

DDE for Public Health Reporting App User Guide 2026

FEBRUARY 2026



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1 Introduction

- » Direct Data Entry (DDE) for Public Health Reporting is an application that provides online web forms which allows participating health organizations to submit lab results and related case reports for communicable diseases. DDE tool can be accessed in the HIE portal.

The screenshot shows the KHIE portal interface. At the top, there is a header with the KHIE logo, copyright information, and a 'SWITCH HIE' button. Below the header is a 'HOME' navigation bar. A disclaimer states: 'This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, Kentucky Health Information Exchange's Participation Agreement ("PA") and Kentucky Health Information Exchange uses a privacy monitoring tool to ensure all users are adherent to an approved policy or use case. By continuing to use this system you indicate your awareness of and consent to these terms and conditions.' The main content area is divided into two sections: 'Patient Search' and 'Search Results'. The 'Patient Search' section includes input fields for First Name, Last Name, Date of Birth, Gender, and SSN, along with 'Reset' and 'Search' buttons. The 'Search Results' section shows a table with columns for First Name, Last Name, Date of Birth, Gender, and Address, and a message 'No records found'. Below the search section is a 'Your Dashboard' section with a gear icon and a note: 'For applications requiring patient context, please start by using the Patient Search interface above.' The dashboard contains two tiles: 'DDE for Public Health Reporting' (highlighted with a red box) and 'User Guide & Help'.

DDE gives user access to two types of forms:

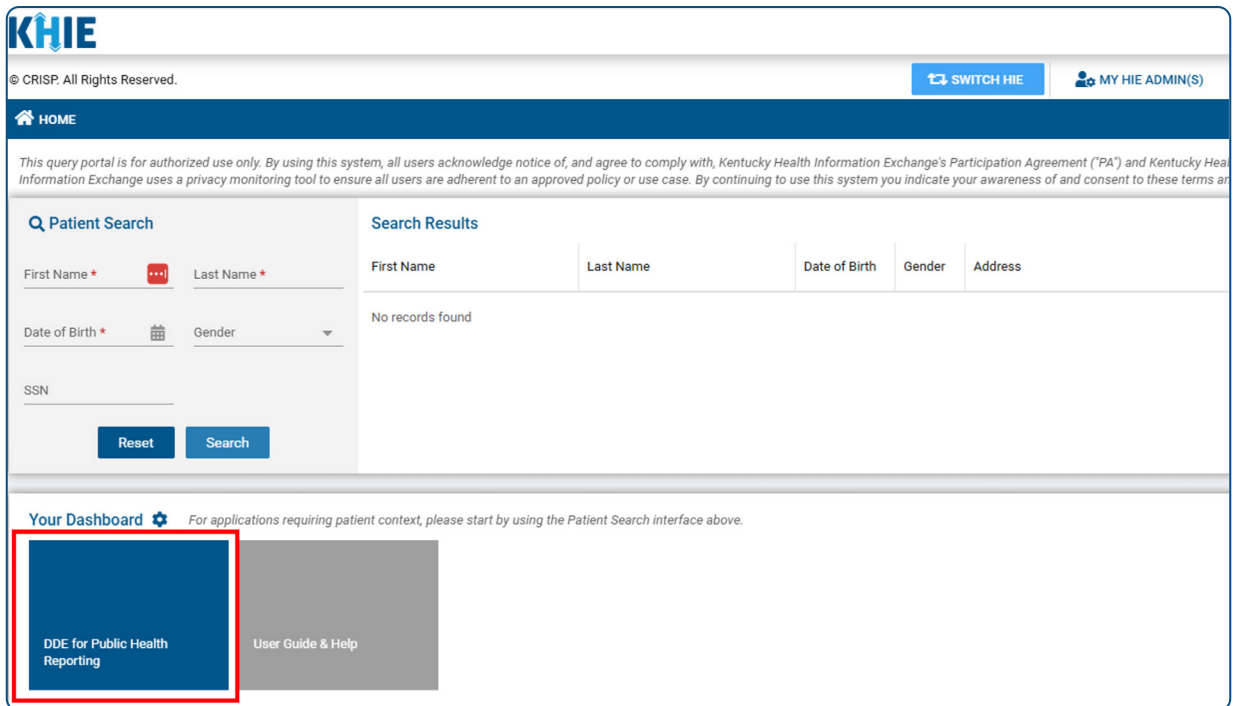
- Lab Data Entry form
- Case Report Entry form

Note: Forms are available by role type. You will only see both forms if you have access to see both forms. If you are an electronic lab report (**eLR**) user, you will only have access to the Lab data entry form. If you are an electronic case report (**eCR**) user, you will only have access to Case report entry form.

If a user needs access to any of the forms, please contact khiesupport@ky.gov.

2 User Preferences Setup

- » User Preferences was created to streamline the process of entering recurring data for users. These settings are available for both the **Lab Entry Form** and **Case Report Form**. Users are encouraged to enter recurring information **before** beginning any form to enhance user workflow. The details entered here are **required** in the workflow when users begin a form, these options will be available in the field's drop-down list.



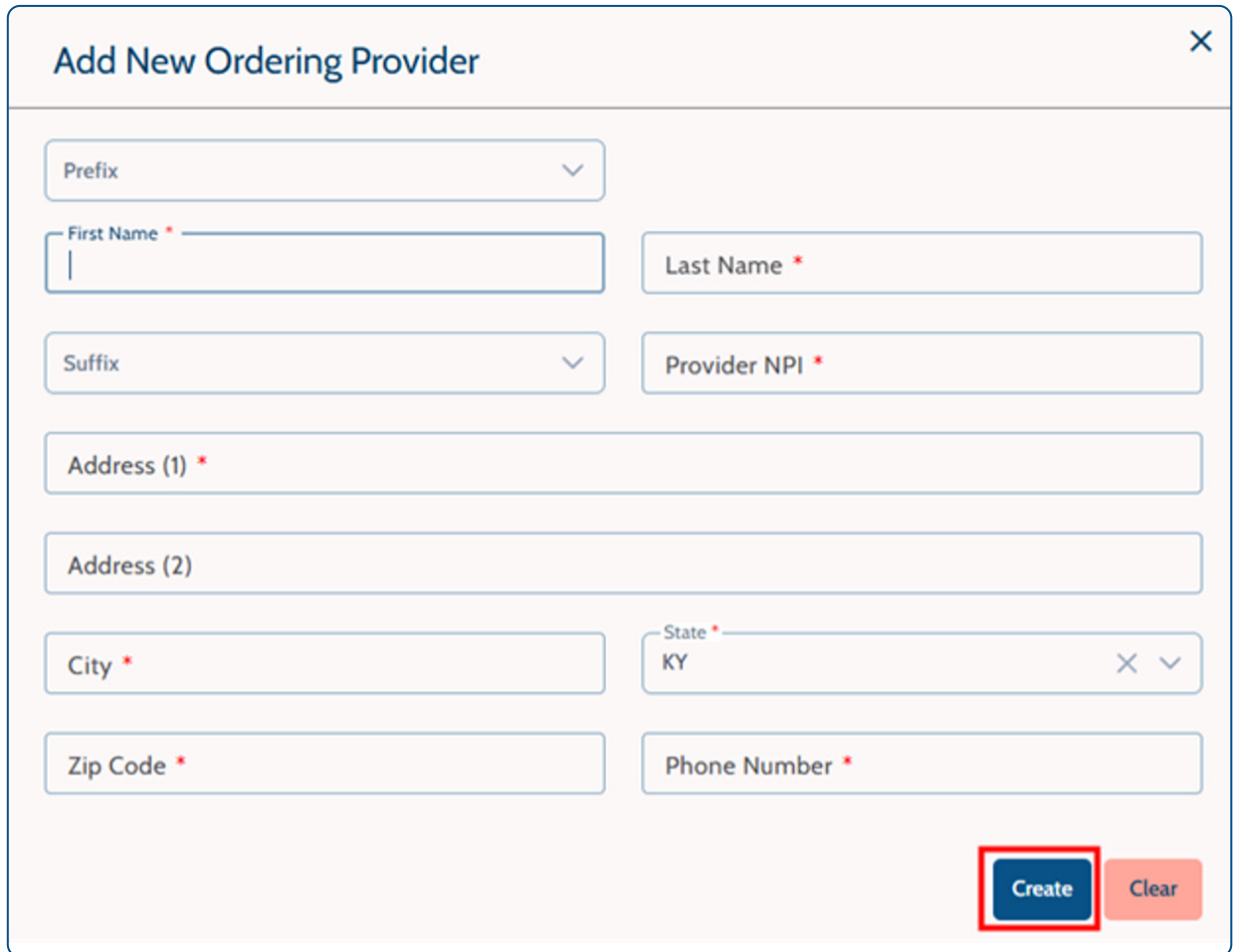
3 Lab Data Entry User Preferences

- » When users click on the **Ordering Provider Details**, the following screen appears; users should select **Add New**.



3 Lab Data Entry User Preferences

The **Add New Ordering Provider** screen appears. Enter all **Ordering Provider details**; required fields are marked with asterisks (*). If applicable, select the appropriate **Prefix** and Suffix from the drop down. Provider **NPI** must be 10 digits; users will get an error message if it's less or more than 10 digits. After providing all necessary information, click **Create**.



