of document

Printer

Save as PDF

Settings

Custom Print
Type specific pages, sections...

Pages: 1-3, 7, 10-12

Create Document

Document
Choose File   No file chosen
Document Type
Select values
Note

Save 💾   Close ✕

O. Education: this final question is not found on a tab, rather at the top of the Investigation tile

Investigation:

Save

Status
Pending

Stage
Assigned

Was the Patient Educated on Disease Control and Prevention Measures?
○ Yes ○ No ○ Unknown

4. **Task: Complete Provider Follow-Up (no patient interview)**

   A. <u>Check mark</u> "Record does not meet interview criteria" [for patient interview] and different workflow options will appear

   ☐ Record does not meet interview criteria

   B. <u>Select</u> "Review Investigation"

   ✓ Record does not meet interview criteria

   | Save | Cancel | Awaiting Response | Review Investigation |

   C. <u>Review Alerts</u>
      i. Change or Update required information

   Investigation:

   Save 💾   Split Investigation

   Alerts
   - Hospitalization information is missing
   - School information is missing
   - Childcare information is missing
   - Employment information is missing
   - No treatments have been entered

   D. <u>Save</u>   Save 💾

5. **Task: Complete Provider Follow-Up AND Complete Patient Interview**

   A. <u>Select</u> "Proceed to Interview"

   | Awaiting Response | Proceed to Interview |

   B. <u>Interview Patient</u> for additional information and enter into IDSS under appropriate tabs, as explained above.

   | Awaiting Response | Interview Complete |

   C. <u>Select "Interview Complete"</u> when information has been gathered and added to IDSS

   E. <u>Review Alerts</u>
      i. Change: To change or update required information, select "cancel" and make needed changes. Once complete, follow step C again.
      ii. Continue: To send case to review without changes, select "continue"

   ⚠ Warning
   - Was the patient educated on disease control and prevention measures? is missing
   - Race is missing
   - School information is missing
   - Childcare information is missing
   - Employment information is missing

   | Continue | Cancel |

6. Task: Review Investigation for Closure

    A. This Task will be completed by the Hepatitis B Manager. The manager will automatically receive notification that the Task needs to be completed; you will not need to assign a Task, nor send an investigation notification.

    B. Once the Investigation is closed, the Investigation is removed from "My Tasks" tile on My Dashboard, since you will no longer have Tasks with the case. However, the case will remain on the "My Open Investigations" tile until the case is evaluated. This will allow you to track the progress of the case until evaluated by the State.

        NOTE: It is helpful to review the "My Tasks" Tile on your Dashboard often to ensure no Tasks for the Investigation need to be completed. If a Task is found, click on the arrow to be taken directly to the Outcomes page to complete the Task.

    C. Once Reviewed by the State, you will receive one of two notifications:
      i. Case has been closed.
      ii. Correction Needed. If corrections are requested:
- Complete requested corrections
- Note corrections in the Note Tab
- Re-submit for review by selected "Interview Complete" again

---

Section 7.1 HEPATITIS B GTKs (Good to Know)

- Remember to status the case first
- Clicking "yes" will often bring up more options to provide detailed information
- Watch the question's timeframe (6 months/lifetime) for accurate information gathering
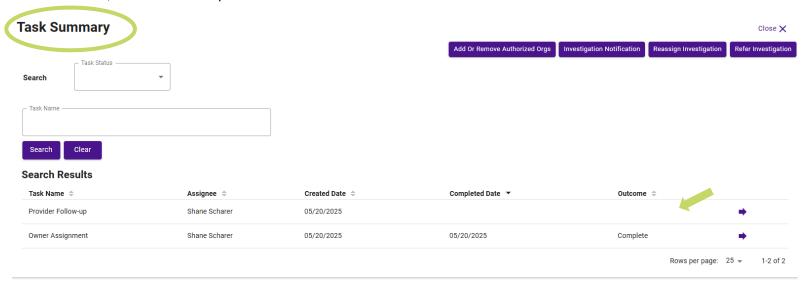
7.2 HEPATITIS C

Tasks Overview

Tasks are the workflow in completing a case or file. The Task Summary tile will show you which task you are on; the last uncompleted task with have a blank outcome.

Task Summary   Close ✕

| Add Or Remove Authorized Orgs | Investigation Notification | Reassign Investigation | Refer Investigation |

Search — Task Status — ▼

— Task Name —

[Search] [Clear]

Search Results

Task Name ⇕	Assignee ⇕	Created Date ⇕	Completed Date ▼	Outcome ⇕	
Provider Follow-up	Shane Scharer	05/20/2025			➡
Owner Assignment	Shane Scharer	05/20/2025	05/20/2025	Complete	➡

Rows per page: 25 ▾   1-2 of 2

1. Owner Assignment

Task Name ⇕	Assignee ⇕	Created Date ⇕	Completed Date ▼	Outcome ⇕	
Owner Assignment	Shane Scharer	05/20/2025			➡

Rows per page: 25 ▾

    a. Click on the arrow at the end of the line
    b. Click on "Claim"
    c. Click on "Complete"
        *Task will now show an outcome of "complete" and new task will appear

Task Name ⇕	Assignee ⇕	Created Date ⇕	Completed Date ▼	Outcome ⇕
Provider Follow-up	Shane Scharer	05/20/2025		
Owner Assignment	Shane Scharer	05/20/2025	05/20/2025	Complete

Rows per page: 25

2. Provider Follow up

    a. Complete information in the Investigation tabs

    b. Check "Record does not meet interview criteria"

☐ Record does not meet interview criteria

    c. Select "Review Investigation"

✓ Record does not meet interview criteria

Save	Cancel	Awaiting Response	Review Investigation

Investigation:

Save 💾   Split Investig

3. Review Investigation for Closure

    a. Alerts: take note of any alerts and fix any required information

Alerts

- Race is missing

    b. Click the arrow at the end of the row

Task Name ⇕	Assignee ⇕	Created Date ⇕	Completed Date ▼	Outcome ⇕	
Review Investigation for Closure		05/20/2025			➡
Provider Follow-up	Shane Scharer	05/20/2025	05/20/2025	Review Investigation	→
Owner Assignment	Shane Scharer	05/20/2025	05/20/2025	Complete	➡

    c. Claim the task

    d. Click "close"

4. Case is Closed. Case can be re-opened at any time to add information:

    a. Open the Investigation

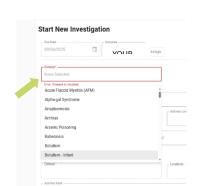   b. Click on "Reopen Investigation" on the Investigation Tile

Investigation:

Reopen Investigation

7.3 PERINATAL HEPATITIS B

1. **Create Record:** More than likely, there will be no Record of the infant in IDSS and a Record will need to be created. See Section 4.1 in IDSS User Manual for details on how to create a Record. A basic overview is:

    A. Create - click on the "Create +" in the upper right corner of Record Search window.   Create +

    B. Complete Basic Information– Fill in all known information for the new Record.
    - i. Required fields: First Name and Last Name; but all known information should be entered.
    - ii. Birthdate: If birthdate is not known, check the box for "Use Estimated Age" and enter the estimated age.

    C. Complete Demographic Information
    - a. Demographics: if unknown, leave blank
    - b. Address: create in Investigation (only historical addresses shown here)
    - c. Email address, if known
    - d. Contacts, especially mother information
    - e. Phone Numbers
    - f. Online Presence, if applicable

2. **Create Investigation:** see Section 4.2 on details on how to create an Investigation. A basic overview is:
    - A. Select: "Create a New Investigation" link

    - B. Complete Investigation Information
      - i. Disease: select from drop down list.
      - ii. Address: Complete known address information
            NOTE: State and County is the minimum information required for address. *It is important to include this, so that the Investigation will show on your Dashboard*.

3. **TASK: Owner Assignment/Claim**
    - A. Claim Investigation
    - B. Save/Complete Task

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Visit/Hospitalization

Vaccinations

Childcare, School, and Occupation

Labs

Epi-Links

Clusters/Outbreaks

Exposure

Documents

Notes

Mother's Information

Admin

4. **TASK: Provider Follow-Up**

A. <u>Demographics Tab:</u> Review Demographics and made any necessary updates or changes; be sure to add Guardian information.

B. <u>Clinical Info & Diagnosis Tab</u>
NOTE: Currently tab is not editable (including PVST); Shelly notified

   i. Birth Information – complete all Birth Facility and Birth Weigh
      NOTE: Weight Unit from lb to kg/g will be automatically calculated

   ii. Primary Medical Provider Information

   iii. Symptoms: mark "yes" to see complete list of possible symptoms, mark any that apply. If none apply, mark "no".
   iv. Testing: check all that apply, multiple reasons can be chosen
   v. PVS Testing History: *skip at initial Investigation*; will be completed at least 1 month after final dose of Hepatitis B vaccine.
   vi. Diabetes Question: not required

C. <u>Visit/Hospitalization</u>: enter Hospitalization information by using the "Create +" function
      NOTE: Remember "less is more" and enter the least amount of criteria to search for Hospital. Add new facility only after all search options have been exhausted.

D. <u>Vaccinations</u>: enter known HBIG and Hep B vaccination information by clicking "Yes" and then using the "Create +" function.

E. <u>Childcare, School, Occupation</u>: add any childcare information

F. <u>Mother's Information</u>:
   i. Click on the magnifying glass to search for the Mother's Record; create if not already in IDSS
   ii. Enter Ethicnity, Race, and mother's birth country information
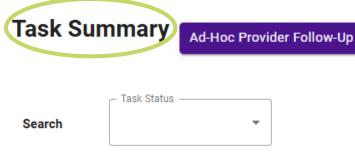   iii. Complete HBsAG questions

G. Epi-Link: In the Epi-Link tab, you will see all Related Investigations. In order for a person to be listed, there needs to be a previously entered Investigation (not just Record).

To enter a new Epi-Linked contact (including mother), Perinatal Hepititis uses the Task Summary tile button "Create Epi-Link". This is located in the Workflow Tile on Task Summary in the upper right corner.

NOTE: It is important to be on the Task Summary portion ofof the Workflow, not in a Task. For example, if you are in the Provider Follow Up Task, you will *not* see the correct buttons, as shown to the right.

For a more detailed process on how to add Epi-Links in general, see Section 3.5.8 of the CADE Manual.
For Perinatal Hepatitis:
  i.   Click on "Create Epi-Link" in Workflow Tile while on 'Task Summary':
       • Search for the Record, usually using First and Last Name
       • In the Search Results, click the arrow of the appropriate Investigation
       • Click the "Edit" pencil
       • And……?

H. Other Tabs:
   ii.   Clusters/Outbreaks: only used at the direction of the Disease Coordinator
   iii. Notes: Add any pertinent information for the Investigation
   iv.   Labs: additional labs will be added to the Events Tab, towards the bottom of the Events Tab.

5. **TASK: Complete Provider-Follow Up.** Once all the information has been entered, return the Workflow Summary Tile to mark the Task as complete and move on to the next Task in the Workflow. In this case, you will select "Schedule Next Task".

6. **TASK: Schedule next Task.** The goal is to follow through immunization process (up to 18 months). In IDSS, you are able to receive a notification when the next task is due. This will remove the Investigation from your "My Task" list on your Dashboard until the day you select to be notified.

Because of the notification feature of this Task, only *one* Follow Up Task can be scheduled at a time; either Mother/Provider Outreach, Vaccination, or Testing. However, at any point during the course of the Investigation, you can add an "Ad-Hoc" Task.

First, let's cover the Follow Up Tasks and then the "Ad Hoc" feature.

A. Vaccination Follow Up**:** IDSS provides email reminders on when the Vaccination Follow Up task is due. Because of the notification feature of this Task, only *one* Follow Up Task can be scheduled at a time: Vaccination, Test, or Provider/Mother Follow Up.
    i. **Set Up Vaccination Follow Up**
        • Due Date: Selected Today's Date – this is not the due date for the Task to be complete, that will be entered later.
        • Claim the Task (Or assign to someone else)
        • Reminder Statement: The following reminder will always be displayed on Vaccination Follow Ups: "HBIG and HepB vaccine at birth 2 months of age: 2nd dose of HepB vaccine 6 months of age: 3rd dose of HepB vaccine (may have had 4 doses-minimum age for the final dose of HepB vaccine is 24 weeks of age)"
        • Next Task Type: Choose the Task Type from the drop-down list in the box.
        • Days Until Next Task: determine when you want to receive notification of this task; not necessarily when the vaccination will be due.
            NOTE: **You will not be able to add any more Follow Ups until the amount of time entered in "Days Until Next Task" has expired**.
                Example: you enter "50" in the "Days Until Next Task" field. The Task will 'disappear' from the Workflow and the "My Tasks" tile for 50 days. At the end of 50 days, you will receive a notification and the Task will 'reappear' in the Workflow and on the Dashboard.
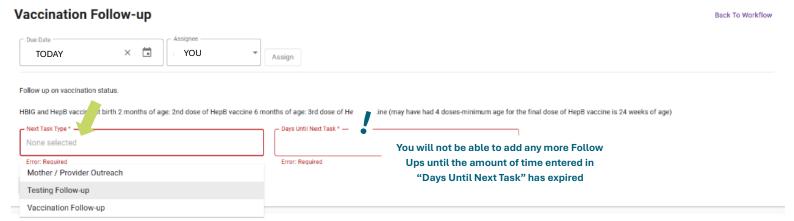   • Next Task: Any additions to the Investigation must be done through "Ad-Hoc" tasks. *The next Task will not be available until the entered time has passed*.
            NOTE*:* Review Investigation (Closing the case) is only available at the end of the Testing Follow Up task. All other tasks will not have that option.

ii. Complete Vaccination Follow Up

- **Notification**: once the number of days selected has pass, you will receive an email notification of the Task.
- **Dashboard**: the Task will appear on the "My Tasks" tile to be completed
- **Select the Task** by clicking on the arrow at the end of the Tile
- **Conduct Follow Up and Enter information** pertient to the Investigation
- **Complete Task**: complete the Task by selecting "Schedule Next Task" and following above steps to repeat the process

Vaccination Follow-up

Back To Workflow

Due Date
TODAY

Assignee
YOU

Assign

Follow up on vaccination status.

HBIG and HepB vaccin_ _t birth 2 months of age: 2nd dose of HepB vaccine 6 months of age: 3rd dose of He_ _ine (may have had 4 doses-minimum age for the final dose of HepB vaccine is 24 weeks of age)

Next Task Type *
None selected
Error: Required

Mother / Provider Outreach
Testing Follow-up
Vaccination Follow-up

Days Until Next Task *
Error: Required

! **You will not be able to add any more Follow Ups until the amount of time entered in "Days Until Next Task" has expired**

Investigation: Doe, Baby Jane 06/25/2025: Hepatitis B Perinatal

B. <u>Mother/Provider Outreach</u>**:** This task is to be used as needed throughout the vaccination series for reminders, missed appointments, etc. However, because of the Follow Up notification process in IDSS, Mother/Provider Outeach may often be added through the Ad-Hoc feature instead. Either way is an acceptable way to enter information for these type of outreach. Below shows the process for adding the Outreach as a task; we will cover the Ad Hoc process later in this section.

    i.   **Set Up Mother / Provider Outreach**

- Due Date: Selected Today's Date – this is not the due date for the Task to be complete, that will be entered later.
- Claim the Task (Or assign to someone else)
- Reminder Statement: The following reminder will always be displayed on Vaccination Follow Ups: "discuss perinatal exposure, importance of completing on time HepB vaccination, and post vaccination serology testing. This may also be used as needed throughout vaccination series (reminders, missed appointments, etc)".
- Next Task Type: Choose the Task Type from the drop-down list in the box.
- Days Until Next Task: determine when you want to receive notification of this task; not necessarily when the vaccination will be due.

