

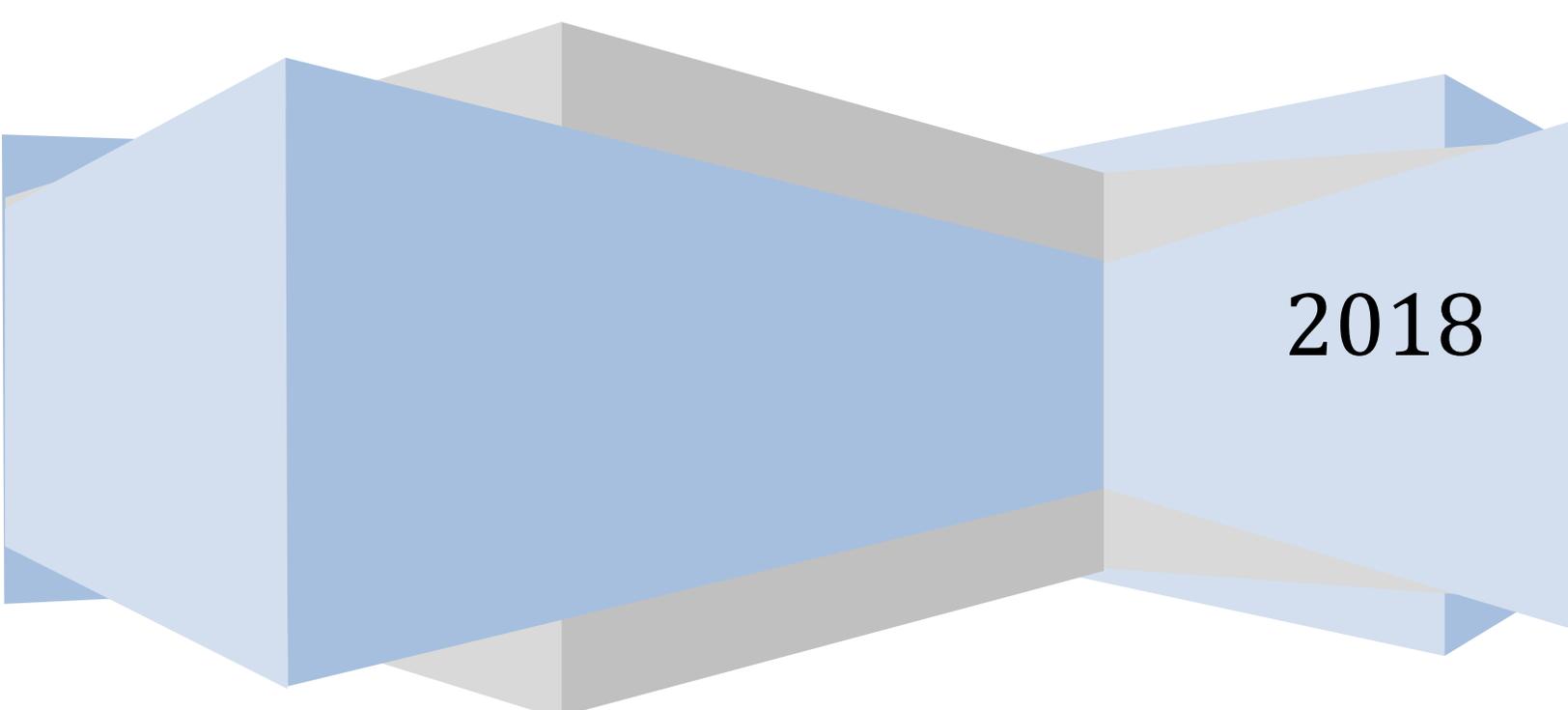


WDRS

Washington Disease Reporting System

Washington Disease Reporting System Quick Reference Guide

Washington State Department of Health



2018



DOH 420-233 July 2018

This guide is non-exhaustive. Please direct questions on topics not covered in this guide to your disease-specific point of contact.

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 **Questions?**

Contact the Washington State Department of Health

Office of Communicable Disease Epidemiology

Email: CommDisEpi@doh.wa.gov | Phone: (206) 418-5500

Contact information by disease area can be found in the [New LHJ CD Epi Investigator Manual](#)

Hepatitis Program

General Hepatitis C Email hepatitis@doh.wa.gov

General Hepatitis B/D Email: CommDisEpi@doh.wa.gov

Blood Lead Program

Email: lead@doh.wa.gov | Phone: 360-236-4280

Tuberculosis Program

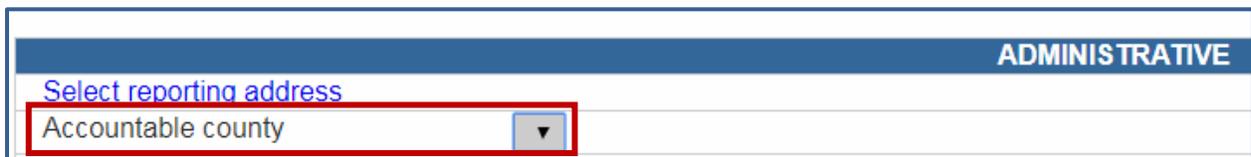
Email: tbservices@doh.wa.gov | Phone: 360-236-3443

Disclaimer: The examples used in this reference guide are fictitious. Any resemblance between any person or case illustrated in this reference guide and an actual person or case is purely coincidental.

For persons with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-525-0127 (TDD/TTY call 711).

How to Assign the Accountable County on an Event

As an investigator, you will be able to see all events defined by your group security, or LHJ(s). If you are a Thurston County investigator, you will only see events in which Thurston County is the Accountable County, as defined by the read-only, grayed out field in each wizard (shown below). This field populates when you select from addresses input when you create an event or update person information. If the accountable county is not in your jurisdiction, you will not see the event.



The screenshot shows a software interface with a blue header bar labeled "ADMINISTRATIVE". Below the header, there is a link that says "Select reporting address". Underneath this link is a dropdown menu with the text "Accountable county" and a small downward-pointing arrow. A red rectangular box highlights the "Accountable county" dropdown menu.

Ensuring your colleagues are able to see an event is a two-step process called 'Assigning the accountable county' for an event.

Step 1: Input the Person's Address

An address can be input when creating the event (address fields are at the bottom of the create event screen) [left image below] or by adding an address to the person by navigating to the Persons tab, editing the person, and adding the address [right image below].

If you do not know the person's address, simply input your county in the county drop down field.

Adding an address when creating the event

Contact Information

Address Type:*
Home

Street 1:

City: State: Zip Code:
WA

County: Country:
USA

Survey Email:

Residence Type: Address Status:

Select Person... Clear

Save Cancel Help

Adding an address via the Persons tab

Event Summary

Basic Information

Event ID: 100000983
Disease: Campylobacteriosis
Person: John Snow ()
Dates: Create Date: 06/27/2018
Type: Interactive
Investigation Status: Open
Linked Events/Contacts: 0 linked event(s)/contact(s) (View)
Attachments: 0 attachment(s) (Add)
Notices: **Workflow Status (1)**
Event is in workflows (View List)
General Notifications (1)
Vital Status: Alive

Edit Event Properties Copy Event

Event Data Lab Results Concerns **Persons**

Persons

Name	Sex assigned at birth
John Snow	

Edit Person

Step 2: Select the Reporting Address in the Wizard

Navigate to the wizard of the event and a blue link to 'Select the reporting address...' will be present at the top of each General Communicable Diseases (GCD) wizard and near the top of each Hepatitis wizard

Event Data Lab Results Concerns Persons Tasks Sun

Question Packages

Question Package	Person	Last Update
Administrative	John Snow	06/27/2018
Demographics	John Snow	06/27/2018
Clinical and Laboratory	John Snow	06/27/2018
Risk and Response	John Snow	06/27/2018
Transmission Tracking	John Snow	06/27/2018
Treatment	John Snow	06/27/2018
Contact Tracing Form	John Snow	06/27/2018
▶ Case Classification	John Snow	06/27/2018
CDC Notification	John Snow	06/27/2018

View Question Package Wizards **Campylobacteriosis** View Wizard

General Communicable Diseases	Hepatitis
<div style="border: 1px solid red; padding: 2px;"> <p>Select reporting address</p> <p>Accountable county ▼</p> </div> <p>Investigator</p> <p>LHJ Case ID (optional)</p> <p>LHJ notification date MM/DD/YYYY <input type="text"/></p> <p>Case classification ▼</p> <p>Investigation status</p>	<div style="border: 1px solid red; padding: 2px;"> <p>Select the reporting address to assign the county of diagnosis ←</p> <p>Street address</p> <p>Street address 2</p> <p>City</p> <p>State ▼</p> <p>Zip code</p> <p>County</p> <p>Country</p> <p>Address type ▼</p> <p>Address within city limits ▼</p> <div style="border: 1px solid red; padding: 2px;"> <p>* County of diagnosis (accountable county) ▼</p> </div> </div>

You will be presented with a list of addresses that have been input on this person. This may only include the county if that is the only address field input. You must 'Select as Official Address' in order for that county to populate the **Accountable County** field.

Choose Associated Address

Available Contact Points						
Start Date	End Date	Address Type	Address	Residence Type	Address Status	Select
01/01/1900	01/01/2030	Home	123 Main St Seattle, WA 98101 King County			Select as Official Address

Close Help

You will know you're successful when the **Accountable county** (GCD) or ***County of diagnosis (accountable county)** (HEP) displays a county. Now, all King County investigators can see this event.

Select reporting address

Accountable county King County ▼

Attaching a File

There may be a document or file, such as a case report form or face sheet, which needs to be attached to an event. Attachment information is displayed in the **Event Summary** screen at the top of the dashboard.

Event Summary

Basic Information	
Event ID:	100000018
Disease:	TB infection
Person:	Mickey Mouse ()
Dates:	Create Date: 05/01/2018
Type:	Interactive
Investigation Status:	Open (Change to Closed)
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Linked Exposure Sites:	0 linked exposure site(s) (View)
Attachments:	0 attachment(s) (Add)
Notices:	<p>Workflow Status (1) Event is in workflows (View List)</p> <p>General Notifications (1) Vital Status: Alive</p>

Attaching a File

1. Open the event to which an attachment will be added.
2. From the **Event Summary** screen select 'Add' next to Attachments.

