IDSS 2.0
USER MANUAL

USER REFERENCE GUIDE

LOCAL PUBLIC HEALTH

CADE DIVISION

Health and
Human Services
Public Health

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. 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.

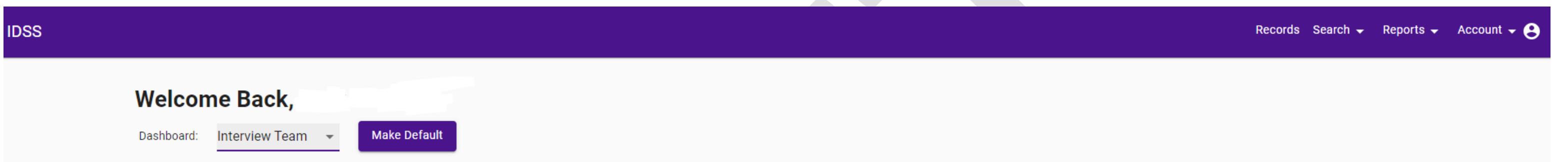
SECTION 1: GETTING STARTED

1.1 LOG IN

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

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:

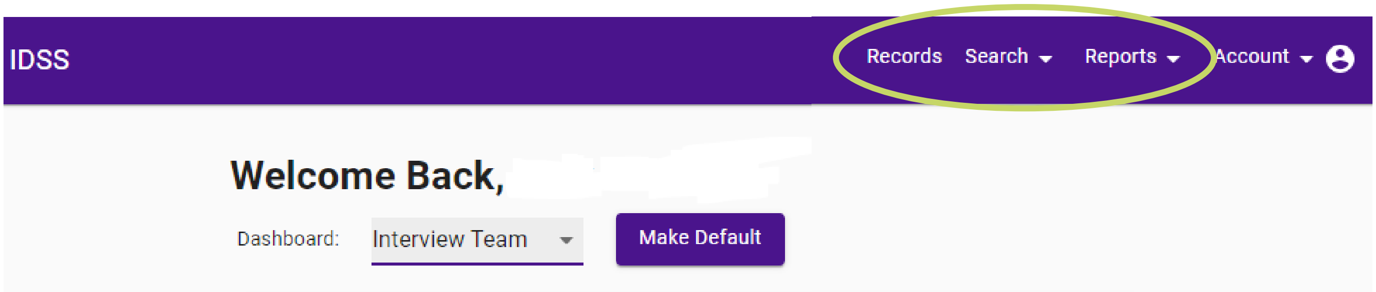


1.2 BASIC NAVIGATION

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

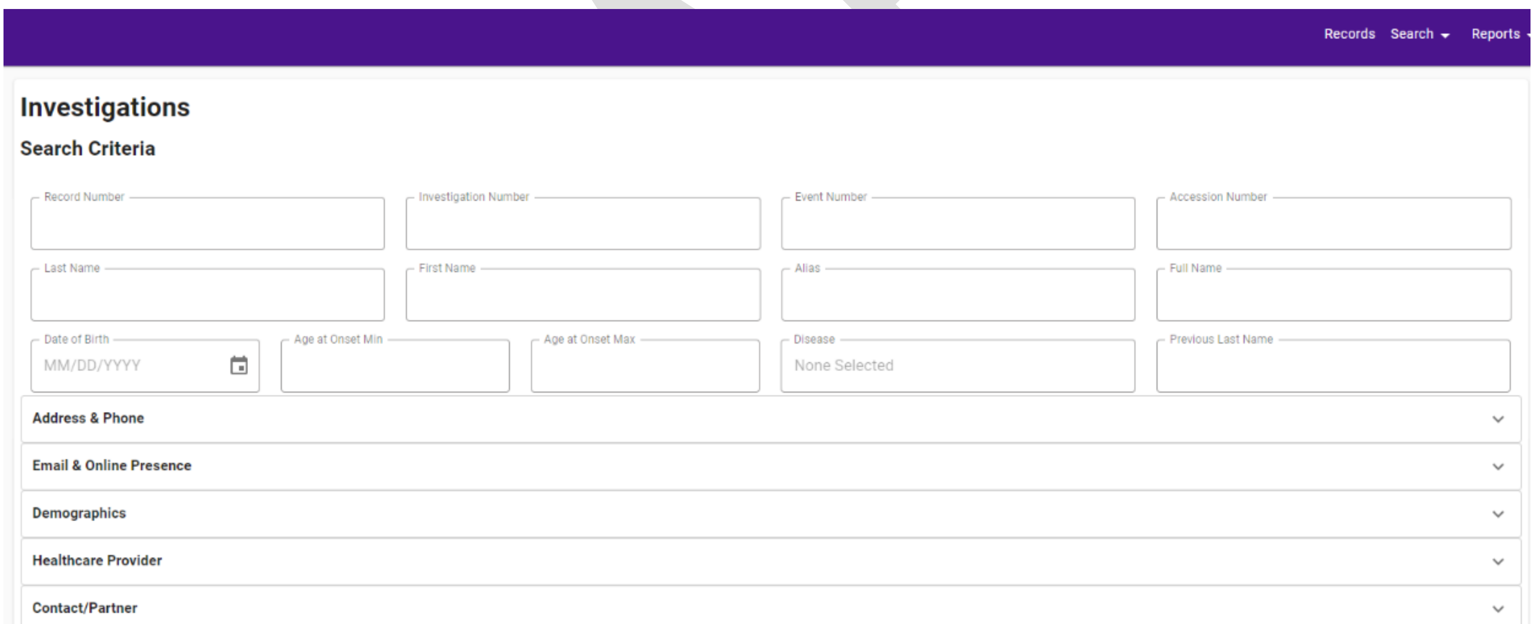
1. Your name will appear at the top of the page to confirm correct log in.
2. Clicking on this IDSS symbol will return you to this Dashboard (main page) at any point during any navigation in IDSS.
3. Account information is accessed by either clicking “Account” or the profile symbol. Account information 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.



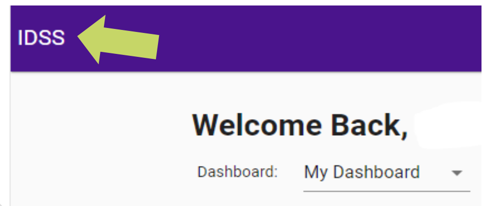
Section 1 GTKs (Good to Know)

- 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)

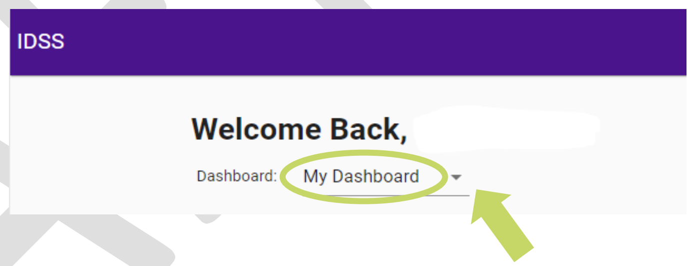
SECTION 2: DASHBOARDS

2.1 INTRODUCTION TO DASHBOARDS

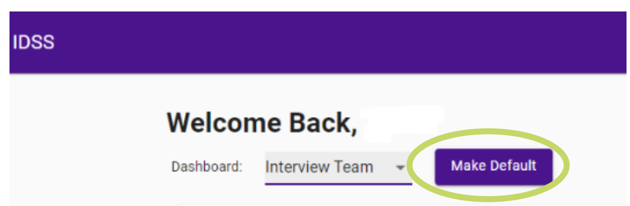
IDSS will use Dashboards as the primary launch point for most activities at the Local Public Health Level; whether searching for a Record, looking for an Event, or starting and continuing an Investigation.



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.

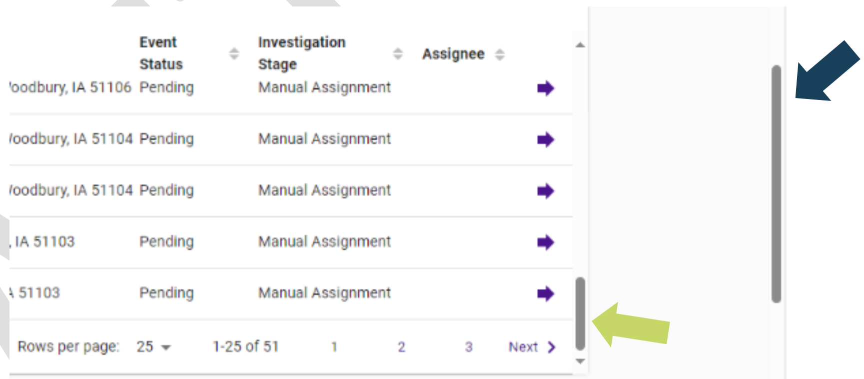
2.2 KEY NAVIGATION POINTS

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".

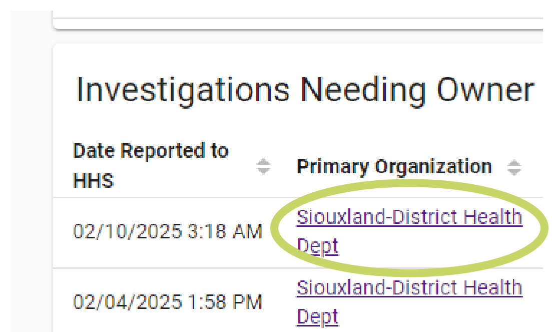
3. **Scroll Bars**: If there are several rows on the Tile (box), the Tile size will not expand or change. Instead, you will see a new, small scroll bar open to the side of the Tile as indicated by the green arrow in the image to the right. This scroll bar will only navigate the lines within that specific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

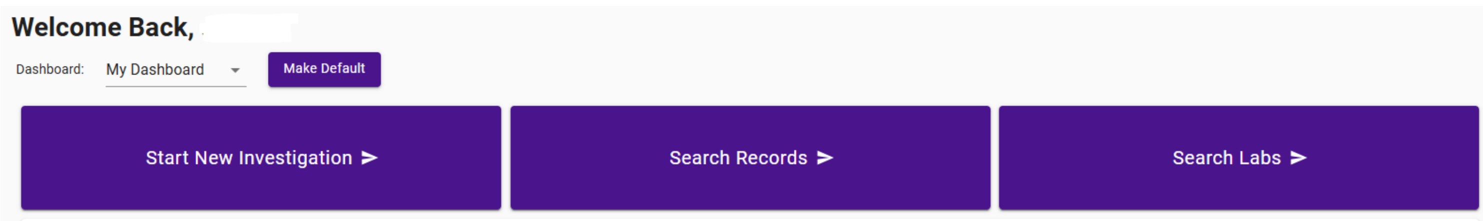
6. **Hyperlinks**: Hyperlinks do not access Records. Hyperlinks are rare and will not be seen often; they are *not* the primary mode of navigation in a Tile. Some information may be formatted to hyperlink. These links have the typical bright blue font and underlined when available. If you do click on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

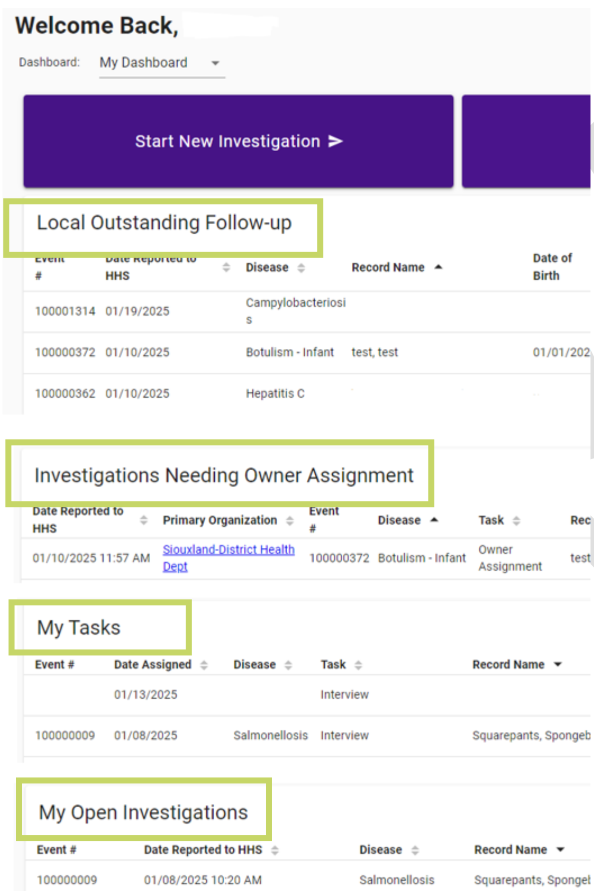


2.3 MY DASHBOARD

"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.





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.

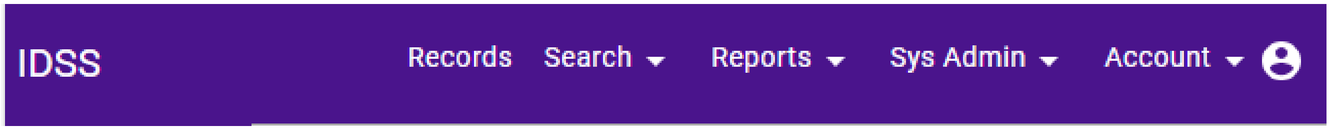
C. <u>Open Investigations by Owner</u>: Chart of total Investigations each worker in your county currently has been assigned or claimed.

D. <u>My Tasks</u>: 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. <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.

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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 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.

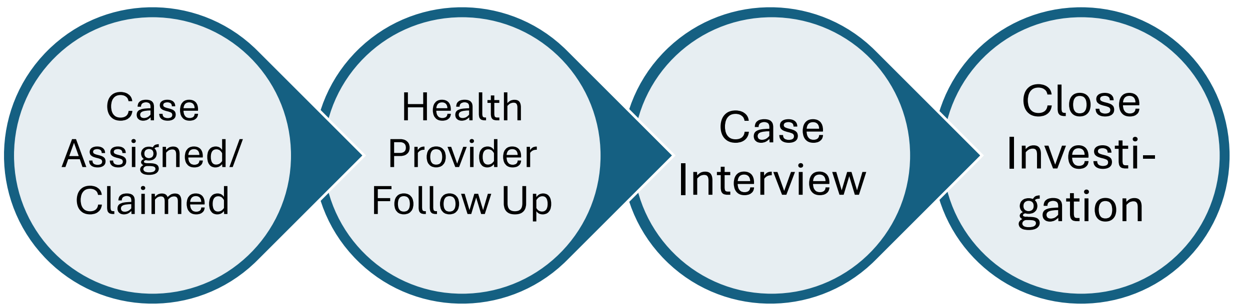
Task: Steps taken in each portion of the Workflow. Each Task must be Claimed and then completed; it can't be skipped. Tasks are used to track the Investigation's progress towards completion.

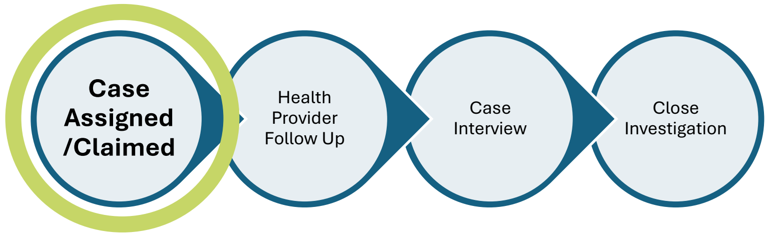
Task Summary: A Tile (box) inside an Investigation that keeps a list of *all* the completed Workflow Tasks for that specific Investigation. This summary includes Tasks you've completed as well as Tasks that have been Assigned to someone else to complete for that specific Investigation.