    NOTE: You will not be able to add any more Follow Ups until the amount of time entered in "Days Until Next Task" has expired.

- Next Task: The next Task will not be available until the entered time has passed. *Any additions to the Investigation must be done through "Ad-Hoc" tasks.*

    NOTE*:* Review Investigation (Closing the case) is only available at the end of the Testing Follow Up task. All other tasks will not have that option.

    ii.   **Complete Mother / Provider Outreach**

- Notification: once the number of days selected has pass, you will receive an email notification of the Task.
- Dashboard: the Task will appear on the "My Tasks" tile to be completed
- Select the Task by clicking on the arrow at the end of the Tile
- Conduct Follow Up
- Enter information pertinent to the Investigation
- Complete Task: complete the Task by selecting "Schedule Next Task" and following above steps to repeat the process

Mother / Provider Outreach

Back To Workflow

Due Date			Assignee		
07/08/2025	✕	📅	Jennifer Miller	▾	Assign

Mother / Provider Outreach

Initial contact: discuss perinatal exposure, importance of completing on time HepB vaccination, and post vaccination serology testing. This may also be used as needed throughout vaccination series (reminders, missed appointments, etc)

Next Task Type *		Days Until Next Task *
Mother / Provider Outreach	✕	0

Save   Cancel   Awaiting Response   Schedule Next Task

C. <u>Testing Follow Up</u>**:** This task is to be used as after the vaccination series is completed.

    i.   **Set Up Testing Follow-up**

- **Due Date**: Selected Today's Date – this is not the due date for the Task to be complete, that will be entered later.
- **Claim** the Task (Or assign to someone else)
- **Reminder Statement**: The following reminder will always be displayed on Testing Follow Ups: "Post Vaccination Serology Testing (PVST) HBsAg AND anti-HBs: at least 1 month following final dose of HepB vaccine and no sooner than age 9 months of age".
- **Next Task Type**: Choose the Task Type from the drop-down list in the box.
- **Days Until Next Task**: determine when you want to receive notification of this task; not necessarily when the vaccination will be due.
  > **NOTE: You will not be able to add any more Follow Ups until the amount of time entered in "Days Until Next Task" has expired**.
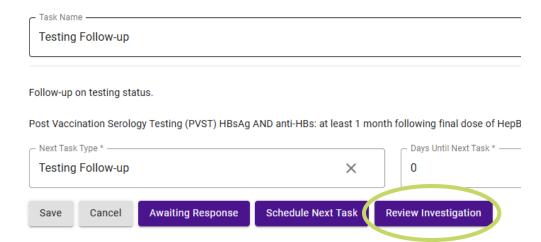- **Next Task**: The next Task will not be available until the entered time has passed. *Any additions to the Investigation must be done through "Ad-Hoc" tasks.*
- **Closing Investigation***:* You can only close the Investigation at the end of the Testing Follow Up task. All other tasks will not have that option.

    ii.   **Complete Testing Follow Up**

- **Notification**: once the number of days selected has pass, you will receive an email notification of the Task.
- **Dashboard**: the Task will appear on the "My Tasks" tile to be completed
- **Select the Task** by clicking on the arrow at the end of the Tile
- **Conduct Follow Up**
- **Enter information** pertinent to the Investigation
- **Complete Task**: complete the Task by selecting "Review Investigation"
  > **NOTE: It is here that you will be able to close the Investigation and submit it to the Diease Coordinator for review.**

Testing Follow-up

Task Name
Testing Follow-up

Follow-up on testing status.

Post Vaccination Serology Testing (PVST) HBsAg AND anti-HBs: at least 1 month following final dose of HepB

Next Task Type * Testing Follow-up ✕   **Days Until Next Task *** 0

[Save] [Cancel] [Awaiting Response] [Schedule Next Task] [Review Investigation]

D. <u>Ad Hoc Follow Up</u>**:** "Ad-Hoc Provider Follow Up" creates a task to be used to add any information for the case outside of the previously created tasks; whether from the Provider *or* Mother (the name will change in future IDSS updates).   This button is located to the top right of the Task Summary tile.

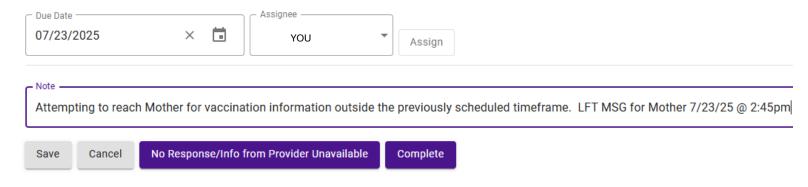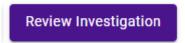| Ad-Hoc Provider Follow-Up | Create Epi-Link | Investigation Notification | Reassign Investigation | Refer Investigation |

i. **Set Up Ad-Hoc Follow Up**
- Due Date: Selected Today's Date – this is not the due date for the Task to be complete
- Claim the Task (Or assign to someone else)
- Reminder Statement: The following reminder will always be displayed on Testing Follow Ups: "Post Vaccination Serology Testing (PVST) HBsAg AND anti-HBs: at least 1 month following final dose of HepB vaccine and no sooner than age 9 months of age".
- Note: Add a note as to the source and reason for the additional information
- Complete: any additional information in the Investigation needed
- Outcome: Select outcome : "No Response/Info Unavailable" or "Complete"

Ad-Hoc Provider Follow-up

Due Date
07/23/2025   ✕ 📅

Assignee
YOU   ▼   Assign

Note
Attempting to reach Mother for vaccination information outside the previously scheduled timeframe. LFT MSG for Mother 7/23/25 @ 2:45pm

Save   Cancel   No Response/Info from Provider Unavailable   Complete

7. **Closing Investigation:** When the Investigation is complete, you will need to submit the Investigation for review by the Disease Coordinator.

   A. Review**:** Click on the "Review Investigation" button on the Testing Follow-Up Workflow Task**.**

   Review Investigation

   i. Location: As previously discussed, at the end of the "Testing Follow Up" Task is the only Task in which this option occurs.

   ii. Automatic Check: Once you select "Review Investigation", IDSS will check for missing information; you may receive a warning message to correct areas. Hit "cancel" to go back and correct the areas. Hit "continue" to send the case to Statusing without making corrections.

   ⚠ Warning
   - School information is missing
   - Childcare information is missing
   - Employment information is missing
   - Was the patient educated on disease control and prevention measures? is missing

   Continue   Cancel

   B. Corrections: If you choose to make corrections; once corrections are completed, return to the Task Summary Tile and select task "Review Investigation".

   C. Statusing**:** The Task Summary shows "Review Investigation for Closure" for the next Task. This Task will be Claimed by the Disease Coordinator (not you).

   Search Results

Task Name ⇕	Assignee ⇕	Created Date ⇕
Review Investigation for Closure		03/19/2025

   D. Pending: The Workflow for the Investigation is now pending while waiting for Review. Since your Tasks are complete, the Investigation is removed from "My Tasks" tile on My Dashboard. However, the case will remain on the "My Open Investigations" tile until the case is closed by a Statuser. This will allow you to track the progress of the case until completed by the State.

   E. Statusing Corrections: If corrections are requested by the Statuser you will receive an Investigation notification via email, as well as an open Task on "My Tasks" tile on My Dashboard. Once corrections are addressed, follow Step 2 above to close the Investigation again.
   NOTE: It is helpful to review the "My Tasks" Tile on your Dashboard often to ensure no Tasks for the Investigation need to be completed. If a Task is found, click on the arrow to be taken directly to the Workflow to complete the Task.

   F. Approved/Evaluated: Once the Investigation is closed by the Statuser, the Investigation is removed all Dashboards.

7.3.1 MATERNAL HEPATITIS B

1. **Notification:** You will receive an email notification that a Maternal Hepatitis B Investigation has been created.

2. **TASK: Owner Assignment**
   A. Enter the Investigation by either searching for the record, or clicking on the link in the email
   B. Claim the Investigation
   C. Click "Complete"

3. **TASK: Provider Follow-Up:** All fields should be completed and marked "Unknown" if the information is not known.

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Vaccinations

Childcare, School, and Occupation

Labs

Epi-Links

A. Demographics Tab: Review Demographics and made any necessary updates or changes.

B. Healthcare Provider: Complete information gathered from the HCP.
   i. Symptoms: Open-text box to add any symptoms given by the HCP, even if not usually attributed to Hepatitis.
   ii. Hospitalization: If "yes" is selected, a table will show in which you can use the "Create +" function to enter details.
   iii. Treatment: If "yes" is selected, a table will show in which you can use the "Create +" function to enter details.
   iv. Travel: Open-text box to add any travel information
   v. Patient Notification
   vi. Healthcare Providers: add any additional Healthcare Providers, not already shown, through the "Create +" function
   vii. mark "yes" to see complete list of possible symptoms, mark any that apply. If none apply, mark "no". If the outcome is not known, mark "Unknown".
   viii. Testing: check all that apply.

C. Vaccinations: All fields should be completed and marked "Unknown" if the information is not known.

4. **Task: Complete Provider Follow-Up Task**

Each Task has an *outcome*, and the same Task can have several outcomes. After each attempt at a Task, there are multiple choices that will track the progress of the Investigation, as seen below. You may have multiple outcomes for each Task, depending on the result of the attempt. For each Provider Follow Up, there are 4 possible outcome options:

A. Awaiting Response: HCP contact been made and you are waiting for a response back; make notes and close current Task. A new Task with the same name will generate in the Workflow.

B. Proceed to Interview: HCP information has been gathered and entered; the Task is complete and ready for the next Task in the Workflow.

C. No Response/Info from Provider: Unable to reach HCP after multiple attempts or the provider is unable to be identified; the Task is complete and ready for the next Task in the Workflow.

D. Provider Follow up Skipped: Provider follow up not done; the Task is complete and ready for the next Task in the Workflow.

Provider Follow-up

Task Name	Due Date	Assi
Provider Follow-up	08/06/2025 ✕ 📅	She

Note

☐ Record does not meet interview criteria

[Save] [Cancel] [**Awaiting Response**] [**Proceed to Interview**] [**No Response/Info from Provider Unavailable**] [**Provider Follow-up Skipped**]

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Vaccinations

Childcare, School, and Occupation

Labs

Epi-Links

5. TASK: Interview

A. <u>Demographics:</u> Review with patient

B. <u>Clinical Info & Diagnosis Tab</u>
   i. Symptoms: mark "yes" to see complete list of possible symptoms, mark any that apply. If none apply, mark "no". If the outcome is not known, mark "Unknown".
   ii. Testing: check all that apply.

C. <u>Risk Factors:</u> Every field should be completed; select "unknown" for any information that is not known from either the Provider or Patient.

D. <u>Visit/Hospitalization</u>: review information gathered from Provider and add any missing information

E. <u>Treatment</u>: review information gathered from Provider and add any missing information

F. <u>Vaccinations</u>: review information gathered from Provider and add any missing information

G. <u>Epi-Link</u>: In the Epi-Link tab, you will see all Related Investigations. In order for a person to be listed, there needs to be a previously entered Investigation (not just Record). To enter a new Epi-Linked contact (including baby), Maternal Hepititis uses the Task Summary tile button "Create Epi-Link". This is located in the Workflow Tile on Task Summary in the upper right corner.
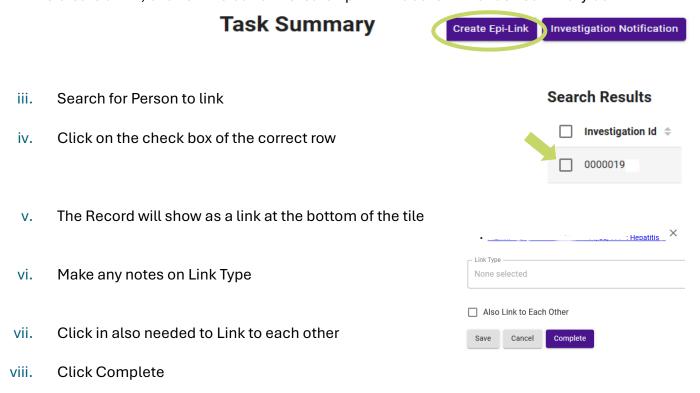
NOTE: It is important to be on the Task Summary portion ofof the Workflow, not in a Task. For example, if you are in the Provider Follow Up Task, you will *not* see the correct buttons, as shown to the right.

Task Summary Ad-Hoc Provider Follow-Up Create Epi-Link

Search   Task Status

For a more detailed process on how to add Epi-Links in general, see Section 3.5.8 of the CADE Manual. For Perinatal Hepatitis:

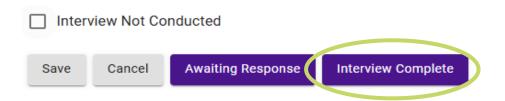   i.   To create a link; click on the button "Create Epi-Link" above in the Task Summary box.

    iii.   Search for Person to link

    iv.   Click on the check box of the correct row

    v.   The Record will show as a link at the bottom of the tile

    vi.   Make any notes on Link Type

    vii.   Click in also needed to Link to each other

    viii.   Click Complete

    I. Other Tabs:
        i.   Notes: Add any pertinent information for the Investigation
        ii.   Labs: additional labs will be added to the Events Tab, towards the bottom of the Events Tab.
        iii.   Clusters/Outbreaks: only used at the direction of the Disease Coordinator

6. **TASK: Complete Interview.** Once all the information has been entered, return the Workflow Summary Tile to mark the Task as complete and move on to the next Task in the Workflow. In this case, you will select "Interview Complete".

7. TASK: Closing the Investigation: When the Investigation is complete, IDSS will look for incomplete information.

> Automatic Check: Once you select "Review Investigation", IDSS will check for missing information; you may receive a warning message to correct areas. Hit "cancel" to go back and correct the areas. Hit "continue" to send the case to Statusing without making corrections.

> ⚠ Warning
> - School information is missing
> - Childcare information is missing
> - Employment information is missing
> - Was the patient educated on disease control and prevention measures? is missing
>
> Continue   Cancel

> B. Corrections: If you choose to make corrections; once corrections are completed, return to the Task Summary Tile and select task "Review Investigation".

> C. Statusing: The Task Summary shows "Review Investigation for Closure" for the next Task. This Task will be Claimed by the Disease Coordinator (not you).

