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Kentucky Health Information Exchange (KHIE)

Direct Data Entry for Vaccine Preventable Diseases Case Reports (Diphtheria)

User Guide

February 2024

Document Control Information

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1 Introduction

Overview

This training manual covers KHIE's Direct Data Entry for Vaccine Preventable Diseases Case Reports functionality in the ePartnerViewer. Users with the *Manual Case Reporter* role can submit case reports from the ePartnerViewer by completing an online case report. The process generates a manual electronic initial case report (eICR) which is routed to the Kentucky Department for Public Health (KDPH). All examples and screenshots used in this guide are simulated with mock data; no Protected Health Information (PHI) is present.

Please Note: All screenshots shown throughout this document reflect how Users would interact with the ePartnerViewer while using a desktop or tablet device. While core functionality remains the same across multiple devices, interface components may vary in presentation.

Supported Web Browsers

Users must access the ePartnerViewer with a supported web browser. The ePartnerViewer is configured to support the following modern browsers on desktop, tablet, and mobile devices:

Desktop Browser Version	Mobile Browser Version
Microsoft Internet Explorer	
Not supported	Not supported
Microsoft Edge	
Version 44+	Version 40+
Google Chrome	
Version 70+	Version 70+
Mozilla Firefox	
Version 48+	Version 48+
Apple Safari	
Version 9+	iOS 11+

Please Note: The ePartnerViewer does **not** support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

Mobile Device Considerations

The ePartnerViewer is based on responsive design. This means it renders in the best format based on the user's device size. Responsive design applies to mobile, tablet, and desktop devices. Tablet devices in landscape display mode are considered desktop.

Accessing the ePartnerViewer

To access the ePartnerViewer, users must meet the following specifications:

1. Users must be part of an organization with a signed Participation Agreement with KHIE.
2. Users are required to have a Kentucky Online Gateway (KOG) account.
3. Users are required to complete Multi-Factor Authentication (MFA).

Please Note: For specific information about creating a Kentucky Online Gateway (KOG) account and how to complete MFA, please review the ***ePartnerViewer Login: Kentucky Online Gateway (KOG) and Okta Verify Multi-Factor Authentication (MFA) User Guide***.

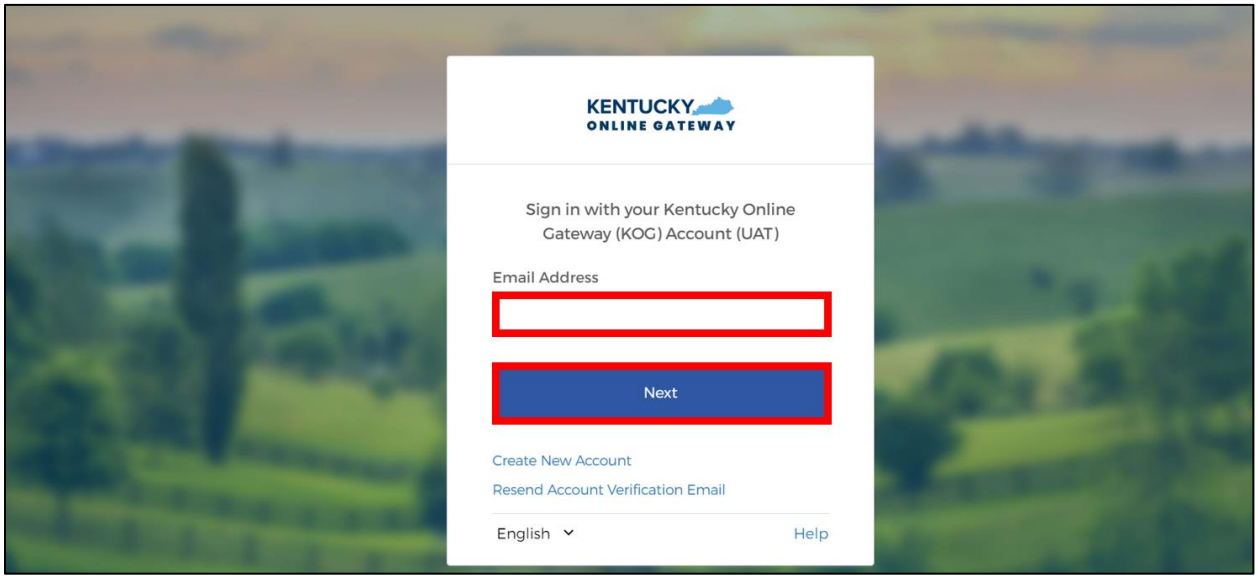
2 Logging into ePartnerViewer

Users with the *Manual Case Reporter* role are authorized to access the Vaccine Preventable Diseases Case Report in the ePartnerViewer. You must log into your Kentucky Online Gateway (KOG) account to access the ePartnerViewer.