Event Summary

Basic Information	
Event ID:	100000018
Disease:	TB infection
Person:	Mickey Mouse ()
Dates:	Create Date: 05/01/2018
Type:	Interactive
Investigation Status:	Open (Change to Closed)
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Linked Exposure Sites:	0 linked exposure site(s) (View)
Attachments:	0 attachment(s) (Add)
Notices:	<p>Workflow Status (1) Event is in workflows (View List)</p> <p>General Notifications (1) Vital Status: Alive</p>

3. The following screen will appear.

4. Browse for the file to attach, enter a Description, and select 'Save.' Note: The file size limit for individual case attachments in WDRS is 7.63 MB. If this limit is exceeded, then you will see an error message that reads, "Attachment is too large".
5. You will be brought to the **Manage Attachments** screen, where you can view, edit or delete an existing attachment or add a new attachment.

Attachments									
Create Date	Person	File	Description	Status	Type	Updated By	Security Level	Action	
05/03/2018	Mickey Mouse	WDRSTraining_SaveTheDate_FINAL.pdf	Form	Requires Review	General	Lindsay Horn [lma0303]	None	View	Edit Delete

Filter: Showing 1 to 1 of 1 entries

[Add Attachment](#) [Dashboard](#) [Help](#)

Attachment Information Fields

Field	Description
Create Date	The date the attachment was added in WDRS.
Person	The person whose event the attachment is on.
File	The name and path of the file to be attached.
Description	A description of the file being attached. (Required)
Status	The status of the attachment, and whether it requires review, is approved, or is rejected.

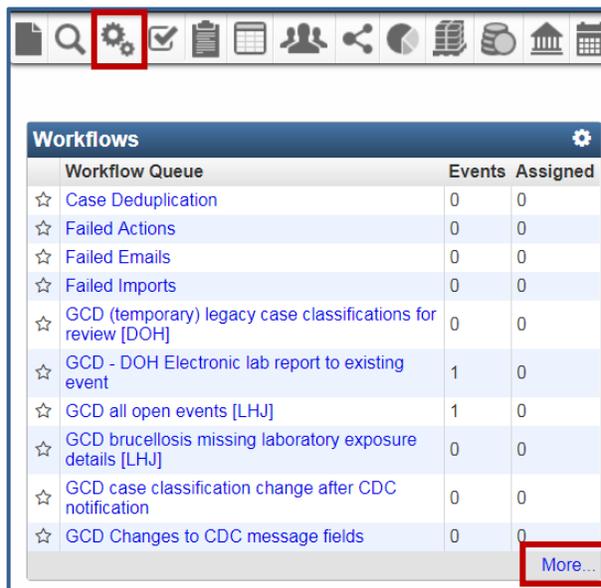
Field	Description
Type	The type of file being attached. Select the most appropriate option, most choices may not be applicable. Lab Results may be required in the lab result itself, refer to program area guidance.
Security Level	Determines the security level needed for a user to be able to see the attachment. Choices are: None, Very low, low, medium, high, very high should not be used.
Notes	Notes about the attachment.

Checking Workflows

Workflows organize events and the work that needs to be done on them. Each workflow is a specific question or query asked about events in WDRS.

To check your workflows:

1. Select the gears icon in the toolbar or select 'More...' in the lower corner of the Workflows pane on the WDRS Home Page.
2. Depending on your role/group you may see different workflows than what is portrayed in the example (right). There may be workflows assigned to you through the Task function in WDRS.



Note: to simplify your workflow screen, hide workflows with no events in them by selecting the link "(Hide empty workflows)" next to the

Workflow Queues title. Once hidden you may make these workflows visible again by selecting, "(Show empty workflows)" at any time.

Workflow Queues				
Workflow Queues (Show empty workflows)				
Workflow Queue	Total Count	Priority	Last Update	
1. General Communicable Diseases - Open events [DOH]				
☆ GCD Other open events immediately notifiable [DOH]	2	High	03/20/2018 04:06 PM	
☆ GCD Zoonotic open events high interest [DOH]	1	High	03/20/2018 04:07 PM	
☆ GCD Zoonotic open events immediately notifiable [DOH]	1	High	03/20/2018 04:07 PM	
☆ GCD Flu/Leg events unsuccessfully auto classified [DOH]	1	Medium	03/20/2018 04:00 PM	
☆ GCD Foodborne/Enterics events unsuccessfully auto classified [DOH]	2	Medium	03/20/2018 04:00 PM	
☆ GCD VPD events unsuccessfully auto classified [DOH]	1	Medium	03/20/2018 04:00 PM	

Workflow Queue Fields

Field	Description
Star ☆	Marks a workflow as “favorite.” We recommend using this feature for workflows you access frequently or that are pertinent to your work.
Workflow Queue	The name of the query which describes the condition of the events. Each line item is a clickable link which will open a new screen which lists the event(s) in the queue.
Total Count	The number of events that have been triggered by the specific monitor.
Priority	Displays the priority assigned to the specific workflow.
Last Update	Displays the date and time the workflow was last updated along with an information box with the workflow description, time until next refresh, and refresh frequency. Most are set to refresh every 10 minutes. Workflows with higher urgency may refresh more often.

- To view events in a workflow, click on the name of the workflow. You can now select those events you want to view by selecting a link in the Event column on the left hand side of the screen.

Workflow Details - GCD Other open events immediately notifiable [DOH]

GCD Other open events immediately notifiable [DOH] (Last Update: 03/20/2018 04:10 PM)

<input type="checkbox"/>	Event	Disease	Accountable county	Last Name	First Name	Birth Date	Final case classification	Create Date
<input type="checkbox"/>	100000005	Botulism, foodborne		Horn	Betty			03/19/2018
<input type="checkbox"/>	100000000	Anthrax		ant	macleod			03/19/2018

Filter: Contains Displaying 1...2 of 2 ([Export All](#))

<< First < Prev 1 / 1 Next > Last >>

Assign to user: [\[Assign to me\]](#) Assign to group:

For more information, view the [Hepatitis and General Communicable Diseases LHJ Workflow Instruction Manual](#) (PDF) available on the [GCD WDRS homepage](#).

Concerns

A concern is an issue that could affect the event, such as a problem with that record or something important for the user to be aware of (e.g. pregnancy or pediatric). There are two types of concerns in WDRS: **system-generated** concerns and **user-generated concerns**. A **system-generated** concern is automatically generated by WDRS based on rules written into the system and is used to highlight potential data entry issues. One example of a system-generated concern is if the **Investigation Complete Date** precedes the **Investigation Start Date**. A **user-generated** concern is created by the user to bring attention to an issue.

Concerns are flagged in the **Basic Information** pane of the **Event Summary** screen. Details of the concern are visible on the **Concerns Tab** of the event record and it is important to check it regularly.



It is important to resolve concerns at the time they occur. Concerns may prevent rules from running in the system, potentially preventing important case investigation questions from becoming visible (e.g. pregnancy or infant-specific questions).

Example: Brucellosis has infant-specific questions that will only appear if the age at symptom onset is less than 365 days. If **Symptom Onset Date** is incorrectly entered with a date preceding **Date of Birth**, the concern '**Symptom onset date cannot be before birthdate**' will generate. This concern will prevent WDRS from calculating the age at symptom onset and therefore not display infant-specific questions. This is an example of a **system-generated** concern.

Event Summary

Basic Information		Notes (Add/Edit Show My Notes)
Event ID:	100000006	
Disease:	Shigellosis	
Person:	Auto Test2 ()	
Dates:	Create Date: 04/02/2018	
Type:	Interactive	
Investigation Status:	Open (Change to Closed)	
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)	
Linked Exposure Sites:	0 linked exposure site(s) (View)	
Attachments:	0 attachment(s) (Add)	
Notices:	<p>CustomConcerns (1) Issues exist in this record, check the Concerns tab for details.</p> <p>Workflow Status (1) Event is in workflows (View List)</p> <p>General Notifications (1) Vital Status: Alive</p>	

Edit Event Properties Copy Event

Event Data Lab Results **Concerns** Persons Tasks Surveys Calendar Event Properties Event History

Concerns	
Concern	Description
DATE_VALIDATIONS_RULE_INVESTIGATION_COMPLETE_DATE_CONCERN	Investigation complete date cannot be before the Investigation start date. Information is in the Administrative question package.
MANUAL1	Is this part of outbreak 0012X?

System-generated concern (points to DATE_VALIDATIONS_RULE_INVESTIGATION_COMPLETE_DATE_CONCERN)

User-generated concern (points to MANUAL1)

Event Data Lab Results Concerns Persons Tasks Surveys Calendar Event Properties Event History

Concerns						
Concern	Description	Person	Last Update	Severity	Status	
DATE_VALIDATIONS_RULE_LHJ_NOTIFICATION_DATE_CONCERN	LHJ Notification date cannot be before the Symptom onset date. Information is in the Administrative and Clinical & Laboratory question packages.	Blue Bunny	07/06/2018	Medium	Active	

Concern Fields

Field	Description
Concern	Unique name of the concern in the database.
Description	Provides a detailed description of the concern, including information on how to resolve the concern.
Person/Party	The person or party about whom the event is based.
Last Update	The date upon which the concern was last updated. If no updates have been made to the concern this date is the date the concern was created.
Severity	Displays the severity level of the concern (Very Low, Low, Medium, High, Very High).
Status	Refers to the current state of the concern – either active or resolved.

Adding a Concern

1. To add a user-generated concern, click the 'Add Concern' button on the **Concerns Tab**.
2. In the **Add Concern** screen, a user can set the 'Severity' of the concern. Setting the severity level to Very High causes the concern to display in bright red in the Event Summary section, as shown below.