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

WORKFLOW OVERVIEW

The Workflow has 4 over-all steps:

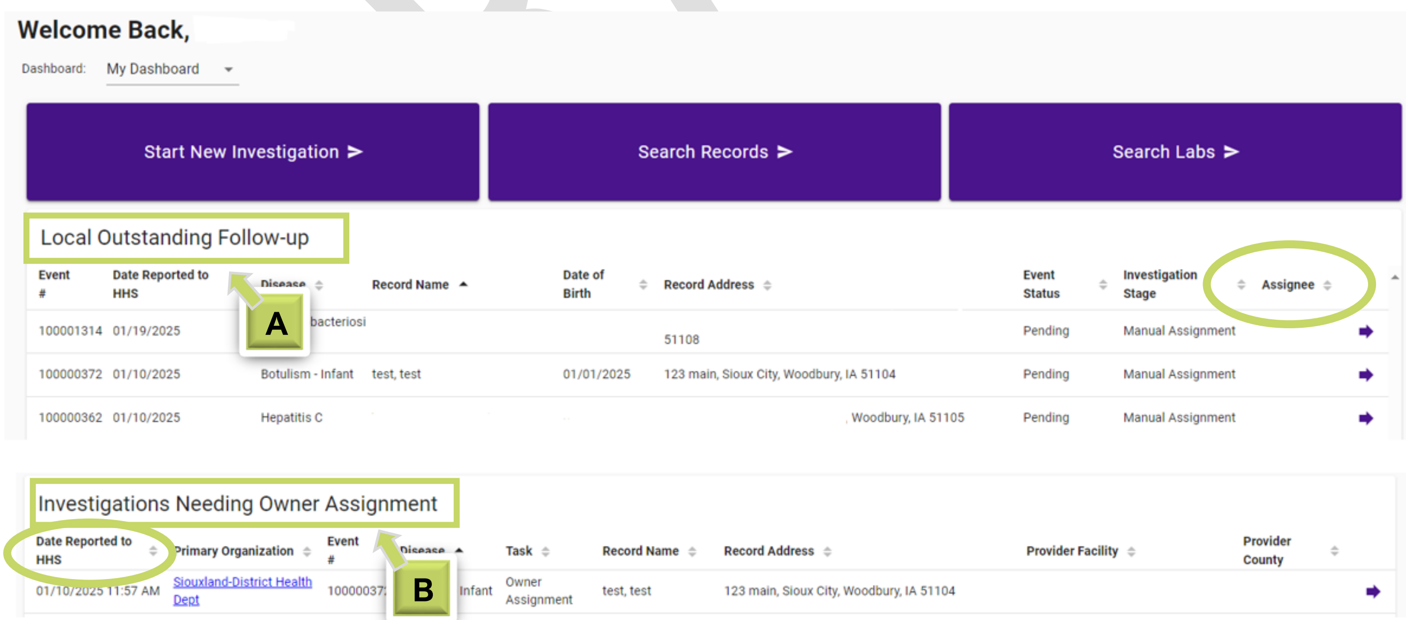




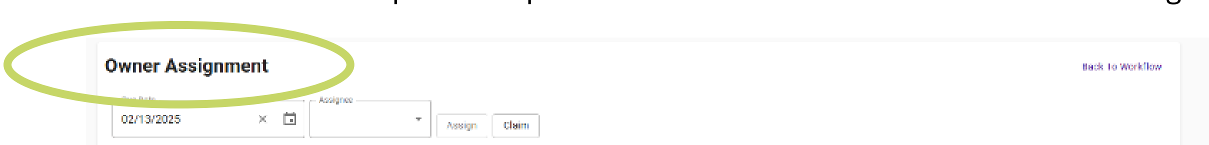
3.2 ASSIGNING or CLAIMING CASES

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



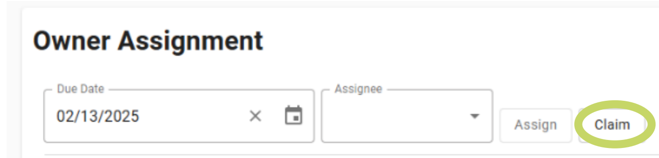
2. **Workflow Task:** Either process opens the first Task of the Workflow: Owner Assignment



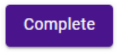
3. Task: Owner Assignment

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.



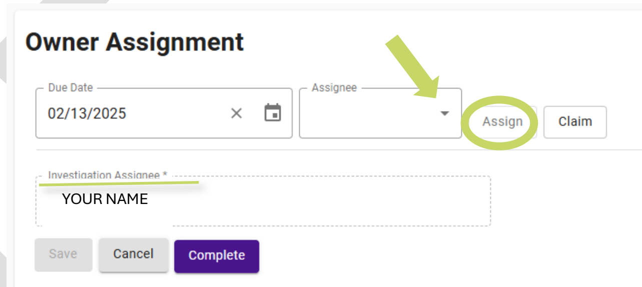
ii. Click "Complete"



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

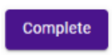
B. Assigning an Investigation

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



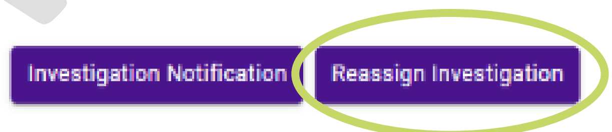
ii. You will see it retains your information as the person that completed this Task in "Investigation Assignee"

iii. Click "Complete"



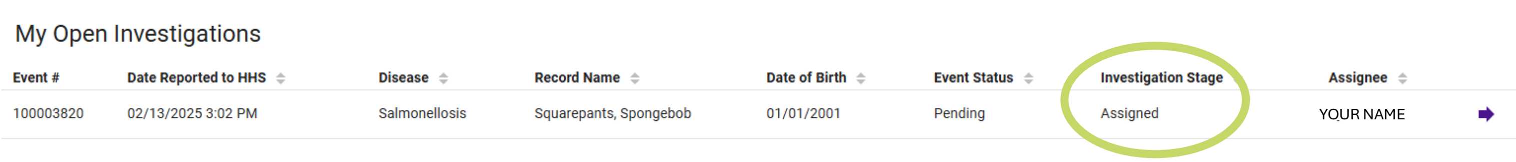
iv. This Task is now complete, and the Tile will change to the Task Summary

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.



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, which is the last completed Task.



My Open Investigations

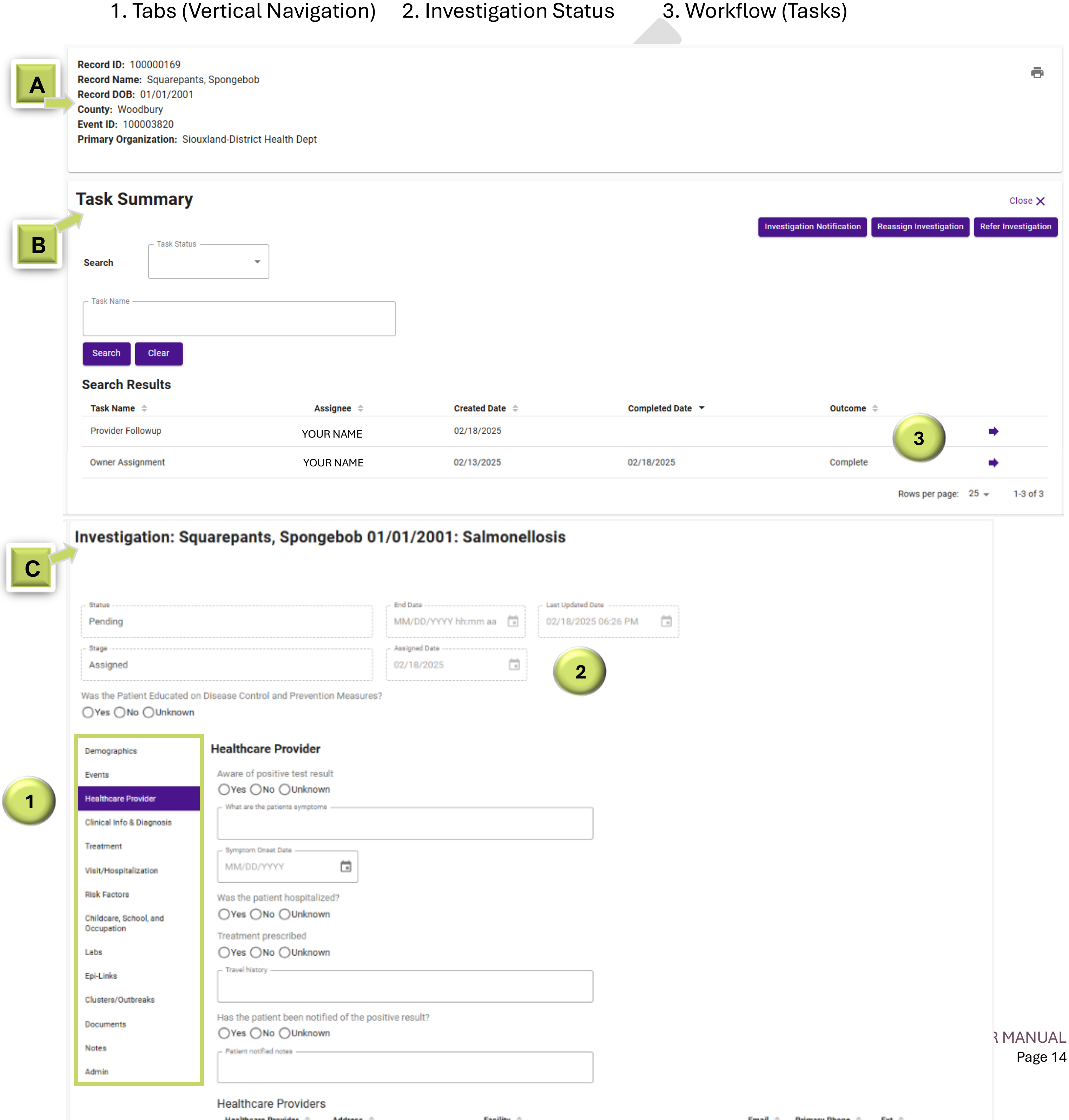
Event #	Date Reported to HHS	Disease	Record Name	Date of Birth	Event Status	Investigation Stage	Assignee
100003820	02/13/2025 3:02 PM	Salmonellosis	Squarepants, Spongebob	01/01/2001	Pending	Assigned	YOUR NAME

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)

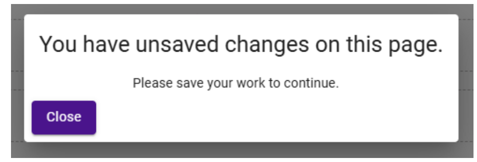


3. Other Basic Functions in an Investigation

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.

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.



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

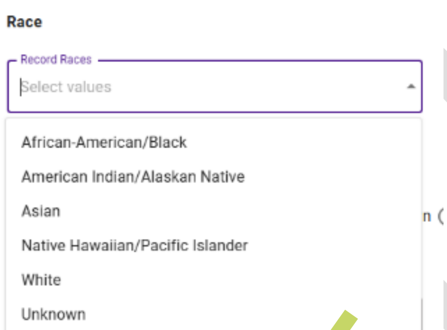
i. Create +: Allows you to add detailed information to an established table in a Tile; this is the most common way to add complex information.

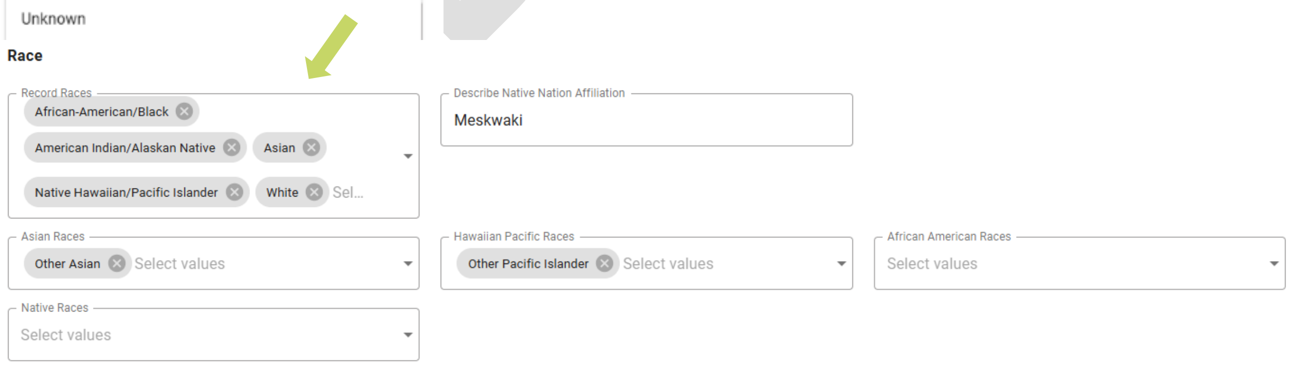
ii. Add Row +: Allows you to add a row of information to a table; most often seen in the Demographics Tab.

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

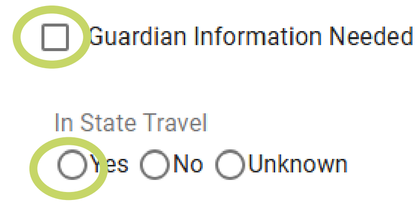
iv. Drop Down Boxes: Allows you to choose from a pre-determined list of options.

- 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" 

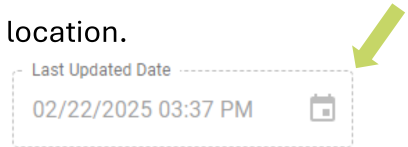




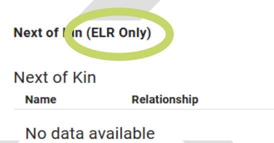
vi. Checkboxes/Radio Buttons: Allows you to choose from a simple list (usually less than 3 options). It is important to note that as with drop-down boxes, certain selections may open more areas for editing.



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



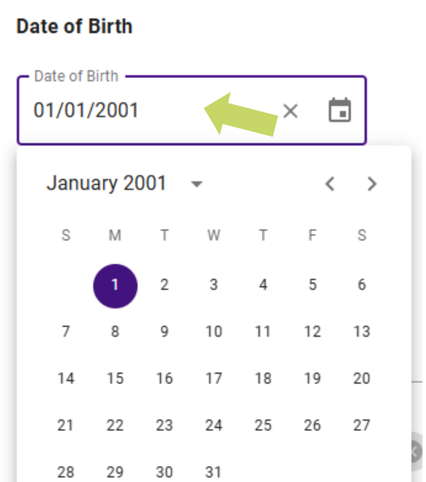
viii. ELR Only: these areas can't be edited



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.

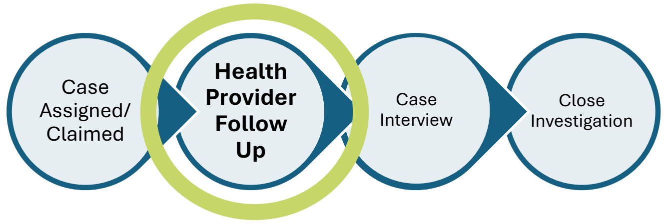
To return to View mode, click "View" or the eye symbol.

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.



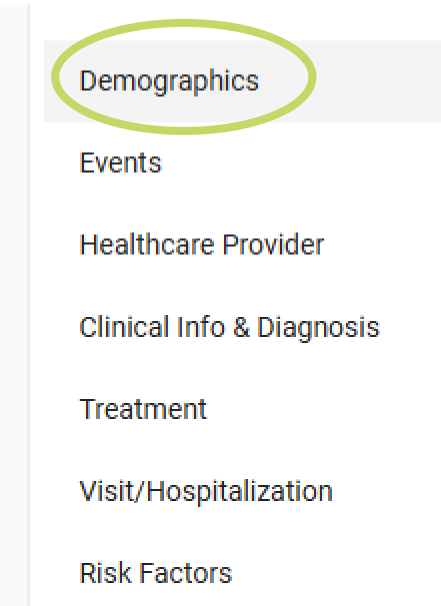
Section 3.3 GTKs (Good to Know)

- 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

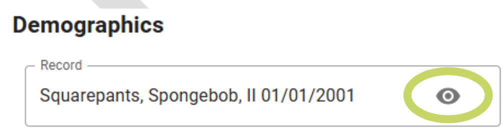
Continuing on with the Workflow of the Investigation, the next Task is to obtain information from the Health Care Provider (HCP). The information gathered will be entered into the Investigation by using the Tab Bar to the left, as seen below. This Workflow is designed to be a tool during the Investigation 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.



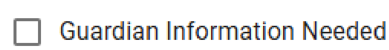
- Click "Edit" 

- Enter corrected or new information
- Click "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.