> **Search Results**
>
> | Task Name ⇕ | Assignee ⇕ | Created Date ⇕ |
> |---|---|---|
> | Review Investigation for Closure | | 03/19/2025 |

> G. Pending: The Workflow for the Investigation is now pending while waiting for Review. Since your Tasks are complete, the Investigation is removed from "My Tasks" tile on My Dashboard. However, the case will remain on the "My Open Investigations" tile until the case is closed by a Statuser. This will allow you to track the progress of the case until completed by the State.

> H. Statusing Corrections: If corrections are requested by the Statuser you will receive an Investigation notification via email, as well as an open Task on "My Tasks" tile on My Dashboard. Once corrections are addressed, follow Step 2 above to close the Investigation again.
> > NOTE: It is helpful to review the "My Tasks" Tile on your Dashboard often to ensure no Tasks for the Investigation need to be completed. If a Task is found, click on the arrow to be taken directly to the Workflow to complete the Task.

I. Approved/Evaluated: Once the Investigation is closed by the Statuser, the Investigation is removed all Dashboards.

IDSS USER MANUAL

STI

APPENDIX B

USER REFERENCE GUIDE

LOCAL PUBLIC HEALTH

STI DIVISION

TABLE OF CONTENTS

AN INTRODUCTION TO IDSS

IDSS is the program that holds the data for HHS Reportable Disease Records. There are three basic components to this information: the Record, Event, and Investigation. This manual will walk you through the Workflow, or process, of accurately recording and navigating this information. Additionally, this manual will guide you through the Tasks of the Workflow, which is in the most efficient way to complete the steps in the system.

NOTE: This manual is designed to guide you through inputting the Investigation information into IDSS. *This manual assumes an individual has had previous training on HHS policies and procedures, as well as prior practice in Investigations.*

All Investigation and Event information will be in a Record, but not all Record information will show in an Event or Investigation. This is because the Record includes historical information that is not needed for current Investigations.

TERMS

Record: An individual person and all the information and history we have on that person; including an entire history of demographics, diseases, Events, and Investigations.

Event: A reported disease

Investigation: The Workflow – or process – of getting information about the disease from health providers and cases (patients). In some cases, an Investigation could cover more than 1 event.

Workflow: The process of completing steps (Tasks) to properly capture disease information in IDSS.

Tasks: The steps required in each stage of the Workflow process.

SECTION 1: GETTING STARTED

1.1 LOG IN

IDSS 2.0 is a web-based (cloud-based) system.

IOWA. | Health and
Human Services

Okta

To log into IDSS 2.0:

1.   During training, go to website: https://stage.idss.hhs.iowa.gov/
2.   Click on the Okta button
3.   Use your Okta credentials to log in
4.   When log in is successful, you will see the welcome screen:
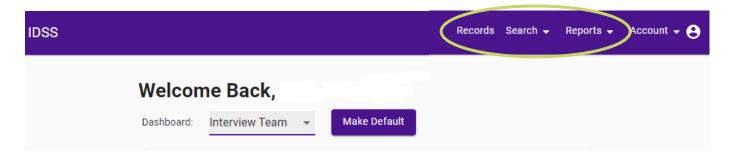
IDSS   Records   Search ▾   Reports ▾   Account ▾ 👤

Welcome Back,

Dashboard: Interview Team   ▾   **Make Default**

1.2 BASIC NAVIGATION

Here is an overview of the different areas of the main page of IDSS, also known as your Dashboard.

IDSS   **2**   Records   Search ▾   Reports ▾   Account ▾ 👤   **3**

Welcome Back,   **1**

Dashboard: Interview Team   ▾   **Make Default**

1. Your name will appear at the top of the page to confirm correct log in.
2. Clicking on this IDSS symbol will return you to this Dashboard (main page) at any point during any navigation in IDSS.
3. Account information is accessed by either clicking "Account" or the profile symbol. Account information is limited and only includes your User Profile (what access level you have) and log out button.   Other profile information is found directly in Okta.
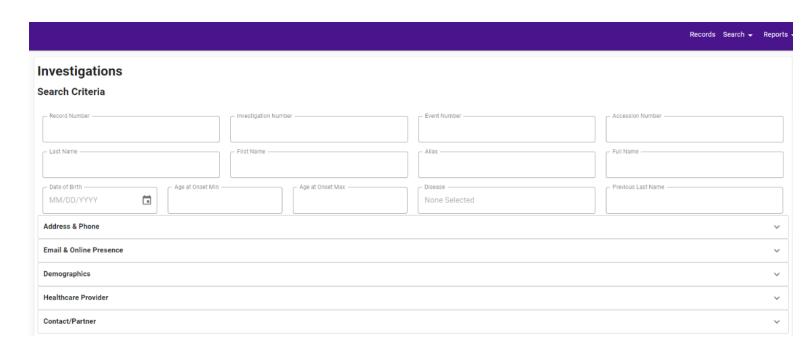
1.3 MENU BAR NAVIGATION

The menu bar will remain at the top of your screen at all times. Menu bar options include:

1. Records – search for any Record (Person); results are limited by user level and jurisdiction.
2. Search – Aside from Records (Person), you can directly search for Lab Results and Investigations by using a variety of criteria, as seen below.
3. Reports – Reports can be accessed here; access is limited by user level. Most information that has been historically gathered through reports, will be readily available on the My Dashboard.

Section 1 GTKs (Good to Know)

- IDSS is linked with your Okta Account
- Changing your Okta password automatically changes your IDSS password
- Clicking on "IDSS" in the upper left corner will return you to your Dashboard (main page)

SECTION 2: DASHBOARDS

2.1 INTRODUCTION TO DASHBOARDS

IDSS will use Dashboards as the primary launch point for most activities at the Local Public Health Level; whether searching for a Record, looking for an Event, or starting and continuing an Investigation.

1. **Location**: Dashboards are your main page and can be accessed at any time by clicking the IDSS symbol in the upper left corner, as indicated by the arrow.

2. **Drop Down List**: according to your User Role, you may have more than one option for different Dashboards that can be seen in the drop-down list, as indicated by the arrow. "My Dashboard" is the recommended default Dashboard.

3. **Default Option**: Click the "make default" button to make the current dashboard your default. You can change the default Dashboard by selecting a different dashboard from the drop-down menu and then clicking the "make default" button. If there is no default button, then the dashboard you are on is your current default dashboard.

4. **Tiles**: on each dashboard, you will see Tiles (or boxes) of information. Most Tiles contain lists of Investigations. The title of Tile specifies what information is included and how it is presented.

5. **User Role Specific**: Dashboards and Tiles are User Role specific, so some variance from department and location is to be expected.

2.2 KEY NAVIGATION POINTS

There are a few basics to know about navigating the Dashboard (main page).

1. **Sorting arrow**: Any time you see a sorting arrow, you can sort by that column

2. **Number of Cases Viewed**: At the bottom of each Tile, you can see how many total cases are in that Tile. You can (1) expand how many rows you see in the Tile by using the drop-down box to view more 'rows per page' **or** (2) navigate to the next page within the Tile by clicking "Next".

Rows per page: 25 ▼   1-25 of 50   1   2   Next >

3. **Scroll Bars**: If there are several rows on the Tile (box), the Tile size will not expand or change. Instead, you will see a new, small scroll bar open to the side of the Tile as indicated by the green arrow in the image to the right. This scroll bar will only navigate the lines within that specific Tile. The larger scroll bar to the left will continue to move the entire page up and down, as indicated by the blue arrow.

	Event Status	Investigation Stage	Assignee
oodbury, IA 51106	Pending	Manual Assignment	→
oodbury, IA 51104	Pending	Manual Assignment	→
oodbury, IA 51104	Pending	Manual Assignment	→
, IA 51103	Pending	Manual Assignment	→
51103	Pending	Manual Assignment	→

Rows per page: 25 ▼   1-25 of 51   1   2   3   Next >

4. **Customization**: Tiles are pre-set and can't be hidden, minimized, or changed.

5. **Access**: To access or choose a case, you can either (1) click on the arrow at the end of a row or (2) hover anywhere in the line of the case and when it turns gray, click to select.

6. **Hyperlinks**: Hyperlinks do not access Records. Hyperlinks are rare and will not be seen often; they are *not* the primary mode of navigation in a Tile. Some information may be formatted to hyperlink. These links have the typical bright blue font and underlined when available.   If you do click on a hyperlink, you can simply click the back arrow to return to the previous page.

Investigations Needing Owner

Date Reported to HHS	Primary Organization
02/10/2025 3:18 AM	Siouxland-District Health Dept
02/04/2025 1:58 PM	Siouxland-District Health Dept

2.3 DEFAULT DASHBOARD

"My Dashboard" will be your initial default Dashboard; but this can be changed to STI Dashboard by clicking on the "make default" button. You can choose the Dashboard that has the Tiles and functions to start Tasks you most frequently use; and you can change the default at any time depending on your daily work plan. Tiles displayed are according to User Roles and the selected Dashboard type.

1. **Launch Buttons**: each of these buttons will open to another process; we will cover details of navigating these processes in following Sections.

Welcome Back,

Dashboard: My Dashboard ▼   Make Default

Start New Investigation ➤	Search Records ➤	Search Labs ➤

Welcome Back,

Dashboard: My Dashboard ▼

Start New Investigation ➤	

Local Outstanding Follow-up

Event #	Date Reported to HHS	Disease	Record Name ▲	Date of Birth
100001314	01/19/2025	Campylobacteriosis		
100000372	01/10/2025	Botulism - Infant	test, test	01/01/202
100000362	01/10/2025	Hepatitis C		

Investigations Needing Owner Assignment

Date Reported to HHS	Primary Organization	Event #	Disease ▲	Task	Rec
01/10/2025 11:57 AM	Siouxland-District Health Dept	100000372	Botulism - Infant	Owner Assignment	test

My Tasks

Event #	Date Assigned	Disease	Task	Record Name ▼
	01/13/2025		Interview	
100000009	01/08/2025	Salmonellosis	Interview	Squarepants, Spongeb

My Open Investigations

Event #	Date Reported to HHS	Disease	Record Name ▼
100000009	01/08/2025 10:20 AM	Salmonellosis	Squarepants, Spongel

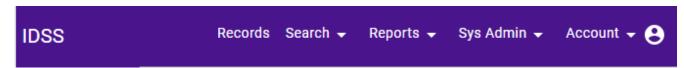**2. Tiles:** Most Tiles have a list of Investigations. These Tiles have headers to explain which Investigations are listed. This is designed to help you easily find cases specific to your role. The most common Tiles found on My Dashboard will be:

A. Local Outstanding Follow-up: County-wide list of open Investigations of all reportable diseases, lists displayed are according to your User Role.

B. Investigations Needing Owner Assignment: County-wide list of Investigations that haven't yet been assigned. These can either be claimed by you or assigned to someone else on the team. We will cover this process in detail in Section 3.2.

C. Open Investigations by Owner: Chart of total Investigations each worker in your county currently has been assigned or claimed.

D. My Tasks: The progress of each Investigation assigned to (or claimed by) you specifically. Tasks are steps that are completed through a Workflow process; the Workflow will be explained in detail in Section 3.

E. My Recent Labs: Last 14 days of labs of assigned cases, open or complete.

F. <u>My Open Investigations</u>: list of all Investigations that are currently open and owned by you. This would include cases that you have submitted for closure, but are waiting for a statuser to evaluate. This differs from the "My Tasks" Tile because it does not list the progress of Tasks

3. **Navigation**: the top navigation bar will always be present, including when you are on My Dashboard.

4. **User Role Specific Displays**: IDSS is now more locked down on confidential information through your User Role; meaning not all Investigations can be seen by everyone with access to IDSS. All LPH will be able to see all Records (individual people), but you will only be able see specific Investigations according to your specific User Role. In other words, your User Role will determine what Investigations are displayed on your Dashboard. You will not be able to see Investigations outside of your LPH role or jurisdiction. For example, if you do not work with STI diseases, you will not have access to those Investigations. We will cover how to request access to Investigations outside your User Role and transfer Investigations to other Counties in Section 6.3.

2.4 STI DASHBOARD

"STI Dashboard" can be changed to your default Dashboard, if preferred.
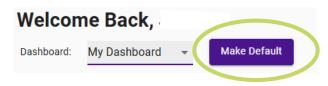
1. **Key Differences from "My Dashboard"**

A. Tiles:

   i. Owner Assignment: STI This Dashboard has some of the same Tiles as My Dashboard; the main difference being the STI Dashboard has the Owner Assignment Tile.

   ii. Investigations Needing Owner Assignment: County-wide list of Investigations that haven't yet been assigned. These can either be claimed by you or assigned to someone else on the team. We will cover this process in detail in Section 3.2.

   iii. Open Investigations by Owner: Chart of total Investigations each worker in your jurisdiction has been assigned or claimed.

   iv. My Tasks: The progress of each Investigation assigned to (or claimed by) you specifically. Tasks are steps that are completed through a Workflow process; the Workflow will be explained in detail in Section 3.

   v. My Recent Labs: Last 14 days of labs of assigned cases, open or complete.

   i. Larger Tiles: as previously discussed, Tiles can't be customized (made larger, ect). In the STI Dashboard, the Tiles are set to be larger than My Dashboard

B. Launch Buttons: There is only one Launch Button: Search Records. Start New Investigation and Search Labs is not displayed on this Dashboard.

2. **Reminder:** Your default Dashboard can be changed at any time simply by clicking "Make Default" while on the Dashboard you want to make your default.

Welcome Back,

Dashboard: My Dashboard ▾   **Make Default**

Section 2 GTKs (Good to Know)

- You **can** change your default Dashboard anytime
- You **can't** change, hide, or move Tiles on Dashboards
- Clicking anywhere on the line of the case or the arrow at the end will move you into the Workflow or Task
- To get back to Dashboards at any time, just click "IDSS" in the upper left corner
- Due to stricter confidentiality guidelines, you will not be able to see Investigations in areas or diseases you do not have jurisdiction.

SECTION 3: INVESTIGATION WORKFLOW

The Workflow of Tasks is the **primary way** in which an Investigation will be handled, from beginning to end. The Workflow is a series of Tasks that help move the Investigation through the proper process. This Section shows an example of the progression of Tasks (non-disease specific) to helps you know how to work through the Workflow Tasks from beginning to close.

3.1   WORKFLOW OF TASKS OVERVIEW FOR INVESTIGATIONS

In this section, we will have a quick, basic overview of the Workflow and helpful definitions. Then we will break apart each step for a detailed look at the particular Tasks and all the options in that Task. Finally, we will provide helpful hints and a summarized review of the entire Workflow and Tasks process.

IDSS is designed to be a helpful tool to use while you are conducting the interview, making the HHS surveillance process easier.

WORKFLOW TERMS

Workflow: The process in which we will enter information from the Investigation of an Event

Assigned: Someone (other than yourself) has designated a Task or an Investigation is your responsibility

Claimed: You have taken ownership of a Task or an Investigation. Claiming is often how you move through the different Tasks of a Workflow.

Task: Steps taken in each portion of the Workflow. Each Task must be Claimed and then completed; it can't be skipped. Tasks are used to track the Investigation's progress towards completion.