Event Summary	
Basic Information	
Event ID:	100000001
Disease:	Campylobacteriosis
Person:	Blue Bunny ()
Dates:	Create Date: 07/05/2018
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Attachments:	0 attachment(s) (Add)
Notices:	<p>CustomConcerns (1) Issues exist in this record, check the Concerns tab for details.</p> <p>Workflow Status (1) Event is in workflows (View List)</p> <p>General Notifications (1) Vital Status: Alive</p>

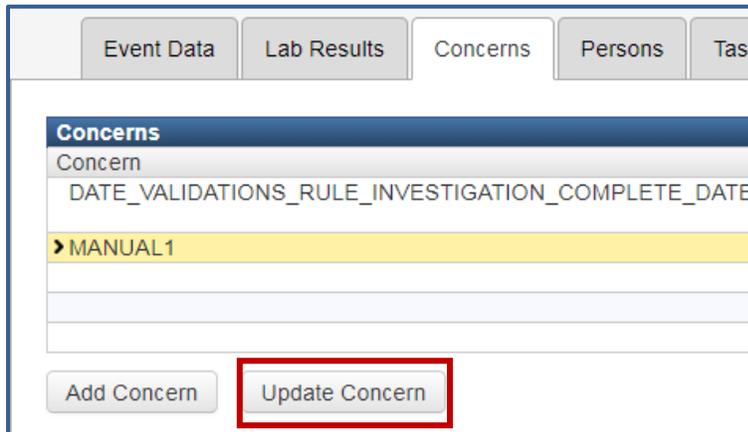
3. The 'Status' of the concern can be "Active" or "Resolved".
4. Enter a short 'Description' and any additional 'Notes' and click the 'Save' button to create the concern. *Note: Any user that views this event will see the concerns you have created.*

Concern Information	
Concern:	MANUAL2
Severity:	<input type="text" value="Medium"/>
Status:	<input type="text" value="Active"/>
Description:	<input type="text"/>
Notes:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>	

Resolving a Concern

To resolve a **system-generated concern**, simply correct the data entry issue provided in the "Description" field.

To resolve a **user-generated concern**:



1. Highlight the concern on the **Concerns tab**, select 'Update Concern.'
2. Change the 'Status' from "Active" to "Resolved".
3. The 'Notes' field is available to note how the concern was resolved.

Please note: User-generated concerns remain in the concerns table even after they have been resolved.

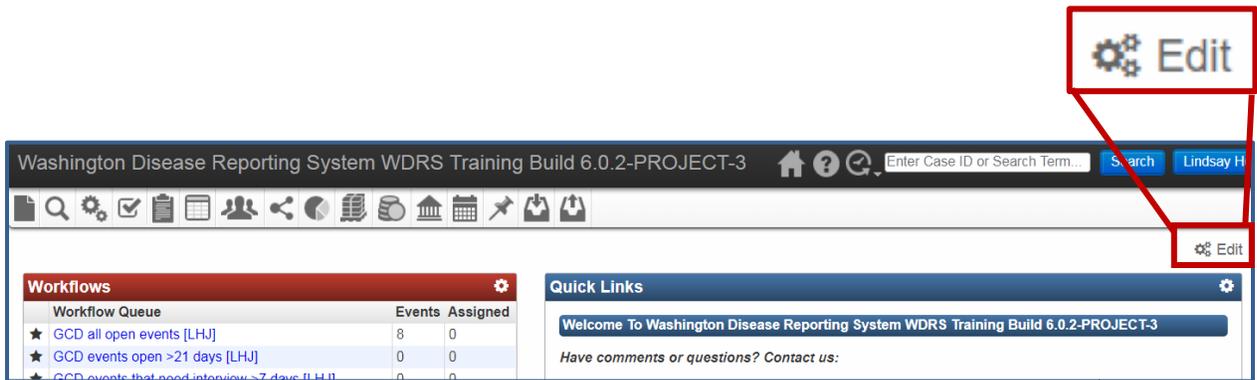
Configuring the Home Page

The WDRS home page provides the user with a summary of current events and information. The page is originally configured to include a panel for Workflows, Alerts and Notifications, Tasks, Recent Records, and Quick Links.

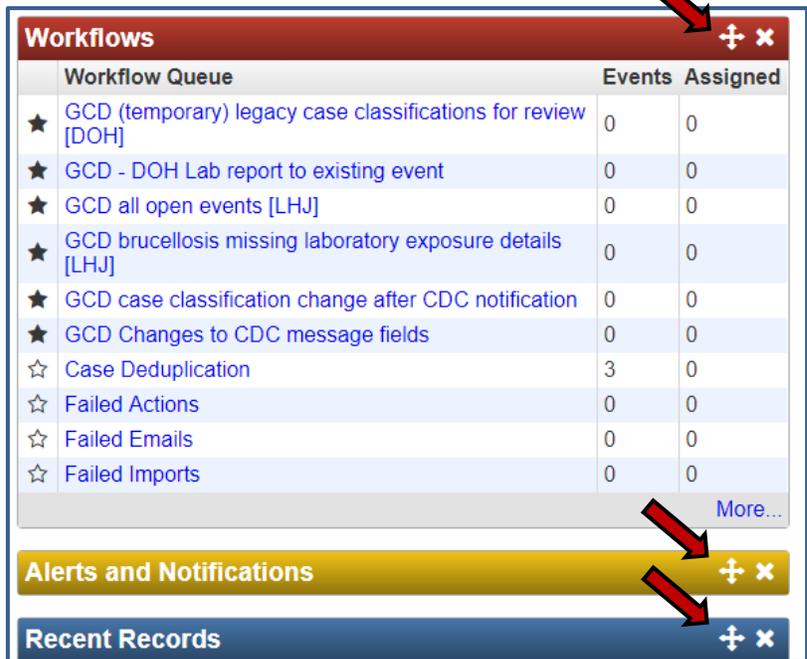
The home page can be customized by the user to suit their individual needs. Each user has the opportunity to limit the number of panes visible, as well as where they are located on the home page. Additionally, users can change certain pane attributes, such as the title bar color and the maximum number of list items to display.

How to Change the Placement of the Layout of Panes on the Home Page

1. Click the 'Edit' link at the top right of the **WDRS Home Page**.
Notice that "move handle" controls appear in the title bar of each pane.



2. Click and drag a handle to relocate the corresponding pane on the page. Notice how the elements rearrange themselves and dotted rectangles become visible at appropriate moments as you move the pane around, providing you with subtle visual assistance in moving the pane to the desired location.

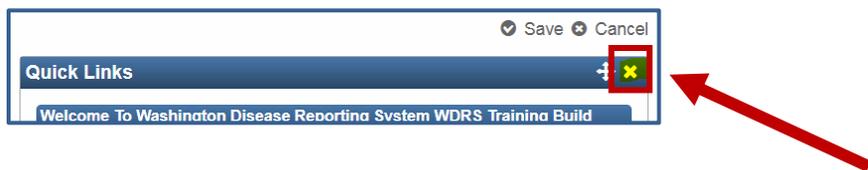


3. Click 'Save' in the upper right-hand corner of the screen to save the new layout.



How to Remove Panes from the Home Page

1. Click the 'Edit' link at the top right of the page.



Notice that "delete" controls (X icons) appear in the title bar of each pane. To remove a pane entirely from the page, click its "delete" control (the X).

2. Click 'Save' to save your changes.

How to Add/Restore Panes to the Home Page

If panes exist that are not currently displayed on the splash page, an Add link appears at the top right of the page.

1. Click the 'Add' link at the top right of the page.



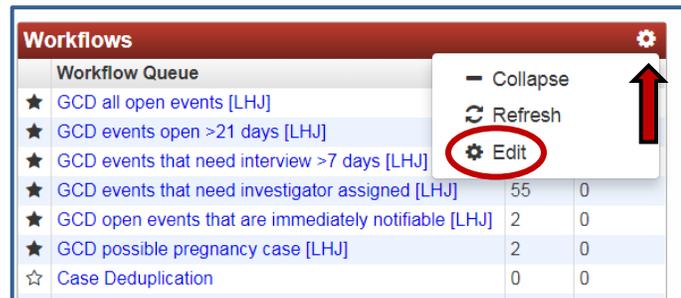
2. From the popup, select the pane you want to add to the page.
3. Click 'Save' to save your changes.

How to Change the Attributes of a Pane

You can change the appearance and utility of each pane, such as the color of the title bar and, in some cases, the maximum number of items that you want the pane to display at any given time.

Some panes, such as the Workflow pane, have additional attributes you can adjust.

1. Click the gear icon in a title bar.
2. Select 'Edit' from the popup menu that appears.



- Change the available attributes as desired by clicking the desired color, checking the appropriate boxes, etc.
- Click 'Save'.

Workflow Queue	Events	Assigned
★ GCD all open events [LHJ]	8	0
★ GCD events open >21 days [LHJ]	0	0
★ GCD events that need interview >7 days [LHJ]	0	0

Copying an Event

The **Copy Event** button allows the user to copy data from an existing event to a new event or to a separate existing event. The user can control which question packages and data fields (attachments, notes, concerns, investigations) are copied to the new location.

Event Summary		Notes (Add/Edit Show My Notes)
Basic Information		
Event ID:	100000005	
Disease:	Botulism, infant	
Person:	Alfred Moon Birth Date: 12/12/2017 (0 yo Male)	
Dates:	Create Date: 03/05/2018	
Type:	Interactive	
Investigation Status:	Open	
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)	
Attachments:	0 attachment(s) (Add)	
Notices:	Workflow Status (1) Event is in workflows (View List)	
	General Notifications (1) Vital Status: Alive	
<input type="button" value="Edit Event Properties"/> <input type="button" value="Copy Event"/>		

As an example, this functionality can be used if an event is started as a *Salmonellosis* event and later becomes identified as Typhoid. **Once selected, event data are copied to a new event. If you need to delete the original event, assign a task to the appropriate [DOH staff member](#).**

Clicking the **Copy Event** button takes the user to the **Copy Event** screen. The upper half of the **Copy Event** screen has the **Source Event** section which lists information about the event being copied.

The **Target Event** section allows the user to change the disease or the event status before copying the event. Additionally, the user can choose to copy applicable question packages (QP) (*this only includes fields shared between the two conditions*) and fields, such as attachments, lab results, and notes, to the new event by checking the appropriate boxes. Finally, the user can choose whether to link the new case to the source case.

Clicking the 'Save' button copies the specified data to the new case.

Copy Event Fields

Field	Description
Copy Mode	Allows the user to copy either as a new event or to an existing event.
Disease	Select a new disease for the event if necessary.
Status	Defaults to the current event's status, but allows the user to change the current investigation status of the event.
Notes	Allows the user to enter event-related notes.
Copy Question Packages	Allows the user to selectively choose which question packages should be copied over to the new event. Only shows question packages where

	questions have been answered. Important: only questions shared between the two conditions will be copied.
Copy Fields	Allows the user to selectively choose which other field information should be copied over to the new event.
Link to Source As	Allows the user the option to create a link between the new event and the copied event, according to a configurable list of predetermined link types.