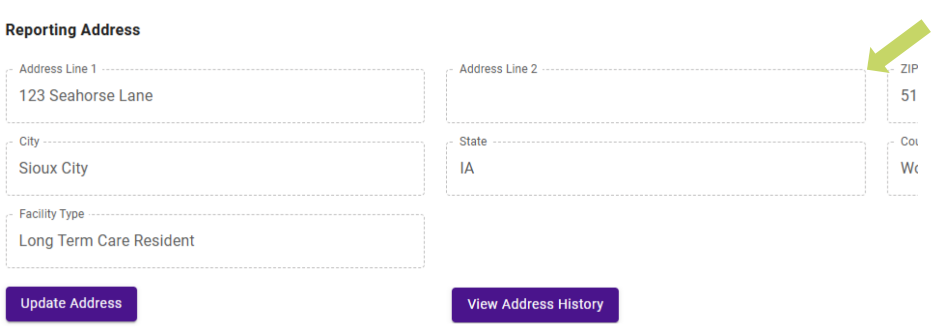
NOTE: closing the box without saving will lose all changes

iii. Contacts: Record contacts in this box are *not* parents, care takers, POA, etc. To add Guardian or afore mentioned persons, return to the Demographics tab and click on the checkbox as shown.



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.



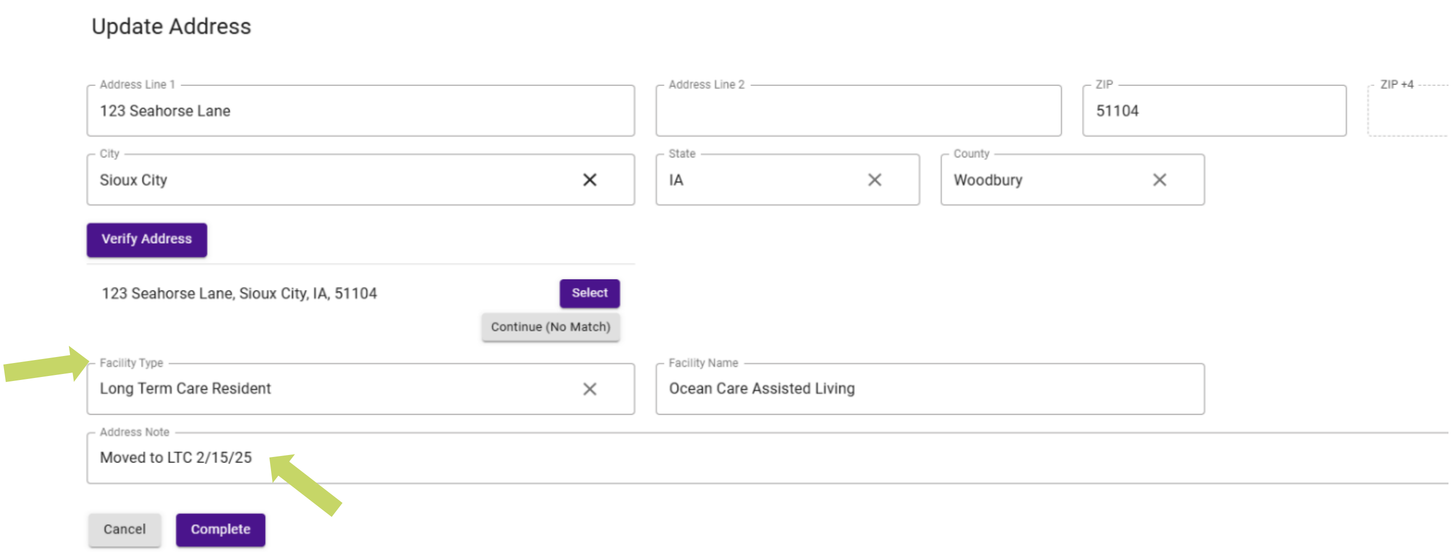
iii. Address Changes: To change or add additional information:

- Click "Update Address"
- Enter corrected or new information
- Click on "Verify Address"

- Click either "Select" to choose corrected address information or click "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.



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".

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.

Add Row +

iii. Inactive: for phone numbers that are no longer active, click on the arrow; mark "Inactive"; save; and close.

☐ Inactive

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

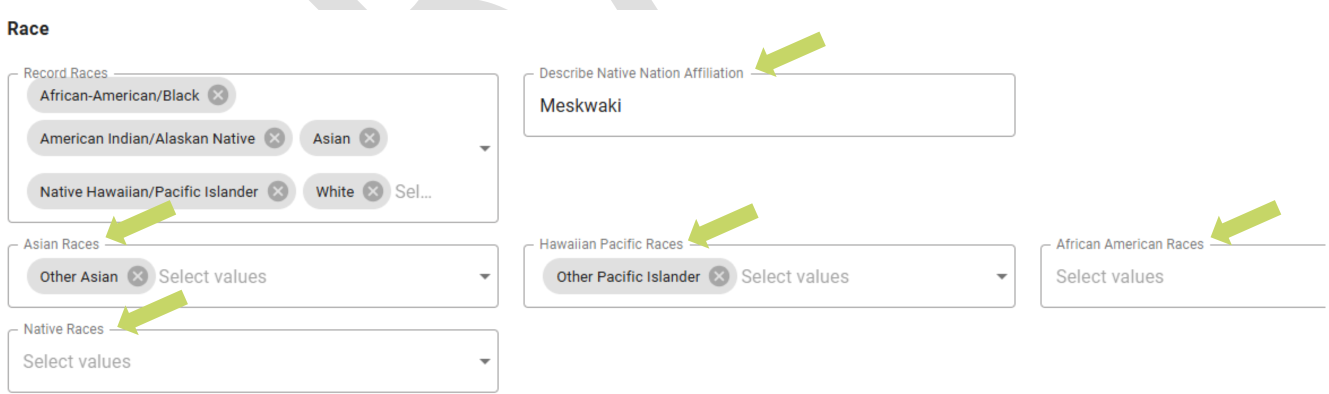
E. Guardian: to add Guardian information, click on the box and enter information. This would include parents, care takers, POAs, and others.

☐ Guardian Information Needed

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)

Add Row +

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.

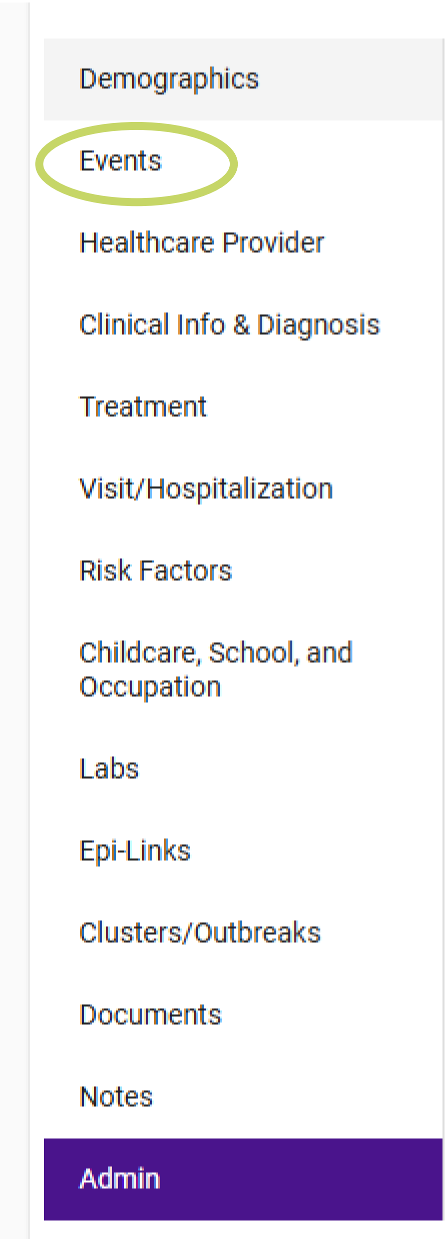


H. Next of Kin: This field is designated through ELR only and can't be edited

I. Save: remember to save work often and before navigating to different areas

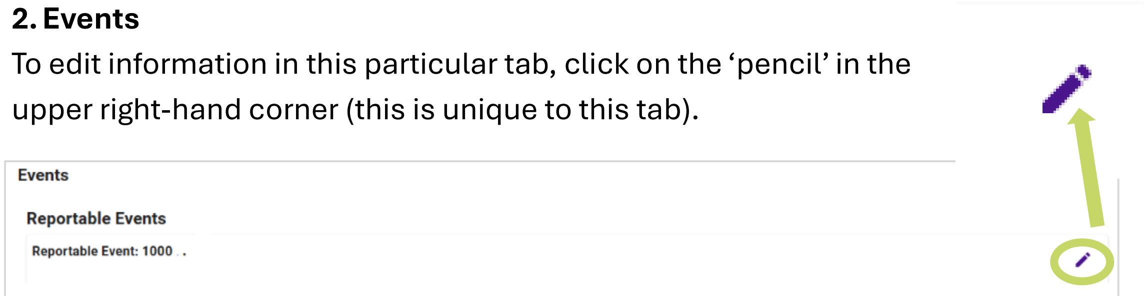
Save

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).



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

B. <u>Diagnosis Date</u>: Date case was diagnosed from HCP

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

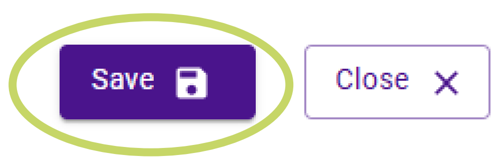
D. <u>Lab Results</u>: added Lab results from the HCP should be added here (not in the Lab tab). Details on how to add Labs is located in Section 4.3.

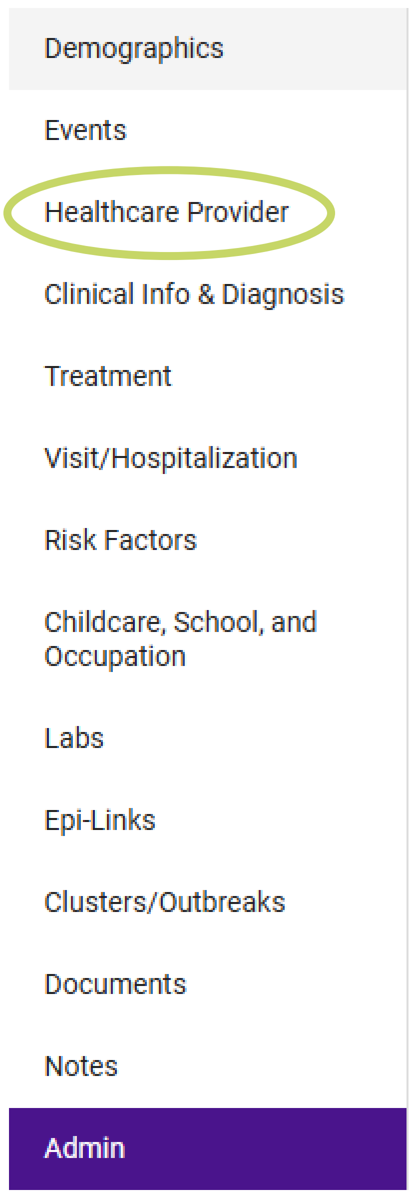
E. <u>Other Fields</u>: These fields will not be updated or changed

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.

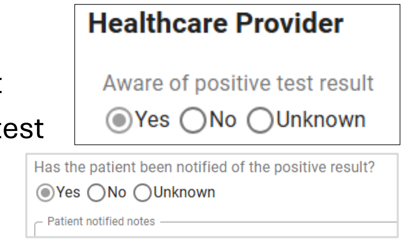
D. <u>Save</u>: click "Save" before navigating away from this tab. Closing without saving will not automatically save and the data will need to be re-entered.





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).

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.

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;

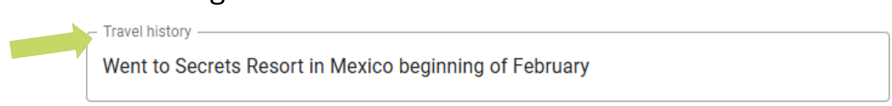
i. Click the "yes" radio button.

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

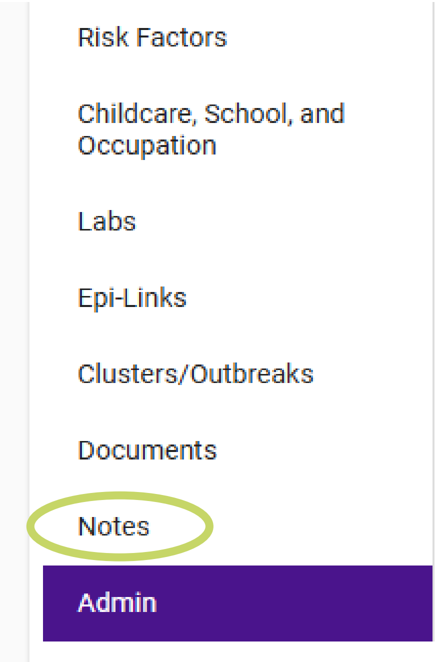
iii. Click "Save".

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.



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.



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 +"

ii. Enter any note information (source is not a required field)

iii. Save and Close

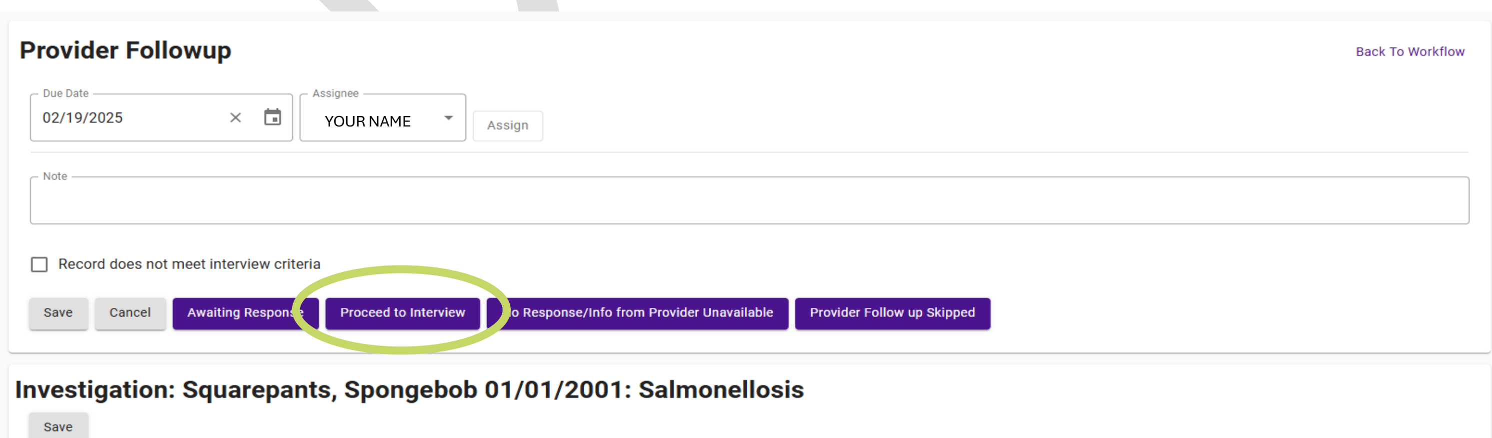
B. Edit a Note : Notes can be edited by clicking on the arrow and updating information directly in the Note box. (Reminder: grayed-out boxes can't be edited).

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.