Task Summary: A Tile (box) inside an Investigation that keeps a list of *all* the completed Workflow Tasks for that specific Investigation. This summary includes Tasks you've completed as well as Tasks that have been Assigned to someone else to complete for that specific Investigation.

Stage: The most current *completed* Task (step) in the Workflow of the Investigation.

WORKFLOW OVERVIEW

The Workflow has 3 over-all steps (or Tasks):

Claim the Case → Invest-igation → Close

3.2 ASSIGNING or CLAIMING CASES

The first Task of the Workflow is to own a case. In order to do that, an Investigation needs to be **Assigned or Claimed**. For STI, Investigations will be individually assigned directly to DIS by their own Local manager. However, Local Users also have Owner Assignment and choose to Claim any case that needs to be worked before it is assigned.
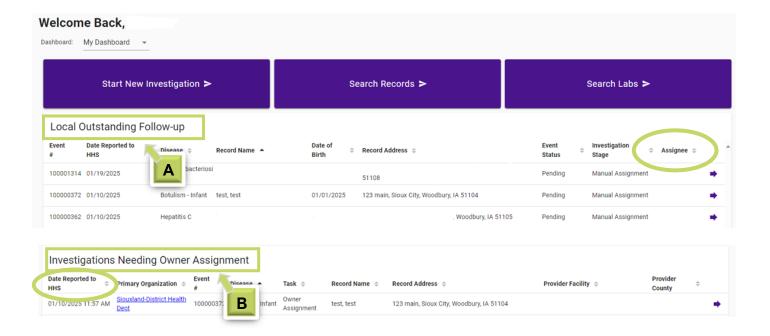
1. **Locating Cases to Claim/Assign**
    A. Email Notification
        i. New Investigations will often prompt an automatic notification email
        ii. Click the link in the email to go directly to the first Workflow assignment
        NOTE: Most all cases with be assigned by the local manager; in rare situations you will need to Claim a case, follow the process below.

    B. Owner Assignment
        i. On my Dashboard, In the Investigations Needing Owner Assignment Tile or Local Outstanding Follow-up Tile; locate a case by:
            a. Sort by "Assignee" – if the area is blank, those cases are available
            b. Click on the line or the arrow of the case to enter the Workflow

2. TASK: Owner Assignment
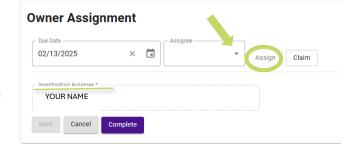
A. Claiming an Investigation

   i. If you would like to claim the Investigation for yourself, simply click "Claim" and all required fields will fill in.

Owner Assignment

Due Date: 02/13/2025 × 📅   Assignee: ▼   Assign   **Claim**

   ii. Click "Complete"   Complete

   iii. This Task is now complete, and the Tile will change to the Task Summary.

B. Assigning an Investigation (rarely used)

   i. To assign an Investigation to another person, chose a person from the drop-down menu under Assignee and click "Assign"

   ii. You will see it retains your information as the person that completed this Task in "Investigation Assignee"

   iii. Click "Complete"   Complete

Owner Assignment

Due Date: 02/13/2025 × 📅   Assignee: ▼   Assign   Claim

Investigation Assignee *
YOUR NAME

Save   Cancel   Complete

   iv. This Task is now complete, and the Tile will change to the Task Summary

C. Reassign Investigation: To assign the Investigation Task to another person after the Investigation has been assigned to you; go into Task Summary and click "Reassign Investigation" and follow the above steps for Assigning an Investigation.

Investigation Notification   Reassign Investigation

D. Investigation Notification: To notify another person of the current Task in the Workflow, you can click "Investigation Notification". Entering a Note in this step will automatically generate a Note in the Investigation.

E. Task Review: To return to My Dashboard, click on "IDSS" in the upper left corner. Now in the My Open Investigations Tile, the Case is listed. In this Tile, the Investigation Stage column shows the last completed Task in the Workflow. In this situation, the case has been successfully Assigned.

My Open Investigations

Event #	Date Reported to HHS	Disease	Record Name	Date of Birth	Event Status	Investigation Stage	Assignee
100003820	02/13/2025 3:02 PM	Salmonellosis	Squarepants, Spongebob	01/01/2001	Pending	Assigned	YOUR NAME ➡

3.3   INVESTIGATION: OVERVIEW OF INVESTIGATION PAGE

Now that the case is Claimed, the Investigation can continue; but first, let's get familiar with terms of the Investigation page to make navigation and explanation easier.

1. **Tiles** – are the main blocks of information, separated by a gray line. 3 tiles are usually shown:

   A. Record Summary Tile   B. Task Summary Tile   C. Investigation Tile

2. **Features** – features of the Investigation are numbered below:

   1. Tabs (Vertical Navigation)   2. Investigation Status   3. Workflow (Tasks)

A

Record ID: 100000169
Record Name: Squarepants, Spongebob
Record DOB: 01/01/2001
County: Woodbury
Event ID: 100003820
Primary Organization: Siouxland-District Health Dept

B

Task Summary

Close ✕

Investigation Notification   Reassign Investigation   Refer Investigation

Search

Task Status ▼

Task Name

[Search] [Clear]

Search Results

Task Name	Assignee	Created Date	Completed Date	Outcome	
Provider Followup	YOUR NAME	02/18/2025			➡
Owner Assignment	YOUR NAME	02/13/2025	02/18/2025	Complete	➡

3

Rows per page: 25 ▾   1-3 of 3

C

Investigation: Squarepants, Spongebob 01/01/2001: Chlamydia, Gonorrhea

2

Status: Pending

End Date: MM/DD/YYYY hh:mm aa

Last Updated Date: 02/18/2025 06:26 PM

Stage: Assigned

Assigned Date: 02/18/2025

Was the Patient Educated on Disease Control and Prevention Measures?
◯ Yes ◯ No ◯ Unknown

1

- Demographics
- Events
- Clinical
- Risk Factors
- Partners
- Documents
- Notes
- Lab Log
- Epi-Links
- Clusters/Outbreaks
- Visit/Hospitalization
- Admin

3. Other Basic Functions in an Investigation

A. Saving: Saving is **not automatic**, to keep your work, click "Save" before closing

   i. Buttons: there are two Save buttons options; one at the top
and one at the bottom of the Investigation Tile.

Save 💾

Save 💾

   ii. Prompts: you may be prompted to save your work before
continuing to another tab or Tile, *but not always*. To avoid
losing information, save your work.

> You have unsaved changes on this page.
> Please save your work to continue.
> Close

B. Editing: there are different ways to add information, depending on the area

   i. Create +: Allows you to add detailed information to an established table in a
Tile; this is the most common way to add complex information.

Create +

   ii. Add Row +: Allows you to add a row of information to a table; most often
seen in the Demographics Tab.

Add Row +

   iii. Open Boxes: Allows you to type-in information with any
character, up to 75 characters.

Describe Native Nation Affiliation
Meskwaki

   iv. Drop Down Boxes: Allows you to choose from a
pre-determined list of options.

- At times, you may be able to choose more than one option
- Depending on your selection, additional boxes may appear
- To remove or de-select an option, click the "x"

Race

Record Races
Select values

African-American/Black
American Indian/Alaskan Native
Asian
Native Hawaiian/Pacific Islander
White
Unknown

Race

Record Races
African-American/Black ✕
American Indian/Alaskan Native ✕   Asian ✕
Native Hawaiian/Pacific Islander ✕   White ✕ Sel...

Describe Native Nation Affiliation
Meskwaki

Asian Races
Other Asian ✕ Select values

Hawaiian Pacific Races
Other Pacific Islander ✕ Select values

African American Races
Select values

Native Races
Select values

vi. **Checkboxes/Radio Buttons**: Allows you to choose from a simple list (usually less than 3 options). It is important to note that as with drop-down boxes, certain selections may open more areas for editing.

☐ Guardian Information Needed

In State Travel
○ Yes ○ No ○ Unknown

vii. **Dotted/Grayed-Out Boxes**: Can't be edited in the current location.

Last Updated Date
02/22/2025 03:37 PM 📅

viii. **ELR Only**: these areas can't be edited

Next of Kin (ELR Only)

Next of Kin
Name   Relationship
No data available

C. <u>View/Edit Toggle</u>: At times, you will see the Investigation in "View" mode, usually after you save information. Edits can't take place during "view" mode; so to continue editing, simply click "Edit" or the pencil symbol.

Edit ✏️

To return to View mode, click "View" or the eye symbol.

View 👁

Date of Birth

D. <u>Calendar</u>: When dates are required, there is an option to use the pop-up calendar or input the dates manually in MM/DD/YYYY format.

Date of Birth
01/01/2001   × 📅

January 2001 ▾   ‹ ›

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

Section 3.3 GTKs (Good to Know)

- The Workflow begins by Claiming or being Assigned an Investigation
- Save often, work is not automatically saved.
- Editing some information may open more prompts
- Even if an Investigation has not been claimed/assigned to you; if the Investigation falls within your User Role purview (County) you will be able to see the Investigation and the progress.

3.4   INFORMATION GATHERING

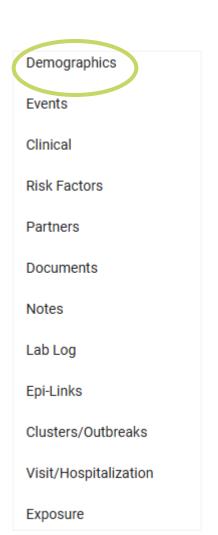Continuing on with the Workflow of the Investigation, the next Task is to obtain information for the Investigation. As a reminder, this manual does not explain **how** to conduct an STI investigation, but rather how to enter the information from an Investigation into the IDSS system.

The information gathered will be entered into the Investigation by using the Tab Bar to the left, as seen below to the left. Let's review the tabs from the vertical navigation bar you will most often use for the Task: Information Gathering.

Demographics

Events

Clinical

Risk Factors

Partners

Documents

Notes

Lab Log

Epi-Links

Clusters/Outbreaks

Visit/Hospitalization

Exposure

1. **Demographics**: Basic information on the Case

   A. Record: The Record's name and DOB will be displayed here.

   i. Name Change: To change or add additional information on the name, click on the "eye" and a new box will pop-up.

   Demographics

   Record
   Squarepants, Spongebob, II 01/01/2001

   - Click "Edit"   Edit ✏
   - Enter corrected or new information
   - Click "Save"   Save 💾

   ii. Record-level name changes: In addition to first and last name, there are other specifics found in this box that can be edited: Suffix, Previous Last Name, Alias, Deceased status.

   NOTE: closing the box without saving will lose all changes

B. Address

i. Reporting Address: this is the address submitted from ELR information. Note the grayed-out/dotted boxes indicate changes can't be made in this current area.

ii. Address Changes: To change or add additional information:

- Click "Update Address" **Update Address**

- Enter corrected or new information

- Click on "Verify Address" **Verify Address**

- Click either "Select" to choose corrected address information or click "Continue (No Match)" **Select** / Continue (No Match)

- Enter any facility information (as noted by the green arrow in the image below)
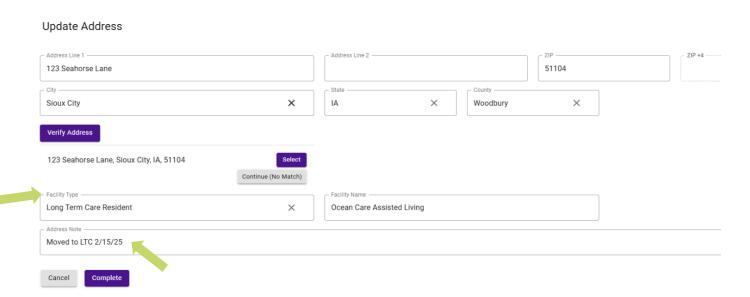
- Enter any notes about the address

NOTE: As previously mentioned, Investigations can only be viewed if the Investigation is in your jurisdiction. For STI, if *either* the Provider or Investigation is in your area; you will have access. If updating the address results in *both* the person and the provider out of your jurisdiction, you will no longer have access to the Investigation.

iii. Address History: The history of all the addresses for this person – not just this Investigation – can be viewed by clicking on "View Address History". **View Address History**

Update Address

Address Line 1	Address Line 2	ZIP	ZIP +4
123 Seahorse Lane		51104	

City	State	County
Sioux City ✕	IA ✕	Woodbury ✕

Verify Address

123 Seahorse Lane, Sioux City, IA, 51104   **Select**
Continue (No Match)

Facility Type	Facility Name
Long Term Care Resident ✕	Ocean Care Assisted Living

Address Note
Moved to LTC 2/15/25

Cancel   **Complete**

C. Phone:

    i.   Update: to update a current phone number click on the arrow; make updates; save; and close.

    ii. New Number: to add a phone number, click on "Add Row +" and enter new information. Hit "Save" at the top or bottom of the Investigation Tile.

    iii. Inactive: for phone numbers that are no longer active, click on the arrow; mark "Inactive"; save; and close.
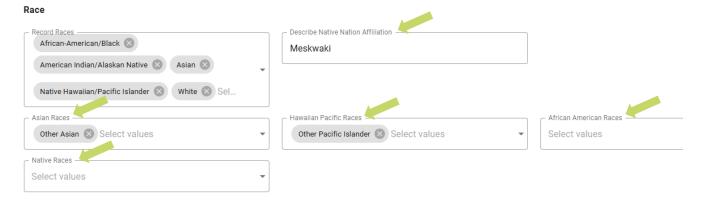
      NOTE: Remember to save. Clicking the red "x" will close the box without saving any information.

D. Guardian: to add Guardian information, click on the box and enter information. This would include parents, care takers, POAs, and others.
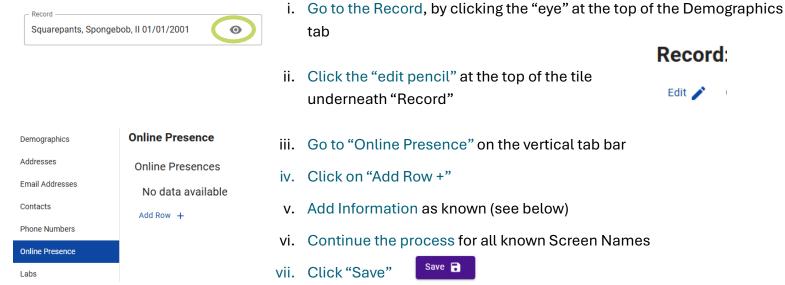
E. Email Address: to enter an email address, click "Add Row +" and enter information. This is currently not a required field; but if known, it should be added. As with phone numbers, email addresses can be marked 'inactive'. Several email addresses can be added with a note differentiating the purpose (i.e.: work, personal)

F. Race: more than 1 race can be entered from the drop-down menu; when some options are selected, another drop-down box may appear. In several instances, there are sub-groups and if this information is known, it should be added. Several examples of this are shown below.