1. To navigate to the ePartnerViewer, enter the following **ePartnerViewer URL** in a supported browser window: **https://epartnerviewer.khie.ky.gov**

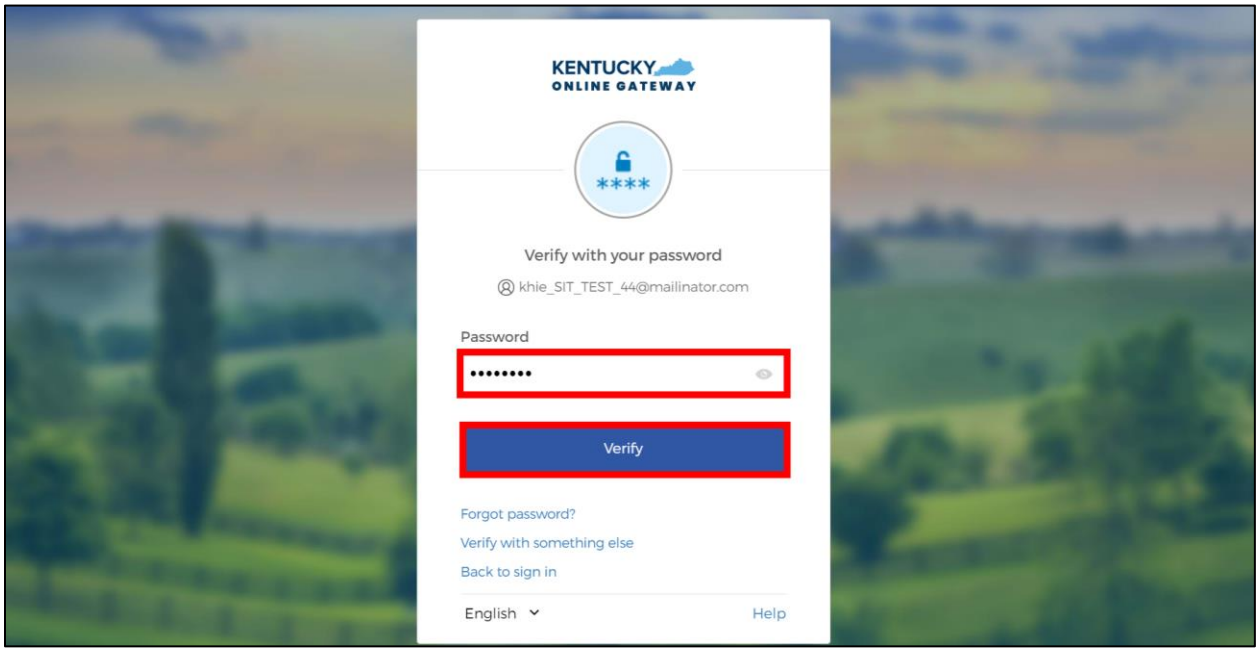
Please Note: The ePartnerViewer does **not** support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