7. Task Flow Outcomes

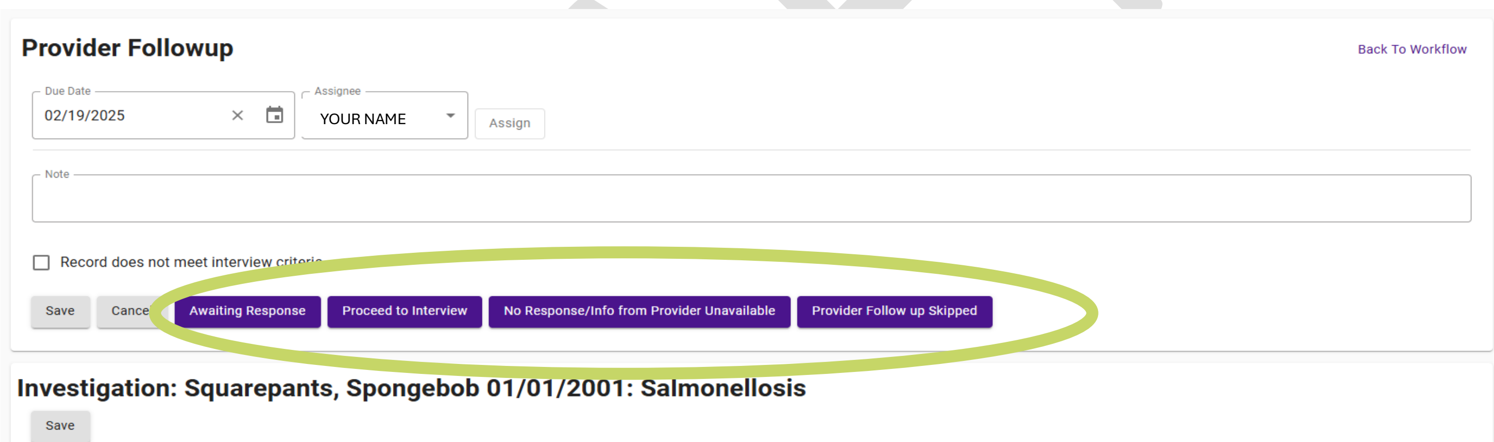
Each Task has an outcome, even if the Task wasn't completed as was shown previously in this section. After each attempt at a Task, there are multiple choices that will track the progress of the Investigation, as seen below. You may have multiple outcomes for each Task, depending on the outcome. For each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

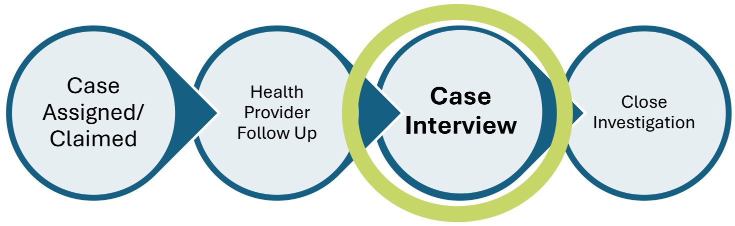
3) No Response/Info from Provider: Unable to reach HCP after multiple attempts or the provider is unable to be identified; the Task is complete and ready for the next Task in the Workflow.

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



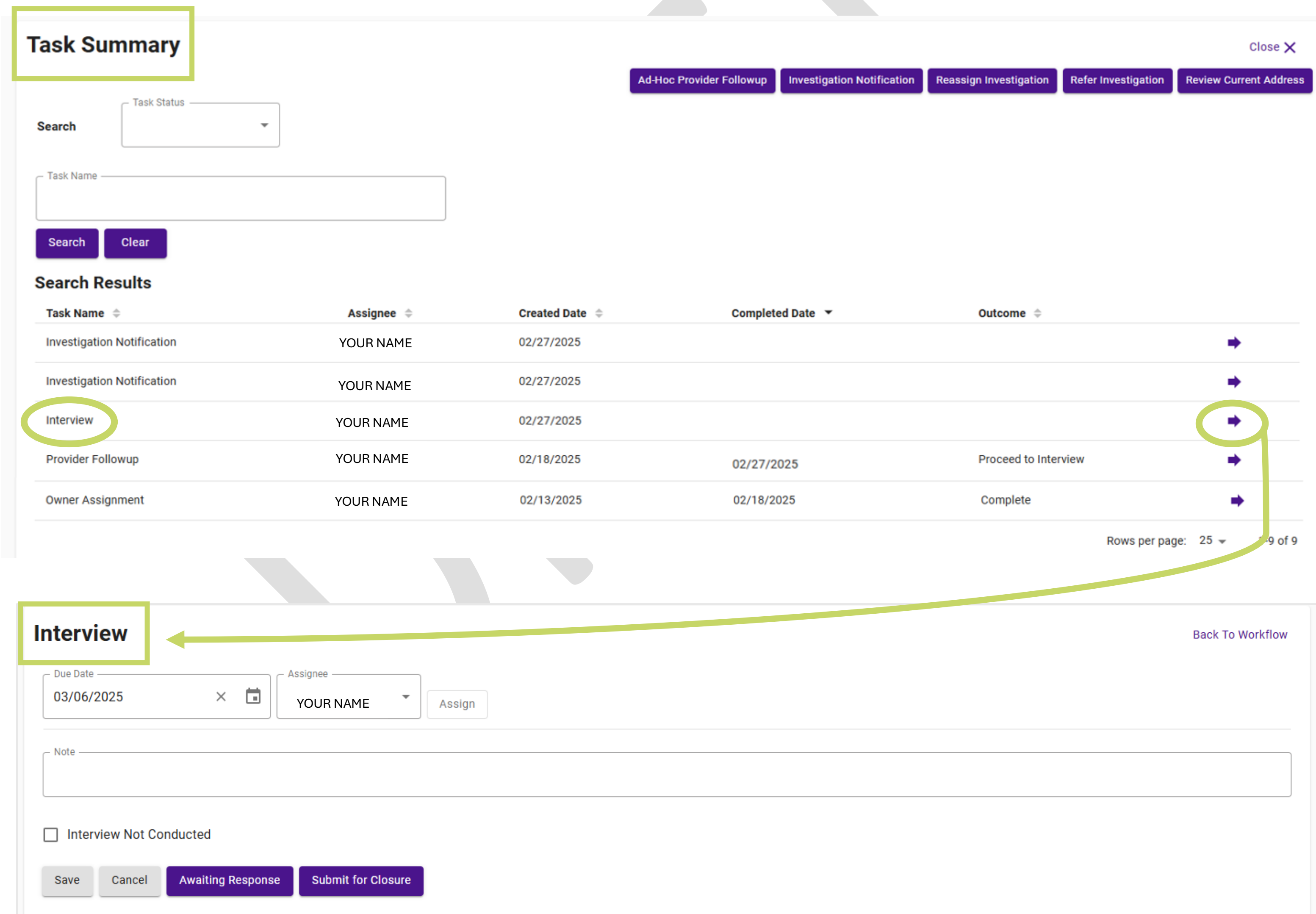
Section 3.4 GTKs (Good to Know)

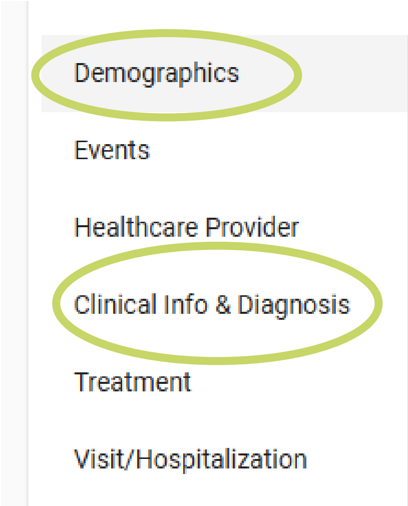
- Save, Save, Save! System time-outs will not keep unsaved work/data
- Most of the complex data will be entered with the "Create +" function
- Hospitalization and Treatment information will automatically be transferred to other tabs
- Facility information is found and entered in the Demographics tab 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.



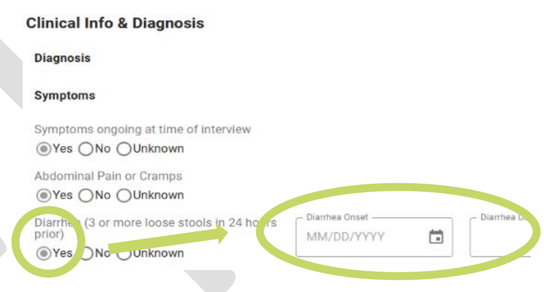


1. **Demographics**: Review demographic information and add any additional information provided from the patient directly.

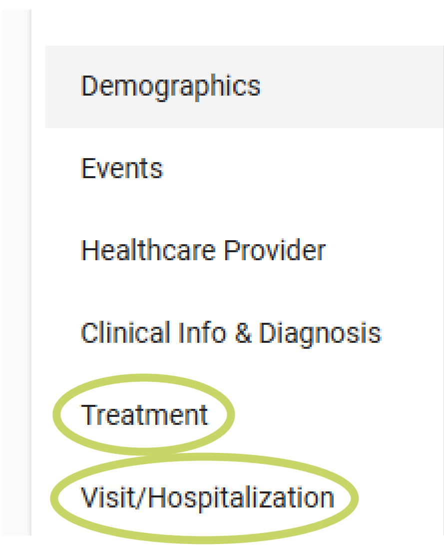
2. **Clinical Info & Diagnosis**: Enter symptom information provided from the patient.

A. Disease Specific: Symptom information gathered and recorded will vary according to disease

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



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

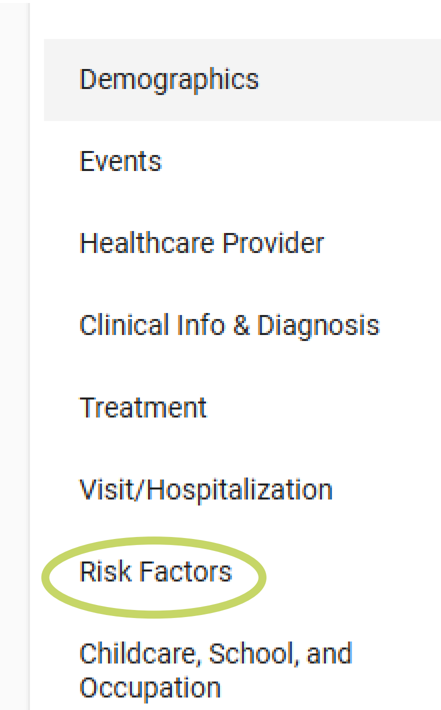


3. **Treatment:** Prescribed medications are listed here. Add any additional prescribed medications the patient has taken regarding this specific disease that has not already been disclosed by the HCP.

   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.

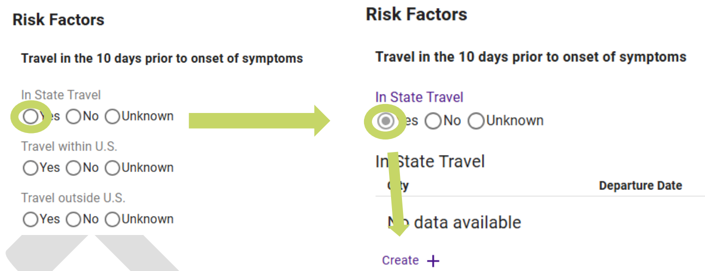


5. Risk Factors: Review all listed factors and questions with the case

Some overall tips for this section are:

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

B. Affirmative Answers



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 +

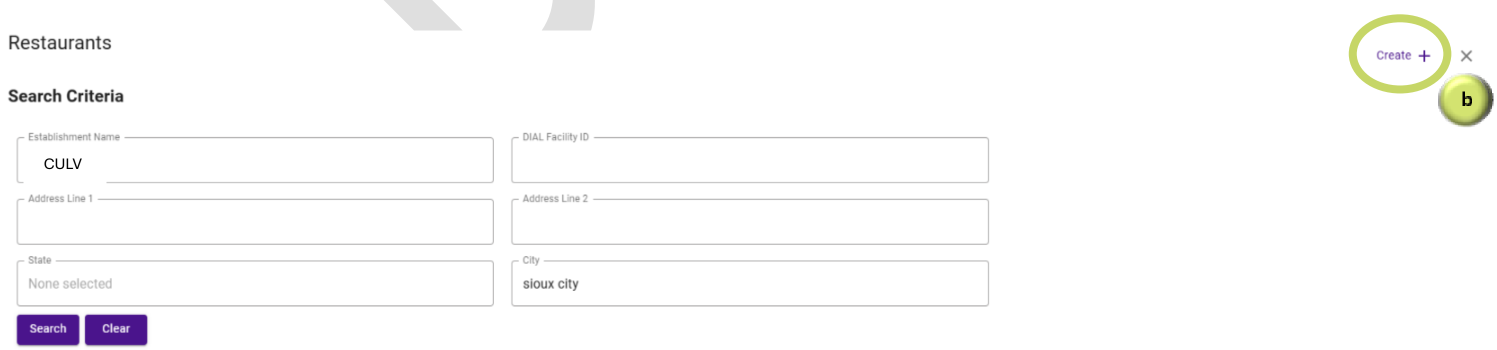
C. Searching: In some cases, there is pre-loaded information that can be searched and added (ex: Restaurant). Search by clicking on the magnifying glass. A new box will open up and you can enter the search criteria. In most cases, 'less is more' and partial names will yield more results. For example,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

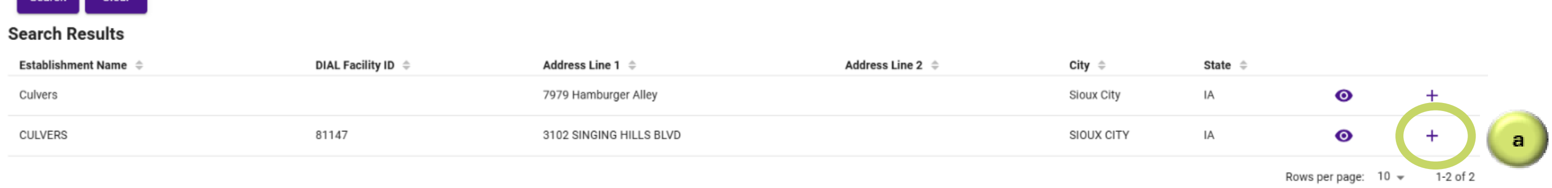
i. If establishment is found, click on the "+" button on the line of the correct location. It will auto-fill the information. Click "Save".

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".

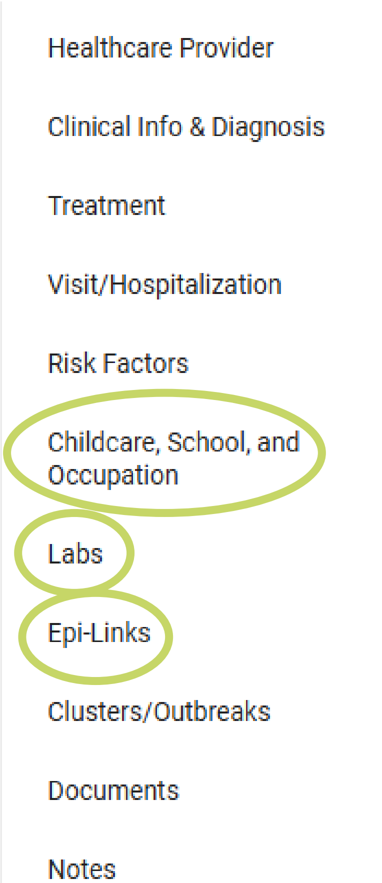
*NOTE: Newly created information will be added to the database and be searchable by **all**. Please ensure accuracy to avoid duplication.*

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





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		+



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 +

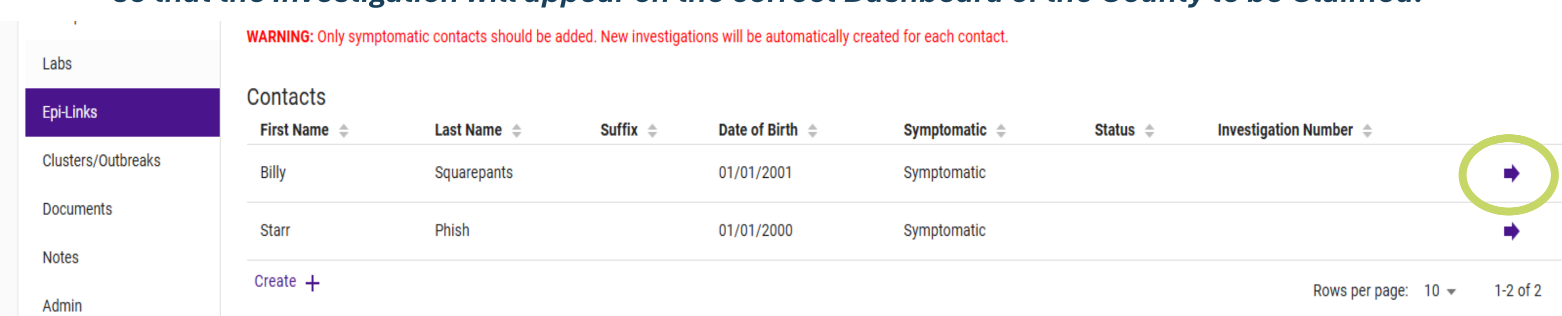
ii. Required fields are: First Name, Last Name, age (estimated age is available), and County.