G. Online Presence: to add User Names from different apps, you will need to go the Record level (not Investigation level) of the Demographics. To do this:

Demographics

Record
Squarepants, Spongebob, II 01/01/2001 👁

i. Go to the Record, by clicking the "eye" at the top of the Demographics tab

ii. Click the "edit pencil" at the top of the tile underneath "Record"

Record:

Edit ✏

Demographics
Addresses
Email Addresses
Contacts
Phone Numbers
Online Presence
Labs

Online Presence

Online Presences

No data available

Add Row ➕

iii. Go to "Online Presence" on the vertical tab bar

iv. Click on "Add Row +"

v. Add Information as known (see below)

vi. Continue the process for all known Screen Names

vii. Click "Save"   Save 💾

NOTE: clicking the red 'x' will close the box **without saving**

Online Presence

Online Presences

Screen Name

URL

Applications
Select values

Notes

Add Row ➕

I. <u>Other Fields</u>: fields not specifically mentioned are not required. However, if information is known it should be added.

Demographics

Events

Clinical

Risk Factors

Partners

Documents

Notes

Lab Log

Epi-Links

Clusters/Outbreaks

Visit/Hospitalization

Exposure

2.   Events

To edit information in this particular tab, click on the 'pencil' in the upper right-hand corner (this is unique to this tab).

Events

Reportable Events

Reportable Event: 1000 .

A. Onset Date: Date when the condition or symptoms began; if the date is unknown, leave this blank.

B. Diagnosis Date: Date case was diagnosed from HCP

C. Outcome: select outcome from drop-down list. To change outcome, click the 'x' to remove the selection and choose new option.

D. Lab Results: added Lab results from the HCP should be added here (not in the Lab Log tab). Details on how to add Labs is located in Section 4.3.

E. Other Fields: These fields will not be updated or changed
   i. Data Source: this is an automatic field and does not need to be updated.
   ii. Status Date: this is for closers only; it is equivalent to "evaluation date" and will be updated during review by the closer.

D. Save: click "Save" before navigating away from this tab. Closing without saving will not automatically save and the data will need to be re-entered.

Save 💾   Close ✕

3. Clinical: fill out gathered information. All questions should be answered, and if unknown, select the "unknown" option.

Demographics

Demographics

Events

Clinical

Risk Factors

Partners

Documents

Notes

Lab Log

Epi-Links

Clusters/Outbreaks

Visit/Hospitalization

Admin
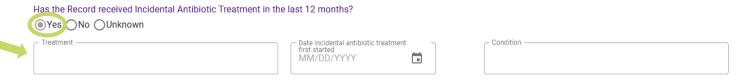
A. <u>STI History</u>: This area is to be used for historical STI diagnoses in which the investigation was not completed in Iowa or captured in IDSS. An example would be when information is received from another state.

STI History
◯ Yes ◯ No ◯ Unknown

The below table is used to enter historical STI diagnoses in which the investigation was not captured in IDSS or conducted in Iowa. For example, when receiving OOJ information from other states.

STI History (manual entry)

Date	Disease	Disease Type	Geographic Location

No data available

Create +

B. <u>STI History (manual entry)</u>: To enter the information:
    i. Click "Create +"

Create +

    ii. A pop-up box will appear, allowing you to enter STI information
    iii. Click "Save".

C. <u>OOJ Dispositions Received</u>: enter any OOJ information here;
    i. Click "Create +"

Create +

    ii. A pop-up box will appear, allowing you to enter STI information
    iii. A note can also be added if more details are needed
    iv. Click "Save".

D. <u>Symptoms</u>: Choose the appropriate radio button for the presence of symptoms or signs.

     i. If yes is chosen, a table will appear

     ii. Click "Create +"

     iii. A pop-up box will appear, allowing you to enter details; including whether it was Clinician observed or patient described

     iv. Click "Save"

     iv. Continue to add signs and symptoms by clicking "Create +" until all have been added to the table.

     vi. When complete, click "Save".

E. <u>Incidental Treatment</u>: enter incidental treatment from the last 12 months here.

     i. If you click the "yes" radio button, another table will appear.

     ii. Enter treatment details

G. <u>Investigation</u>: Complete information as to whether the Case was sampled for Enhanced Investigation.

Risk Factors

Partners

Documents

Notes

Lab Log

Epi-Links

Clusters/Outbreaks

4. **Risk Factors:** fill out gathered information. All questions should be answered, and if unknown, select the "unknown" option.

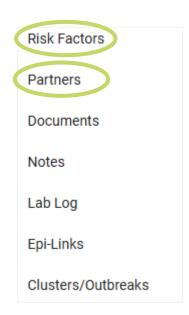   NOTE: There is a new table for drug types and route when "Yes" is selected for the question "engaged in drug use"

5. **Partners**: Adding a Partner   Create +

   i.   To Add a partner, click "Create +"
   ii. Search for a record by clicking on the magnifying glass, add Record by selecting the row
   iii. If No Record is found, create a Record by clicking "Create +" in the search window
   iv. Verify Demographic information
   v.   Assign DIS Agency and DIS (if applicable)
   vi. Provide description (if applicable)
   vii. Provide Exposure information
   viii. Partner referral basis: S1P1, etc...
   ix. Epi-Links: this information will carry over automatically to the Epi-Links tab

THIS WILL CREATE A NEW INVESTIGATION WORKFLOW THAT WILL NEED TO BE CLAIMED

   x.   Partners: Investigation – complete any known information in the tabs available through the Partners window. Initally, the vertical tabs shown are Record level information (image to the right).

        ii. Demographics
        iii. Online Presence
        iv. Notes
        v.   Labs/Treatment: can only be completed in the full Investigation

Demographics & Related Investigations

Labs

Treatment

Online Presence

Notes
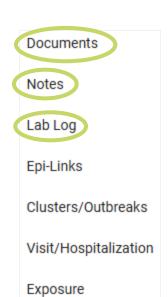
NOTE: To enter the full Investigation, *you will need to Claim the case*, as a new Investigation Workflow has begun. You may want to utilize the "sidebar" option or have mulitple tabs open work both Investigations simultaneously. See Section 6 for detailed instructions.

6. **Documents**: attach any pertinent history and lab information received

7. **Notes**: Notes from *any* stage of the Workflow that have been entered are listed here. Notes can be created, edited and viewed from this tab.

> A. <u>Create a Note</u>
>> i. Click on "Create +"   Create +
>> ii. Enter any note information (source is not a required field)
>> iii. Save and Close
>
> B. <u>Edit a Note</u> : Notes can be edited by clicking on the arrow and updating information directly in the Note box. (Reminder: grayed-out boxes can't be edited).
>
> C. <u>View a Note</u>: Notes can be viewed on the Note tab, regardless of Task they were entered on

8. **Lab Log:** List of all labs related to the Investigation.

> i. Current Investigation: Labs that are important to the case of investigation currently; including manual negatives that are important to the investigation
> ii. Other Investigation: Previous Investigation Labs
> iii. Supplemental Lab Results: ELR negatives, but still be important to your specific case
>
> NOTE: Labs are entered in Events, not the Lab Log tab.

9. **Other Tabs:**
> i. Epi-Links: will automatically carry over from the Partner tab
> ii. Clusters/Outbreaks: Will be directly by the State specifically when applicable (DIS can ignore for now).
> iii. Visit/Hospitalization (optional)
> iv. Admin: This tab shows all the activity in the Investigation

Documents

Notes

Lab Log

Epi-Links

Clusters/Outbreaks

Visit/Hospitalization

Exposure

Admin

10. TASK: Information Gathering – Complete

Complete this task in the workflow by completing:

i. <u>Enter</u>: Any Notes and Place of Interview

ii. <u>Checkmark</u>: If Interview was not conducted, checkmark the box; otherwise leave blank

iii. <u>Select</u>: "Info Gathering Complete" button

iv. <u>Corrections/Errors</u>: Complete any missing or flagged information the system alerts

Information Gathering   Back To Workflow

Due Date	Assignee	
05/01/2025 ✕ 📅	YOUR NAME ▼	Assign

Note

☐ Interview Not Conducted

Place of Interview
None selected

Save   Cancel   **Info Gathering Complete**

3.5   INVESTIGATION: CLOSE INVESTIGION
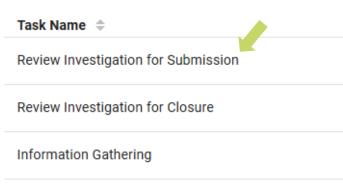
1. **TASK: Review Investigation for Closure**
    The Investigation will be reviewed by the State and you will be
    notified of any corrections (this Task will be completed by
    someone other than you). You will not need to Claim or
    Assign this task.

Task Name ⇕
Review Investigation for Closure

2. **TASK: Review Investigation for Submission**
    If the Reviewer find errors or needs more information
    about an Investigation, it will be noted, re-opened
    and you will be notified.

Task Name ⇕
Review Investigation for Submission
Review Investigation for Closure
Information Gathering

   v.   Claim this Task and make the required
         corrections and notes.

   vi.   Resubmit for closure following the
         steps in listed in *4. Task – Information
         Gathering: Complete.*

3.6 INVESTIGATION: GENERAL REMINDERS

1. Task Summary Tile Reminders

A. <u>Workflow Tasks</u>: the Task Summary is the Tile in an Investigation that shows all the of the Tasks initiated as start of the Investigation.

B. <u>Viewing Tasks</u>: to view or go into a Task, you can click on the line or the arrow at the end of the line. To return to the Task Summary, click "Back to Workflow" in the upper right corner of the Tile.

Back To Workflow

C. <u>Team Access</u>: In some situations, Tasks may be Claimed by someone else, or you may Assign a Task to someone else. Example: a team member is asked to help with an Investigation while the original investigator is out of the office. The team member can go into the Investigation and Claim a *task* to complete. Though the *ownership* of the Investigation will not change, the flexibility to complete certain Tasks by others will keep the Investigation progressing.

D. <u>Task Sorting/Searching</u>: depending on the actions taken during the Investigation, the list of Tasks may start to get long. You can limit the Tasks shown in the Task Summary Tile by searching for Task Name or Task Status. You can also sort by using the sorting arrows located by any column header.

Task Name	Assignee	Created Date	Completed Date	Outcome	
Interview	YOUR NAME	03/19/2025			→
Interview	YOUR NAME	03/19/2025	03/19/2025	Awaiting Response	→
Interview	YOUR NAME	03/19/2025	03/19/2025	Awaiting Response	→
Interview	YOUR NAME	03/05/2025	03/19/2025	Awaiting Response	→

Rows per page: 25 ▾   1-4 of 4

2. IDSS Searching Reminders

Whether searching Records or pre-loaded information (such as Providers, Restaurants, etc), here are some reminders and additional searching tips:

A. "Less is More" - partial names or information **will** yield more results, and in many cases provide the information desired without having to Create the information.
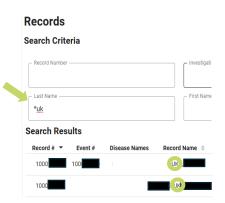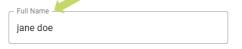
B. Entering *any* part of the name will yield results. For example, in searching for St. Luke's, it's not known if it's listed as "Saint or St"; skip that part of the name all together and enter "Luke". This will avoid any punctuation or abbreviations that may or may not be in the name in IDSS.

C. Utilize "wild card" feature with the use of an asterisk. In the example to the right, using *uk* to search for all records with "uk" anywhere in the last name, regardless if the "uk" shows up at the beginning, middle or end.

Records

Search Criteria

Record Number		Investigati
Last Name		First Name
*uk		

Search Results

Record # ▼	Event #	Disease Names	Record Name ⇕
1000▇	100▇		UK▇
1000▇			▇UK▇

D. In searching for names, using the "Full Name" box will search for names that are flipped or similar.

Full Name
jane doe

E. Be wary of entering new searchable data for well-known locations or providers. As seen below, when searching for "St. Luke's" there are several erroneous duplicate entries caused by slight changes to the name or punctuation.

ST LUKES FAMILY HEALTH CENTER - CEDAR RAPIDS			4251 RIVER CENTER CT	CEDAR RAPIDS	IA
St Luke's Hospital			1026 A Ave NE	Cedar Rapids	IA
ST LUKES HOSPITAL			PO Box 3026	Cedar Rapids	IA
St. Luke's Hospital	16D0386919	2.16.840.1.113883.3.2885.1	1026 'A' Avenue NE	Cedar Rapids	IA
ST. LUKE"S HOSPITAL	2.16.840.1.113883.3.		1026 A Ave NE	Cedar Rapids	IA

Section 3.7 GTKs (Good to Know)

- Other team members can work on an Investigation through Claiming or being Assigned Tasks. The ownership of the Investigation will not change.
- Avoid duplication - thoroughly search before adding or creating new places or people to IDSS
- Workflow is the process in which the Investigation progresses, and each step can be tracked

3.9 INVESTIGATION: DISEASE SPECIFICS

Section 3 instructions are not disease specific. Therefore, this manual does not cover all possible areas that need to be covered during some Investigations. Depending on the disease, the questions will vary and there may be some other steps to take.

The IDSS Workflow is designed to be intuitive for each disease Interview and lead you through the correct process per disease.

However, if you have questions, please reach out to your Disease Coordinator.

Most information is added by "creating"; usually through the "Create +" function seen in the Workflow on existing Records and Investigations. However, there are rare times when new Records, Investigations, and Lab Results will need to be created; this section will focus on how to create that new information in IDSS.

4.1   CREATING A NEW RECORD

Most of the time, a new Record will be created by an ELR or Epi-Link process. In situations when a Record is not located in IDSS, a new Record will need to be created.

1. Search: before Creating a new Record, *thoroughly* search all Records in IDSS, keeping in mind partial names can be used to widen search results.

Dashboard: My Dashboard

| Start New Investigation ➤ | Search Records ➤ | Search Labs ➤ |

      A. Dashboard – click the "Search Records" button on your Dashboard.

      B. Criteria – Use any known information for the Record. Remember 'less is more' and using partial names or information will produce more results to avoid duplication.

Search   Clear

2. Create: If results do not produce a match, a new Record will be created.   No data available

      A. Create - click on the "Create +" in the upper right corner.   Create +

      B. Complete – Fill in all known information for the new Record.
          i. Required fields: First Name and Last Name; but all known information should be entered.
          ii. Birthdate: If birthdate is not known, check the box for "Use Estimated Age" and enter the estimated age.
          iii. Address: will be added later

Create Record   Back To Search

☐ Deceased

| Last Name | First Name | Middle Name | Suffix | Previous Last Name (if applicable) |
| Squarepants | William | Joseph | None sel | |

| Alias | Sex | Date of Birth | |
| Billy Jo | Male ✕ | 01/01/2001 ✕ 📅 | ☐ Use Estimated Age |

Save 💾

      C. Save – Click "Save"

3. New Record Information: A new Record will appear with Tabs to the bottom left.

A. <u>Demographics</u>: complete all known demographics; if unknown, leave blank.

B. <u>Address</u>: enter known address by clicking on "Create +". If exact address is not known, be sure to capture at least the County of residence. Click "Save" and then "Close".

C. <u>Email Addresses</u>: Click on "Add Row +" and enter any known email addresses.
NOTE: clicking the red "x" will delete the information.