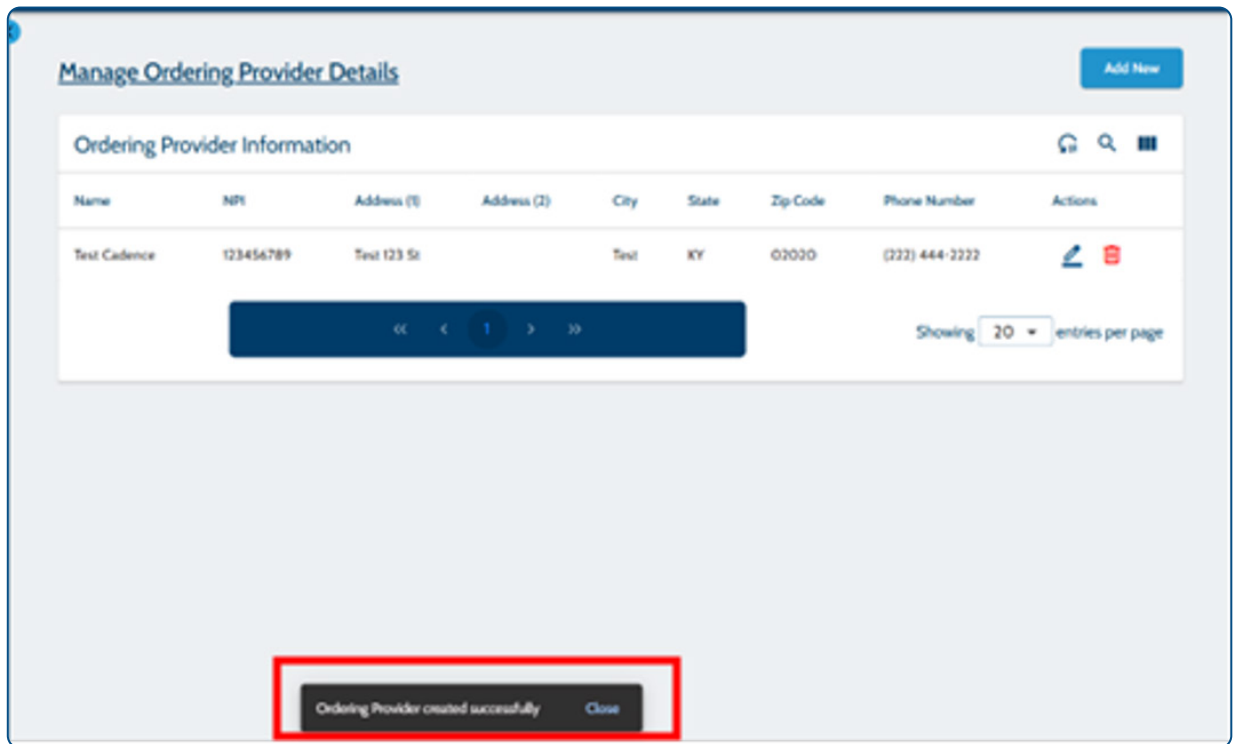
The screenshot shows a form titled "Add New Ordering Provider" with a close button (X) in the top right corner. The form contains the following fields:

- Prefix (dropdown menu)
- First Name * (text input)
- Last Name * (text input)
- Suffix (dropdown menu)
- Provider NPI * (text input)
- Address (1) * (text input)
- Address (2) (text input)
- City * (text input)
- State * (dropdown menu, currently showing "KY")
- Zip Code * (text input)
- Phone Number * (text input)

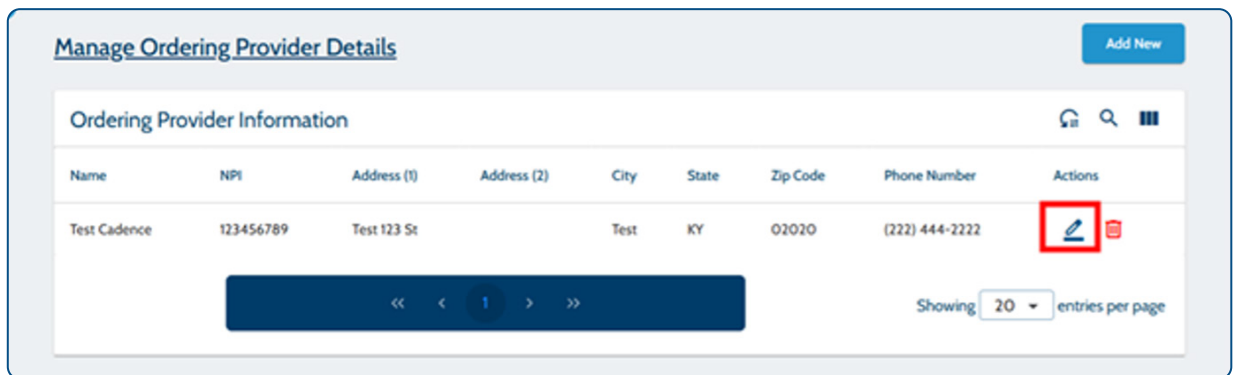
At the bottom right of the form, there are two buttons: "Create" (highlighted with a red box) and "Clear".

The details of the ordering provider will appear, and a confirmation message will display: "**Ordering Provider created successfully**". To add another Ordering Provider Details, users should click on the **Add New** button

3 Lab Data Entry User Preferences



Users can edit an Ordering Provider detail, by clicking on the **edit icon**.



The **Update Ordering Provider Details** will appear, allowing users to edit any necessary information. After making changes, users must click **Save** to apply and store the updated details.

3 Lab Data Entry User Preferences

Update Ordering Provider Details [Close]

Prefix: Dr. [X] [v]

First Name: Test

Last Name: Cadence

Suffix: [X] [v]

Provider NPI: 1234567890

Address (1): Test 123 st

Address (2):

City: Test

State: KY [X] [v]

Zip Code: 02020

Phone Number: (123) 456-7890

[Save] [Cancel]

Users can delete an ordering provider's entry by selecting the **trash bin** icon. A warning pop-up will appear. Click **Delete** to confirm the removal or click **Cancel** to keep the information. Please note that this action **cannot be undone**.

Manage Ordering Provider Details [Add New]

Ordering Provider Information [Refresh] [Search] [Menu]

Name	NPI	Address (1)	Address (2)	State	Zip Code	Phone Number	Actions
Test Cadence	1234				02020	(222) 444-2222	[Edit] [Trash]

Showing 20 entries per page

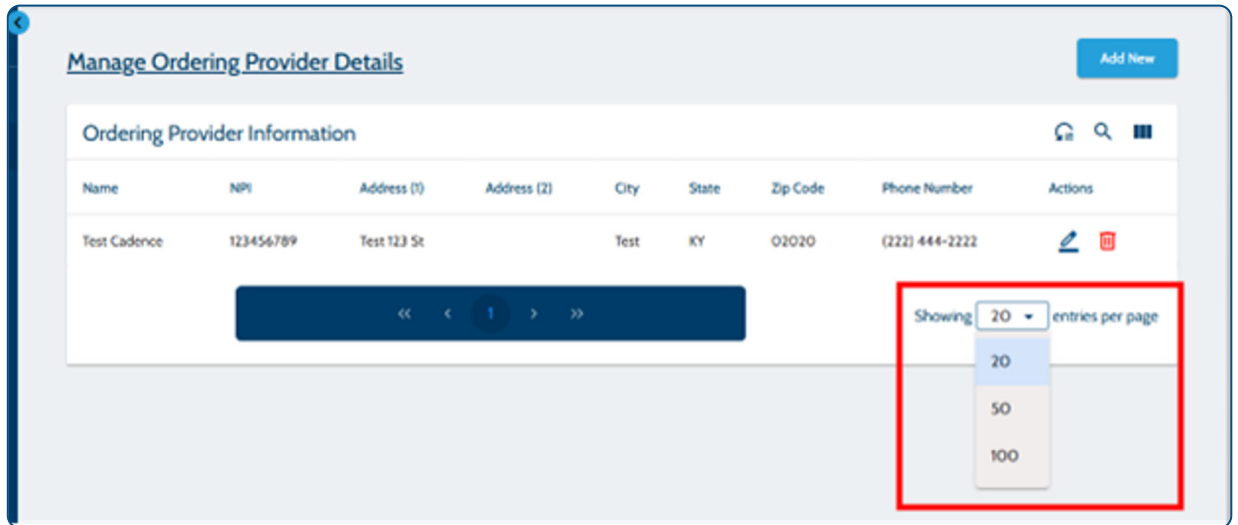
WARNING [Close]

This action cannot be undone. Are you sure you want to delete this Ordering Provider?

[Delete] [Cancel]

4 Modifying the Tables

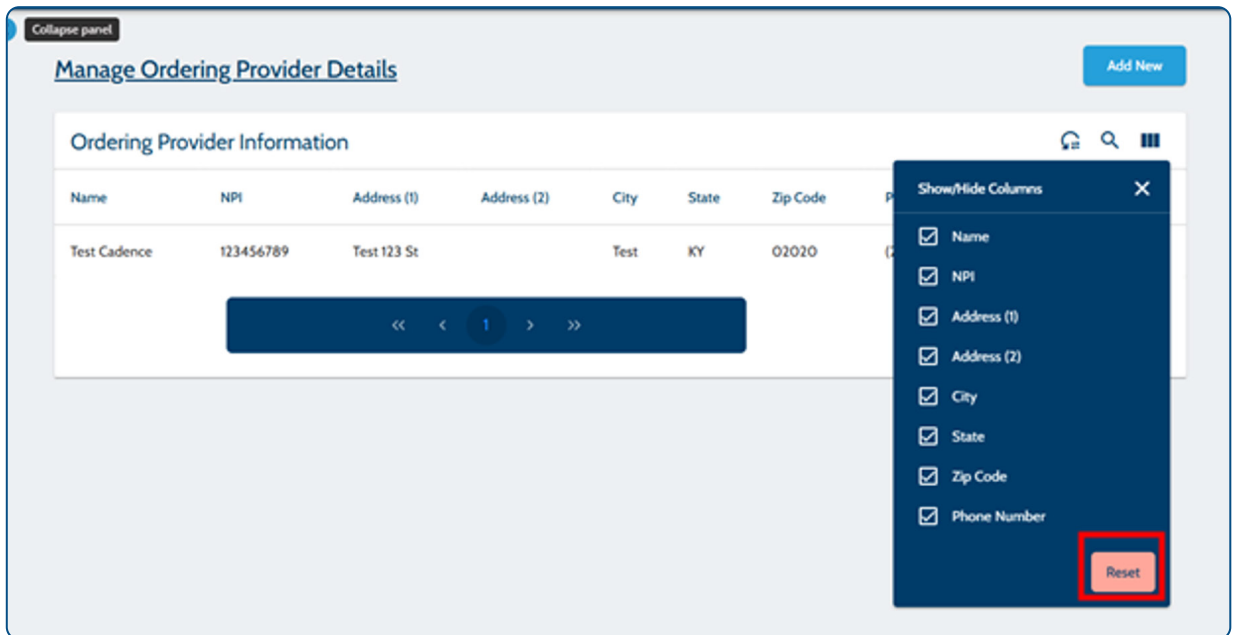
- » Users can choose how many entries to display per page by selecting a value from the drop-down menu. Up to 100 entries can be shown on a single page