Deleting an Event

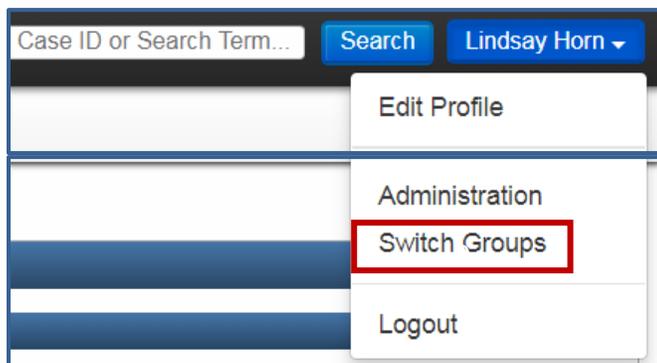
The ability to delete an event is a permission only granted to DOH staff members. If an event needs to be deleted, contact the appropriate staff member at DOH. See [Contact information by disease area](#) for program-specific contact information if you are unsure of the appropriate DOH contact.

Filtering a Session by Group

If you have permissions to see events in more than one group in WDRS (i.e. you conduct work in more than one Local Health Jurisdiction), you may filter your session in WDRS based on groups. Group selection will filter the events and workflows you see to those which the selected group(s) has permission to see.

To do so:

1. Click on your name in the upper right corner of the screen and select 'Switch Groups.'



2. Select one or more groups you would like enabled for that session. The checkbox next to the 'Group' title can be used to check or uncheck all of the line items in the list.

Select Session Group

This page allows you to control which user groups are associated with your current web session. Selecting a subset of the groups lets you filter down your view and access permissions to those limited to the selected group(s).

Select Group(s)		Status
<input type="checkbox"/>	Group	
<input checked="" type="checkbox"/>	GCD Adams County edit	Enabled
<input checked="" type="checkbox"/>	GCD Island County edit	Enabled
<input checked="" type="checkbox"/>	GCD Kittitas County edit	Enabled

Save Cancel Help

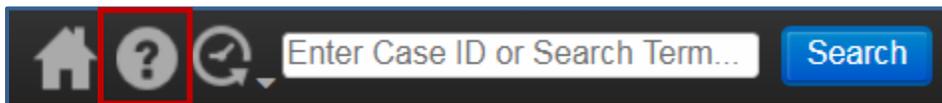
3. Click the Save button.
4. Once you've selected a subset of available groups, your name on the dashboard will display '(Filtered)'.

Lindsay Horn
(Filtered)
▼

5. To switch groups, simply return to the group selection window and change your settings (steps 1 and 2).

Help Button

For additional system guidance, use the help button on your toolbar.



You will be brought to a user guide where you can search by topic.



Locked Events

Only one user at a time can have an "editable" copy of an event open. When one user has an event open, other users are not able to work on that same event. WDRS places a temporary lock on all active (open) events which is indicated by the **“(Read Only)”** message next to the Event ID.

When a user attempts to open an event that another user already has open, WDRS displays a prompt with the user name who is currently in the event and the option to override their case lock. Please do so with caution.

Select 'Cancel' to view the event in read-only mode. **You will still be able to open the event; however, access to the event is read-only.** It is important to recognize that if a user is viewing an event in a read-only state, the question package will still appear to be editable. However, the 'Save' button is deactivated, and thus they will be unable to save data.

Notes

[Event Notes](#) are entered on the **Event Summary screen** of the dashboard whereas [Person Notes](#) are entered in the **Persons tab**. **Event notes** are retained with the event only and won't show in any other past or future event(s) this person may have. **Person notes** persist with the person and are intended to track notes that are related to the person and are not expected to change over time, such as the fact that a person is blind, paraplegic, or has Down's syndrome.

Notes will display the name of the user who added the note as well as the date and time stamp when the note was added. Both note types have settings to ensure that only users with the appropriate permissions can see them. Notes can be designated as either 'Public' or 'Sensitive' by specifying in the 'Type' dropdown. At present, there is no distinction between these two settings and all users with permission to see the event will see all associated notes.

Event Notes

Washington Disease Reporting System WDRS 10/24/17 Training- Build 5.4.2.4-PROJECT-19

Event Summary

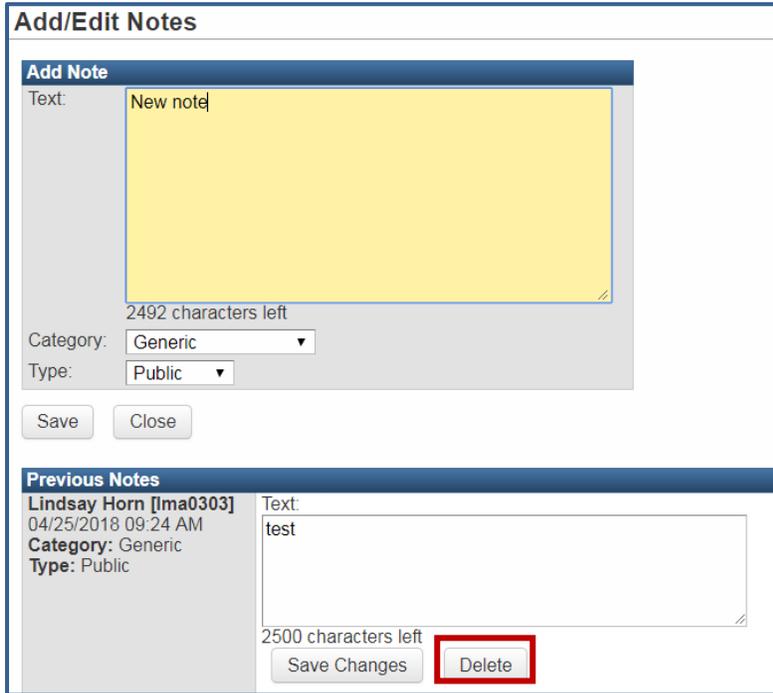
Basic Information		Notes (Add/Edit Show My Notes)
Event ID:	100000039	
Disease:	Botulism, foodborne	
Person:	Sally Smith ()	
Dates:	Create Date: 10/27/2017	
Type:	Interactive	
Investigation Status:	Open	
Linked Events/Contacts:	1 linked event(s)/contact(s) (View)	
Attachments:	0 attachment(s) (Add)	
Notices:	Event is in workflows (View List)	
	Vital Status: Alive	

Edit Event Properties Copy Event

Editing/Deleting Event Notes

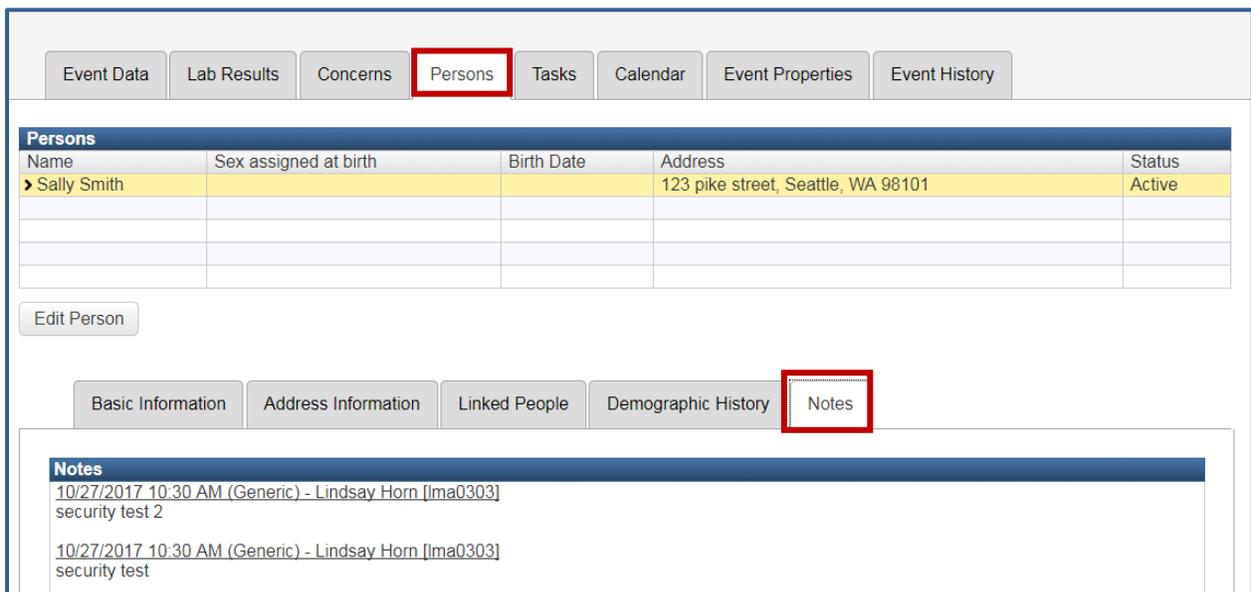
Users can edit or delete their own notes but no one else's. Additionally, users can only edit or delete their most recent note, and only if it was the last note added to the event. This allows references to older notes to be maintained in WDRS for auditing or in the event of a records request. *Example: User 1 opens the event and enters a note and saves it. Later, User 2 opens the same event and also adds a note. Now User 1 will no longer be able to edit or delete their original note because User 2's note was the last one added to the event.*

To edit the most recent note, select 'Add/Edit' in the Notes pane. In the new screen that opens, you will have a 'Delete' option if your note is the most recent.



For General Communicable Diseases, **Event Notes** are intended to capture all notes relating to that event. There is an additional free text notes field in the Clinical and Laboratory question package that also appears at the bottom of each wizard. This field is for optional use as needed.

Person Notes



Name	Sex assigned at birth	Birth Date	Address	Status
▶ Sally Smith			123 pike street, Seattle, WA 98101	Active

Person Notes may only be added by DOH. To view person notes, visit the Persons tab and select the **Notes** sub-tab.

Picker Search

Hospitalized at least overnight for this illness Yes ▼

Facility name Not answered  

There are different question types within WDRS that require a user to search for the appropriate response (you may **not** type directly into these fields). There are varying types of search capability, including pickers (party, event, investigator) and questions that point at lists that would be impractical to render on the screen (e.g. language, travel out of countries, etc.).

When you encounter a picker field, select the search  icon to search for your answer options (remember the wildcard function, shown below). Select the value you would like to use so that it is highlighted, and click ‘Select.’