2. On the **KOG Login Page**, enter your **Email Address**. Click **Next**.



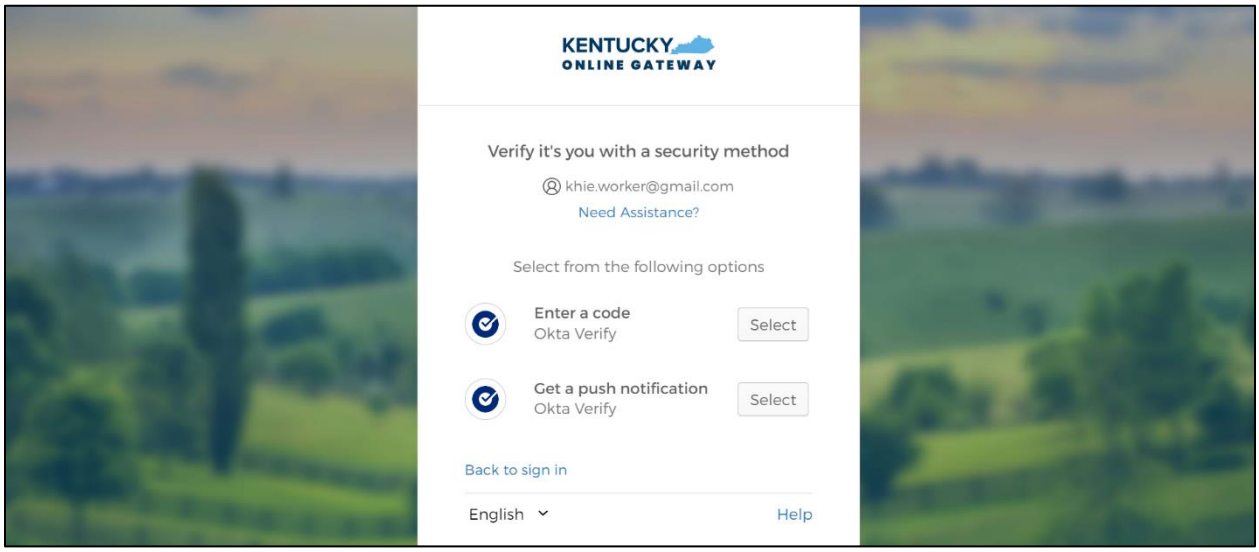
Please Note: You must enter the email address you provided when you created your KOG account.

3. Enter your **Password**. Click **Verify**.



Multi-Factor Authentication

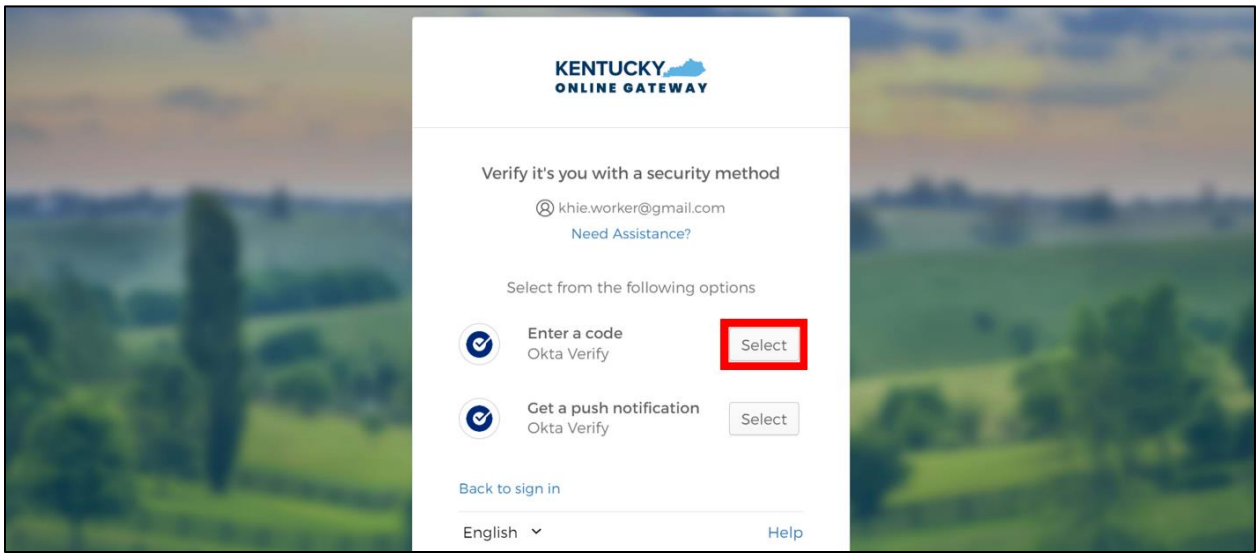
4. After logging into KOG and verifying your password, you are automatically navigated to the **Verify it's you with a security method** screen. You will be asked to complete Multi-Factor Authentication (MFA) using Okta Verify. Users have two (2) options for completing Okta Verify MFA:
   - Use a security code from the Okta Verify app.
   - Use the push notification from the Okta Verify app.