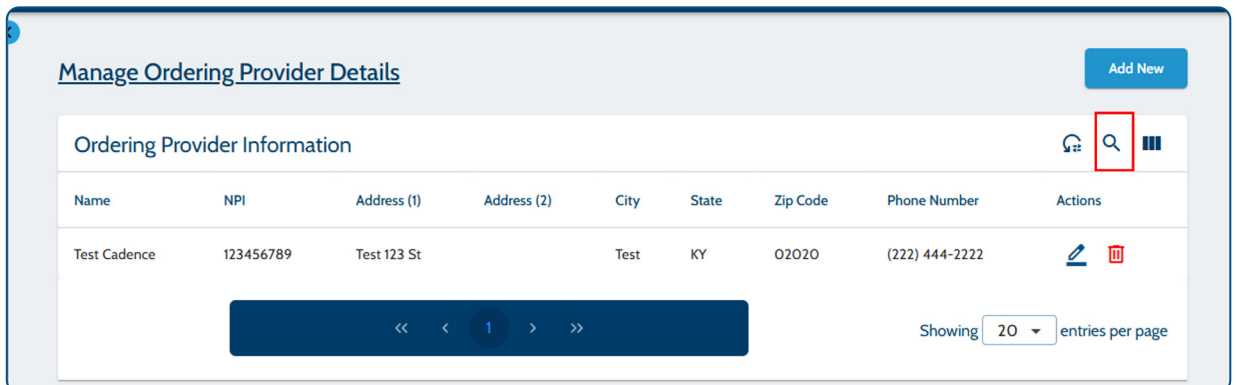
Users can control which columns are visible in the table by opening the column menu. This menu allows users to select or deselect the columns they want to display. By default, all columns are checked, meaning all are visible. To hide a column, users can uncheck it, and the column will be removed from the table immediately. To close the menu, click the X icon. Selecting the Reset button will restore the default view with all columns checked.

4 Modifying the Tables

By clicking the **'Reset'** button, it will undo all action done for the columns.



Users can search for a provider by selecting the search icon and entering any information relevant to a provider on the list. As user types, the search functionality will filter the view.



4 Modifying the Tables

The **reset icon** resets all action done in regard to column display and provider search to its default state.

Manage Ordering Provider Details Add New

Ordering Provider Information [Reset Icon] [Search] [Menu]

Name	NPI	Address (1)	Address (2)	City	State	Zip Code	Phone Number	Actions
Test Cadence	123456789	Test 123 St		Test	KY	02020	(222) 444-2222	[Edit] [Delete]

<< < 1 > >>

Showing entries per page

5 Manage Ordering Facility Details

» Users can add ordering facility details by selecting the “Ordering Facility Details” from the “User Preferences” drop down then click on “**Add New**” on the right.

DDE for Public Health Reporting

Manage Ordering Facility Details Add New

Lab Data Entry

User Preferences [Reset Icon] [Search] [Menu]

- Ordering Provider Details
- Ordering Facility Details**
- Communicable Disease Lab Entry

Address (2)	City	State	Zip Code	Phone Number	Actions
There is no data to display					

5 Manage Ordering Facility Details

Add New Ordering Facility pop-up window displays. Users must enter all required fields marked with asterisks (*). After filling in all mandatory fields, click **Create**.

After creating ordering facility details, users are returned to the worklist's view. Users can edit any information by clicking on the edit icon. The **Update Ordering Facility Details** will appear, allowing users to edit any necessary information. After making changes, users must click **Save** to apply and store the updated details.

Facility Name	Address (1)	Address (2)	City	State	Zip Code	Phone Number	Actions
Cadence Facility	456 Facility st	-	Cadence	KY	12365	(123) 654-7890	[Edit] [Delete]
Test Cadence	789 Cadence st	-	Ciryy	KY	78965	(123) 456-7890	[Edit] [Delete]
Test Facility	123 Facility st	-	Test	KY	32145	(987) 456-3210	[Edit] [Delete]

5 Manage Ordering Facility Details

Users can delete an ordering provider's entry by selecting the **trash bin icon**. A warning pop-up will appear. Click **Delete** to confirm the removal or click **Cancel** to keep the information. Please note that this action **cannot be undone**.

Filling out Laboratory Information in the Lab Entry Form

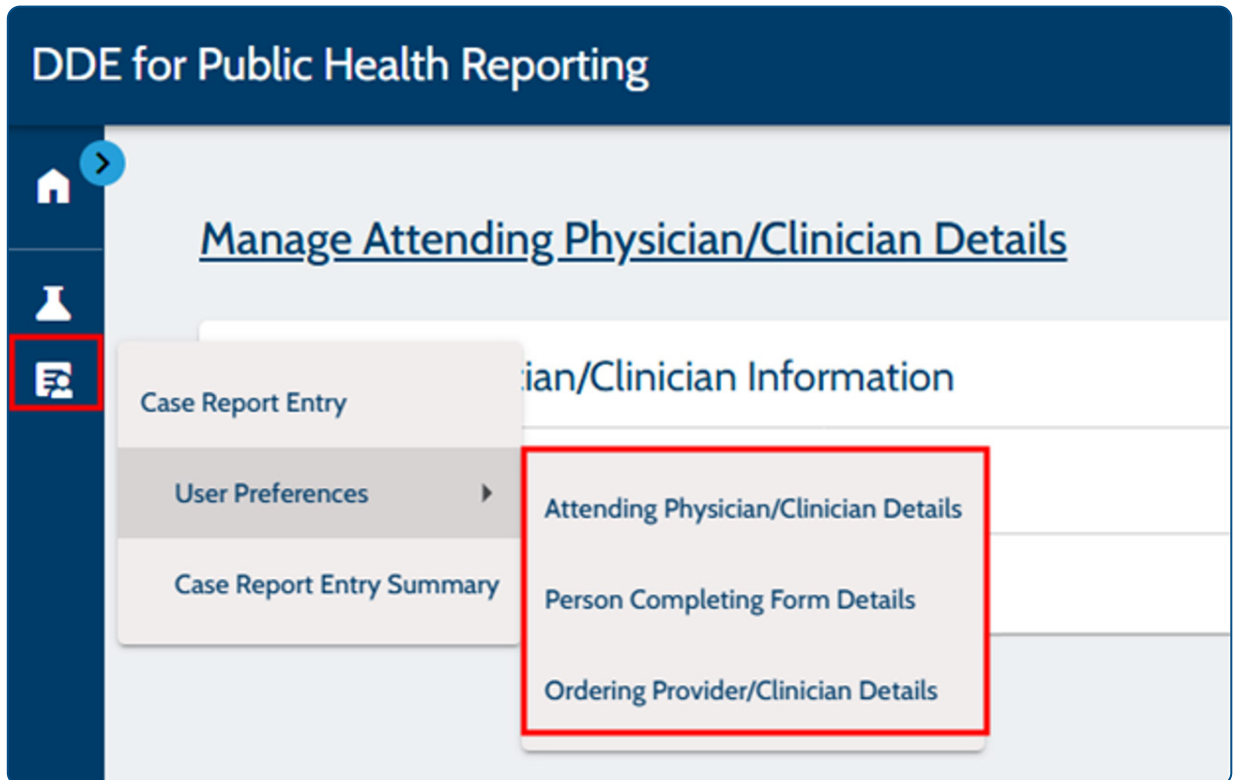
- » When filling the laboratory information in the **lab data entry form**, and users cannot find a facility or provider name from the drop-down list, users can click the '+' icon and this will display a pop-up screen.

The **Add New** screen will appear. Users should enter all required information and click create.

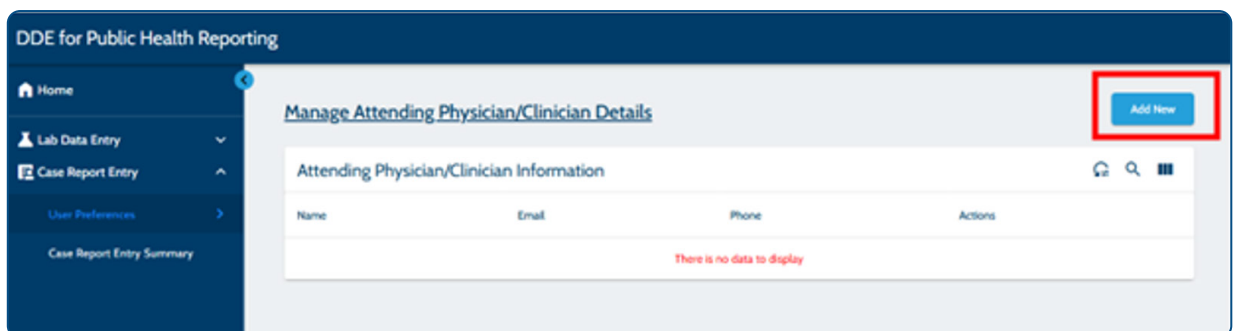
A confirmation message will display confirming entry success. Users can then click the drop-down arrow to see added information.

6 Case Report Form User Preferences

- » The case report entry form can be found on the side panel by clicking on the third icon (*this form is available by role type*). Users should begin by filling in user preference details which contain the **Attending physician/Clinician, Person Completing Form** and **Ordering Provider/Clinician** details.



When users select any of the options, the **Add New** button appears to the right and should be clicked.



6 Case Report Form User Preferences

The form to add the new details appears. Users should enter all details in the required field and click **Create**.