State of Washington [US] | https://test-secureaccess.wa.gov/doh/wdrs_staging_qa/maven/searchParty.do?mode=question&Restriction=Party.Typ.

Search Party

Search Criteria

Status: Active ▼

Full Name:

City:

State: ▼

Zip Code:

Survey Email:

PHIMS-STD identifier:

eHARS identifier:

Street:

Sort Options

Sort By: Name ▼

Sort Order: Ascending ▼

Search Options

Search History:

Search Soundex:

Search Clear

Search Results

Full Name	Street Address	City	State	Zip Co
St Alphonsus Regional Medical Center-Unk	1055 N Curtis Rd	Boise	ID	83706
St Anthony Family Medicine		Gig Harbor		98335
▶ St Anthony Hospital		Gig Harbor		98332
St Anthony Hospital-Er	11567 Canterwood Blvd NW	Gig Harbor	WA	98332
St Anthony Hospital-Inpt	11567 Canterwood Blvd NW	Gig Harbor	WA	98332
St Anthony Hospital-Outpt	11567 Canterwood Blvd NW	Gig Harbor	WA	98332
St Anthony Hospital-Unk	11567 Canterwood Blvd NW	Gig Harbor	WA	98332
St Clare Hospital		Lakewood		98499
St Clare Hospital		Lakewood		98499
St Clare Hospital		Lakewood		98499

Showing 1 to 10 of 100 entries First Previous 1 2

More than 100 results available. Please refine your search.

Select Cancel Help

The value will now appear in the field. If you select the incorrect search result, use the trash can  icon to delete that selection. This only deletes it from the field, not from the picker list.

Hospitalized at least overnight for this illness	Yes ▾
Facility name <input type="text"/>	St Anthony Hospital Add New
Hospital admission date	MM/DD/YYYY

Printing an Event

To Print a Document

1. Open the event for which a document needs to be printed.
2. Click the Print Event icon in the toolbar
3. A screen will appear listing all documents available for printing for the specific event. This screen is different depending on the disease specified in the event.

Print Documents - Hep B Perinatal - Hepatitis B and D

Print Documents			
Document	Description	Person	Action
CRFFieldRecordflatten.xml	Field Record	Hep B Perinatal	Open Attach
EventPrint.jsp	Event Print	Hep B Perinatal	Open Attach

Filter: Showing 1 to 2 of 2 entries First Previous 1

[Dashboard](#) [Help](#)

4. Locate the necessary document from the list displayed.
5. Open the document by either clicking on the name of the print template or click on the 'Open' link in the Action column.
6. You can also attach the document to the event by selecting 'Attach' in the Action column. You can view the attached document from the **Basic Information pane** on the **Event Summary screen**.

Event Summary

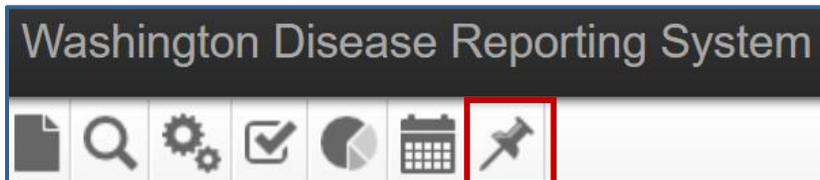
Basic Information	
Event ID:	100000010
Disease:	Hepatitis B and D
Person:	Hep B Perinatal Birth Date: 04/06/2017 (0 yo Female)
Dates:	Create Date: 04/03/2018
Type:	Interactive
Investigation Status:	Open (Change to Closed)
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Linked Exposure Sites:	0 linked exposure site(s) (View)
Attachments:	1 attachment(s) (Add) (View)
Notices:	<p>Workflow Status (1) Event is in workflows (View List)</p> <p>General Notifications (1) Vital Status: Alive</p>

Edit Event Properties
Copy Event

Recent Events

Viewing Recent Events

To quickly locate an event you've recently worked on or created, navigate to the **Recent Events** screen by selecting the push pin icon in the toolbar or by using the **Recent Records** pane of the **WDRS Home Page**.



Recent Records ⚙️

Event ID	Full Name	Disease
☆ 100000175	Test, Preg	Hepatitis B and D
☆ 100000016	Test, BB	Hepatitis B and D
☆ 100000099	Test, Perinat	Hepatitis B and D
☆ 100000003	Doe, Jane	Arboviral disease, other
☆ 100000021	Test, Print Template	Campylobacteriosis
☆ 100000000	Horn, Bell	Campylobacteriosis
☆ 100000004	Doe, John	Botulism, foodborne
☆ 100000009	One, Test	Coronavirus
☆ 100000008	Day, Snow	Botulism, wound
☆ 100000005	Ball, Snow	Coccidioidomycosis

More...

Bookmarking Recent Events

The **Recent Events** screen shows the 20 most recent events you've worked on. If you'd like to retain an event on your recent events screen, bookmark the event by clicking on the star in the bookmark column.

Recent Events					
Event ID	Person	Status	Disease	Access Time	Bookmark
100000175	Test, Preg	Open	Hepatitis B and D	12/27/2017 03:33 PM	★
100000016	Test, BB	Open	Hepatitis B and D	12/27/2017 02:18 PM	☆
100000099	Test, Perinat	Open	Hepatitis B and D	12/27/2017 01:42 PM	☆
100000003	Doe, Jane	Open	Arboviral disease, other	12/27/2017 01:00 PM	☆
100000021	Test, Print Template	Open	Campylobacteriosis	12/27/2017 12:32 PM	☆
100000000	Horn, Bell	Open	Campylobacteriosis	12/27/2017 12:24 PM	★
100000004	Doe, John	Open	Botulism, foodborne	12/27/2017 08:07 AM	☆

Bookmarked events do not expire from the list unless the bookmark is explicitly removed by the user and do not count towards the 20 recent events that are displayed in the list.

To remove a bookmark from an event, simply click on the star to remove the selection.

Reports

Running Reports

To run a report:

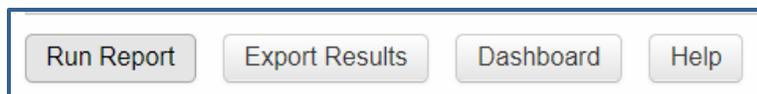
1. From WDRS Dashboard, click the **Reports** button 
2. Click the 'Category' dropdown list and select the desired report category. Commonly used options are: General Communicable Disease, Hepatitis, Lead, System Management Reports, Tuberculosis.
3. Click the 'Select Report' dropdown list and select the desired report. The options vary by the Category. For General Communicable Disease the options include daily, monthly, and yearly reports as well as condition-specific reports for exposures or deaths.
4. The 'Description' box contains text which describes what the report is used for and how it works. Please note that not all reports contain description information and this box may be empty.

The screenshot shows the 'Maven Reporting' interface with the following fields and values:

- Category: General Communicable Diseases
- Select Report: GCD Core Export [LHJ]
- Description: Core export
- Report Date From [Required]*: MM/DD/YYYY
- Report Date To [Required]*: MM/DD/YYYY
- County [Required - Use CNTRL for multi-select]*: Adams County, Asotin County, Benton County, Chelan County, Clallam County
- Output Type: HTML

Buttons at the bottom: Run Report, Dashboard, Help

5. Select applicable report parameters. An asterisk (*) indicates a required parameter.
 - Report period: The report may ask for a 'Report Date From'/'Report Date To' or 'Report Period' for data to be reported. Note that these dates are **EXCLUSIVE**. If you need to see data for the current day, set the end date to the following day's date.
 - Output Type: You may select between displaying the report in a non-editable format within the browser window (HTML) or exporting it to an external application such as Excel. Exporting the data allows for the data to be manipulated, formatted, or graphed.
 - When 'Output Type' displays, select from the dropdown list.
 - Alternatively, you may have to select 'Run Report' (which opens the results as HTML in a new browser tab) or 'Export Results' (which offers appropriate export options including HTML, CSV, PDF, and Excel).



- The 'Excel w/Parameters' option is available for line list and tabular reports to facilitate the exporting of the report parameters and name.
- *Note: If you plan to import the data into statistical software program, such as SAS or R, we recommend exporting the data as a CSV.*

Queued Reports

Reports may take a while to run and have been configured to queue rather than run while the user waits. This enables the user to get back to other tasks while waiting. After choosing to 'Run' or 'Export' the report, the user will see a message indicating that the report has been queued and that the status is 'Pending'.

The selected report has been forced to be queued due to performance concerns.

The 'Refresh' link is provided for the user to click after having waited for a period of time (which varies depending on the report). The reports process will continue to run in the background when users leave the "Reports" screen, allowing users to perform other tasks in WDRS without impacting the report process. To determine if the report is ready to be downloaded, the user can go back to the reports screen and select the same report again and click the 'Refresh' link. If the report is ready to be downloaded at that point, the user will see a link which says 'Download' and can click that to download the report results.

The top screenshot shows a table titled "Report Schedule" with columns: Scheduled Time, Frequency, Created By, and Status. The first row shows: 03/06/2018 04 33 PM, Realtime, Lindsay Horn [lma0303], and Pending. A "Refresh" button is highlighted in red above the table, and the "Status" cell is highlighted in yellow. Below the table, it says "Showing 1 to 1 of 1 entries" and has navigation buttons: First, Previous, 1, Next, Last.

The bottom screenshot shows a table titled "Available Reports" with columns: Create Date, Created By, File, and Action. The first row shows: 03/06/2018 04 24 PM, Lindsay Horn [lma0303], GCD_CASE_COUNTS_BY_YEAR_LHJ_lma0303_20180306162441.html, and Download Delete. The "Download" button is highlighted in red. Below the table, it says "Showing 1 to 1 of 1 entries" and has navigation buttons: First, Previous, 1, Next, Last.

Data Dictionary

When applicable, a data dictionary will be maintained and available at <http://doh.wa.gov/wdrs>.

Sharing an Event

Access to events is strictly controlled by group and role configuration. However, WDRS also supports the ability to provide adhoc permissions to events, called **sharing** an event. If a user has full access to an event in the system and event **sharing** permissions, the user can explicitly grant access to a particular event to a specified user and/or group. This feature is intended to support scenarios where access to a particular event needs to be shared across groups or jurisdictions that normally would not have access to each other's events (e.g., person moved from one part of the state to another but jurisdictional ownership of the event is not transferred).