D. <u>Contacts</u>: Click on "Create +" to add additional information for someone *other* than the Record. Contact information for family members, POAs, caretakers, and guardians can be entered and noted here.

E. <u>Phone Numbers</u>: Click on "Add Row +" to enter phone numbers for the Record.
NOTE: clicking the red "x" will delete the information.

F. <u>Online Presence</u>: Click on "Add Row +" to enter phone numbers for the Record.
NOTE: clicking the red "x" will delete the information.

4. Save: Remember to "Save" before leaving the page; Saving is not automatic.

A. <u>Prompt</u>: sometimes, you may receive a reminder to save if you have entered information that has not been saved.

B. <u>Edit/View</u>: after saving, the Record will change to "View" mode. To continuing editing the Record and adding information, click "Edit" at the top of the page.

4.2 CREATING A NEW INVESTIGATION

Most of the time, an Investigation will be automatically created by an ELR or Epi-Link process and will only need to be Claimed/Assigned and not Created. In rare situations outside of this process, a *new* Investigation will need to be created.

Note: This process will start a Workflow.

1. Create Investigation from Newly Created Record: After creating a new Record (as outlined in Section 4.1), you can go directly into creating a new Investigation. To Create a new Investigation directly from the Record in this process, click on "Create New Investigation" at the top of the page

Record: Squarepants, SpongeBilly 01/01/1960 (Est.)

Edit ✏️   Create New Investigation   Request Investigation Access

Start New Investigation

A. Complete Investigation Information: unlike Claimed or Assigned Investigations that are added through ELR, when an Investigation is created there is missing information that needs to be completed.
  i.   Disease: select from drop down list.
  ii. Address: Complete known address information
          NOTE: State and County is the minimum information required for address. *It is important to include this, so that the Investigation will show on your Dashboard*.

B. Complete Lab Information**:** Select the checkbox to add lab results.

☐ Select the checkbox to add lab results to the investigation.

  i.   Add known Lab information (see Section 4.3 for detailed instructions)
  ii. Remember to attach any lab documentation to the Investigation after the Investigation creation is completed. Unfortunately, documents can't be added during the creation process.

2. Create Investigation from My Dashboard: While on your
Dashboard, you can click on the "Create New Investigation"
button at the top of the page.

A. Complete Investigation Information: unlike Claimed or
Assigned Investigations that are added through ELR, when an
Investigation is created there is missing information that
needs to be completed.
  - i. Disease: select from drop down list.
  - ii. Search Records (existing Record): Click on the
    magnifying glass and enter search criteria.
  - iii. Address: Complete known address information

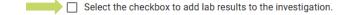> NOTE: State and County is the minimum information required for address. *It is
> important to include this, so that the Investigation will show on your
> Dashboard*.

B. Complete Lab Information**: Select the checkbox to add lab results.

  - i. Add known Lab information (see Section 4.3 for detailed instructions)
  - ii. Reminder: attach any lab documentation to the Investigation after the Investigation
    has been completely created. Unfortunately, documents can't be added during the
    creation process.

Either process above will open a new Workflow and start an Investigation.

3. Claim or Assign Investigation:
The Investigation still needs to be Claimed or
Assigned, as discussed in Section 3.   By
default, your name will appear as the Assignee
when you start a new Investigation; however, it
can be Assigned to someone else through the process discussed in Section 3.

4.3   CREATING LAB RESULTS

Most of the time, Lab Results will be created by an ELR. In situations when an additional Lab or a new Investigation has been created, the lab information will need to be manually added. Adding Lab Results to an existing Investigation:

1. **Adding Lab Results to an existing Investigation**
    A. Go to Event Tab
        (Reminder: Labs are entered into the Event Tab and not the Lab Tab)

Demographics

Events

Healthcare Provider

Clinical Info & Diagnosis

Treatment

Visit/Hospitalization

Risk Factors

Childcare, School, and Occupation

Labs

    B. Basic Lab Information
        i. Required Fields: must enter to proceed and are denoted by an asterisk*
            •Collection Date
            •Specimen Type

        ii. Optional Fields: complete if known
            • Received Date
            • Specimen Result Date
            • Accession #
            • Specimen Source Site

Collection Date*	Received Date	Specimen Result Date
MM/DD/YYYY 📅	MM/DD/YYYY 📅	MM/DD/YYYY 📅

Accession #	Specimen Type*	Specimen Source Site
	None Selected	

    C. Lab Data
        i. Required Fields: must enter to proceed
            • Test: click anywhere in the box to select from pre-set Test options.
                NOTE: narrow options by typing the first part of the test name
            • Result: click anywhere in the box to select from pre-set options

Lab Data *

Test*
None Selected

Result*
None Selected

Numeric Result Value

ii. Optional Fields: complete if known
- Numeric Result Value
- Result Units
- Reference Range
- Observation Result Status

Lab Data *

Test*

None Selected

Result*

None Selected

Numeric Result Value	Result Units	Reference Range	Observation Result Status
			None selected

D. Additional Lab Results

To add more lab results, copy the row by clicking the "+"

or "Add New Lab Result +"

Add New Lab Result +

E. Facility Information

i. Required Fields: must enter to proceed
- Performing Facility
   NOTE: narrow options by typing a partial name

ii. Optional Fields: complete if known
- Ordering Facility
- Ordering Provider Type
- Ordering Provider First Name/Middle Name/Last Name
- Ordering Provider Phone/Address/City/State/County/Zip

Performing Facility*	Ordering Facility

Ordering Provider Type	Ordering Provider First Name	Ordering Provider Middle Name	Ordering Provider Last Name
None selected			

Ordering Provider Phone	Ext	Ordering Provider Address	Ordering Provider City
( ) -			

Ordering Provider State	Ordering Provider County	Ordering Provider ZIP
None selected	None selected	

Save   Cancel   Complete

F. **Complete**
   A. Click "Save" - if there is missing information, an error message will appear
   B. Click "Complete" to close the Lab Results box.

2. Adding Lab Results to a newly Created Investigation:

Start New Investigation

Due Date
07/21/2025

Assignee
Rose Marie Scott   Assign

Disease*
Salmonellosis   × 👁

Search Records*
Squarepants, Bobby Jo 01/01/2001

Address Line 1
1515 State St

Address Line

City
Sioux City   ×

State
IA

Verify Address

Address Note

A. Select Checkbox

☐ Select the checkbox to add lab results to the investigation.

The box is located here

☐ Select the checkbox to add lab results to the investigation.

Save   Cancel   Complete

B. Basic Lab Information

    i. Required Fields: must enter to proceed and are denoted by an asterisk*

        •Collection Date

        •Specimen Type

    ii. Optional Fields: complete if known

        • Received Date

        • Specimen Result Date

        • Accession #

        • Specimen Source Site

Collection Date*
MM/DD/YYYY

Received Date
MM/DD/YYYY

Specimen Result Date
MM/DD/YYYY

Accession #

Specimen Type*
None Selected

Specimen Source Site

C. <u>Lab Data</u>
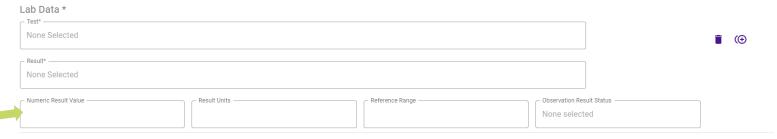
   i. Required Fields: must enter to proceed

      • Test: click anywhere in the box to select from pre-set Test options.

        NOTE: narrow options by typing the first part of the test name

      • Result: click anywhere in the box to select from pre-set options

   ii. Optional Fields: complete if known

      • Numeric Result Value

      • Result Units

      • Reference Range

      • Observation Result Status

Lab Data *

Test*
None Selected

Result*
None Selected

Numeric Result Value | Result Units | Reference Range | Observation Result Status
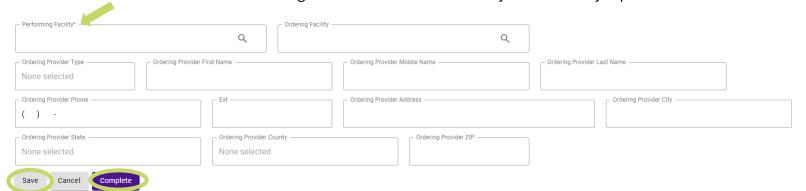None selected

D. <u>Additional Lab Results</u>

   To add more lab results, copy the row by clicking the "+"

   or "Add New Lab Result +"

Add New Lab Result +

E. <u>Facility Information</u>

   i. Required Fields: must enter to proceed

      • Performing Facility

        NOTE: narrow options by typing a partial name

   ii. Optional Fields: complete if known

      • Ordering Facility

      • Ordering Provider Type

      • Ordering Provider First Name/Middle Name/Last Name

      • Ordering Provider Phone/Address/City/State/County/Zip

F. <u>Complete</u>

   i. <u>Click "Save"</u> - if there is missing information, an error message will appear

   ii. <u>Click "Complete"</u> to start the new Investigation.
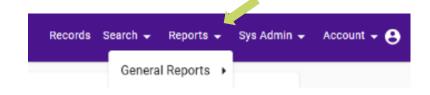
Section 4 GTKs (Good to Know)

• Thoroughly search before adding a new Record. Name changes, misspellings, and incorrect DOBs are all possible.

• Remember 'less is more' when searching.

• Required Information for new Records or Investigations are noted with an asterisk

SECTION 5: REPORTS

Reports are found in the top right corner of the IDSS bar. Click on the "Reports" and one options will be seen: General. To access the Report list, hover over the arrow to see options and select.

5.1 BASIC REPORT INFORMATION

A. Reports are listed alphabetically

B. When a report has parameters entered that will yield no results the report should show the Title, Parameters, text that reads "No Data Available".

C. Reports can be output as PDF by choosing the Report followed by (PDF); otherwise, reports will be generated in Excel.

D. The results will be based on input parameters selected. If no input is given for a particular field, all options will be considered in the run. (Ex: if no Disease Type is specified, all diseases will be pulled)

5.2 GENERAL REPORTS

Disease Query Report
Disease Query Report (PDF)
Epidemiologically Linked Events Report
Epidemiologically Linked Events Report (PDF)
Local Outstanding Follow-up Report
Local Outstanding Follow-up Report (PDF)
Public Health Performance Report
Public Health Performance Report (PDF)

1. Disease Query Report: list of Record group by counties and their associated disease(s). It is used in various way, from data analysis, work flow, etc. This report is applicable to all disease classes (i.e. STI, TB, CADE, LPH)

2. Epidemiologically Linked Events Reports: The result will be based on input parameters selected. This report is applicable to all disease classes (i.e. STI, TB, CADE, LPH)

3. Local Outstanding Follow-up Report: This report will be used to identify outstanding events so that the local agencies may follow up on their open events.

4. Public Health Performance Report: This report identifies how many days each Task of the Workflow took to complete; including an option for a broad overlook of days between notification and close of Investigation. All days displayed for the Task time requested (through parameters set) are calculated based on notification date.

Section 5 GTKs (Good to Know)

- If you currently request Reports to Regional Field Epis, you may continue to do so
- Report-like data for Investigation counts in the county is found on My Dashboard; not Reports
- My Dashboard has many report-like features (eg: Local Outstanding Report). This enables a quick view of LPH Investigations and statuses without a cumbersome report process.

There are key features with IDSS that address some of the concerns with previous surveillance systems used before. This section will highlight some of the most useful features.

6.1 NAVIGATION

3. **Multiple Cases:** IDSS can can have multiple cases open at once in the same *browser*, so you can work on several Investigations simultaneously. Currently, there is no limit to the amount of tabs you can have open for IDSS. In the image below, there are 6 IDSS tabs open. The Dashboard, 2 Provider Follow-Ups, and 3 Interviews are simultaneously open.

2. **Duplicate Tabs:** One of the ways to quickly open up a case that is linked to a case you are currently in is to Duplicate the tab.

A. Shortcut: White the Investigation is up, press and hold "Control+Shift" and tap "K". A browser window with the same Investigation will open and you can navigate to other Sidebar Tabs that contain Contacts, Partners, ect; while leaving the primary case open in the first window.

   OR

B. Menu: On the current Investigation, right-click on the top tab of your browser
C. Choose "Duplicate tab"
D. Another tab will open and mirror the Investigation you are currently on
E. Navigate: You can then navigate to tabs with Contacts, Partners, etc and update any information on those Investigations, while leaving the primary case open in the first browser window.

3. **Sidebar:** IDSS can have multiple cases open at once in the same *screen*.
This will be helpful in working with mulitple cases at once; for example, Epi-Linked cases in the same household

    A. <u>Menu</u>: Right-clicking anywhere on the Task Summary will open a menu.

    B. <u>Split</u>: Chose "Open in Sidebar" to split the current screen to navigate through multiple Investigations on the same screen. The Sidebar will always be on the right side of the screen.

    C. <u>Adjust</u>: The sidebar screen can be widened for a better viewing area by hovering over the gray slider bar until the double white arrows appear. Then click, hold, and then drag the white double arrows to the right or left to widen or shrink the sidebar window.

    D. <u>Maximize</u>: To see the sidebar in full screen, click the icon for "Open Link to New Tab" in the upper right corner. This will create new tab on your browser with the sidebar information in full screen.

    E. <u>Close</u>: To close the sidebar, **save** your completed work and then click on the "x" in the upper right corner.

6.2 SEARCHING TIPS

1. **IDSS Record Search**

   All Records are available for viewing for all IDSS users; however, Investigations are limited to User Rule. This is a detailed look on how to search for Records. For more tips on how to enter information into Criteria fields, review Section 3.7.2.

   A. Select Records: this is located on the top main bar menu

   | Records Search ⌄   Reports ⌄   Sys Admin ⌄   My Profile Account ⌄ 👤 |

   B. Criteria: enter the least amount of criteria required to locate Record. There are several fields available for searching and any combination can be used to locate a Record. The basic areas for searching are:

      i. Record Number, Investigation Number, Event Number, or Accession Number
      ii. Name (First, Last, Alias, or Full Name)
      iii. Date of Birth (Actual DOB or range between two dates)
      iv. Disease (drop down box)
      v. Address and Phone (full address or any part of address)
      vi. Email and Online presence
      vii. Demographics (Race or Ethnicity)

Records   Create +

Search Criteria

Record Number	Investigation Number	Event Number	Accession Number

Last Name	First Name	Alias	Full Name

Disease	Previous Last Name
None Selected	

Date of Birth & Date of Birth Range

Date of Birth	OR	Date of Birth From	Date of Birth To	
MM/DD/YYYY 📅		MM/DD/YYYY 📅	MM/DD/YYYY 📅	*For best results, use either the date or the date range criteria.*

Address & Phone	⌄
Email & Online Presence	⌄
Demographics	⌄

Search   Clear

6.3 ACCESS PROCESSES

1. **Request Access to an Investigation.** Confidentiality guidelines are stricter on IDSS now. Because of this, you will not see Investigations outside of your jurisdiction or User Role. However, **all** IDSS Records are viewable for basic demographics. If you need to access an Investigation that is outside your jurisdiction, you will need to request permission.