Add New Attending Physician/Clinician

Prefix

First Name * Last Name *

Suffix

Address 1 *

Address 2

City * State *
KY

Zip Code * Phone Number *

Email

Create Clear

KHIE

© CRISP. All Rights Reserved. SWITCH HIE MY HIE ADMIN(S)

HOME

This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, Kentucky Health Information Exchange's Participation Agreement ("PA") and Kentucky Health Information Exchange uses a privacy monitoring tool to ensure all users are adherent to an approved policy or use case. By continuing to use this system you indicate your awareness of and consent to these terms at

Q Patient Search Search Results

First Name * Last Name * First Name Last Name Date of Birth Gender Address

Date of Birth * Gender No records found

SSN

Reset Search

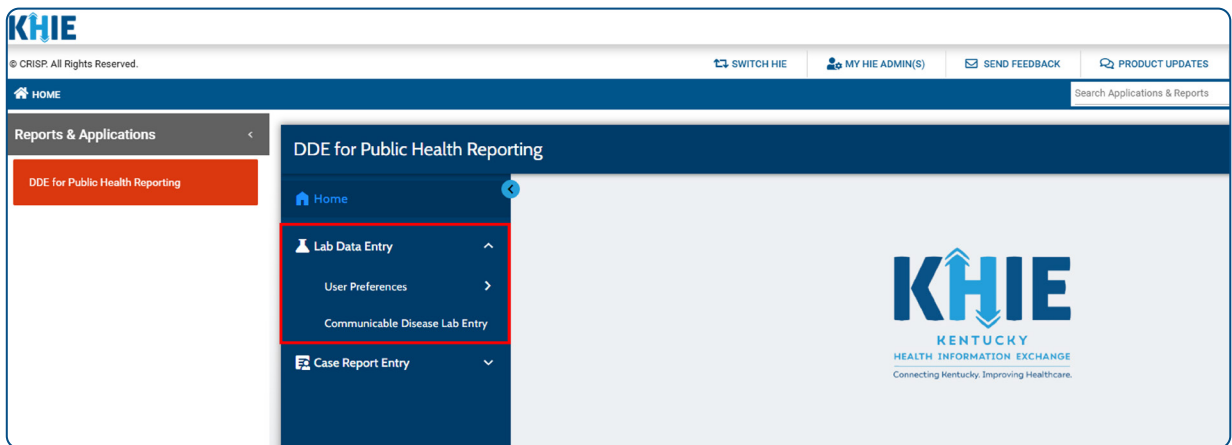
Your Dashboard For applications requiring patient context, please start by using the Patient Search interface above.

DDE for Public Health Reporting User Guide & Help

7 Lab Data Entry Form

» The lab data entry form is designed for users to enter a single result or multiple lab test results at the same time for the same patient. (This form will **only** be accessible to users who have access to the Lab Entry Form.)

Within the lab data entry form drop down, you can manage user preferences (see **Tips and Tricks** section on how to do this) and access the communicable disease lab entry form.



8 Communicable Disease Lab Entry

» To enter lab entry details, users should select the **Communicable Disease Lab Entry** in the left panel and select **New Form**.

The screenshot shows the 'Communicable Disease Lab Entry Details' interface. On the left, the navigation menu includes 'Home', 'Lab Data Entry', 'User Preferences', 'Communicable Disease Lab Entry' (highlighted), and 'Case Report Entry'. The main content area features a 'New Form' button in the top right. Below it is a 'Last Updated' section with 'Start Date' (09/10/2025) and 'End Date' (09/17/2025) pickers, and a 'Retrieve Data' button. A table titled 'Lab Results Information' is shown below, with columns: Performing Facility Name, Patient MRN, Name, Date of Birth, Patient Sex, eCR Report, Status, Date Created, Last Updated, Date Submitted, and Case Report Form. The table is currently empty, displaying 'There is no data to display'.

The lab entry form is a **four-step process** where users enter the (1) Patient Information, (2) Laboratory Information, (3) Ask on Order Entry, (4) Lab Data Review. In each step, there are required fields marked with **red asterisks (*)**. These fields must be completed in order to proceed. Users are encouraged to enter as much information as possible.

The screenshot shows the 'Communicable Disease Lab Entry' screen. The left sidebar has 'Communicable Disease Lab Entry' highlighted. The main content area displays a progress bar with four steps: 1 Patient Information, 2 Laboratory Information, 3 Ask on Order Entry, and 4 Lab Data Review. The first step, 'Patient Information', is currently active and highlighted.

9 Patient Information

- » The **Save button** allows users to save their progress at any time. If a user needs to leave the form before completing it, they can save their work and return to resume from the last saved point. For all fields with a **drop-down**, users can **search** within the list to find relevant information within the field. In the **State field**, the form defaults to KY, users can change this if need be. This changes the county drop-down to display **“Out of System State”**. When users have completed all required fields, users should click **Next** to proceed to the following step.

DDE for Public Health Reporting

1 Patient Information Laboratory Information Ask on Order Entry Lab Data Review

Patient Information

Please complete the form below. All fields marked with an asterisk (*) are required.

Performing Facility Name * Patient ID (MRN) *

Prefix First Name * Middle Name Last Name * Suffix

Date of Birth * Patient Sex * Ethnicity * Race *

Address (1) * Address (2) City *

State * KY Zip Code * County *

Phone * Email

Save Next

DDE for Public Health Reporting

1 Patient Information 2 Laboratory Information Ask on Order Entry Lab Data Review

Laboratory Information

Please complete the form below. All fields marked with an asterisk (*) are required.

Ordering Facility Information

You must select at least one of the options available for Ordering Facility information: Ordering Facility or Ordering Provider.

Facility Name *

Search for NPI

Cadence Facility
Test Cadence
Test Facility

Filler Order Number * Specimen Collection Date/Time

10 Laboratory Information

- » The next step is to enter details about laboratory information. This section is divided into three parts: **Ordering Facility Information, Specimen Information, and Test Results.**

DDE for Public Health Reporting

Communicable Disease Lab Entry

1 Patient Information 2 Laboratory Tests Ask on Order Entry Lab Data Review

Laboratory Tests

Please complete the form below. All fields marked with an asterisk (*) are required.

Ordering Facility Information

You must select at least one of the options available for Ordering Facility information: Ordering Facility or Ordering Provider.

Facility Name +

Provider Name + Provider NPI

Specimen Information

Filler Order Number * ? Specimen Collection Date/Time *

Specimen Site Specimen Type *

Ordering Facility Information

- » Users **must** select an ordering facility **or** ordering provider from the drop-down list. There will only be a list of Ordering Facility and Provider name if the user entered this information in **User Preference** section **before** beginning a form (see *User preference set up above for this*).

If ordering facility or provider details were not entered initially, users can create new facility/provider information by clicking on the '+' icon.

Please complete the form below. All fields marked with an asterisk (*) are required.

Ordering Facility Information

You must select at least one of the options available for Ordering Facility information: Ordering Facility or Ordering Provider.

Facility Name +

Provider Name + Provider NPI

10 Laboratory Information

When users select a provider name from the drop-down list, this auto populates the provider NPI linked to the provider selected.

Please complete the form below. All fields marked with an asterisk (*) are required.

Ordering Facility Information

You must select at least one of the options available for Ordering Facility information: Ordering Facility or Ordering Provider.

Facility Name Cadence Facility	X	▼	+	Provider NPI 123456789
Provider Name Test Cadence	X	▼	+	

Specimen Information

» When entering specimen information, users should click on the drop down for a list of options and search for information. The **specimen collection date/time** can be typed in or be selected from the date picker by clicking on the date icon. All required fields with an asterisk (*) must be completed.

Specimen Information

Filler Order Number *	?	Specimen Collection Date/Time *	📅
Specimen Site	▼	Specimen Type *	▼

Test Results

» The test results section requires more entries. Users should select either **Condition Group** or **Condition**. Note that if you select Condition first, the Condition Group will auto-populate. If you select a Condition Group first, the Condition field will display a drop-down list of associated conditions for you to choose from.

The instruction at the bottom of the form instructs users on how to include additional lab results.

10 Laboratory Information

Test Results

Please select either Condition or Condition Group. Please note, if you select Condition, the Condition Group will auto-populate. When you select a Condition Group first, the Condition field will display the associated Conditions from which you can choose.

Select Condition Group * | Select Condition *

Resulted Test * | Resulted Test LOINC *

Result Type *

Units | Reference Range

Abnormal Flag | Lab Report Date/Time *

Notes

Additional Resulted Test

Select "Add Result (Same Sample)" if entering a lab result from a test that was performed on the same specimen. Otherwise, select "Add Result (Different Sample)" if entering a result for a separate sample.

Resulted Test (Same Sample) | Resulted Test (Different Sample)

When selecting any **Resulted Test** from the drop down, this auto populates the **Resulted Test LOINC** associated with the test so users do not have to enter that.

Test Results

Select Condition Group * | Select Condition*

Foodborne and Waterborne Diseases | Acanthamoeba Infection

Culture Result ?

Resulted Test* | Resulted Test LOINC*

Acanthamoeba sp identified in Specimen by Organism specific culture | 9781-6

Acanthamoeba sp identified in Specimen by Organism specific culture

Acanthamoeba sp DNA [Presence] in Tissue by NAA with probe detection

Acanthamoeba sp DNA [Presence] in Specimen by NAA with probe detection

Acanthamoeba sp DNA [Presence] in Cerebral spinal fluid by NAA with probe detection

Acanthamoeba sp Ag [Presence] in Specimen by Immunofluorescence

Reference Range

Lab Report Date/Time *

Alternatively, in situations where the resulted test LOINC code is known but the resulted test name is not, users can use search/select from the list of LOINC codes and this auto populates the resulted test name.

Test Results

Select Condition Group * | Select Condition*

Foodborne and Waterborne Diseases | Acanthamoeba Infection

Culture Result ?

Resulted Test* | Resulted Test LOINC*

This field is required. | 9781-6

Result Type* | 88914-7

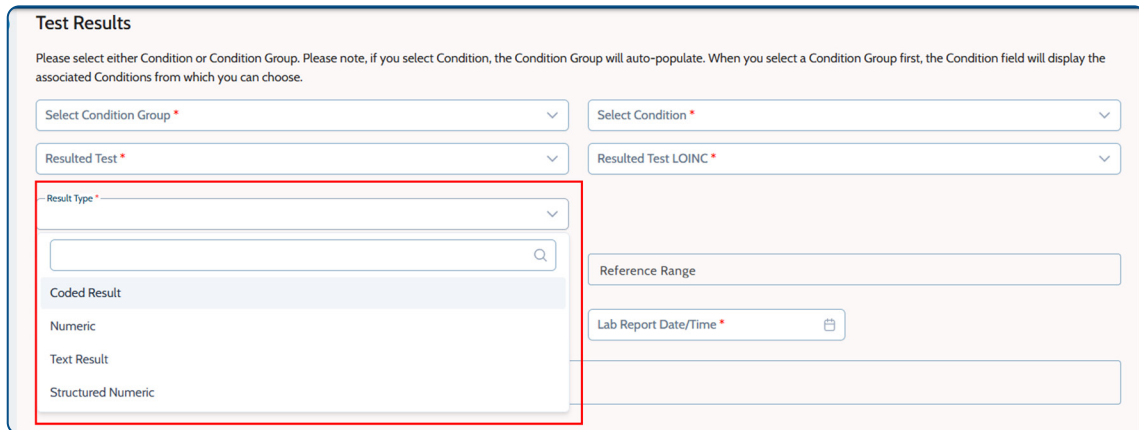
Units | 41429-2

Abnormal Flag | 88570-7

97527-6

10 Laboratory Information

The result type field has **four options**, and depending on the result type selected, the entry differs.