Share an Event

1. To **share** an event, follow the instructions below. Note: This does not pertain to chronic hepatitis cases that have moved to a new jurisdiction. Please [see below](#) for instructions on how to share these events. Open the event which needs to be shared.



2. From **Event Dashboard**, click the **Share Event** icon in the toolbar
3. The ‘Currently Shared’ screen displays all the information about the users and/or user groups the event is currently shared with.. If the event is not being shared with other users/user groups, the screen will display a blank table at the top of the window, as shown.

Share Event - Sally Joy - Legionellosis

Currently Shared										
Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action

Add Event Share

Event ID: 100000020
 Person: Sally Joy
 Disease: Legionellosis
 Type: View Only Limited
 User:
 User Group: GCD Columbia County edit
 Allow Delegation:

Save Dashboard Help

4. Select the **Type** of permissions being allocated to the new user or user group (‘View only Limited’, ‘View only Full’, ‘View and Update Limited’, ‘View and Update Full’). Note: ‘Limited’ settings are not currently configured and there is no difference between **Limited** and **Full Types**.
 - **View only Limited:** User(s)/group(s) may view a limited amount of question data in the shared event, but may not make any updates to that event.
 - **View only Full:** User(s) may view all question data in the shared event, but may not make any updates to it.
 - **View and Update Limited:** User(s) sees a limited amount of question data in the shared event, and may make updates to those questions.
 - **View and Update Full:** User(s) may view and edit all questions in the shared event.
5. Using the dropdown, choose the **User** or **User Group** with whom the event will be shared. Note that when creating a share, it is possible to select either a user or a group,

but not both at once. To share with an additional party (user or user group) follow the steps to create another share.

6. Check the 'Allow Delegation' box button to allow the user or user group with whom the event is being shared to also be able to share the event with other users or user groups (if desired). Note: Please ensure that events are only shared with necessary users and groups.
7. Click 'Save'. The **Shared Events** table is now populated with the information from this share.

Share Event Fields

Field	Description
Event ID	The Event ID of the event.
Person	The name of patient whose event is being shared.
Type	The type of permissions given to the user ('View only Limited', 'View only Full', 'View and Update Limited', 'View and Update Full').
User	A dropdown list of users within WDRS.
User Group	A dropdown list of user groups within WDRS.
Allow Delegation	Specifies if the user or user group with whom this event is being shared will have the ability to share it with another user or user group.

You can see events that have been shared with you in the workflows list, under **Case Specific Monitors**:

Case Specific Monitors					
☆	Open Cases - Assigned to Current User	0	Medium	03/06/2018 03:07 PM	ⓘ
☆	Shared Cases - Cases shared by me	1	Medium	03/06/2018 03:07 PM	ⓘ
☆	Shared Cases - Cases shared with me or my group(s)	0	Medium	03/06/2018 03:07 PM	ⓘ

For Chronic Hepatitis B and Chronic Hepatitis C cases that have moved to another jurisdiction

Because chronic hepatitis cases may move between jurisdictions many times in the course of their disease, there is unique functionality for sharing edit rights for chronic hepatitis. Event sharing for chronic hepatitis cases should be done from within the **Administrative** question package via the "Managing County" function. The "County of Diagnosis (accountable county)" should never change – it should **always** remain the county where the case was originally diagnosed. If an LHJ investigator receives notice that a chronic hepatitis case has moved to a

new jurisdiction, they should update the Managing County in the “Case Management” subsection of the **Administrative** question package.

Case Management	
Managing county notification date ☰	03/01/2018  Add New
Managing county	Columbia County 
LHJ case ID	
User	Tessa Fairfortune
Notes	

- **Managing county notification date** – input the date it became known the case had moved to a new jurisdiction.
- **Managing county** – input the county where the patient now lives.
- **LHJ case ID** – if the new LHJ has a unique ID for this case, they can use this field to record it.
- **User** – automatically populated when “Managing county notification date” is input.
- **Notes** – a place for the user to record any notes about the jurisdiction change.

If the case moves again to another jurisdiction, select ‘Add New’ in the Case Management section and add the information on the new LHJ below.

Case Management	
Managing county notification date ☰	03/01/2018  Add New
Managing county	Columbia County 
LHJ case ID	
User	Tessa Fairfortune
Notes	

By inputting a managing county, the LHJ **automatically** grants edit rights for the case to the new county – it does not need to be shared via the “Share Event” screen. Please note that only the most recent managing county will have view and edit permissions (i.e. managing county permissions are not cumulative). The accountable county will always have access to the event.

Unshare an Event

There will be occasions where it is only necessary to **share** an event with another group for a limited period of time. When the required amount of time has passed, you will need to **unshare** the event.

1. Open the event to be “unshared” in the WDRS Dashboard.

2. Click the Share Event icon



3. In the Action column, click the link that says 'Unshare' next to the shared event that needs to no longer be shared.

Currently Shared										
Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action
100000020	Sally Joy	Open	Legionellosis	View Only Limited	03/06/2018	Lindsay Horn [lma0303]	Cynthia Harry [charry123]		No	Unshare

4. Click 'OK' to confirm that the event should no longer be shared.

For Chronic Hepatitis B and Chronic Hepatitis C cases that have moved to another jurisdiction

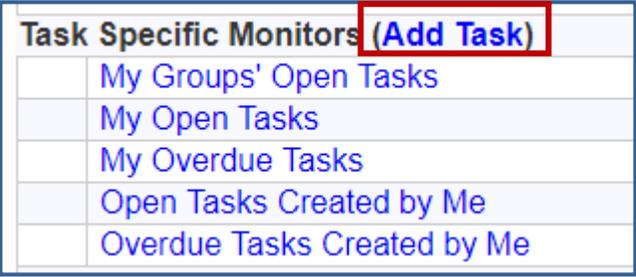
This functionality does not exist for chronic hepatitis cases. Please [see above](#) for instructions on assigning chronic hepatitis cases.

Tasks

Tasks are activities that need to be completed for a case. **Tasks** are a way for you to delegate work and can be assigned to specific users or groups. They can have a due date and are updated manually as they are completed.

Tasks can be viewed and created in three places and the functionality can be different depending upon where you initiate the create task action:

Where task is created	How to create task	Visual
From within an event using the Tasks tab on the Event Summary screen	Select the 'Add Task' button on the Tasks tab to create an <u>event-specific</u> task.	

<p>From the Workflow Queues page under the Task Specific Monitors category</p>	<p>Select the 'Add Task' link from the Workflow page (under Task Specific Monitors), to create a general (non-event-specific) task.</p>	
<p>From the Tasks icon on the WDRS Dashboard toolbar</p>	<p>If you click the Tasks icon  on the toolbar, you can create both event-specific and general (non-event-specific) tasks.</p>	

An example of a **general** (non-event-specific) **task** would be to ask a user (or user group) to review lab results for all of the hepatitis events that have been received in their jurisdiction recently to check for similarities. An example of an **event-specific** task that would be associated with a specific event is to ask a user to follow up on laboratory results.

Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To
Outreach	Not Event-Specific		Review hep C events for epi links	Pending	Lindsay Horn [lhorn] (05/15/2018)	Not specific to an event	Lindsay Horn [Start Task]
Laboratory	Medium	05/22/2018	Follow up with lab for serogrouping results	Pending	Lindsay Horn [lhorn] (05/15/2018)	100000000 - Arboviral disease, other - Mickey Mouse	Lindsay Horn [Start Task]

Filter: Showing 1 to 2 of 2 entries First

Creating and Assigning a New Task

Event-Specific Tasks

1. To create a task specific to an event, first open the event to the **Event Summary** screen.
2. Click the **Tasks** icon  on the **WDRS Dashboard** toolbar.
3. Click the 'Add event task' button. (Select the 'Add Task' button if you would like to create a task that is not specific to this event.)

Tasks for the selected event			
Type	Priority	Due Date	Description
Filter: <input type="text"/> Showing 0 to 0 of 0 entries			

My tasks (specifically assigned to me)			
Type	Priority	Due Date	Description
Filter: <input type="text"/> Showing 0 to 0 of 0 entries			

4. You will be brought to the following screen:

Add Task

Task Information

Event: 100000000 - Arboviral disease, other - Mickey Mouse

Type: ▼

Status: Pending ▼

Priority: Medium ▼

Assigned Date: MM/DD/YYYY

Due Date: MM/DD/YYYY

Start Date: MM/DD/YYYY

Complete Date: MM/DD/YYYY

Description:

Notes:

Task Attachment: No file chosen

Assign to user: 🔍 🗑️ Assign to me

Assign to group: 🔍 🗑️

5. Select the **Type** of task from the dropdown list.
6. If necessary, select the appropriate task **Status** from the list (Pending, In Progress, or Completed), **Priority** of the task, **Assigned Date** and **Due Date**.
7. Enter a brief description of the task to be done and add notes to clarify if necessary.
8. Add an attachment if necessary.

9. Select the correct user and/or group from the search field.
10. Click the 'Save' button.
11. Alternatively, you may create an Event-Specific task by visiting the **Tasks** Tab within an event and selecting the 'Add Task' button and then follow the steps above.

Accessing Tasks

Information provided when a task is accessed via the **Tasks** icon  on the **Dashboard** is different than the task information provided in the 'Task Specific Monitors' of the **Workflow Queues** (shown below).

The **Tasks** screen displays tasks which are specific to the event that is currently open in the **Dashboard** – regardless of to whom the task is assigned. Additionally, on the **Tasks** screen all tasks which are assigned to the current user – regardless of which event they are assigned – will also display.

The task information on the **Workflow Queues** screen is displayed in several workflows under the **Task Specific Monitors** category.

Task Specific Monitors (Add Task)				
My Groups' Open Tasks	0	Medium	05/15/2018 06:26 PM	
My Open Tasks	2	Medium	05/15/2018 06:26 PM	
My Overdue Tasks	0	Medium	05/15/2018 06:26 PM	
Open Tasks Created by Me	3	Medium	05/15/2018 06:26 PM	
Overdue Tasks Created by Me	0	Medium	05/15/2018 06:26 PM	

The workflows displayed on this screen are as follows:

Task Specific Monitors	Description
My Groups' Open Tasks	All tasks for your group that have not been completed.
My Open Tasks	All tasks assigned to you that have not been completed.
My Overdue Tasks	All tasks that are assigned to you and are overdue.
Open Tasks Created by Me	Pending tasks that you have created.
Overdue Tasks Created by Me	Overdue tasks that you have created.