   A. <u>Locate the Record</u> by conducting a Record search. Details on searching for Records is in Section 6.3.1. Select the Record by clicking the line or the arrow at the end of the line of the appropriate Record.

   B. <u>Request</u>: Select "Request Investigation Access"

   ### Record: Squarepants, Sponge Billy 01/01/2000

   Edit ✏️   Create New Investigation   Request Investigation Access ⬅

   C. <u>Complete Fields</u>:
   - i. Disease (drop down selection) *required field
   - ii. Reason: (drop down selection) *required field
     1. Assisting another jurisdiction
     2. Epi-Linked Case – out of jurisdiction
     3. Investigation is part of an outbreak in my jurisdiction
     4. Manually add a new lab result
   - iii. Optional Field: notes to explain the situation further

Record: Squarepants, Sponge Billy 01/01/2000

Edit ✏️   Create New Investigation   Request Investigation Access

Record Number	Record Create Date	
100014653	07/16/2025	☐ Deceased

DS Base Access Additional Investigations

Disease *
Salmonellosis   ✕ 👁

Reason *
None selected
- Assisting another jurisdiction
- Epi-linked case - out of jurisdiction
- Investigation is part of an outbreak in my jurisdiction
- Manually add a new lab result

Additional Information

Cancel   Search

   D. <u>Click "Search"</u>

   Search

E. Workflow: Request Investigation Access. If an Investigation is located, a Workflow of the Investigation will open. Verify the information (if known).

Investigations

Field	Value
Investigation ID	100005919
Event ID	100005891
Disease Name	Salmonellosis
Onset Date	
Event Status	Pending
Investigation Status	Pending
Date Reported to HHS	07/16/2025

☐ Request Access

Cancel   Request Access

F. Click on the "Request Access" checkbox of the correct Investigation, as there may be more than one Investigation listed in the Workflow initially.

☐ Request Access

G. Click "Request Access"

Cancel   Request Access

H. Approval: as long as the reason is a pre-approved reason to gain access, approval will be automatic. In other cases, you will be notified once approval has been granted. All the requests, pre-approved or otherwise, are visible to the State.

I. Record Search: Once approval is completed, you will need to search for the Record again; as the original Primary Organization will remain and therefore will not yet appear on your jurisdiction's dashboard.

Record ID: 100014653
Record Name: Squarepants, Sponge Billy
Record DOB: 01/01/2000
County: Polk
Event ID: 100005891
Primary Organization: NOT YOUR County Health Department

J. Select Investigation: This time when you search for the Record, you will see the Investigation is now available to select.

Record: Squarepants, Sponge Billy 01/01/2000   🖨 Back To Search

Edit ✏   Create New Investigation   Request Investigation Access

Record Number	Record Create Date	
100014653	07/16/2025	☐ Deceased

First Name	Middle Name	Last Name	Suffix	Previous Last Name (if applicable)
Sponge Billy		Squarepants		

Investigations

Investigation #	Event #	Disease Name	Onset Date	Event Status	Investigation Status	County	Address	Has Contacts	Is Contact	Date Reported to HHS		
100005919	100005891	Salmonellosis		Pending	Manual Assignment	Polk	1515 State St			07/16/2025 5:41 PM	👁	➡

Rows per page: 10 ▾   1-1 of

K. Workflow Task: Owner Assignment. You can now Claim the Investigation and continue with the Workflow as usual. *Once this Investigation has been Claimed, you will then see the Investigation on your Dashboard.*

6.4 OTHER STI SPECIFIC INFORMATION

1. **Case Reports**
    A. STI Case Summary Report: located in the Investigation tile, top of the page

    B. Partner Report: located in the Investigation tile, top of the page

Investigation: _

[Save]

[STI Case Summary Report]   [Create Partner Report]

2. **Investigations and Events**
    A. Split Investigation: TBD
    B. Merging Cases: can be requested and completed on the State level

3. **CoInfection**

    Events

    A. Create Coinfection Event: located in the Events tab

    [Create Coinfection Event]

Task Summary   Close ✕
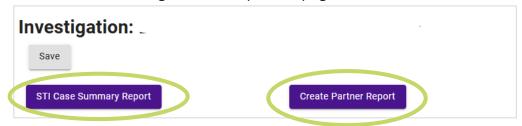
[Add To Outbreak/Cluster] [Create Epi-Link] [Investigation Notification] [Re-Interview] [Reassign Investigation] [Refer Investigation]

Search   ┌─ Task Status ─┐
          │   ▼│
          └──────────────┘

4. **Ad Hoc Buttons:** in the Task Summary tile, there are additional buttons that will be rarely used.
    A. Add to Outbreak/Cluster: only use when directed by Disease Coordinator
    B. Create Epi-Link: Normally, Epi-Links should be created under the Partners Tab. However, there are rare circumstances when Partner would not be applicable, and this function should be used to link the cases.
    C. Investigation Notification: Send a notification to someone within your STI jurisdiction about the Event/Investigation
    D. Re-Interview: Only used if directed to Re-Interview for the same Investigation
    E. Reassign Investigation: Request to assign ownership (*not Tasks*) of the Investigation.
        Reminder: Individual Tasks can be completed by *any* Team Member with the correct User Role, regardless of Investigation ownership.
    F. Refer Investigation: Send notification to the Disease Coordinator to refer to another area

SECTION 7: SPECIFIC DISEASES

There are key features with IDSS that pertain to specific diseases. In this section, we will walk through several, but not all, specific disease processes and key differences.

Section 7 assumes two prerequisites:
1. **Previous training of the disease process on a former IDSS system;** *AND*
2. **Previous training on IDSS 2.0 general disease navigation, such as those covered in Sections 1-6 of the STI User Guide.**

TABLE OF CONTENTS – SECTION 7

7.4 STI GENERAL WORKFLOW (NO SPECIFIC DISEASE)

1. **Locate Case:** either from Dashboard or from Email notification

2. **Task: Owner Assignment**
   A. <u>Claiming</u> the case will auto-populate your informaiton into required fields.
   B. Click <u>Complete</u>

Owner Assignment

Due Date
05/28/2025 ✕ 📅

Assignee
None ▼   Assign   Claim

Investigation Assignee *
None Selected

Save Cancel Complete

3. **Task: Information Gathering**

   A. <u>Review Investigation</u>

Information Gathering

Due Date
05/01/2025 ✕ 📅

Assignee
YOUR NAME ▼
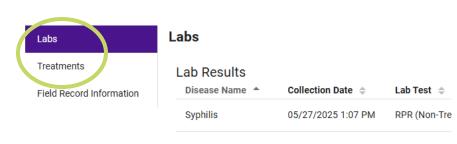
   i. Events Tab: Reportable Events – click on the Event line or arrow to open the Event

Demographics
Events
Clinical
Risk Factors
Partners
Documents

Events

Create Coinfection Event

Reportable Events

Event Number	Onset Date	Disease	Disease Type	Status	Disposition	Treatment	Date Reported to HHS
10000		Syphilis	Syphilis	Probable			05/28/2025	➡

Rows per page: 10 ▼ 1-1 of 1

   ii. Reportable Event Window: Review Labs and Treatments. Tabs are located toward the bottom of the Reportable Event window

Labs
Treatments
Field Record Information

Labs

Lab Results

Disease Name	Collection Date	Lab Test
Syphilis	05/27/2025 1:07 PM	RPR (Non-Tre

   iii. Review Reporting Form/Labs (if received)
   • Event Tab: Add Labs, if applicable
   • Event Tab: Add Treatment information, if applicable

Information Gathering

Due Date
05/01/2025 × 🗓

Assignee

IOWA
**Health and
Human Services
Public Health**

1. Patient Call (may be made before or after Provider call)

Demographics

Events

Clinical

Risk Factors

Partners

i. Demographics: Verify demographic information

ii. Clinical Tab: fill out gathered information
   NOTE: When STI History is manually
   added, it will populate into the
   above table; the table will only be
   visible when "yes" is selected.

STI History
◉ Yes ◯ No ◯ Unknown

STI History
Disease   Disease Type
No data available

The below table is used to enter historical STI diagno

STI History (manual entry)
Date   Disease
No data available

Create +

iii. Risk Factors Tab: fill out gathered information
   NOTE: There is a new table for drug types and route when
   "Yes" is selected for question "engaged in drug use"

![IOWA Health and Human Services Public Health logo]

2. Partners: Adding a Partner

Demographics

Events

Clinical

Risk Factors

(Partners)

i. To Add a partner, click "Create   Create ✚   +"

ii. Search for a record by clicking on the magnifying glass, add Record by selecting the row

iii. If No Record is found, create a Record by clicking "Create +" in the search window

iv. Verify Demographic information

v. Assign DIS Agency and DIS (if applicable)

vi. Provide description (if applicable)

vii. Provide Exposure information

viii. Partner referral basis: S1P1, etc…

ix. Epi-Links: this information will carry over automatically to the Epi-Links tab

THIS WILL CREATE A NEW INVESTIGATION WORKFLOW

3. Partners: Investigation – complete any known information in the tabs available through the Partners window:

Demographics & Related Investigations

Labs

Treatment

Online Presence

Notes

i. Demographics
ii. Online Presence
iii. Notes
iv. Labs/Treatment: can only be completed in the full Investigation

4. Complete Investigation Information

Labs

Treatments

Field Record Information

    i. Events Tab: complete Field Record Information
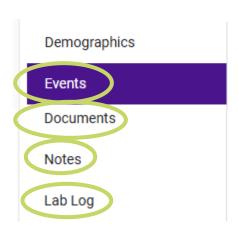
    ii. Documents: attach any pertinent history and lab information received

    iii. Notes

    iv. Lab Log:
- Current Investigation: Labs that are important to the case of investigation currently; including manual negatives that are important to the investigation

- Other Investigation: Previous Investigation Labs

- Supplemental Lab Results: ELR negatives, but still be important to your specific case

Demographics

Events

Documents

Notes

Lab Log

Clusters/Outbreaks

Visit/Hospitalization

Admin

5. Other Tabs:

    i. Epi-Links: will automatically carry over from the Partner tab

    ii. Clusters/Outbreaks: Will be directly by the State specifically when applicable (DIS can ignore for now).

    iii. Visit/Hospitalization (optional)

6. **Task: Information Gathering – Complete**
   Complete this task in the workflow by completing:

   i. Enter: Any Notes and Place of Interview

   ii. Checkmark: If Interview was not conducted, checkmark the box; otherwise leave blank

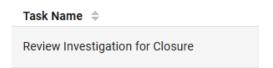   iii. Select: "Info Gathering Complete" button

   iv. Corrections/Errors: Complete any missing or flagged information the system alerts

Information Gathering   Back To Workflow

Due Date	Assignee
05/01/2025 ✕ 📅	YOUR NAME ▾ Assign

Note

☐ Interview Not Conducted   Place of Interview
                                   None selected

Save   Cancel   **Info Gathering Complete**

7. **Task: Review Investigation for Closure**
   The Investigation will be reviewed by the State and you will be notified of any corrections. You will not need to Claim or Assign this task.

Task Name ⇅
Review Investigation for Closure

8. **Task: Review Investigation for Submission**
   If the Reviewer find errors or needs more information about an Investigation, it will be noted, re-opened and you will be notified.

   i. Claim this Task and make the required corrections and notes.

   ii. Resubmit for closure following the steps in listed above in step 6. *Task – Information Gathering: Complete*.

Task Name ⇅
Review Investigation for Submission
Review Investigation for Closure
Information Gathering

Once the Investigation is complete/approved, it will no longer show on your Dashboard.

7.5 STI – CHLAMYDIA

7.6 STI – GONORRHEA

7.6 STI – SYPHILIS

7.7 STI – HIV – focus on HIV questions

Clincial Tab: HIV/PrEP: enter any information about HIV or PrEP Status.

IDSS MANUAL

TUBERCULOSIS
APPENDIX C

USER
REFERENCE
GUIDE

LOCAL
PUBLIC
HEALTH

TUBERCULOSIS
DIVISION

This appendix assumes two prerequisites:

1. Previous training of the disease process on a former or current disease system;

AND

2. Previous training on IDSS 2.0 general disease navigation, as covered in Sections 1-6 of the IDSS User Guide.

This manual does not train on *how* to conduct a disease investigation process; it is designed to guide you through inputting the information gathered from an Investigation into IDSS.

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7.10 TB- CONTACT (TBC)

7.11 TB - OTHER

IDSS MANUAL

ELR-LABS

APPENDIX D

USER
REFERENCE
GUIDE

LOCAL
PUBLIC
HEALTH

ELR-LABS
APPENDIX D

IOWA
Health and
Human Services
Public Health

Significant laboratory test and result information is available to authorized users in IDSS. There is a fair amount of new technical information that most IDSS users have never seen before. The purpose of this section is to provide a brief explanation of each item in the laboratory content while pointing out the key data elements or fields needed to quickly identify the test, the result, and important dates.

This ELR-LABS Appendix assumes two prerequisites:

1. **Previous training of the disease process on a former IDSS system;**

   AND

2. **Previous training on IDSS 2.0 general disease navigation; such as those covered in Sections 1-6 in the IDSS 2.0 User Manual; CADE Division.**

Table of Contents

8.1 BASIC LABORATORY DETAILS

1. **Basic Laboratory Details for the Investigator**
   A. <u>Location</u>:
      1) All lab test and results that are part of an Investigation are attached to an Event (See below)
      2) You can also view lab results from Labs Tab
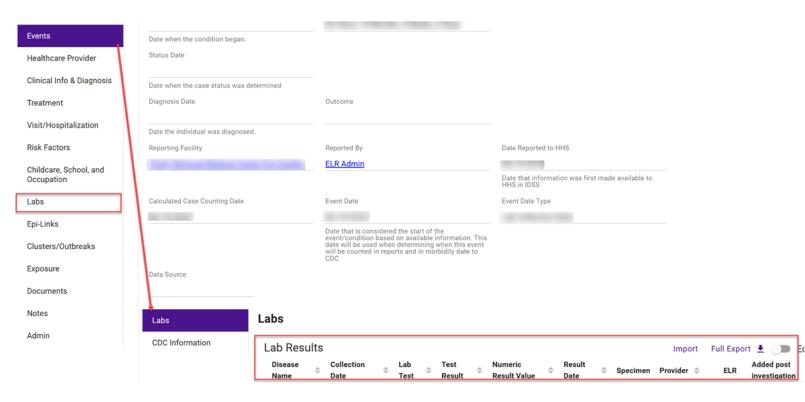
      NOTE: For STI: Chlamydia, Gonorrhea, and Syphilis; the "Labs" tab is called "Lab Log"
   B. <u>Creating Lab</u>:
      1) If you want to manually add a lab result to an investigation, it can only be done on the Events/Labs tab using the Add Lab Result button.
      2) See Section 4 of the CADE Manual for more detailed information on Creating Lab Results.

   NOTE: patient information is blurred in the image below.