Security Code from Okta Verify App

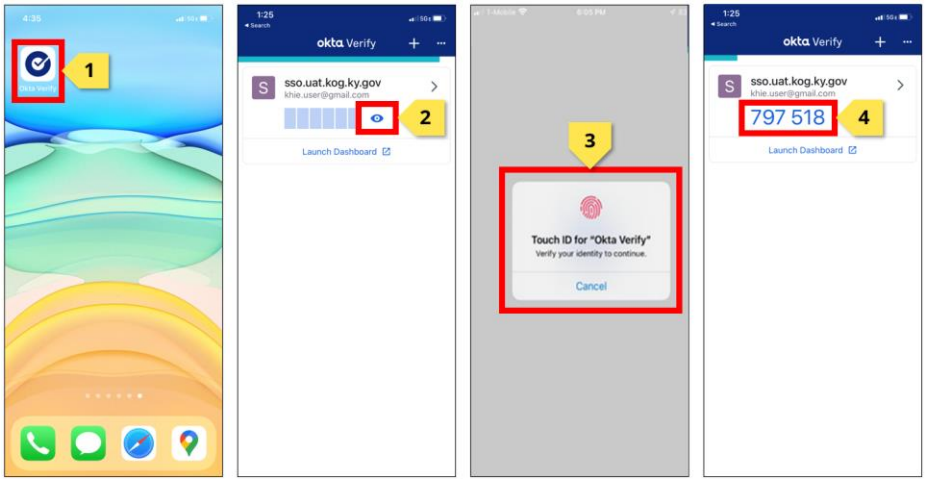
To complete MFA using the security code from Okta Verify, complete the following steps:

1. After logging into KOG, you are navigated to the **Verify it's you with a security method** screen. Click the **Select** button next to **Enter a code**.

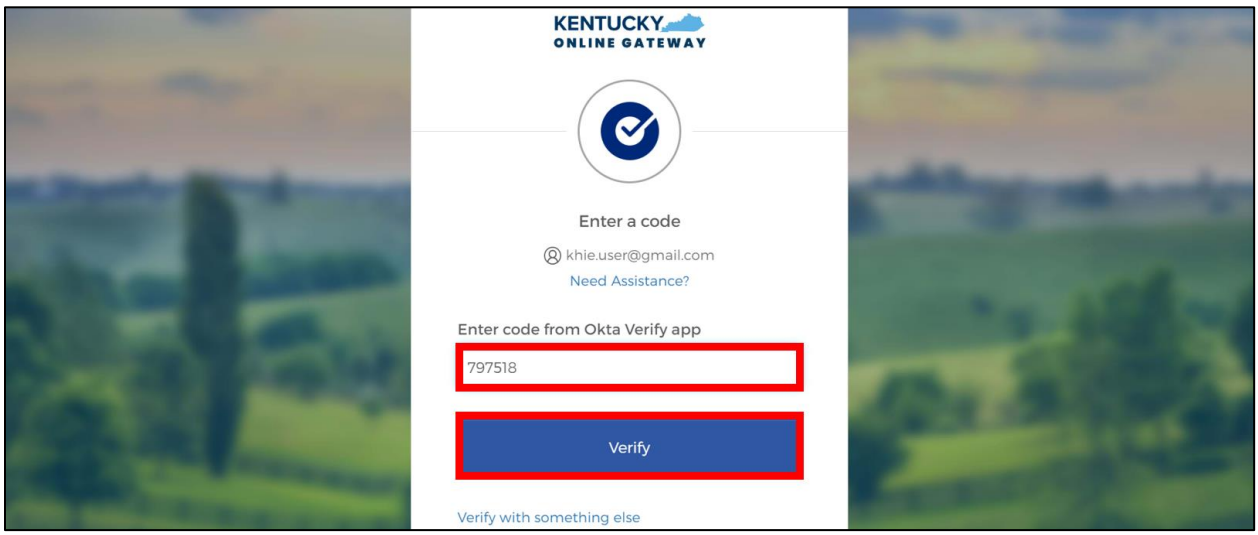


2. To locate the Okta Verify code, complete the following steps from your mobile device or tablet:

- *Step 1*: Open the **Okta Verify app** on your mobile device or tablet.
- *Step 2*: If the code is hidden, click the **Eye Icon** below the email address used for your KOG account.
- *Step 3*: Verify your identity using either **Touch ID** or **Face ID**.
- *Step 4*: Upon verifying your identity, the **6-digit code** displays.