Test Results

Please select either Condition or Condition Group. Please note, if you select Condition, the Condition Group will auto-populate. When you select a Condition Group first, the Condition field will display the associated Conditions from which you can choose.

Select Condition Group *

Select Condition *

Resulted Test *

Resulted Test LOINC *

Result Type *

Coded Result

Numeric

Text Result

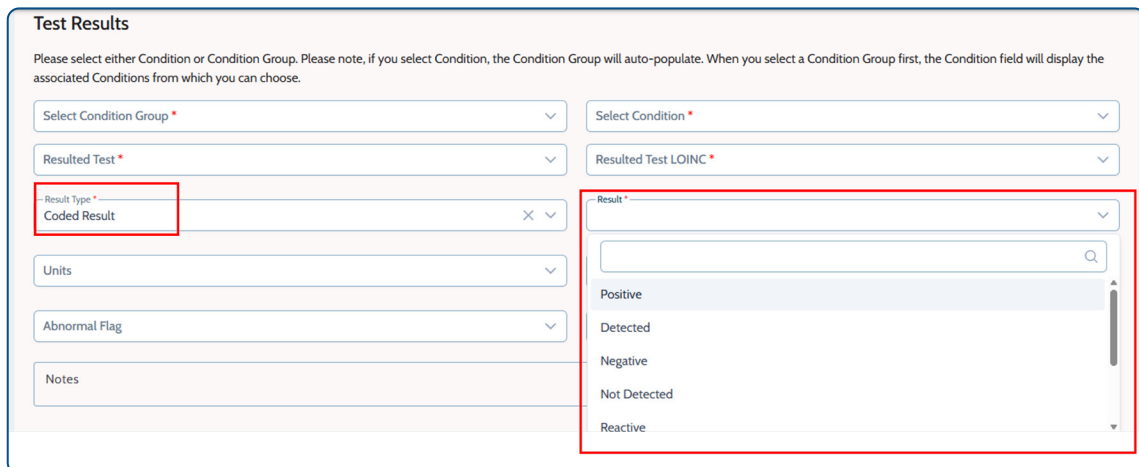
Structured Numeric

Reference Range

Lab Report Date/Time *

The screenshot shows the 'Test Results' form with the 'Result Type' dropdown menu open. The menu lists four options: 'Coded Result', 'Numeric', 'Text Result', and 'Structured Numeric'. The 'Result Type' field is highlighted with a red box.

If a user selects **Coded Result**, a drop-down list of options appears in the **Result** field.



Test Results

Please select either Condition or Condition Group. Please note, if you select Condition, the Condition Group will auto-populate. When you select a Condition Group first, the Condition field will display the associated Conditions from which you can choose.

Select Condition Group *

Select Condition *

Resulted Test *

Resulted Test LOINC *

Result Type *

Coded Result

Units

Abnormal Flag

Notes

Result *

Positive

Detected

Negative

Not Detected

Reactive

The screenshot shows the 'Test Results' form with the 'Result Type' dropdown menu open and 'Coded Result' selected. The 'Result' field dropdown menu is also open, showing a list of options: 'Positive', 'Detected', 'Negative', 'Not Detected', and 'Reactive'. The 'Result Type' and 'Result' fields are highlighted with red boxes.

10

Laboratory Information

If **Numeric Result** is selected, enter the value and choose a unit from the Units drop-down (required). If the value has no unit, select “**Number**”.

Test Results

Please select either Condition or Condition Group. Please note, if you select Condition, the Condition Group will auto-populate. When you select a Condition Group first, the Condition field will display the associated Conditions from which you can choose.

Select Condition Group *	Select Condition *
Resulted Test *	Resulted Test LOINC *
Result Type * Numeric	Result *
Units *	Reference Range
Abnormal Flag	Lab Report Date/Time *

If **Text Results** is selected, enter text in the result field which is typeable.

Test Results

Please select either Condition or Condition Group. Please note, if you select Condition, the Condition Group will auto-populate. When you select a Condition Group first, the Condition field will display the associated Conditions from which you can choose.

Select Condition Group *	Select Condition *
Resulted Test *	Resulted Test LOINC *
Result Type * Text Result	Result *
Units	Reference Range
Abnormal Flag	Lab Report Date/Time *
Notes	

If **Structured Numeric** is selected, users should enter all required fields.

Test Results

Please select either Condition or Condition Group. Please note, if you select Condition, the Condition Group will auto-populate. When you select a Condition Group first, the Condition field will display the associated Conditions from which you can choose.

Select Condition Group *	Select Condition *
Resulted Test *	Resulted Test LOINC *
Result Type * Structured Numeric	Result Value 1 *
Comparator	Result Value 2
Separator	Reference Range
Units *	Lab Report Date/Time *
Abnormal Flag	

10

Laboratory Information

Ask on Order Entry

- » The next step is the **Ask on Order Entry** section. If the user selected **Female** in the Patient Information step, the **“Is the patient pregnant?”** field will appear and must be completed to move forward. If **Male** was selected, this field will not display. All other fields in this section are optional, but users may enter information if it is available.

Communicable Disease Lab Entry

1 Patient Information 2 Laboratory Information 3 Ask on Order Entry Lab Data Review

Ask on Order Entry

Please provide additional details for the condition or disease that is being reported.

Is this the patient's first test?

Does the patient have symptoms?

Was the patient hospitalized?

Is the patient a healthcare worker?

Does the patient reside in a congregate care facility?

Is the patient pregnant?

Save Previous Next

10

Laboratory Information

Lab Data Review

- » This screen displays a summary of the information entered by the users. Users should review data entered in this page before clicking on the submit button below. Users can **print/download** the lab report entry before submitting by clicking the **Print button**.

DDE for Public Health Reporting

Communicable Disease Lab Entry

1 Patient Information 2 Laboratory Information 3 Ask on Order Entry 4 Lab Data Review

Lab Data Review

Please review your information before submitting. Print

Patient Information ▾

Performing Facility Name Access Family Health Center	Patient ID (MRN) 2332323233	First Name Anna	Middle Name -
Last Name cadence	Date of Birth 12/02/2025	Sex Female	Ethnicity Hispanic or Latino
Race Asian	Address 1 223 addy st	Address 2 -	City Caddy
State KY	Zip Code 22312	County Anderson	Phone 3323232232
Email			

After verifying the information is accurate, users should click on the submit button below. the Lab Data Entry form.

Units	Reference Range	Abnormal Flag	Notes
Percent	-	-	-

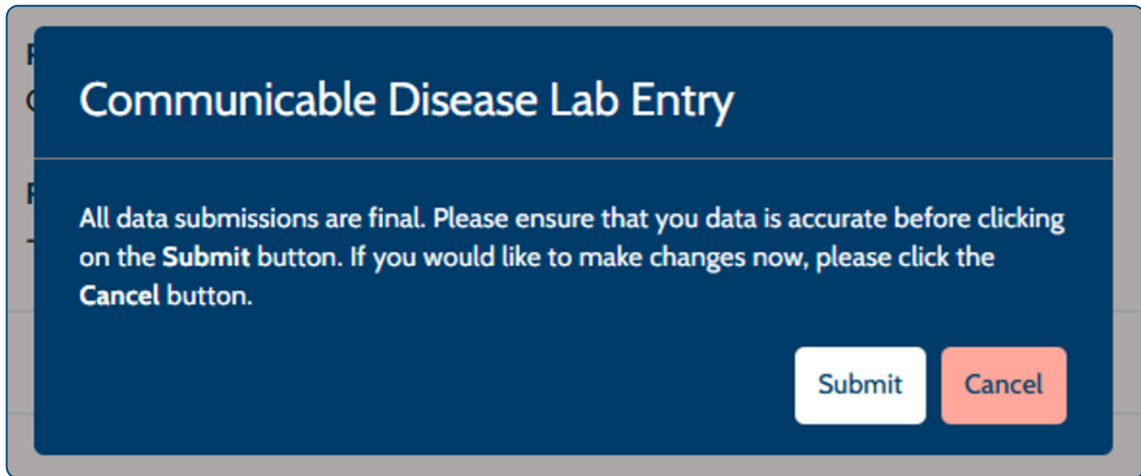
Ask On Order Entry ▾

First test? -	Has symptoms? -	Hospitalized? -	Healthcare worker? -
In a Congregate Care Facility? -			

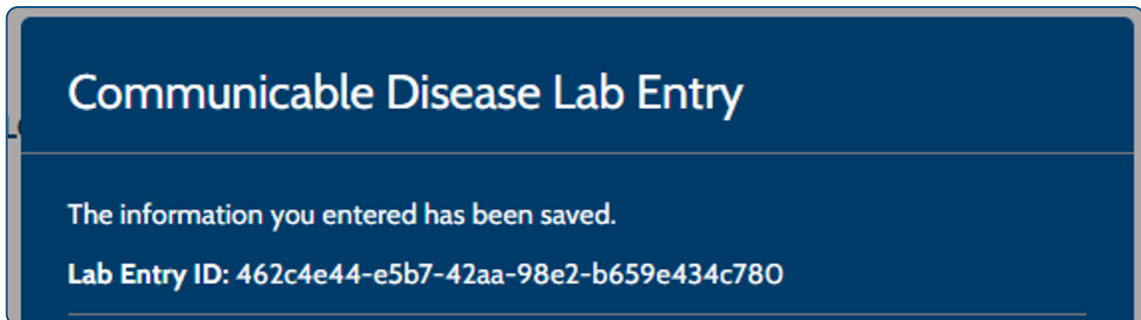
Previous Submit

10 Laboratory Information

A confirmation modal pop-up appears. Once submitted, users **cannot** make any changes after submission.



When users click submit, a Lab Entry ID is created which users can save for reference purposes.