Demographics

Events

Clinical

Risk Factors

Partners

Documents

Notes

Lab Log

Epi-Links

Clusters/Outbreaks

Visit/Hospitalization

Exposure

Admin

Lab Log

❶ Current Investigation Lab Results

Import   Full Export ⬇ ⚪   Edit View

Disease Name	Collection Date	Lab Test	Test Result	Numeric Result Value	Result Date	Specimen	Provider	ELR	Added post investigation
Syphilis	06/16/2025 8:41 PM	T pallidum Ab Ser Ql IA (Treponemal)	Positive		06/16/2025	Other Blood	CERNER, CERNER	✓	➡

Rows per page: 10 ▾   1-1 of 1

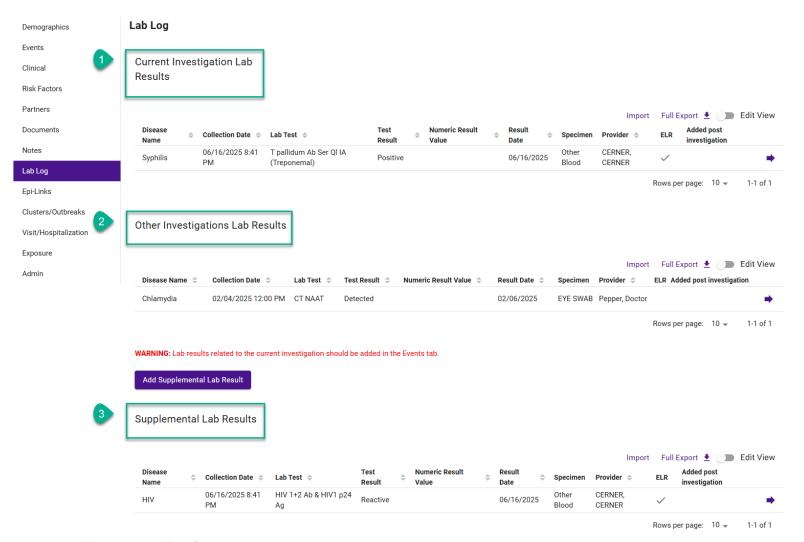**❷ Other Investigations Lab Results**

Import   Full Export ⬇ ⚪   Edit View

Disease Name	Collection Date	Lab Test	Test Result	Numeric Result Value	Result Date	Specimen	Provider	ELR	Added post investigation
Chlamydia	02/04/2025 12:00 PM	CT NAAT	Detected		02/06/2025	EYE SWAB	Pepper, Doctor		➡

Rows per page: 10 ▾   1-1 of 1

WARNING: Lab results related to the current investigation should be added in the Events tab.

[Add Supplemental Lab Result]

❸ Supplemental Lab Results

Import   Full Export ⬇ ⚪   Edit View

Disease Name	Collection Date	Lab Test	Test Result	Numeric Result Value	Result Date	Specimen	Provider	ELR	Added post investigation
HIV	06/16/2025 8:41 PM	HIV 1+2 Ab & HIV1 p24 Ag	Reactive		06/16/2025	Other Blood	CERNER, CERNER	✓	➡

Rows per page: 10 ▾   1-1 of 1

C. Lab Tab Overview:

1) **Lab Results**: contains the lab tests and results that are part of the Investigation you are looking at.
   - For STI conditions, this section is labeled "Current Investigation Lab Results"

2) **Other Investigation Lab Results**: This middle section of lab results may or may not be present. If it is, it may be called by various descriptive names that are customized for the disease.
   - For STI conditions, this middle section is called "Other Investigations Lab Results" and contains lab results from other STI infections this person had *at a different time*.

3) **Supplemental Lab Results**: Supplemental Lab Results is always present (whether any lab results display or not) and contains lab results that are not part of the Investigation you are looking at, but are attached to the Record. These might be negative results or results related to other conditions

D. Lab Result List View

Most of the time, viewing the lab result list view is all you will need to do as it contains the key information about the lab results. Below is a description of each section.

Current Investigation Lab Results

① Disease Name	② Collection Date	③ Lab Test	④ Test Result	⑤ Numeric Result Value	⑥ Result Date	⑦ Specimen	⑧ Provider	⑨ ELR	⑩ Added post investigation	Edit View
Syphilis	06/16/2025 8:41 PM	T pallidum Ab Ser Ql IA (Treponemal)	Positive		06/16/2025	Other Blood	CERNER, CERNER	✓		➡

Rows per page: 10 ▾   1-1 of 1

1) **Disease name**: this is the disease that a particular test and result combination are linked to in IDSS.

2) **Collection date:** this is the specimen collection date on which the test was performed.

3) **Lab Test:** this is the common IDSS test name performed on the specimen.

4) **Test Result:** the result of the test performed and either some form of positive/negative value or is the organism that the test identified.

5) **Numeric Result Value:** if the test performed yields numeric results, those results display here.

6) **Result Date:** the date the result was observed and released from the lab.

7) **Specimen:** the collected material on which the test was performed (e.g. blood, stool, cerebrospinal fluid, etc.).

8) **Provider:** the last, first name of the healthcare provider that ordered the test.

9) **ELR**: an indicator of whether the lab result was received by electronic lab reporting (ELR) or not. When a checkmark appears, the lab result was received by ELR. When blank, the lab report was received by some other reporting method and entered manually into IDSS.

10) **Added post Investigation:** when a checkmark is present, the lab result was added to the Investigation after the investigation has been through final review and statusing and was closed.

👁 *This symbol means there is more information available*.

If there are questions about a particular lab result and you need to contact the performing lab or the ordering healthcare provider, click on the "eye" to open the laboratory record for a detailed view. You will be able to find address and phone numbers for facilities displayed either in the Facility Info section or by clicking on the value for the appropriate field with the symbol on the right side.

Health and
Human Services
Public Health

8.2   SPECIFIC LABORATORY RESULTS DETAILED VIEW

A significant amount of information is available about every lab result received via ELR and this additional information can be used by various types of users for different purposes:

1) **Investigators/Interviewers:** can find contact information for the ordering provider, ordering facility, performing laboratory, and sending facility (the facility that sent the report via ELR).

2) **Surveillance Program Staff:** can see details about how the test was identified based on the LOINC code & LOINC code description as well as the Fully Specified Name and the Local Test Code & Local Test Description used by the performing lab. If there appear to be discrepancies between the LOINC Fully Specified Name and the Local Test Description, questions should be raised with the Iowa Surveillance Electronic Exchange (ISEE) team which manages ELR, eCR, and Case Notification.

3) **Epidemiologists:** can see notes associated with the lab request, the lab result, and the specimen if sent in an ELR message. In addition, Ask On Order entry questions and answers as well as other supporting lab results such as susceptibility tests related to parent lab results are available in detailed view.

8.3   DISEASE-SPECIFIC LABORATORY FIELDS

The Lab Result Detail View for Carbapenemase producing organism (CPO) includes an extra field that allows the HAI program to classify a particular test as a Clinical or Screening test.
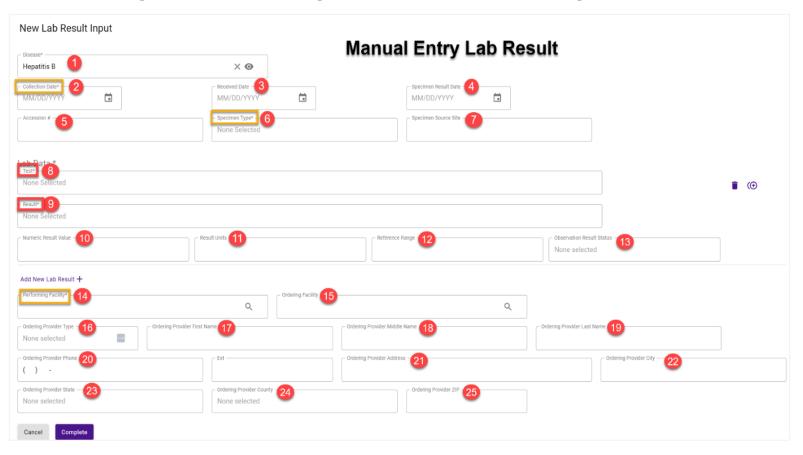
8.4   MANUALLY ENTERING A LAB RESULT

Laboratory reports received by Iowa HHS are electronic most of the time. However, there remains a significant amount of laboratory reports that must be entered manually. This manual entry screen is actually a "task" screen slightly different from the Lab Result Detailed View you will see after saving.

- **Red framed** field labels above indicate a required field.
- **Yellow framed** field labels have warnings, which means it is important, but not required.

NOTE: Image below is also shown again at the end of the section in a larger format

1) **Disease** – Must be selected to properly filter the specimen, test, and result values associated with the disease.

2) **Collection Date** – the specimen collection date indicates when the patient specimen was collected and plays an important role in determining when this infection occurred. In the absence of a known Onset Date, this serves as the closest proxy to the beginning of the infection and is used in determining the Event Date.
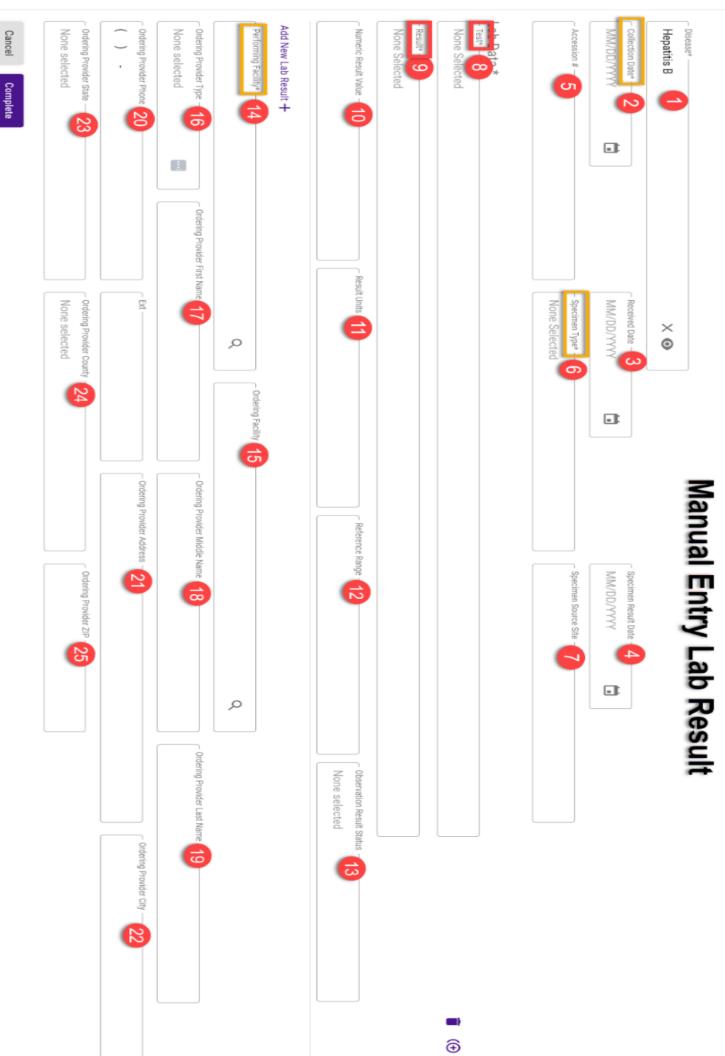
3) Received Date – represents the date the performing lab received the specimen from the ordering facility that collected it.

4) Specimen Result Date – identifies the date that the test was completed, reviewed, and released from the performing facility. It is possible for multiple observations to be made on the same specimen such as in the case of a culture test used to observe growth of an organism **which is** observed periodically over several weeks. Therefore, the same Accession # can be associated with multiple and different result dates.

5) Accession # - precisely identifies the specimen collected from the patient. There may be multiple different specimen collected from a patient the same day or a single specimen may be used to perform multiple tests. This number is unique to the specimen. One thing to note is that a Sending Facility tends to use their own Accession # if they are reporting a lab result performed by a different facility; the Performing Facility will use their own Accession # to identify a specimen rather than the ordering facility's Accession #. You may see multiple tests that look identical except for Accession #; the may be duplicate reports from different senders. The performing facility should be properly identified on each report regardless of who is sending the reportable lab result.

6) Specimen type – represents the type of specimen that was drawn from the patient (blood, stool, serum, CSF, etc.) and often implies the source of the specimen although in some instances more detail is needed by the surveillance program to ascertain the information that they need (e.g. blood lead testing needs to know if the specimen is venous or capillary blood).

7) Specimen Source Site – represents the location in which the specimen was drawn. The available specimen source types are mapped to the previous information, so that the list of sources presented to the user is relevant to the selected disease

8) Lab Data: Test* (Required Field) – type of test used; the available test options are mapped to the disease so only tests relevant to the selected disease are returned in the list presented in the Test field.

9) Lab Data: Result* (Required Field) – results of the test that was performed. The system maintains a mapping to the tests; so only result values relevant to the selected Test/LOINC would be presented in the result list.

10) Numeric Result Value - outcome of the calculation, measurement, or evaluation of the test performed.

11) Result Units – the specific units of measurement listed on the lab, which provides context for a specific result value. These units are essential for comparing results and understanding their clinical significance, as different tests and labs may use different units and reference ranges.

12) Reference Range - the set of values expected for a specific lab test that is considered normal

13) Observation Result Status - the current state or completion status of the test

14) Performing Facility - the facility that was responsible for performing the testing. The list of facilities is maintained by a system administrator.

15) Ordering Facility - the healthcare entity or provider that requests or orders the test

16) Ordering Provider Type – standardized provider role within the health facility

17) Ordering Provider First Name - identifies the person who is responsible placing the test request

18) Ordering Provider Middle Name- identifies the person who is responsible placing the test request

19) Ordering Provider Last Name- identifies the person who is responsible placing the test request

20) Order Provider Phone Number – business or contact phone information for the ordering provider

21) Ordering Provider Address – business address of the provider responsible for ordering the test

22) Ordering Provider City - business address of the provider responsible for ordering the test

23) Ordering Provider State - business address of the provider responsible for ordering the test

24) Ordering Provider County - business address of the provider responsible for ordering the test

25) Ordering Provider Zip - business address of the provider responsible for ordering the test

New Lab Result Input

Manual Entry Lab Result

Disease*
Hepatitis B ①

Collection Date* ②
MM/DD/YYYY

Received Date ③
MM/DD/YYYY

Specimen Result Date ④
MM/DD/YYYY

Accession # ⑤

Specimen Type* ⑥
None Selected

Specimen Source Site ⑦

Lab Date* ⑧
None Selected

Test* ⑧
None Selected

Result* ⑨
None Selected

Numeric Result Value ⑩

Result Units ⑪

Reference Range ⑫

Observation Result Status ⑬
None selected

Add New Lab Result +

Performing Facility* ⑭

Ordering Facility ⑮

Ordering Provider Type ⑯
None selected

Ordering Provider First Name ⑰

Ordering Provider Middle Name ⑱

Ordering Provider Last Name ⑲

Ordering Provider Phone ⑳
( ) -

Ext

Ordering Provider Address ㉑

Ordering Provider City ㉒

Ordering Provider State ㉓
None selected

Ordering Provider County ㉔
None selected

Ordering Provider ZIP ㉕

Cancel   Complete

8.5 CONTACT/QUESTIONS FOR ELR TEAM