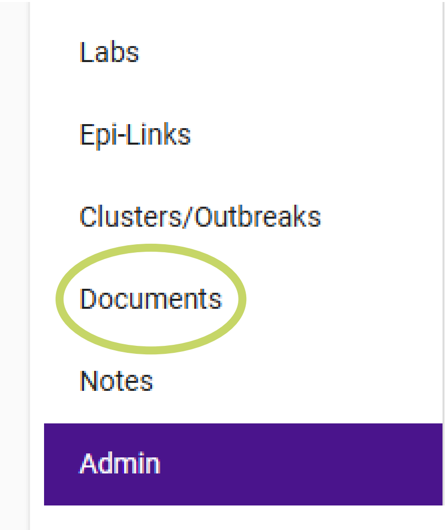
iii. Highly Recommended fields are: Address and Phone Number.

iv. Click "Save"; a new box will open with another option to add known Demographics. When completed, click "Save" and then "Close" Save

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.





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

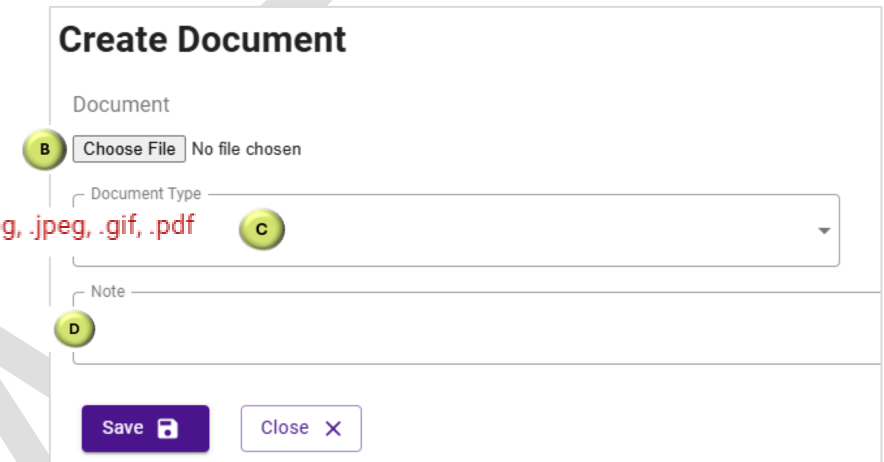
A. Click "Create +" to choose a file to add Create +

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

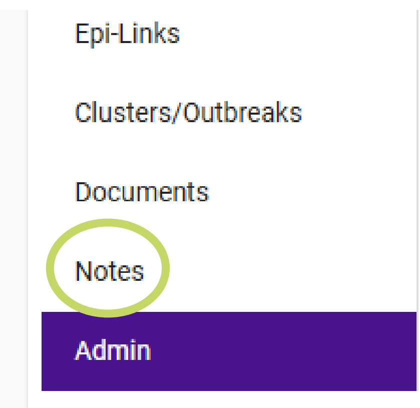
C. Choose from the drop-down list of eligible document type

D. Notes: add any needed notes describing the attachment

E. Click "Save" and then "Close"



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



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.

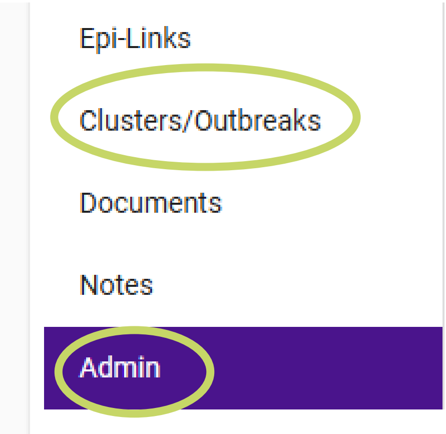
Notes

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



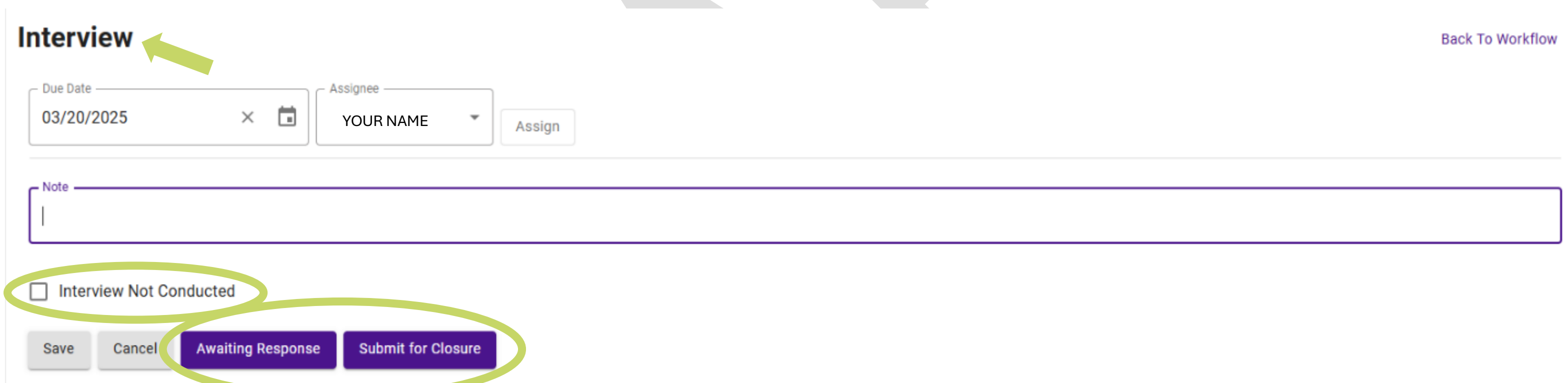
11. Other Tabs: Some tabs will not be regularly used during the Investigation Workflow.

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

B. <u>Clusters/Outbreaks</u>: 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, Submit for Closure, and Interview Not Conducted. A note explaining outcomes can be entered in this section.



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. Submit for Closure: 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.

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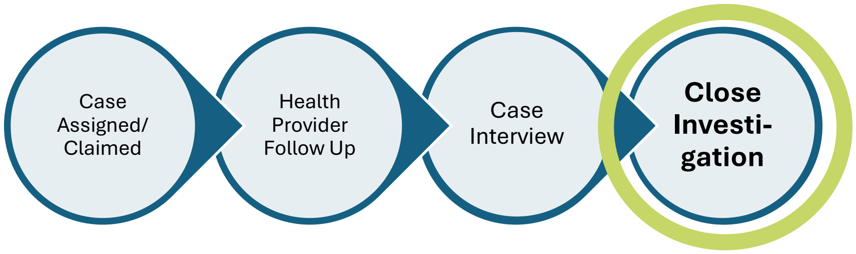
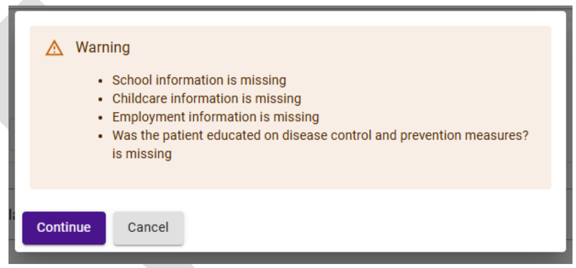
Health and
Human Services
Public Health



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 “Submit for Closure”, 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.

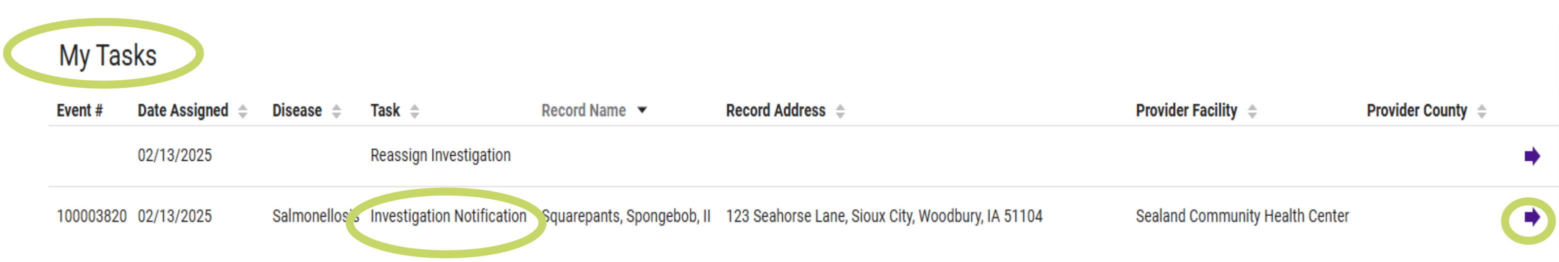
2. **Corrections:** If you choose to make corrections; once corrections are completed, return to the Task Summary Tile and select task “Submit for Closure”.

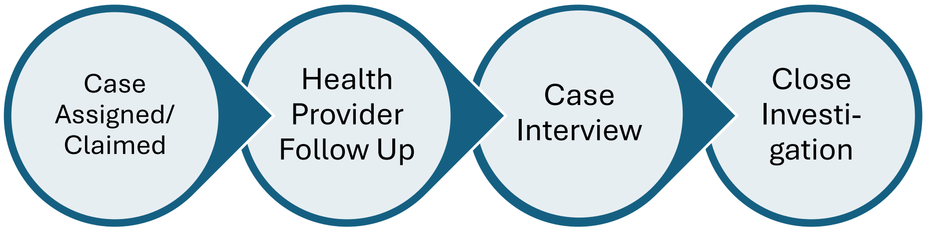
3. **Statusing:** The Task Summary shows “Review Investigation for Closure” for the next Task. This Task will be Claimed by a Statuser (not you).

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 completed by the State.

5. **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 (See below).

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



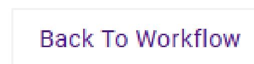


3.7 INVESTIGATION: GENERAL REMINDERS

1. Task Summary Tile Reminders

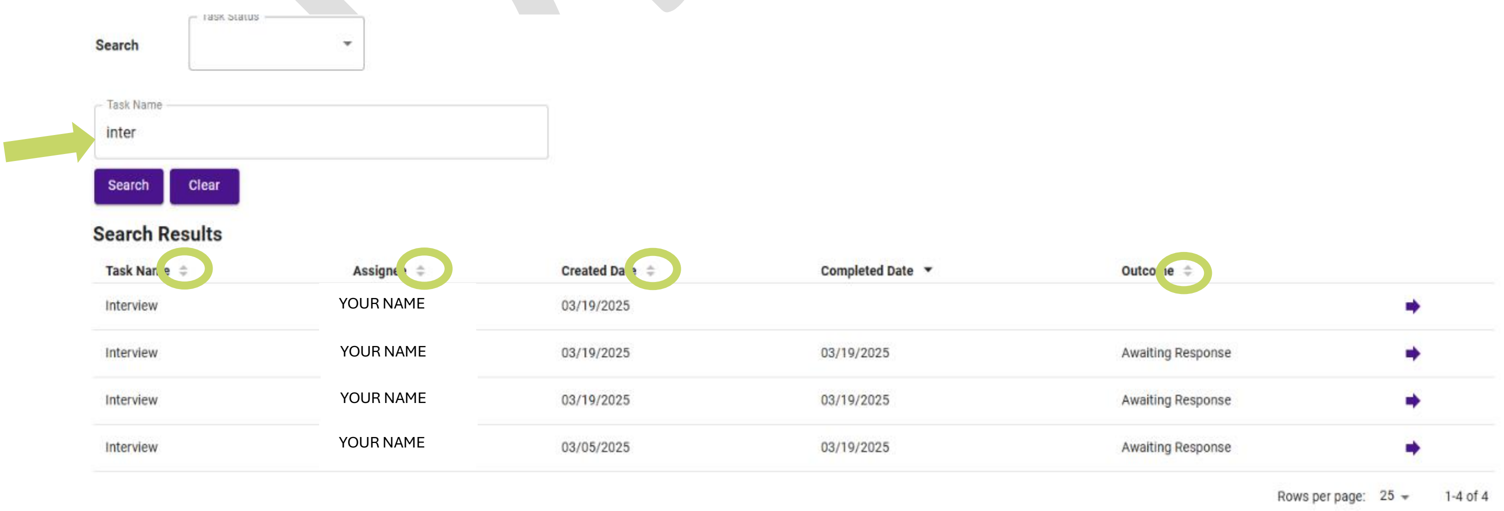
A. Workflow Tasks: the Task Summary is the Tile in an Investigation that shows all the of the Tasks initiated as start of the Investigation.

B. Viewing Tasks: 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.



C. Team Access: 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. Task Sorting/Searching: 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.



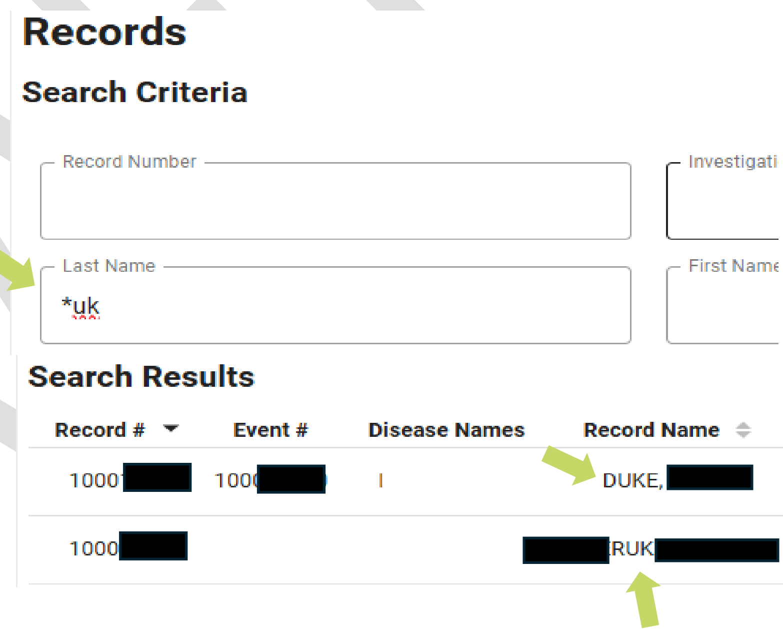
2. IDSS Searching Reminders

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.



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

E. Undo Search: 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. Duplicate Entries: 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

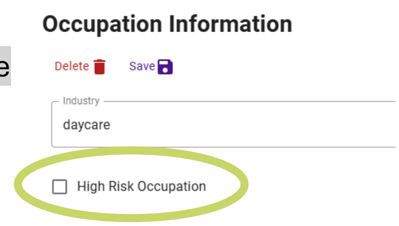
3.8 INVESTIGATION: HEALTH ORDERS

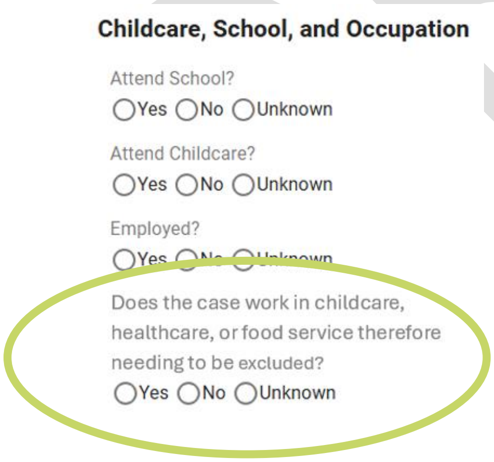
The previous Workflow is not disease-specific. Therefore, it does not cover all possible areas that need to be covered during some Investigations. Depending on the disease, there may be some other steps to take. In this Section, we will look at Exclusions and Health Orders.