3. Return to the **Enter a code** screen on your computer. Enter the **6-digit code** from the Okta Verify app. Click **Verify** to proceed to the **Terms and Conditions of Use** screen of the ePartnerViewer.

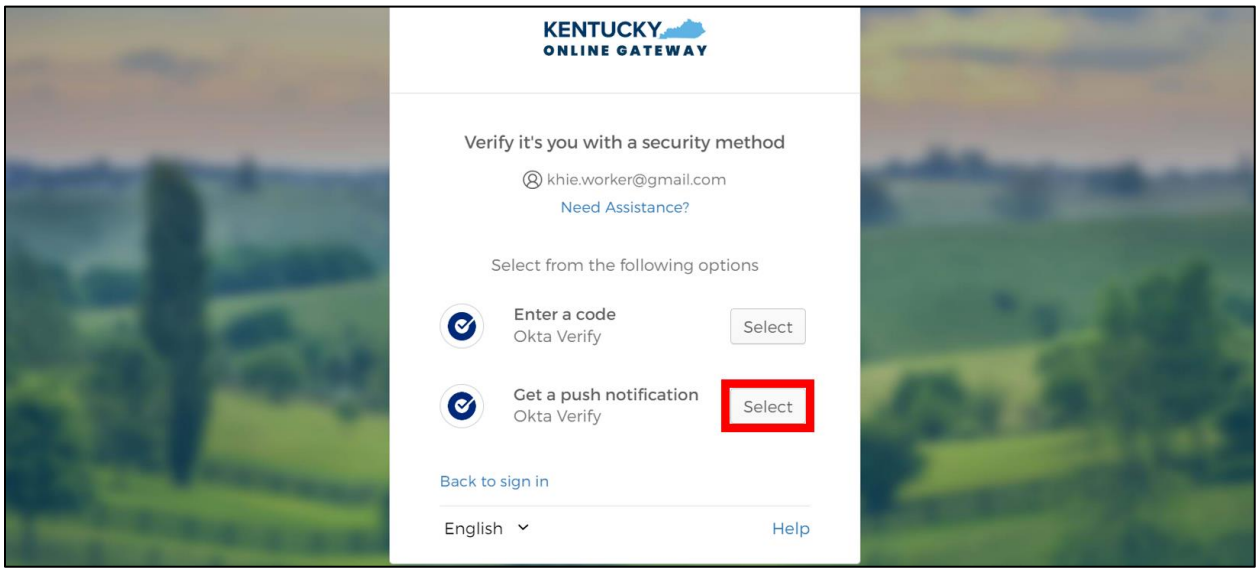


Please Note: Once you enter the code from the Okta Verify app, you are automatically navigated to the **Terms and Conditions of Use** screen. For more information, please review the *Terms and Conditions of Use and Logging In* sub-section of this chapter.