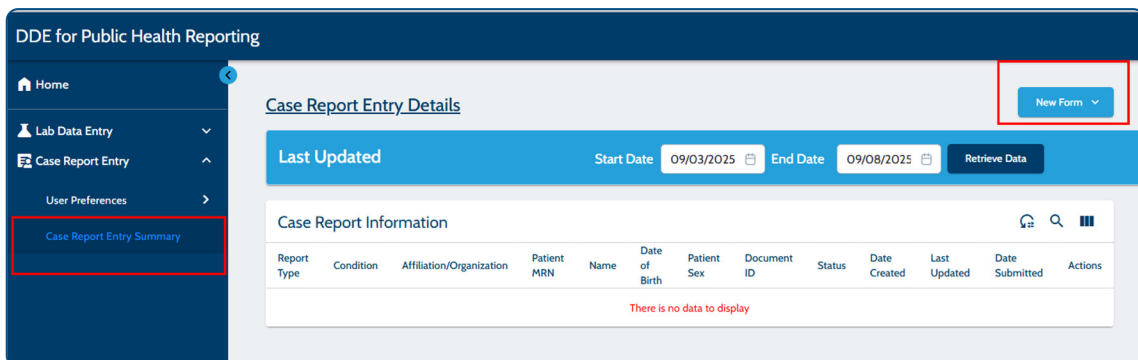


11 Case Report Forms

- » To access Case report forms, users should select the drop down beside the **Case Report Entry** in the panel and click on **Case Report Entry Summary**. (This form will **only** be accessible to users who have access to Case Report Forms.)



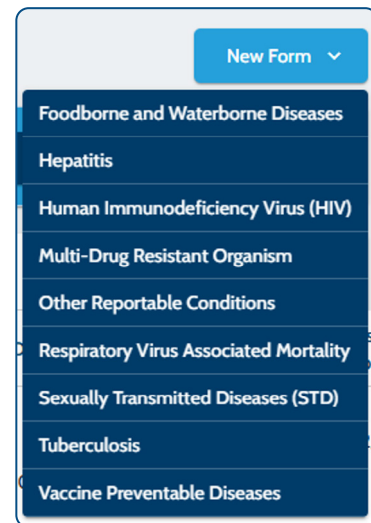
When users click the Case Report Entry Summary, the **New Form** button will appear on the right.



12 How to Find Case Report Forms

» When users click the New Form drop-down, it will reveal the available reportable condition groups.

Note: For user that have been provisioned both the eLR and eCR roles, the system will present the user a pop up upon lab submission if the condition(s) for which they submitted a result for has a case report form.



13 Filling A Case Report Form

» Depending on the **condition group** selected when users click on **New Form**, the number of steps required for completion varies. Each step includes required fields that **must** be completed before users can proceed to the next step.

Each condition group has its own conditions. You can only pick one condition at a time. See the HIV Condition Group for example;

DDE for Public Health Reporting

Human Immunodeficiency Virus (HIV) Case Report Form

1 Patient Information Laboratory Information Hospitalization, ICU, & Death Information Additional Information Service Referrals Treatment Information Additional Comments Review & Submit

Patient Information

Please complete the form below. All fields marked with an asterisk (*) are required.

Select Condition *

Date of Diagnosis * Unknown

on Completing Form, and Attending Physician/Clinician? *
 Yes No

Patient MRN * Affiliation/Organization *

Person Completing Form * Affiliation/Organization *

Attending Physician/Clinician * Affiliation/Organization *

Required fields vary across condition-specific forms, so users should ensure they are completing the correct form. For example, if the **Adult HIV** form is selected, the entered date of birth must indicate that the patient is 13 years of age or older.

Patient Information

Please complete the form below. All fields marked with an asterisk (*) are required.

Select Condition *
 Adult HIV

Date of Diagnosis * Unknown

This form should be completed for Adult HIV/AIDS cases only when the patient is 13 years of age or older.

13 Filling A Case Report Form

The questions assigned to the **Adult HIV form differs** from that in the Pediatric Form.

A screenshot of a form with a red border highlighting a section of demographic questions. The questions are:

- What is the patient's social security number? (with a help icon)
- What was the patient's sex assigned at birth? * (dropdown menu)
- What is the patient's gender identity? * (dropdown menu)
- What is the patient's country of birth? * (dropdown menu)
- What is the patient's sexual orientation? * (dropdown menu)

 Below the highlighted section, there is a question: "Is the facility providing this case information the same facility that made the initial diagnosis?" with radio buttons for "Yes" and "No". At the bottom left is a "Save" button, and at the bottom right is a "Next" button.

All case report forms include **Yes/No/Unknown** questions. In some cases, selecting **Yes** will display additional questions, while selecting **No** will not, and vice versa.

This is an example of what appears when the user selects **Yes**.

A screenshot of a form with a red box around the "Yes" radio button. The question is: "Is the Affiliation/Organization the same for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician? *". Below the question are three dropdown menus:

- Patient MRN *
- Affiliation/Organization * (with a help icon)
- Person Completing Form * (with a plus icon)
- Attending Physician/Clinician * (with a plus icon)

This is an example of what appears when the user selects **No**. More fields appear because the patient's organization differs from that of the person completing the form and the attending physician.

A screenshot of a form with a red box around the "No" radio button. The question is: "Is the Affiliation/Organization the same for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician? *". Below the question are three dropdown menus, each with a plus icon:

- Patient MRN *
- Affiliation/Organization * (with a help icon)
- Person Completing Form * (with a plus icon)
- Attending Physician/Clinician * (with a plus icon)

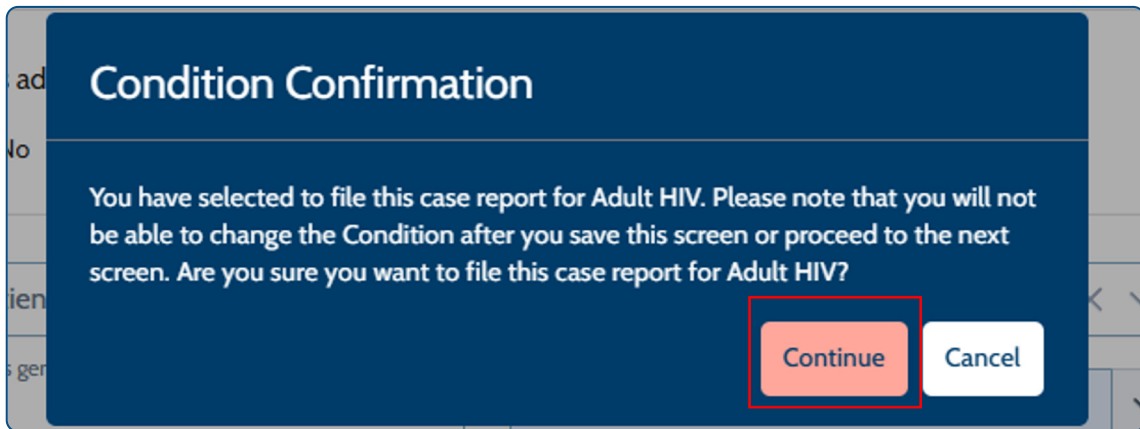
 Additionally, there are three more dropdown menus, each labeled "Affiliation/Organization * (with a help icon)", which are highlighted with a red box. These represent the additional fields that appear when the user selects "No".

13 Filling A Case Report Form

When all required fields in a step are completed, users should click **Next** to proceed; this action **automatically saves** the information entered. If the form is incomplete and a user wants to return later, they must click the **Save button** to preserve their progress.



As mentioned above, once a user selects a condition within the condition group, it must be the correct form. After completing the Patient Information step and clicking **Next**, the user **cannot go back** to change the condition. A confirmation modal appears to inform the user of this. Click **Continue** to proceed.



When users select **Continue**, the form proceeds to the next step, **Laboratory Information**. As noted earlier, additional fields will appear depending on how **Yes/No/Unknown** questions are answered.

 A screenshot of the 'Human Immunodeficiency Virus (HIV) Case Report Form'. The form has a progress bar at the top with eight steps: Patient Information (1), Laboratory Information (2), Applicable Symptoms, Hospitalization, ICU, & Death Information, Additional Information, Service Referrals, Treatment Information, Additional Comments, and Review & Submit. The 'Laboratory Information' step is currently active. Below the progress bar, the text reads: 'Please enter the most recent positive and negative HIV laboratory test results.' There are three questions with radio button options: 'Has the patient had a previous positive Adult HIV test result?' (Yes, No, Unknown), 'Has the patient had a previous negative Adult HIV test result?' (Yes, No, Unknown), and 'Does the patient have a lab test?' (Yes, No, Unknown). At the bottom, there are 'Save', 'Previous', and 'Next' buttons.

13 Filling A Case Report Form

If the patient has had a previous HIV test result and the person completing the form selects **Yes**, additional information about that result must be entered. **This field is required.**

Laboratory Information

Please enter the most recent positive and negative HIV laboratory test results.

Has the patient had a previous positive Adult HIV test result? *

Yes No Unknown

Please enter the positive Adult HIV test result date.

Month * Day * Year *

Please enter the test result date. If the month is not known, please select 'Unknown'. Please enter the test result date. If the day is not known, please select 'Unknown'. Please enter the test result date. If the year is not known, please select 'Unknown'.

If known, please provide the name of the facility where the test was performed.

If the previous result was negative and the user selects Yes, additional information about the negative result must be entered. This field is required.

Has the patient had a previous negative Adult HIV test result? *

Yes No Unknown

Please enter the negative Adult HIV test result date.

Month * Day * Year *

Please enter the test result date. If the month is not known, please select 'Unknown'. Please enter the test result date. If the day is not known, please select 'Unknown'. Please enter the test result date. If the year is not known, please select 'Unknown'.

If known, please provide the name of the facility where the test was performed.

The final question in this step inquires about the patient's lab test. When Yes is selected, the user is required to provide details about the resulted test.

Does the patient have a lab test? * Yes No Unknown

Ordering Facility Name * Laboratory Name *

Resulted Test

Resulted Test 1

Specimen Information

Filler Order (Accession) Number * Specimen Collection Date/Time * Unknown

Specimen Site

Specimen Type *

Test Results

HIV Test Type *

13 Filling A Case Report Form

The fields in the test result section depend on the option selected in the preceding field.