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

A. Childcare/School: If applicable, click "yes" and enter the establishment information through "Create +"

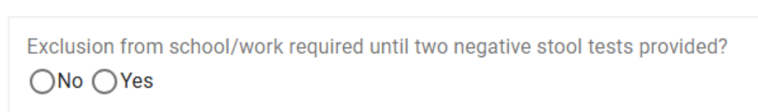
B. Employment: If applicable, click "yes" and add details through the "Create +" feature. In the Occupation Information box, mark "High Risk Occupation", as this will open up the ability to request a Health Order. Click "Save" and then "Close".



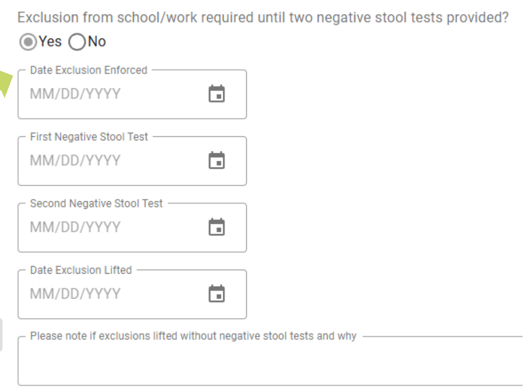


Future Change: Instead of clicking "High Risk Occupation"; answer the question "Does the care work in childcare, healthcare, or food service therefore needing to be excluded?" This question will trigger the option for a Health Order button in the Task Summary tile and replace the above information highlighted in gray.

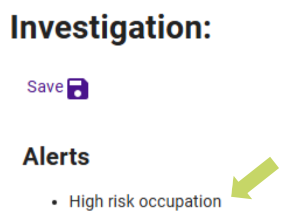
C. Exclusion: On the tab, choose if exclusion is needed.



D. Affirmative: If yes, fill dates as known



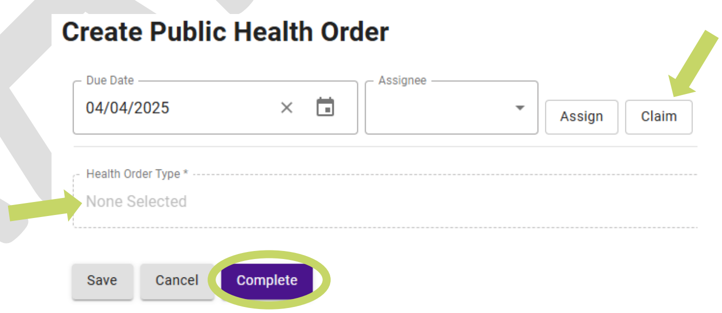
E. Alert: at the top of the Investigation page, you will see an Alert for High risk occupation.



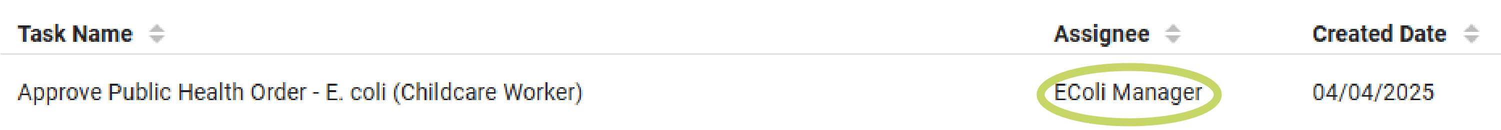
2. Health Order – Create an Order: If the above information warrants a Health Order, this will become part of the Workflow; Tasks will need to be assigned/claimed to complete an Order. Here, we will go through the steps of creating, requesting, executing, and ending and Order.

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

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



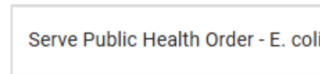
C. <u>Approve Health Order</u>: this task will automatically be assigned to the Disease Manager; in this case, the E.coli Manager. The address, names, and other information provided in the Investigation will automatically populate onto the order.



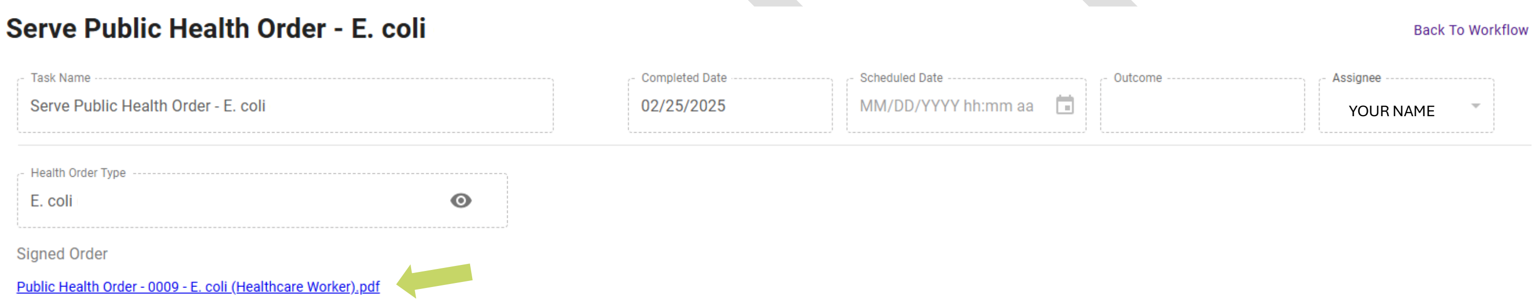
D. Issue Public Health Order: this Task will be automatically assigned to Senior or Field Epidemiologist to review, sign and return.

E. Alert: 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. Serve Public Health Order – Claim Task: Click on the Serve Public Health Order line in the Task Summary of the Investigation to Claim the Task.



G. Serve Public Health Order: The signed order will be available in PDF form to serve. Click “Complete” to finish the Task.



H. Task Complete: Serve Public Health Order. 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	Kemi Oni	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)	Chris Galeazzi	07/17/2025	07/17/2025	Complete
Approve Public Health Order - E. coli (Childcare Worker)	Chris Galeazzi	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. Release Public Health Order: Click on the Release Public Health Order button and complete needed information.

B. Claim Task: Claim or Assign this task

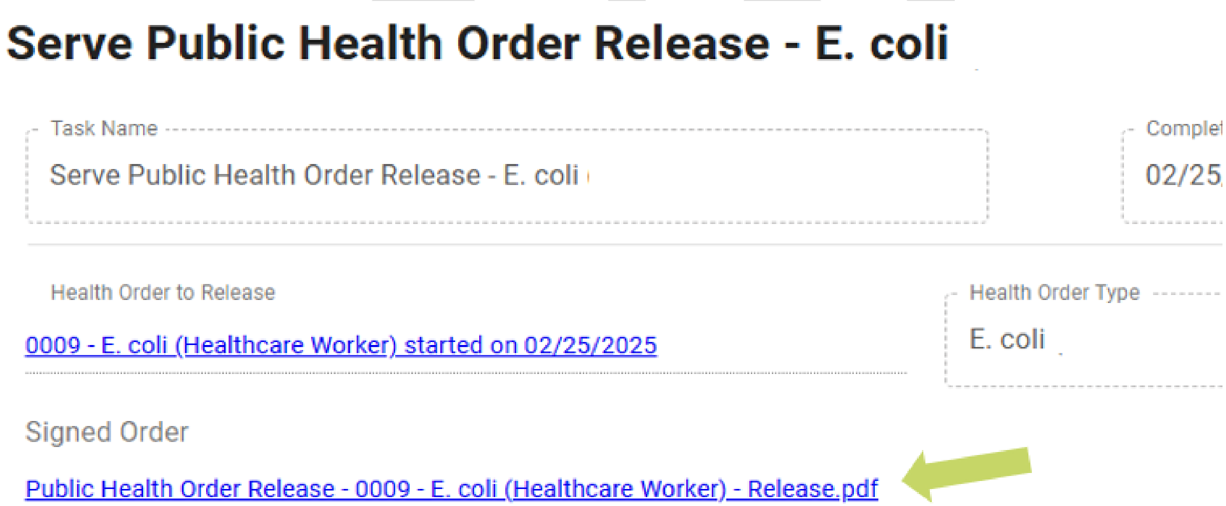
C. Approve Health Order Release: this task will automatically be assigned to the E.coli Manager

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

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

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

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



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.

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.

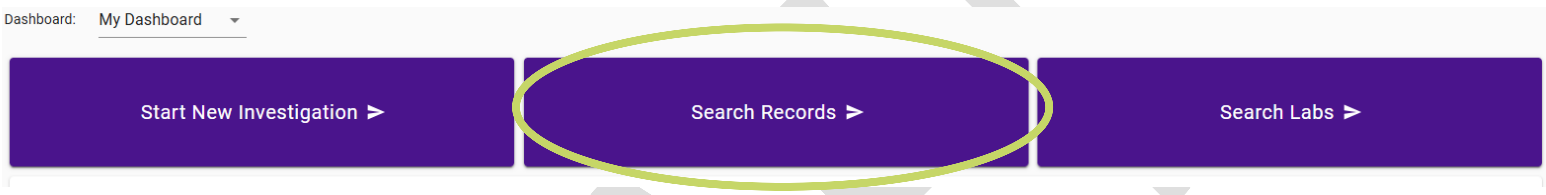
SECTION 4: CREATING

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.

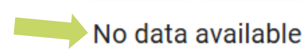
1. Search: before Creating a new Record, ***thoroughly*** search all Records in IDSS, keeping in mind partial names can be used to widen search results.



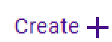
A. Dashboard – click the "Search Records" button on your Dashboard.

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.

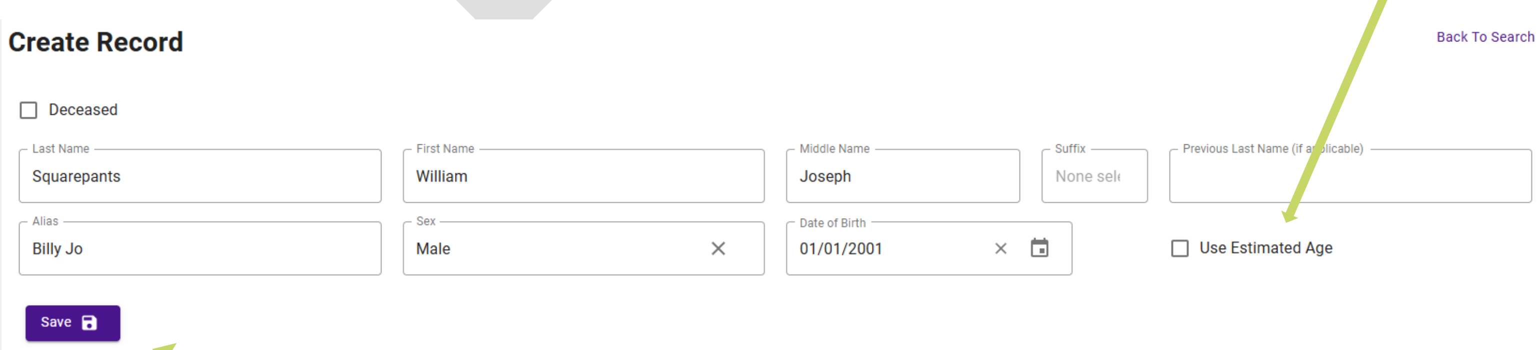


B. Complete – Fill in all known information for the new Record.

i. Required fields: First Name and Last Name; but all known information should be entered.

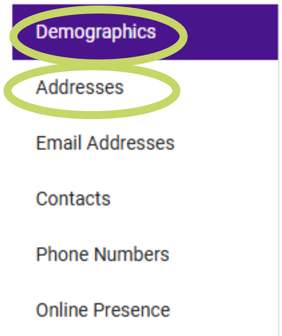
ii. Birthdate: If birthdate is not known, check the box for "Use Estimated Age" and enter the estimated age.

iv. Address: will be added later



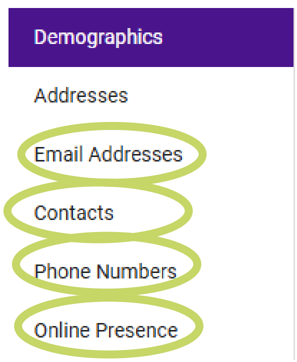
C. Save – Click "Save"

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



A. Demographics: complete all known demographics; if unknown, leave blank.

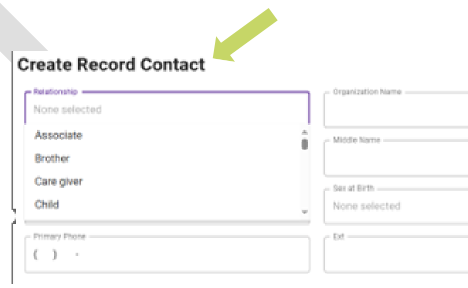
B. Address: enter known address by clicking on "Create +". If exact address is not known, be sure to capture at least the County of residence. Click "Save" and then "Close".



C. Email Addresses: Click on "Add Row +" and enter any known email addresses.

NOTE: clicking the red "x" will delete the information.

D. Contacts: 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. Phone Numbers: Click on "Add Row +" to enter phone numbers for the Record.

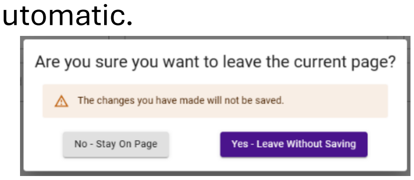
NOTE: clicking the red "x" will delete the information.

F. Online Presence: Click on "Add Row +" to enter phone numbers for the Record.

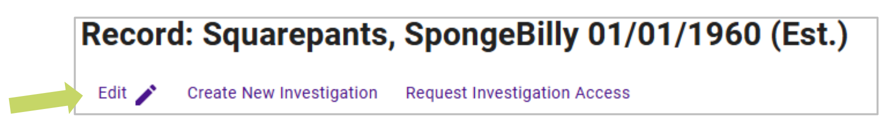
NOTE: clicking the red "x" will delete the information.

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

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



B. Edit/View: 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.

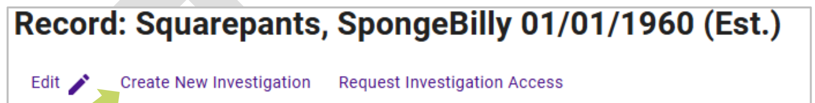


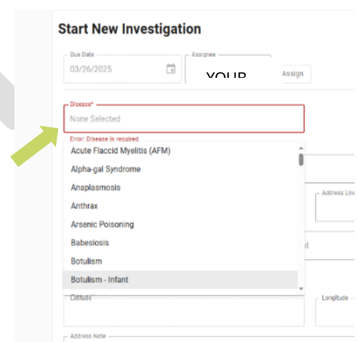
4.2 CREATING A NEW INVESTIGATION

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.

<u>1. Create Investigation from Newly Created Record:</u> 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





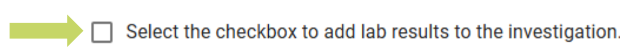
A. <u>Complete Investigation Information</u>: unlike Claimed or Assigned Investigations that are added through ELR, when an Investigation is created there is missing information that needs to be completed.

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*.

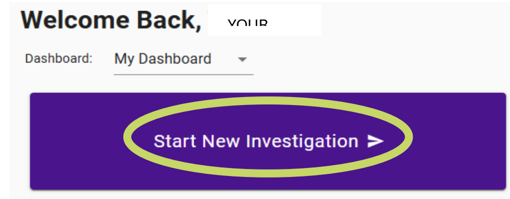
B. <u>Complete Lab Information</u>**:** Select the checkbox to add lab results.



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.

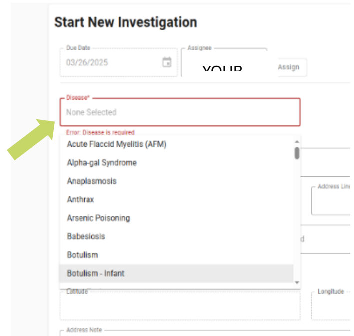


A. Complete Investigation Information: unlike Claimed or Assigned Investigations that are added through ELR, when an Investigation is created there is missing information that needs to be completed.

i. Disease: select from drop down list.

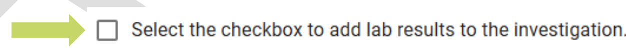
ii. Search Records (existing Record): Click on the magnifying glass and enter search criteria.

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.