Performing Tasks

To perform or update tasks using the workflows:

1. Click the **Workflow** icon on the **Dashboard** toolbar.
2. Select the workflow of interest.
3. To edit or update a task, select the active link and edit the fields accordingly.

To perform or update tasks from the **Tasks** icon on the **Dashboard**:

1. Click the Tasks icon  on the **Dashboard** toolbar.
2. If the task has not yet been started, there will be a 'Start Task' link under the 'Assigned To' person's name. Clicking this link acknowledges that the task has been started by marking the task as 'In Progress', and fills the start date with the current date.

Tasks for the selected event									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	Action
Laboratory	Medium	05/22/2018	Follow up with lab for serogrouping results	Pending	Lindsay Horn [lhorn] (05/15/2018)	100000000 - Arboviral disease, other - Mickey Mouse	Lindsay Horn [Start Task]		Edit Delete

Filter: Showing 1 to 1 of 1 entries First Previous 1 Next Last

Tasks for the selected event									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	Action
Laboratory	Medium	05/22/2018	Follow up with lab for serogrouping results	In Progress	Lindsay Horn [lhorn] (05/15/2018)	100000000 - Arboviral disease, other - Mickey Mouse	Lindsay Horn		Edit Delete

Filter: Showing 1 to 1 of 1 entries First Previous 1 Next Last

3. Select the 'Edit' link to edit the remaining fields as needed.

Viewing Completed Tasks

Once completed, event-specific tasks remain in the **Tasks** tab of the event. Non-event-specific tasks will not be readily accessible.

Event Data
Lab Results
Concerns
Persons
Tasks
Surveys
Calendar
Event Properties
Event

Tasks					
Type	Status	Priority	Due Date	Description	Assigned To
▶ Laboratory	Completed	Medium	05/22/2018	Follow up with lab for serogrouping results	Lindsay Horn [lhorn]

Add Task
Update Task

Details

Type: Laboratory

Status: Completed

Priority: Medium

WDRS Glossary

Below are several terms specific to WDRS

Auto-Case Classification	WDRS will auto-classify eight conditions based on a combination of laboratory and/or clinical information, depending on the condition.
Concern	Messages that appear on the Basic Information section of the Event Summary screen. These messages appear in red and are meant to notify you of an issue or concern regarding the event.
Dashboard	<p>Main Dashboard: Allows you to create a new disease event or outbreak, search for existing diseases or outbreaks, view and work with workflows, add and edit tasks, view recent activity and run reports.</p> <p>Event Summary Dashboard: Allows you to view case summary, link events, add, view and edit cases details and, view and edit lab tests.</p>
Data Conversion	The process of taking our current data systems and aligning them with the fields in WDRS. This often involves taking variables from PHIMS and matching them up with fields in WDRS
Deduplication	The process of merging events, people or organizations that appear more than once in WDRS.
Denormalized tables	Databases store information in many tables, all tied together with an ID number. Denormalized just means "flattened" as in making a single record (i.e. line in Excel) out of many different files tied together on that ID. Also called a "flat file." Several reports in WDRS use denormalized tables.
DRIVE	Project name for Rhapsody transformation of lab data to make it align with WDRS. Lab data is scattered and inconsistent when it comes in. This transforms it to make high-level decisions such as which product code it belongs to and general standardized lab results.
ELR	Electronic Laboratory Reporting
Event	An instance of a disease occurrence. A person can have multiple events.
Expressions	Formula that causes an action on a question in WDRS (e.g. calculating the earliest treatment start date from multiple dates input).
External ID	Person ID. Viewable on the edit person page.
GCD	General Communicable Diseases

HL7	Lab language. It's the format for lab data reported to us electronically. Mostly.
Lab Tab	Also known as the Investigation Template . This is the tab where lab results exist, both populated from WELRS and manually entered.
Linked event	Two events linked together somehow. May be across product codes or across people.
Maven	The off-the-shelf product that we are building into WDRS.
Model	Models are often referred to by their condition or their grouping. This term identifies who manages them. They include: Hepatitis, TB, General Communicable Diseases (GCD), and Lead.
Notification	Messages that appear on the Basic Information screen. These messages will appear in a variety of colors. The messages may inform you that a case is closed, that confirmation is needed or other information you need to review.
Parent/Child Questions	A parent question may contain child questions. Child questions appear as a result of an answer selection made on a parent questions. It is not related to people relations at all.
Person-Centric	The idea that there is a single person who has multiple disease events associated with them.
Person-Party	Stores basic information on a person (Name, Date of birth, aliases, SSN, address). It is technically considered its own model.
PHRED	Public Health Reporting of Electronic Data
Party	A party can be a person (case or contact) or organization (an organization where the outbreak occurred).
Print Templates	A template that populates from data within a question package. Allows for users to easily print items such as a letter that populates with a patient's name and date information to remind them to get a follow up test.
Product Code	Condition-specific code that determines what rules/question packages will exist. Lab results are mapped to product codes. Example: Hep product codes include Hep B/D (HBV), Hep C (HCV), and HCV Screening.
QID	Question ID. Variable name for questions inside question packages

Question Packages	Sets of fields related to an event and related to a specific type of question where we collect our data (e.g. Administrative Question Package)
Reference Code	A list stored in WDRS that contains multiple choice options to be selected from with a search picker or used in a drop down question. Using a reference code allows for multiple conditions to have access to the same, easier to maintain list (ex: facilities). It also allows you to have the same answer choices for multiple questions within your model in a place that is easy to update (as compared to having to go to each question and changing the items within that list).
Repeatable Block	A set of questions that you'll need more than one instance of. Ex: In the Hep communications package you first select who you spoke to, which triggers child questions to appear. After you have completed all of this, you may speak to someone else and need a clean version of these questions available to complete and save. A repeatable block would make this new block of questions appear. Works on all question packages including the person and lab tab.
Reports	Allows user to pull their data out of WDRS. We can set up reports to define which fields should be pulled out.
Rhapsody	Owned by Orion Corp. A computer program that works with basic logic (IF-THEN) to transform data. https://orionhealth.com/us/products/rhapsody/
Roles	A role controls the user's permissions – it assigns responsibility to what a user can <u>do</u> with data in WDRS.
Rosters	XML allowing import of data into WDRS in a way the user would not normally do (i.e. not using the interface).
Rules	Logic set up within Maven that triggers an action. Ex: There is a question that says, "Born within 1945-1975?" A rule can be set up to look at the date of birth on the person-party and automatically answer that question as "Yes" or "No." Rules are also used to populate questions based on lab data, create workflows, and other functionality.
WDRS	Washington Disease Reporting System
Wild Card	A wild card is an asterisk that can be used during searches. The wild card (*) allows you to search using part of the text. For example Harbo* can be used to search for a Harborview hospital.

Wizards	Also called a "virtual question package." Allows the user to subset questions from multiple question packages to fill out easily and quickly. Questions answered in a wizard populate the corresponding fields in the question packages.
Workflow	A list of activities that need to be performed on records. Workflows are based on queries that retrieve event information that needs attention and organizes them for processing. Often workflow and queue are used interchangeably. Examples are: All open events and Events missing suspected exposure type.

General Communicable Diseases (GCD) Quick Reference Guides

Washington State Department of Health Office of Communicable
Disease Epidemiology

Adding a Lab to an Event

To enter lab results for an event, choose the **Lab Results** tab and select 'Add Lab Result'.

Labs				
Lab No.	Specimen collection date	WDRS specimen type	WDRS test performed	WDR
2	01/20/2018		Hepatitis B e antigen (HBeAg)	Posit

For General Communicable Diseases, required fields include:

- **Lab report reviewed – LHJ**
 - If not selected, the event will appear in a workflow for new labs to be reviewed.
- **Specimen identifier/accession number**
- **Specimen collection date*** (preferred). Alternatively the Specimen received date or Result date.
- **WDRS specimen type**
- **WDRS test performed**
- **WDRS test result, coded**
 - Required only if the drop-down activates based on the WDRS test performed.
- **WDRS result, numeric only** (including as necessary WDRS test result, comparator and WDRS units of measure)
- **WDRS result summary**

Additionally, please upload the lab report to the lab result using the 'Upload Document' link.

Lab report information	
Lab report reviewed - DOH	<input type="text"/>
Lab report reviewed - LHJ	<input type="text"/>
WDRS user-entered lab report note	<input type="text"/>
Submitter	<input type="text"/>
If submitter is not on the pick list, please select "Laboratory not listed" and enter information below:	<input type="text"/>
Lab not listed-specify	<input type="text"/>
Performing lab for entire report	<input type="text"/>
If performing lab is not on the pick list, please select "Laboratory not listed" and enter information below:	<input type="text"/>
Lab not listed-specify	<input type="text"/>
Referring lab	<input type="text"/>
If referring lab is not on the pick list, please select "Laboratory not listed" and enter information below:	<input type="text"/>
Lab not listed-specify	<input type="text"/>
Specimen	
Specimen identifier/accession number	<input type="text"/>
Specimen collection date*	<input type="text" value="MM/DD/YYYY"/>
Specimen received date	<input type="text" value="MM/DD/YYYY"/>
WDRS specimen type	<input type="text"/>
Specimen type-Other, specify	<input type="text"/>
WDRS specimen source site	<input type="text"/>
Specimen source site	<input type="text"/>
WDRS specimen reject reason	<input type="text"/>
WDRS specimen reject reason-Other, specify	<input type="text"/>
Test performed and result	
WDRS test performed	<input type="text"/>
Test performed-Other, specify	<input type="text"/>
WDRS test result, coded	<input type="text"/>
WDRS test result, comparator	<input type="text"/>
WDRS result, numeric only	<input type="text"/>
WDRS units of measure	<input type="text"/>
Test method	<input type="text"/>
WDRS interpretation code	<input type="text"/>
Interpretation code-Other, specify	<input type="text"/>
Test result-Other, specify	<input type="text"/>
WDRS result summary	<input type="text"/>
Test result status	<input type="text"/>
Result date	<input type="text" value="MM/DD/YYYY"/>
	Upload Document
Add	
Ordering provider	
WDRS ordering provider	<input type="text"/>
If ordering provider is not on the pick list, please select "Provider not listed" and enter information below:	<input type="text"/>
Provider not listed-specify	<input type="text"/>
Ordering facility	
WDRS ordering facility	<input type="text"/>
If ordering facility is not on the pick list, please select "Facility not listed" and enter information below:	<input type="text"/>
Facility not listed-specify	<input type="text"/>
Save	Cancel Help

For additional details on specific fields in the lab template, refer to the [WDRS Lab Results Instruction Manual](#).