Users should begin by selecting the **HIV Test Type**, which includes two options. If the user selects **Rapid Test**, the **HIV Test Brand** field will appear. Users must select the test brand from the drop-down menu to reveal the list of available options

If users do not select a **HIV Test Brand**, the options in the **Resulted Test** field and **Resulted Test LOINC** field will not appear.

13 Filling A Case Report Form

After the Test Brand has been selected, the options for the Resulted Test field appears.

The screenshot shows the 'Test Results' section of the form. The 'HIV Test Type' is 'Rapid Test' and the 'HIV Test Brand' is 'SureCheck'. The 'Resulted Test' dropdown menu is open, displaying a search bar and a list of options. The first option, 'HIV 1+2 Ab [Presence] in Serum, Plasma or Blood by Rapid Immunoassay', is highlighted in grey and has a red arrow pointing to it. The 'Resulted Test LOINC' field is currently empty.

The Resulted Test LOINC field auto-populates when the user selects the first option (as it is the only option available). The user must then select the Result from the options below.

The screenshot shows the 'Test Results' section. The 'HIV Test Type' is 'Rapid Test' and the 'HIV Test Brand' is 'Abbott/Alere Determine'. The 'Resulted Test' is 'HIV 1-2 Ab and HIV1 p24 Ag [Identifier] in Serum, Plasma or Blood by Rapid Imm...' and the 'Resulted Test LOINC' is '75666-8'. The 'Result' dropdown menu is open, showing a search bar and a list of options: 'HIV Ab positive and Ag positive', 'HIV Ab positive and Ag negative', 'HIV Ab negative and Ag positive', and 'Negative'. The 'Result' field is currently empty.

If the user selects Other, both the Test LOINC and Result fields will auto-populate with 'Other.' The user must then provide the specific result in the text box.

The screenshot shows the 'Test Results' section. The 'HIV Test Type' is 'Rapid Test' and the 'HIV Test Brand' is 'Abbott/Alere Determine'. The 'Resulted Test' is 'Other' and the 'Resulted Test LOINC' is 'Other'. The 'Result' dropdown menu is open, showing a search bar and a list of options: 'Other'. The 'Result' field is currently empty. The 'Please Specify' text box is highlighted with a red box.

13 Filling A Case Report Form

If a user selects **Non-Rapid Tests** in the HIV Test Type field, the same process applies. The **HIV Test Category** field will appear and **must** be selected before the user can choose a Resulted Test and a Resulted Test LOINC option

The screenshot shows a form titled "Test Results" with the following fields:

- HIV Test Type ***: Non-Rapid Test
- HIV Test Category ***: (Red box highlights this field with the message "This field is required.")
- Resulted Test ***: (Dropdown menu)
- Resulted Test LOINC ***: (Dropdown menu)
- KY/EvaluationWeb Number**: (Text input with a help icon)
- Result ***: (Dropdown menu)
- Lab Report Date/Time ***: (Date/time picker with an "Unknown" checkbox)

If there are additional resulted tests, users may add them. Additional test results can **only** be entered if the patient has a lab result; this option will not appear if the user selected **"No"** for the lab result question. Users **must** first complete the required preceding information before entering any additional test results.

What users will see **before** completing the preceding sections. Users **cannot** select these options, and an on-screen instruction will appear to notify them.

The screenshot shows the "Additional Resulted Test" screen with the following elements:

- Additional Resulted Test** (Section Header)
- Instruction: *Select "Add Result (Same Sample)" if entering a lab result from a test that was performed on the same specimen. Otherwise, select "Add Result (Different Sample)" if entering a result for a separate sample.*
- Buttons: **+ Resulted Test (Same Sample)** and **+ Resulted Test (Different Sample)** (Both are disabled)
- Message: **Please complete specimen information before adding another** (Red box highlights this message)
- Buttons: **Save**, **Previous**, and **Next**

After completing the required preceding sections, the Add button becomes clickable.

The screenshot shows the "Additional Resulted Test" screen with the following elements:

- Additional Resulted Test** (Section Header)
- Instruction: *Select "Add Result (Same Sample)" if entering a lab result from a test that was performed on the same specimen. Otherwise, select "Add Result (Different Sample)" if entering a result for a separate sample.*
- Buttons: **+ Resulted Test (Same Sample)** and **+ Resulted Test (Different Sample)** (Both are now enabled)
- Buttons: **Save**, **Previous**, and **Next**

13 Filling A Case Report Form

When a user clicks no or unknown in the **Laboratory Information** step, no further question is asked.

The screenshot shows the 'Laboratory Information' step of the HIV Case Report Form. The progress bar at the top indicates that steps 1 (Patient Information) and 2 (Laboratory Information) are completed, while step 3 (Applicable Symptoms) is the current step. The form contains three questions with radio button options:

- Has the patient had a previous positive Adult HIV test result? *
 Yes No Unknown
- Has the patient had a previous negative Adult HIV test result? *
 Yes No Unknown
- Does the patient have a lab test? * Yes No Unknown

Buttons for 'Save', 'Previous', and 'Next' are visible at the bottom of the form.

In the **Applicable Symptoms** step, the HIV form requires symptom documentation. If the patient had no symptoms, select **No** and move to the next step.

The screenshot shows the 'Applicable Symptoms' step of the HIV Case Report Form. The progress bar at the top indicates that steps 1 (Patient Information), 2 (Laboratory Information), and 3 (Applicable Symptoms) are completed, while step 4 (Hospitalization, ICU, & Death Information) is the current step. The form contains one question with radio button options:

- Were symptoms present during the course of illness? *
 Yes No Unknown

Buttons for 'Save', 'Previous', and 'Next' are visible at the bottom of the form.

13 Filling A Case Report Form

If the patient had symptoms, the person completing form should select yes and a list of symptoms will be revealed along with additional required questions if Yes was selected for these symptoms.

If the patient had symptoms that are not listed, users should enter them in the 'Please Specify' field at the bottom and proceed to the next step once finished.

13 Filling A Case Report Form

The next step captures Hospitalization, ICU, and Death information, which the person completing the form must enter if available. As with previous steps, if **Yes** is selected for any initial question, additional required questions will appear.

Hospitalization, ICU, & Death Information

Please select any applicable hospitalization, ICU, and death information related to this case.

Hospitalization Information

Was the patient hospitalized? *

Yes No Unknown

Please specify the hospital name *
Hospital name is required.

Admission Date *
 Unknown

Discharge Date *
 Unknown
 Still hospitalized

ICU Information

Was the patient admitted to an intensive care unit (ICU)? *

Yes No Unknown

Death Information

The Service Referral step is required to capture further information regarding the patient's HIV status if available

Service Referrals

Please provide any service referrals related to this case for the patient.

Has the patient been informed of his/her HIV infection? *

Yes No Unknown

Other than the laboratory test result, is there other evidence that the patient received HIV medical care? *

Is the patient receiving or referred to HIV medical services? *

Yes No Unknown Refused

Please enter the name(s) of the clinic(s) where the patient has been referred or is receiving treatment for HIV care.

Save Previous Next

13 Filling A Case Report Form

The treatment information step requires information regarding treatment history of the patient if available.

Treatment Information

Please provide all treatment history of the patient under investigation for this case.

Has the patient been prescribed any antiretroviral (ARV) medications? *

Yes No Unknown

Is the patient currently adhering to the prescribed medication regimen? *

Yes No Unknown

Treatment

Ongoing Treatment

Treatment Start Date * Unknown Last Received Date * Unknown ?

Medication * ?

Reason for Treatment *

Additional Information ?

If there is more than one treatment option, the user can enter additional treatment below by selecting the **Add Treatment** button.

Save Previous Next

Once all steps have been completed, users can review all the information in the **Review & Submit** step. Before submitting, users may also **print or download** the case form.

DDE for Public Health Reporting

Foodborne and Waterborne Case Report Form

1 Patient Information 2 Laboratory Information 3 Applicable Symptoms 4 Additional Information 5 Hospitalization, ICU, & Death Information 6 Additional Comments 7 Review & Submit

Review & Submit

Please review your information before submitting.

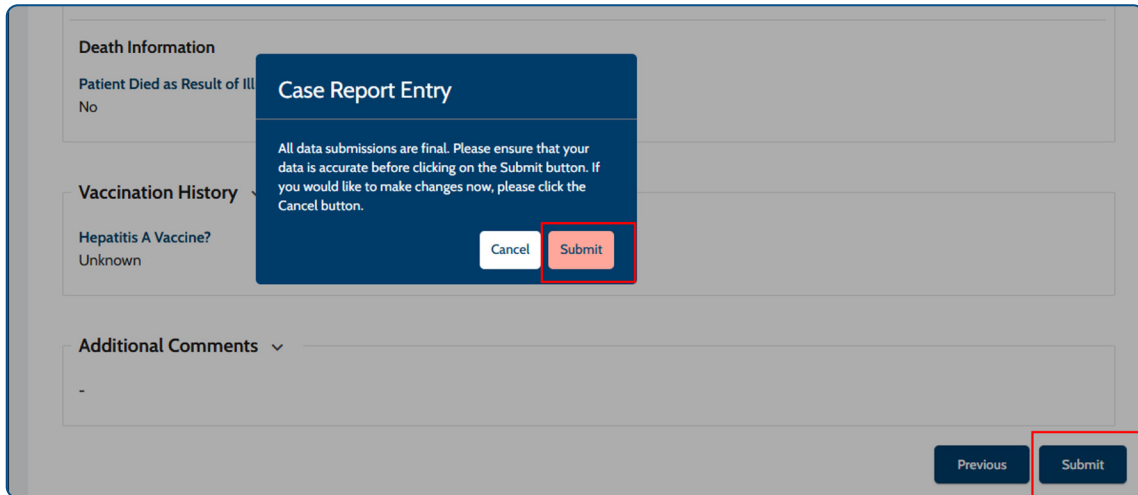
Patient Information

13

Filling A Case Report Form

Submitting a Form:

- » To submit a completed form, click **Submit** at the bottom of the page. A confirmation pop-up will appear. Once submitted, users **cannot** make any changes after submission.