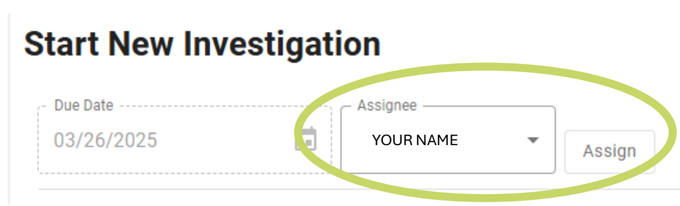


i. Add known Lab information (see Section 4.3 for detailed instructions)

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.

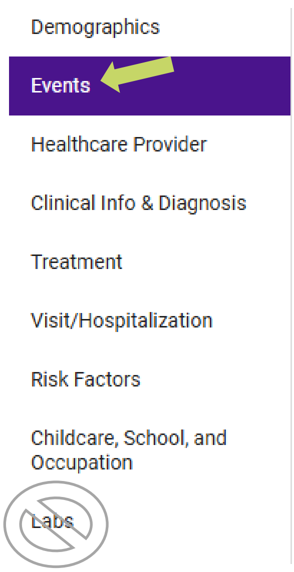
4.3 CREATING LAB RESULTS

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)



   B. Basic Lab Information

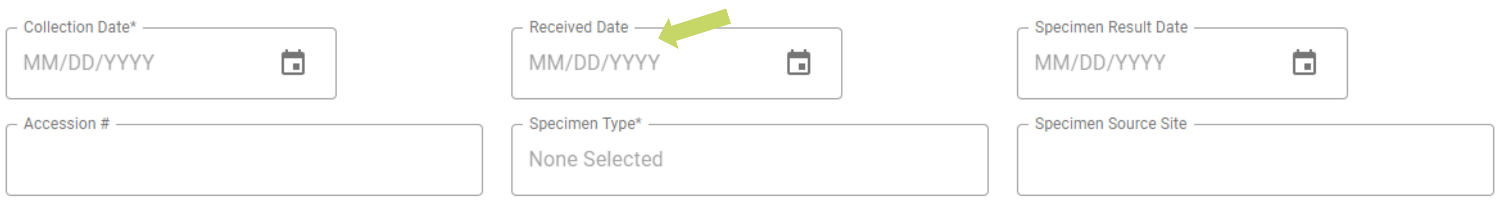
   i. Required Fields: must enter to proceed and are denoted by an asterisk*

   •Collection Date

   •Specimen Type

   ii. Optional Fields: complete if known

   - Received Date
   - Specimen Result Date
   - Accession #
   - Specimen Source Site



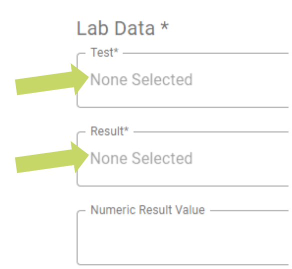
C. Lab Data

i. Required Fields: must enter to proceed

- Test: click anywhere in the box to select from pre-set Test options.

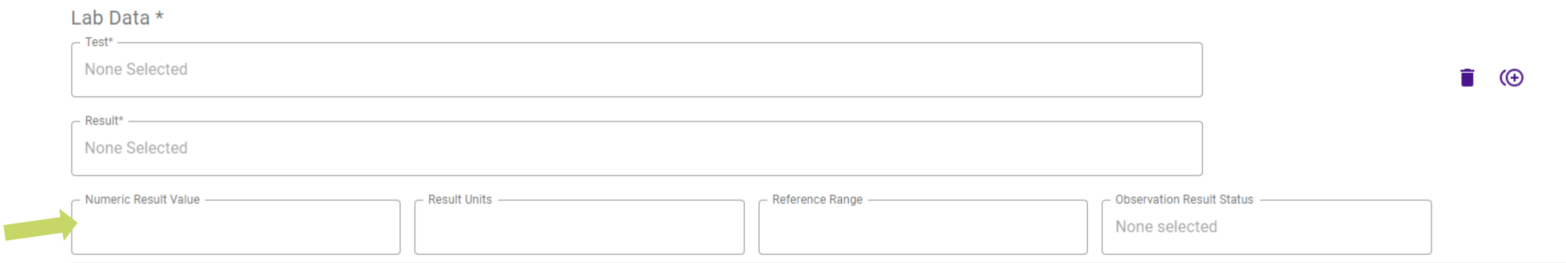
  NOTE: narrow options by typing the first part of the test name

- Result: click anywhere in the box to select from pre-set options



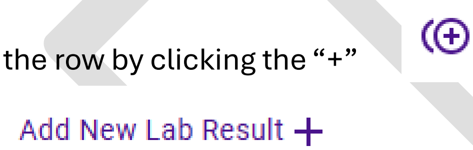
ii. Optional Fields: complete if known

- Numeric Result Value
- Result Units
- Reference Range
- Observation Result Status



D. Additional Lab Results

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



E. Facility Information

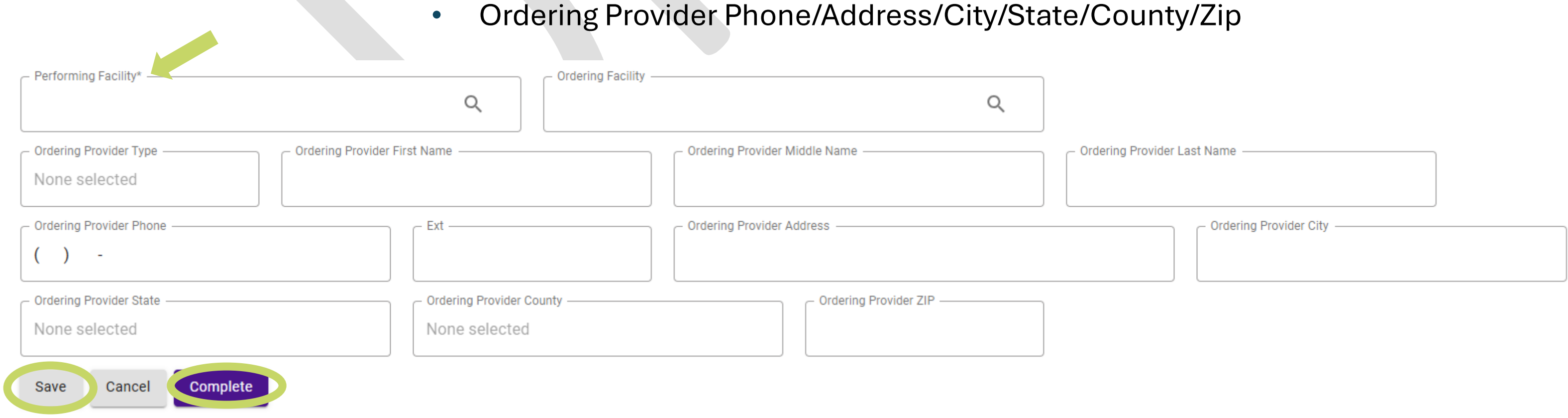
i. Required Fields: must enter to proceed

- Performing Facility

NOTE: narrow options by typing a partial name

ii. Optional Fields: complete if known

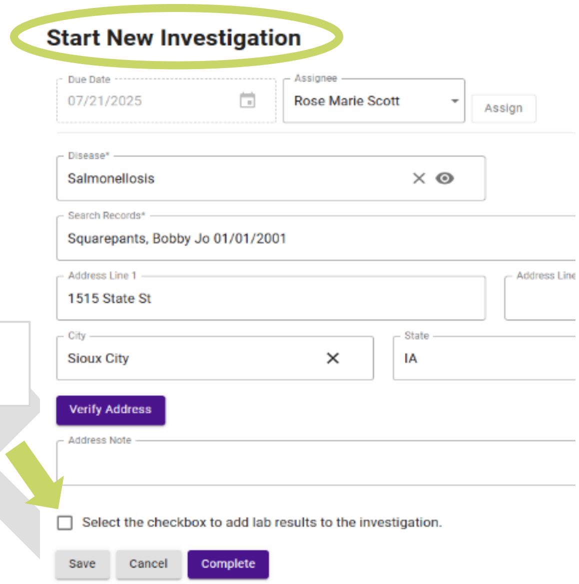
- Ordering Facility
- Ordering Provider Type
- Ordering Provider First Name/Middle Name/Last Name
- Ordering Provider Phone/Address/City/State/County/Zip



F. **Complete**

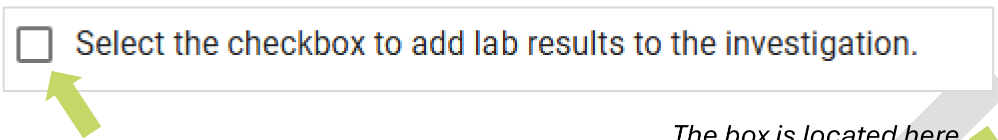
A. Click "Save" - if there is missing information, an error message will appear

B. Click "Complete" to close the Lab Results box.



2. Adding Lab Results to a newly Created Investigation:

A. Select Checkbox



The box is located here

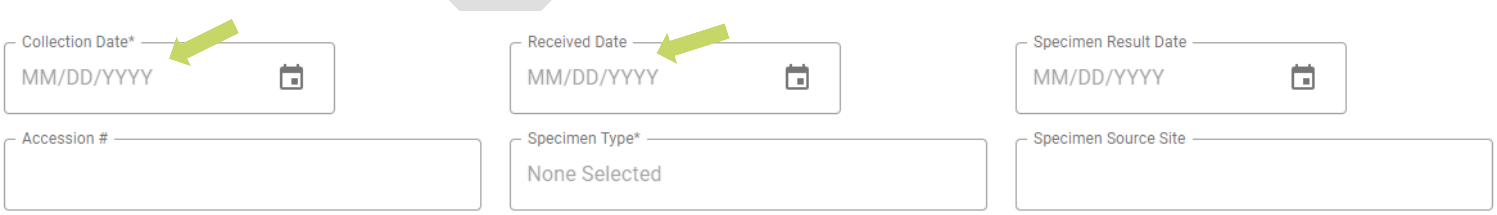
B. Basic Lab Information

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

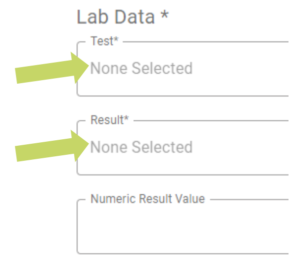


C. Lab Data

i. Required Fields: must enter to proceed

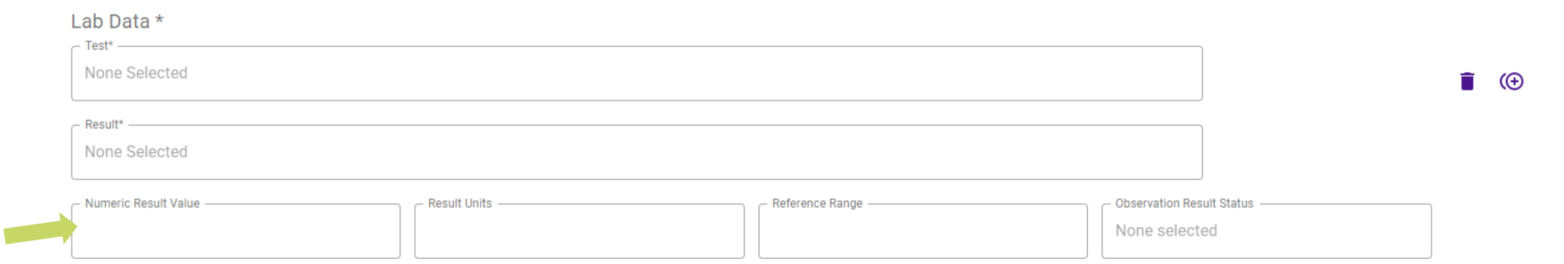
- Test: click anywhere in the box to select from pre-set Test options.

  NOTE: narrow options by typing the first part of the test name
- Result: click anywhere in the box to select from pre-set options



ii. Optional Fields: complete if known

- Numeric Result Value
- Result Units
- Reference Range
- Observation Result Status



D. Additional Lab Results

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

E. Facility Information

i. Required Fields: must enter to proceed

- Performing Facility

  NOTE: narrow options by typing a partial name

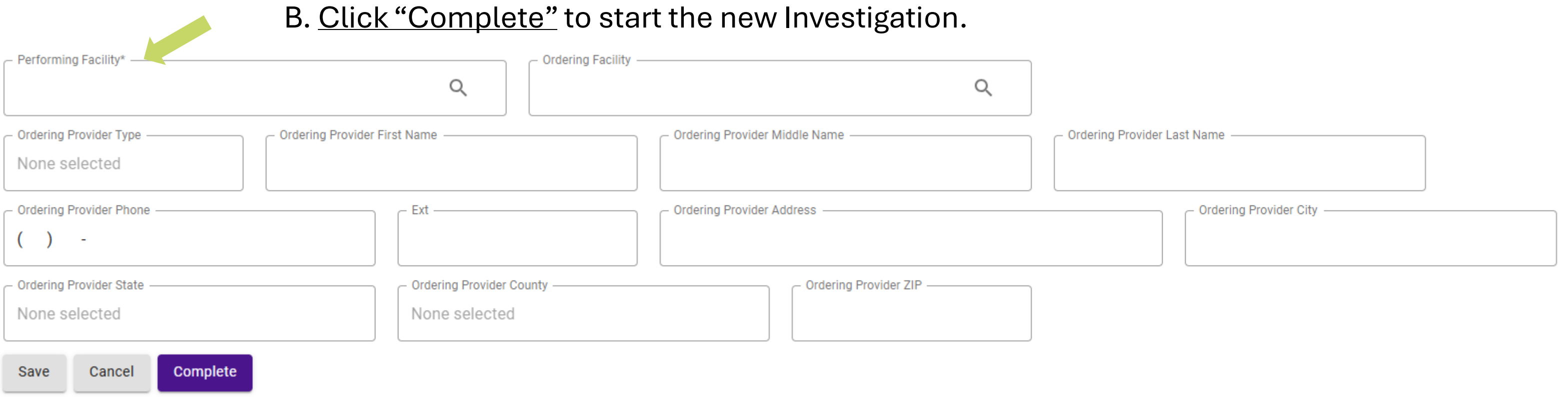
ii. Optional Fields: complete if known

- Ordering Facility
- Ordering Provider Type
- Ordering Provider First Name/Middle Name/Last Name
- Ordering Provider Phone/Address/City/State/County/Zip

F. **Complete**

A. Click "Save" - if there is missing information, an error message will appear

B. Click "Complete" to start the new Investigation.

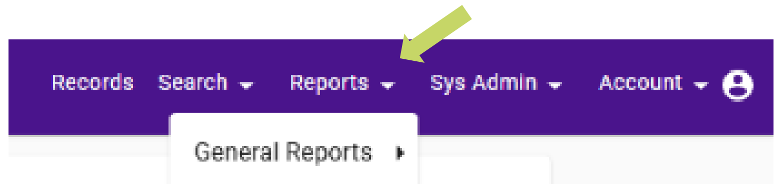


Section 4 GTKs (Good to Know)

- 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.

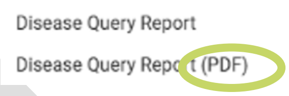


5.1 BASIC REPORT INFORMATION

A. Reports are listed alphabetically

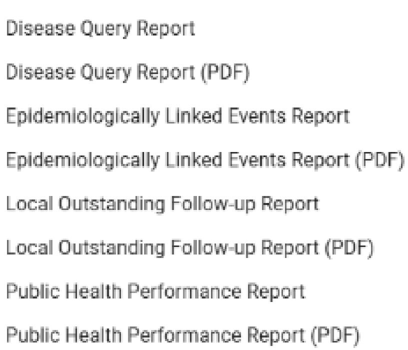
B. When a report has parameters entered that will yield no results the report should show the Title, Parameters, text that reads "No Data Available".

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



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)

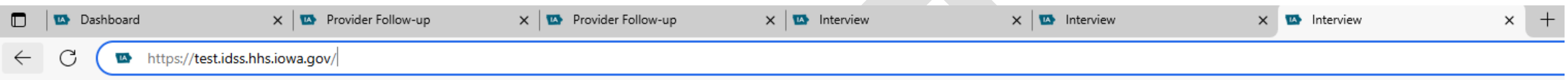
- If you currently request Reports to Regional Field Epis, you may continue to do so
- Report-like data for Investigation counts in the county is found on My Dashboard; not Reports
- My Dashboard has many report-like features (eg: Local Outstanding Report). This enables a quick view of LPH Investigations and statuses without a cumbersome report process.