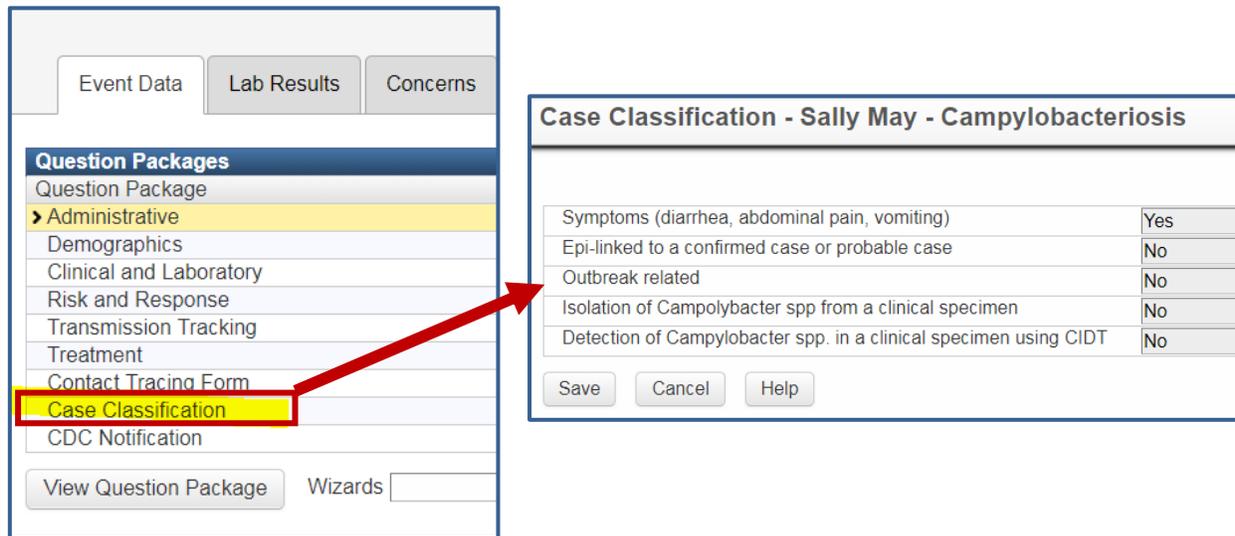
Auto Case Classification

WDRS will auto classify eight conditions based on a combination of laboratory and/or clinical information, depending on the condition. These conditions include Campylobacteriosis, Cryptosporidiosis, Giardiasis, Legionellosis, Pertussis, Salmonellosis, Shigellosis, and Vibriosis.

Case classification fields in Administrative question package are read-only for these conditions and will populate once the criteria is met.



Auto class conditions contain an additional **Case Classification** question package, which displays read-only fields that are the criteria driving the case classification. Classifications will be populated as information is entered into WDRS, updating fields in the **Case Classification** question package, which drive the classification.



For Confirmed, Probable, and Suspect case classifications, you must update the information driving the auto classification in order to change the case classification. Not Reportable or Ruled Out events must be classified using the 'Override classification' checkbox. To have these events classified, notify the Office of Communicable Disease Epidemiology (OCDE) Subject Matter Expert (SME) to override the case classification. Note: SME's will be automatically notified of auto class conditions without a case classification after 21 days from the LHJ notification date.

As an example, Campylobacteriosis case classification criteria include if the test performed is a bacterial culture and the result is positive (both in the lab template).

Test performed and result	
WDRS test performed	Bacterial culture (isolation)
Test performed-Other, specify	
WDRS test result, coded	Campylobacter coli
WDRS test result, comparator	
WDRS result, numeric only	
WDRS units of measure	
Test method	
WDRS interpretation code	
Interpretation code-Other, specify	
Test result-Other, specify	
WDRS result summary	Positive

This combination of entries will update the Case Classification question package field 'Isolation of Campylobacter spp from a clinical specimen' to Yes and classify the condition as confirmed.

Case Classification - Sally May - Campylobacteriosis	
Symptoms (diarrhea, abdominal pain, vomiting)	Yes
Epi-linked to a confirmed case or probable case	No
Outbreak related	No
Isolation of Campylobacter spp from a clinical specimen	Yes
Detection of Campylobacter spp. in a clinical specimen using CIDT	No

Case classification	Confirmed
Override classification	<input type="checkbox"/> Yes
Final case classification	Confirmed

Closing Events

Only OCDE staff can close or re-open events in WDRS. The status of an event is indicated under the **Event Summary** Screen's **Basic Information**.

Events in the GCD model will remain open until annual data reconciliation occurs the following spring. After which, events from the previous year will be closed and all fields become read-only. Please contact the appropriate OCDE SME if an event must be reopened for any reason.

Event Summary	
Basic Information	
Event ID:	100000000
Disease:	Botulism, wound
Person:	Mon Day Birth Date: 12/12/1955 (62 yo Male)
Dates:	Create Date: 03/12/2018
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Attachments:	0 attachment(s) (Add)
Notices:	General Notifications (1) Vital Status: Alive
<input type="button" value="Edit Event Properties"/> <input type="button" value="Copy Event"/>	

Note: Events will leave the 'open events' workflows without being closed. Check the workflow for specific criteria. Most often entering a **Case complete date** will cause the event to leave the workflow.

Linking Events in WDRS

Linking events to one another can be useful because it allows users to keep track of related events. Because all events are separate within the system, links are created to indicate how one is associated with another. There is no limit to the number of events that can be linked to one another.

Linking questions in WDRS come in various forms including 'Epi-linked to a confirmed or probable case' and 'Previous flavivirus infection (e.g., dengue, SLE),' of which the latter would link the same individual's two events. Dropdown options for GCDs various linking questions include 'Yes', 'No', and 'Unknown'. For most GCD conditions, if 'Yes' is selected, the message 'Please link the event(s) on the **Event Summary Screen** (WA residents only)' will appear.

Exposure and Transmission Summary	
Please link the event(s) on the Event Summary Screen (WA residents only)	
Epi-linked to a confirmed case	Yes ▼

If you're linking to a Washington State resident you have access to in WDRS, you will link the two events in WDRS, as described below. No linking is required for non-Washington residents but you may enter notes into the **Exposure Summary** notes field.

Linking Events

In the following example we will vertically link an arboviral event for a person named “Mother Arbo” to an arboviral event for her child, a person named “Baby Arbo”.

1. Return to the **Event Summary** screen of the event you are linking and select ‘View’ next to Linked Events/Contacts.

Event Summary

Basic Information	
Event ID:	100001011
Disease:	Arboviral disease, other
Person:	Mother Arbo ()
Dates:	Create Date: 06/27/2018
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Attachments:	0 attachment(s) (Add)
Notices:	General Notifications (1) Vital Status: Alive

[Edit Event Properties](#) [Copy Event](#)

2. You will be brought to the Linked Events screen. Scroll down to the ‘Link Events’ pane and select Operation: Link to Existing Event. You may then specify the Link Type and Relationship and select ‘Select Event’ to search for the event to link to.

Link Events

Operation: [Select Event...](#)

Link Type:

Relationship: [Reset](#)

[Save](#) [Dashboard](#) [Help](#)

3. Search for the event for linking, choose the event (highlighted below) and click ‘Select.’

Search Case

Search Criteria

Type:

Event ID:

Disease:

Last Name:

First Name:

Birth Date: [\(Inexact\)](#)

Sex assigned at birth:

Street:

City:

Search Results

Event ID	Full Name	Birth Date	Status	Disease	Event Date	Se
100001011	Arbo, Mother		Open	Arboviral disease, other	06/27/2018	
100001012	Arbo, Baby		Open	Arboviral disease, other	06/27/2018	

Showing 1 to 2 of 2 entries [First](#) [Previous](#)

[Select](#) [Cancel](#) [Help](#)

4. The linking event's information will be presented as greyed out. Scroll to the bottom and select 'Save.'
5. This event will now appear as a linked event at the top of the screen.

Linked Events - Mother Arbo - Arboviral disease, other									
Filter Linked Events									
Disease:		Status:							
Apply Filter		Reset Filter							
Linked Events									
Event ID	Full Name	Status	Create Date	Disease	Event Date	Text1	Type	Relationship	Action
100001012	Arbo, Baby	Open	06/27/2018	Arboviral disease, other	06/27/2018		Vertical	Child	Edit Delete
Displaying link(s) 1...1								<< First < Prev 1 / 1 Next > Last	

What are General Communicable Diseases?

General Communicable Diseases (GCD) include the following conditions in WDRS:

Anthrax	Hantavirus pulmonary syndrome
Arboviral disease, other	Hepatitis A, acute
Botulism, foodborne	Hepatitis E, acute
Botulism, infant	Highly antibiotic resistant organism (CRE, VRSA, other gram negative)
Botulism, other	Influenza, novel or unsubtypeable strain
Botulism, wound	Influenza, seasonal (required for deaths of lab-confirmed cases)
Brucellosis	Legionellosis
Burkholderia infection (melioidosis or glanders)	Leptospirosis
Campylobacteriosis	Listeriosis
Cholera	Lyme disease
Coccidioidomycosis	Malaria
Coronavirus	Measles
Cryptococcus gattii	Meningococcal disease
Cryptosporidiosis	Mumps
Cyclosporiasis	Pertussis
Diphtheria	Plague
Giardiasis	Polio
Haemophilus influenzae	

Prion disease, human
Psittacosis
Q fever
Rabies, human
Rabies, suspected human exposure
Rare disease of public health significance
Relapsing fever
Rubella
Salmonellosis
Shellfish poisoning (paralytic, domoic acid,
or diarrhetic)
Shiga toxin-producing Escherichia coli
(STEC)
Shigellosis
Tetanus
Tickborne (excludes Lyme, Relapsing)
Trichinosis
Tularemia
Typhoid fever
Unexplained critical illness or death
Vaccinia transmission
Varicella (required for deaths)
Vibriosis
Viral hemorrhagic fever
West Nile virus disease
Yellow fever
Yersiniosis