The screenshot shows a form titled "Case Report Entry" with a dark blue header. The form is partially filled out with the following information:

- Death Information:** Patient Died as Result of Illness: No
- Vaccination History:** Hepatitis A Vaccine?: Unknown
- Additional Comments:** -

A modal dialog box is overlaid on the form, containing the text: "All data submissions are final. Please ensure that your data is accurate before clicking on the Submit button. If you would like to make changes now, please click the Cancel button." The dialog has two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red box. At the bottom right of the form, there are two buttons: "Previous" and "Submit". The "Submit" button is also highlighted with a red box.

After submission, a document ID is generated confirming the success of the user's submission.



The screenshot shows a confirmation message in a dark blue box with white text. The message reads:

Case Report Entry

Case Report Entry Saved Successfully

Document ID: 05f26745-908e-4554-aae6-18b5528272b5

OK

14 Tips and Tricks

» This section outlines tips and tricks a user can utilize during their workflow.

Help Icons

» Help icons provide descriptions or instructions for what users should enter in a field. They are available in the lab entry form and all case report forms. Hovering your cursor over the “?” help icon displays the relevant guidance.

The screenshot shows the 'Patient Information' section of the form. A red box highlights a help icon (a question mark) next to the 'Patient MRN' field, with a text box explaining: 'An MRN or Medical Record Number is an Organization specific, unique identification number assigned to a patient by a Healthcare Organization. If your Organization does not use an MRN, you MUST create a way to uniquely identify your patient. The MRN must be 3-24 characters in length. Only letters, numbers, and hyphens are allowed. No whitespaces.' Another red box highlights a help icon next to the 'Affiliation/Organization' dropdown menu, with a text box stating: 'Please select the Organization where the Patient ID (MRN) was assigned to the patient.'

Collapsing Panel

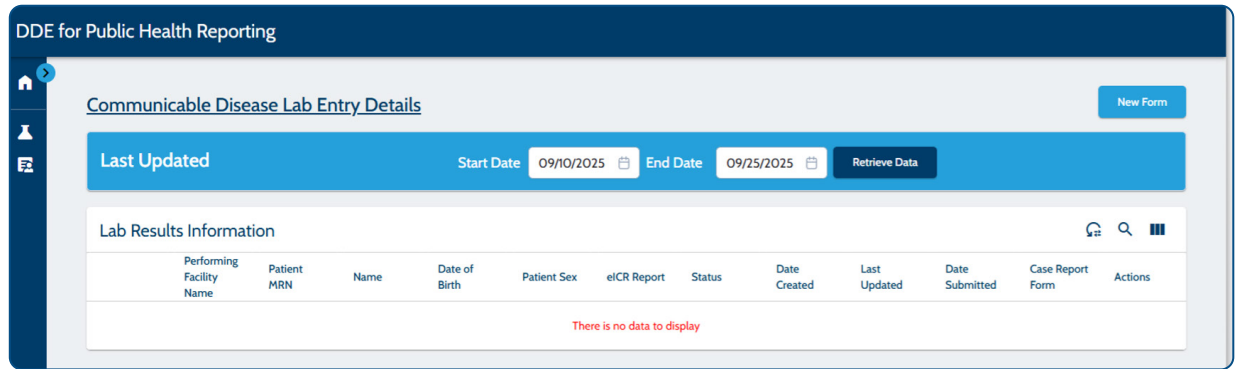
» When accessing any form or the user preferences, be sure to collapse the panel on the left side to view the full screen and improve user experience.

Before Collapsing

The screenshot shows the app's main interface. On the left, a dark blue sidebar menu is expanded. A red box highlights a button labeled 'Collapse panel' with a left-pointing arrow. The main content area displays 'Communicable Disease Lab Entry Details' with a 'Last Updated' section showing dates (09/10/2025 and 09/25/2025) and a 'Lab Results Information' table. The table has columns for Performing Facility Name, Patient MRN, Name, Date of Birth, Patient Sex, eCR Report, Status, Date Created, Last Updated, Date Submitted, and Case Report Form. A red message at the bottom of the table states 'There is no data to display'.

14 Tips and Tricks

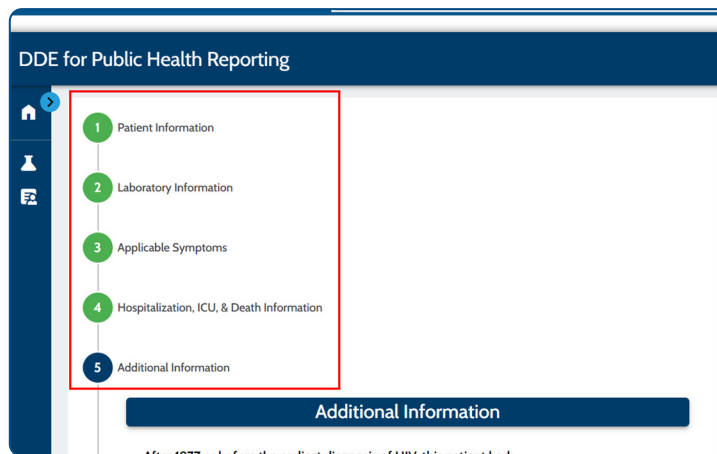
After Collapsing



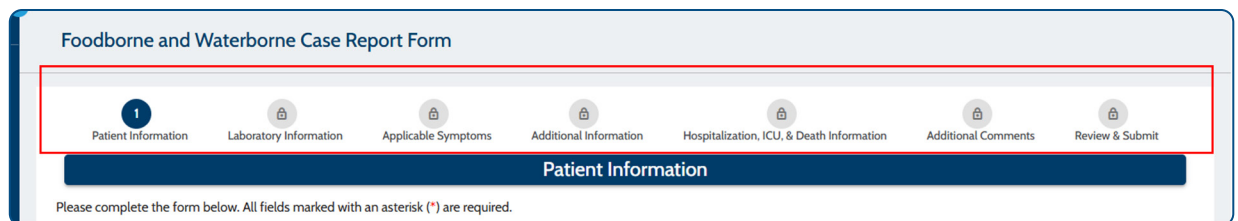
Screen Size View

» The case report form menu adjusts based on screen size. On smaller screens, such as laptops, the steps appear in a vertical list view. On larger screens, such as desktop monitors, the steps display horizontally.

Small Screen Size



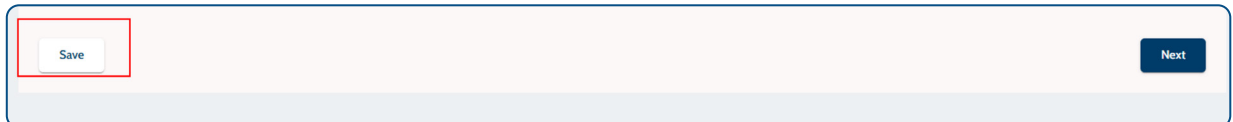
Large Screen Size



14 Tips and Tricks

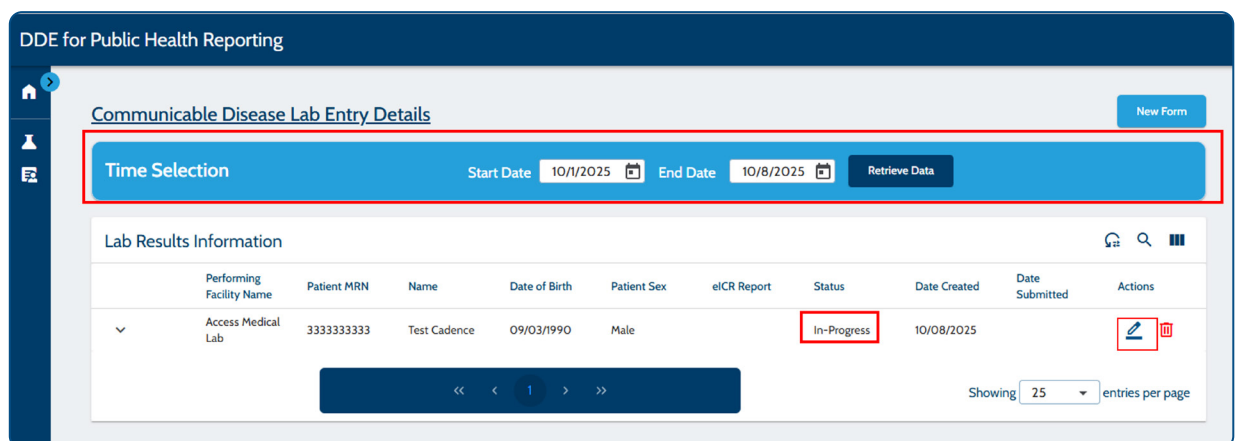
Saved Work Item

- » When users are entering details in a form, users are encouraged to click **Save** *before* progressing to the next step. This saves the current work in progress in case a user is unable to complete a form; they can return back to their saved work. Users can go back to saved work items anywhere in the process if the user saves their work.



In the worklist, the '**Status**' shows '**In-Progress**' with no date submitted as the process is incomplete. To complete the form, users must click on the edit button and enter all necessary details.

The default time selection range is one week, and the end date will always be the current date. If a lab entry report has been saved for more than one week, users should utilize the data range to retrieve the data.

A screenshot of the DDE for Public Health Reporting application interface. The top header is dark blue with the text 'DDE for Public Health Reporting'. Below it is a navigation bar with a home icon, a user icon, and a list icon. The main content area is titled 'Communicable Disease Lab Entry Details' and includes a 'New Form' button. A 'Time Selection' bar is highlighted with a red box, containing 'Start Date' (10/1/2025), 'End Date' (10/8/2025), and a 'Retrieve Data' button. Below this is a table titled 'Lab Results Information' with columns: Performing Facility Name, Patient MRN, Name, Date of Birth, Patient Sex, eICR Report, Status, Date Created, Date Submitted, and Actions. A row is shown with 'Access Medical Lab', '3333333333', 'Test Cadence', '09/03/1990', 'Male', and 'In-Progress' (highlighted with a red box). The 'Actions' column for this row contains an edit icon and a delete icon. At the bottom, there is a pagination control showing '1' and a 'Showing 25 entries per page' dropdown.

15 Appendix

- » These are key terms, acronyms, and concepts referenced throughout the user guide.
- **DDE:** Direct Data Entry.
 - **User Preferences:** Specific content details or information that are recurring in a user workflow, e.g. Performing Facility, Person Filling the Form.
 - **LOINC:** Logical Observation Identifiers Names and Codes, universal standard for identifying medical laboratory observations.



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