SECTION 6: FEATURES

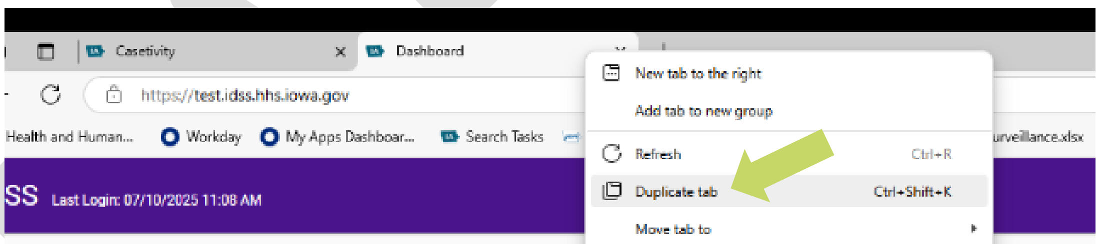
There are key features with IDSS that address some of the concerns with previous surveillance systems used before. This section will highlight some of the most useful features.

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.



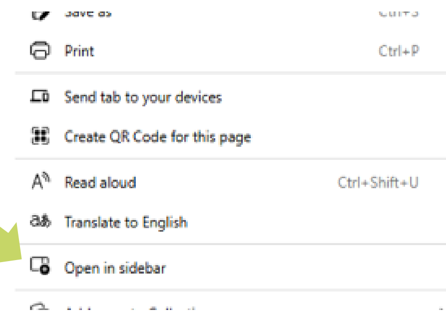
A. <u>Shortcut:</u> White the Investigation is up, press and hold “Control+Shift” and tap “K”. A browser window with the same Investigation will open and you can navigate to other Sidebar Tabs that contain Contacts, Partners, ect; while leaving the primary case open in the first window.

OR

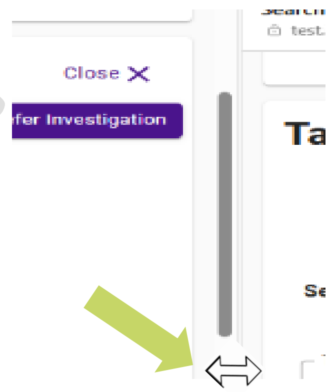
B. <u>Menu</u>: On the current Investigation, right-click on the top tab of your browser
C. <u>Choose</u> “Duplicate tab”
D. <u>Another tab</u> will open and mirror the Investigation you are currently on
E. <u>Navigate</u>: You can then navigate to tabs with Contacts, Partners, etc and update any information 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. Menu: Right-clicking anywhere on the Task Summary will open a menu.



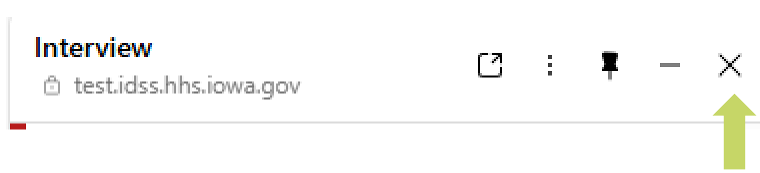
   B. Split: Chose "Open in Sidebar" to split the current screen to navigate through multiple Investigations on the same screen. The Sidebar will always be on the right side of the screen.



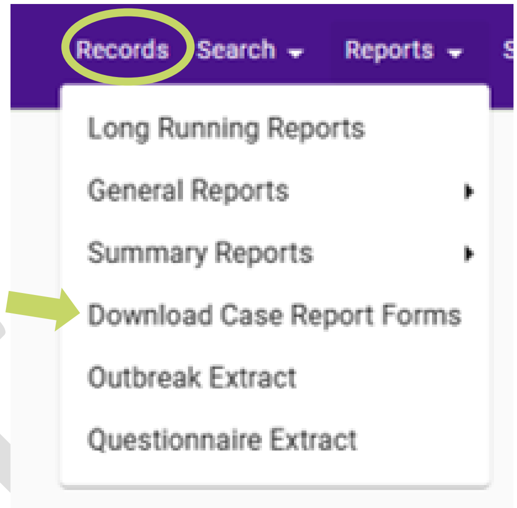
   C. Adjust: The sidebar screen can be widened for a better viewing area by hovering over the gray slider bar until the double white arrows appear. Then click, hold, and then drag the white double arrows to the right or left to widen or shrink the sidebar window.

   D. Maximize: 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. Close: To close the sidebar, **save** your completed work and then click on the "x" in the upper right corner.



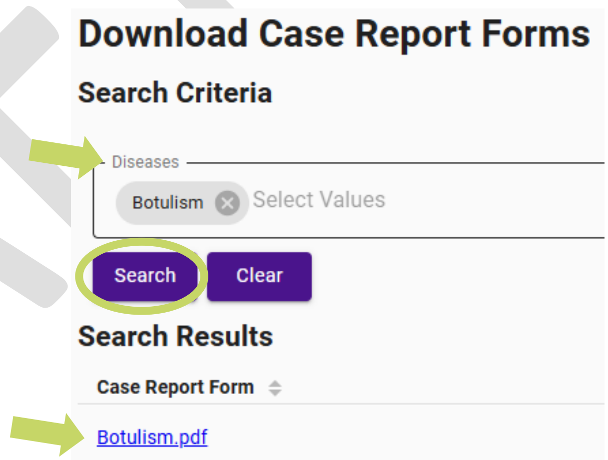
6.2 HELPFUL TOOLS



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

   A. Go to the Reports drop-down menu

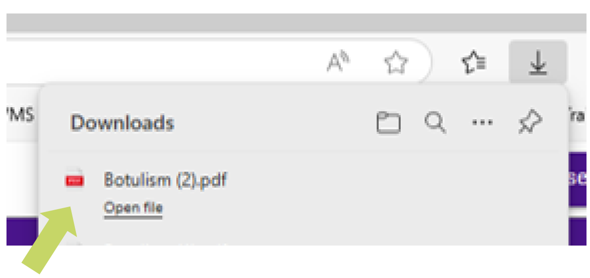
   B. Select "Download Case Report Forms"



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

   D. Select .pdf to download form

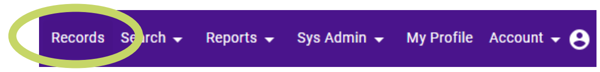
   E. Open downloaded form



2. IDSS Record Search

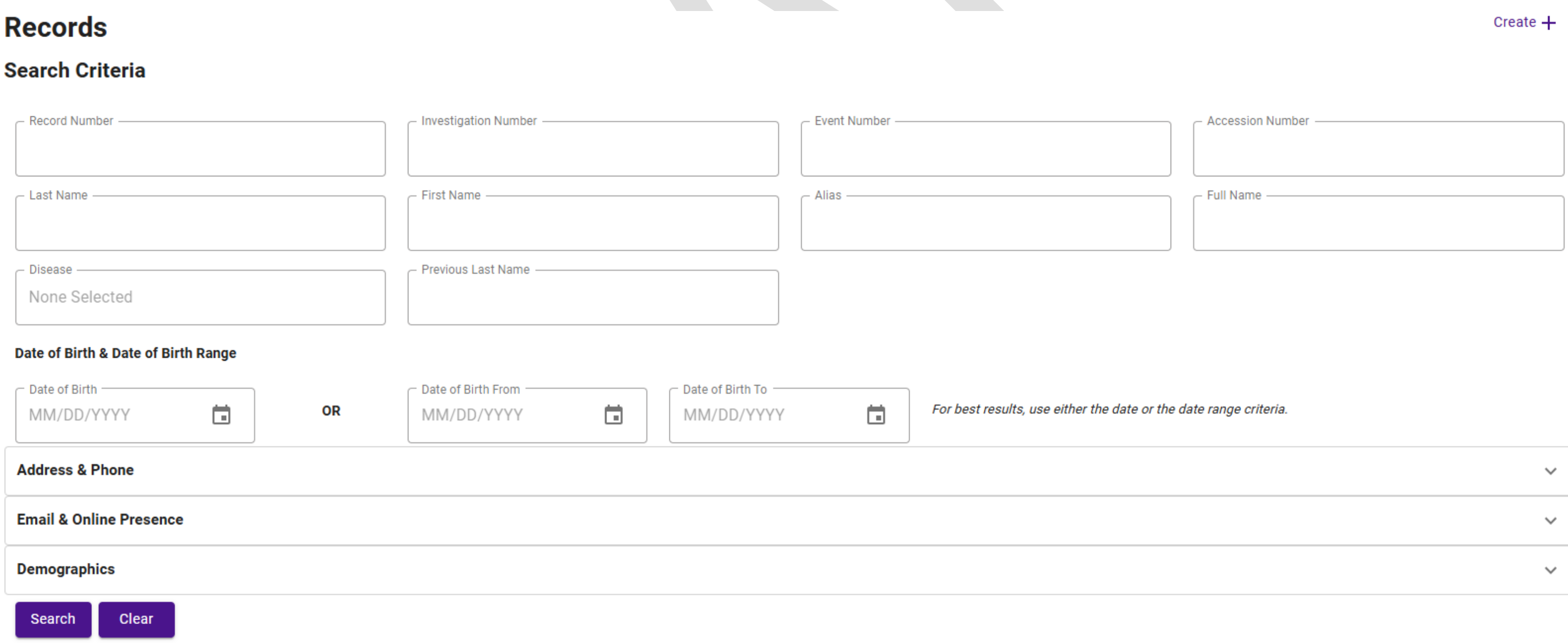
All Records are available for viewing for all IDSS users; however, Investigations are limited to User Rule. This is a detailed look on how to search for Records. For more tips on how to enter information into Criteria fields, review Section 3.7.2.

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



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)

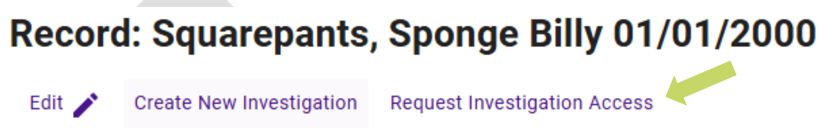


6.3 ACCESS PROCESSES

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. 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.

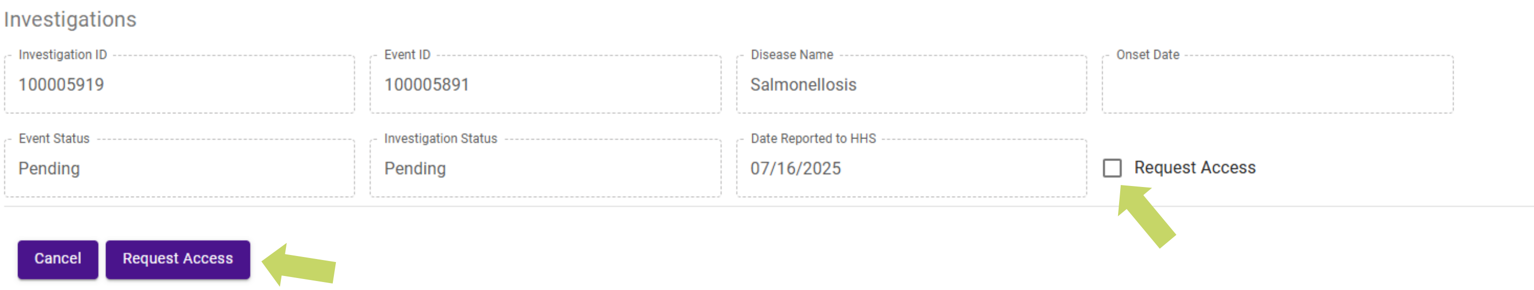
   B. Request: Select "Request Investigation Access"



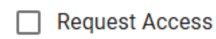
   C. Complete Required Fields:
      i. Disease (drop down selection)
      ii. Reason: (drop down selection)
         1. Assisting another jurisdiction
         2. Epi-Linked Case – out of jurisdiction
         3. Investigation is part of an outbreak in my jurisdiction
         4. Manually add a new lab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

   D. Click "Search"

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



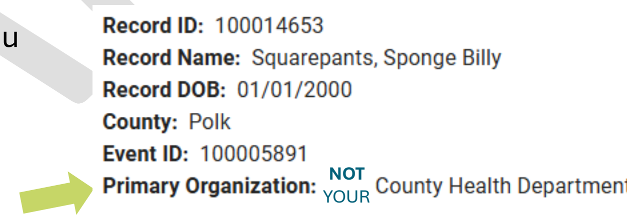
F. Click on the "Request Access" checkbox of the correct Investigation, as there may be more than one Investigation listed in the Workflow initially.



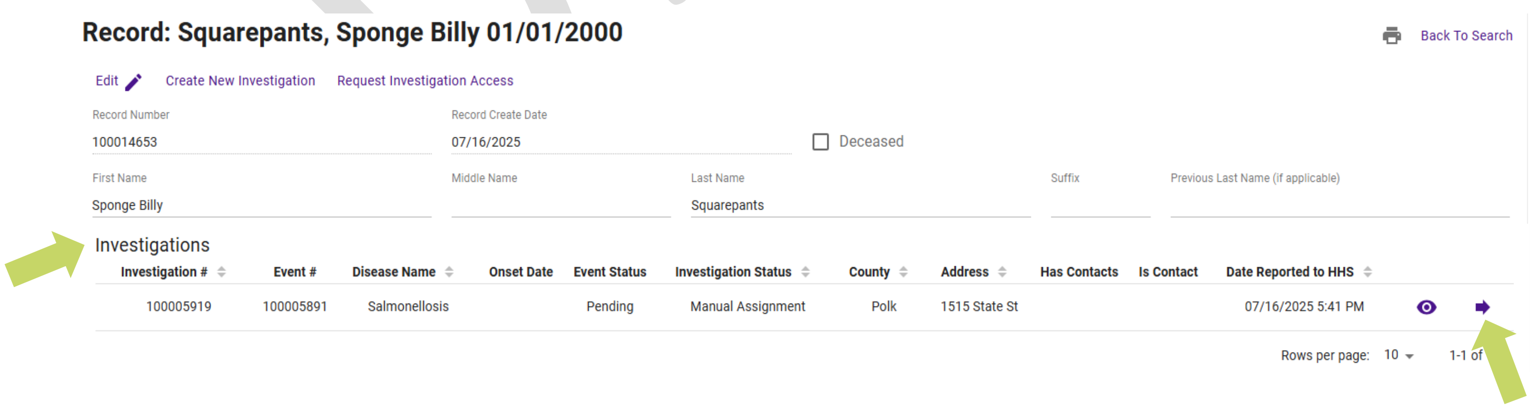
G. Click "Request Access"

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.

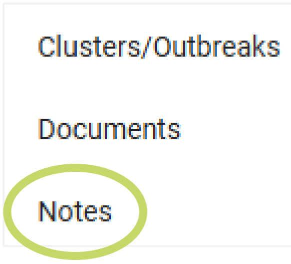


J. Select Investigation: This time when you search for the Record, you will see the Investigation is now available to select.



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).

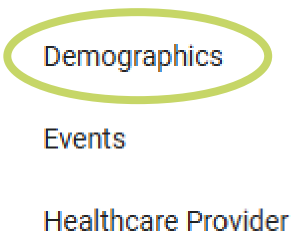


A. Notes Tab: make any applicable notes on the Investigation in the Notes tab.

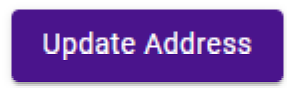
NOTE: It is important to do this step first, as once the address is updated, you will no longer have access to the Investigation because the Investigation will no longer be in your jurisdiction.

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

C. Save: once all information has been entered; Save. Investigation because the Investigation will no longer be in your jurisdiction



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



NOTE: As soon as "Update Address" is clicked; 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, it should be the LAST action in updating any information in the case.

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

IDSS 2.0 application 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.

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

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

C. 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 2.0 platform.

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

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, as covered in Sections 1-6 of the CADE User Guide.**

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