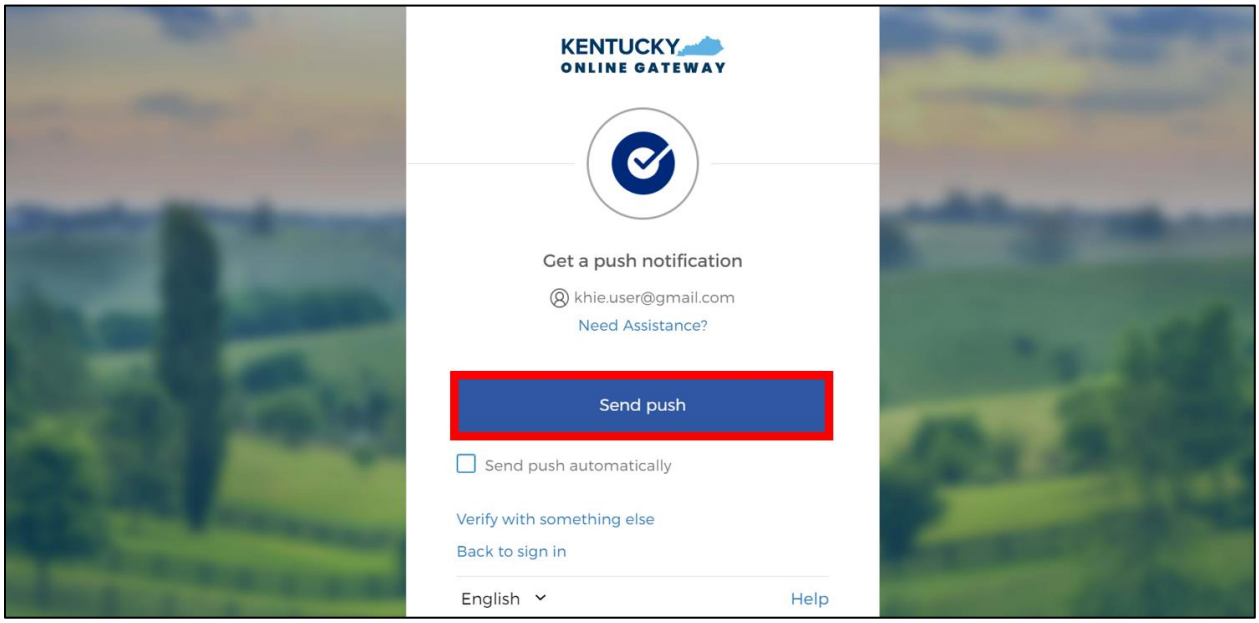
Push Notification from Okta Verify App

To complete MFA using a push notification from Okta Verify, complete the following steps:

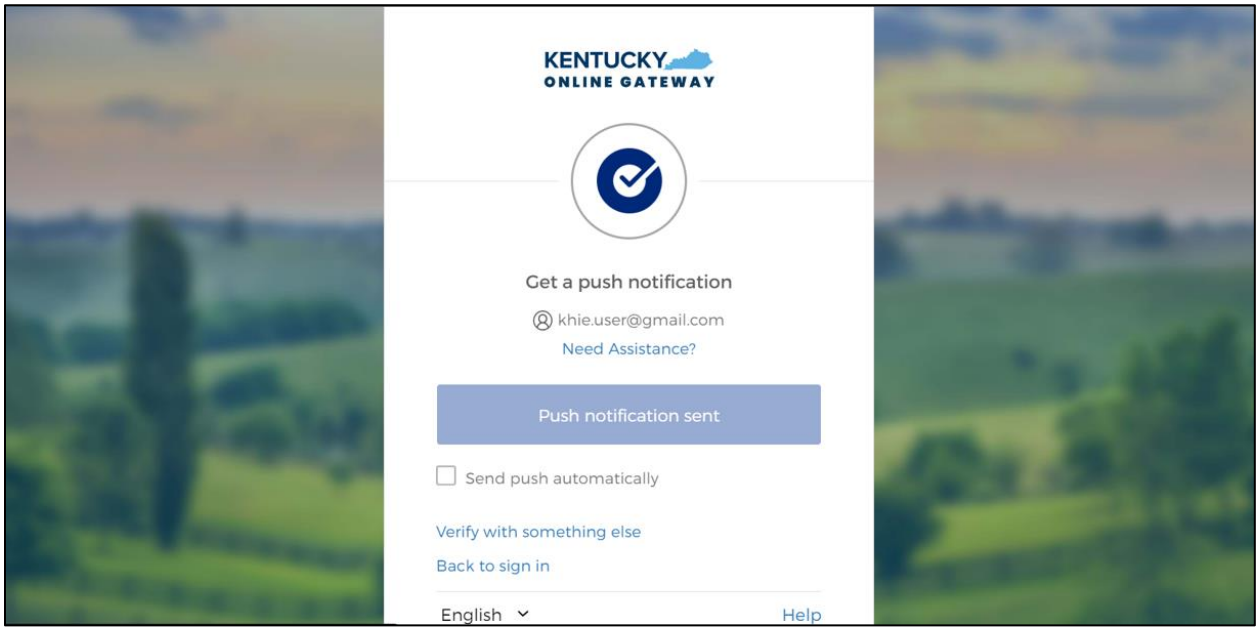
1. After logging into KOG, you are navigated to the **Verify it's you with a security method** screen. Click the **Select** button next to **Get a push notification**.



2. The **Get a push notification** screen displays. Click **Send Push**.

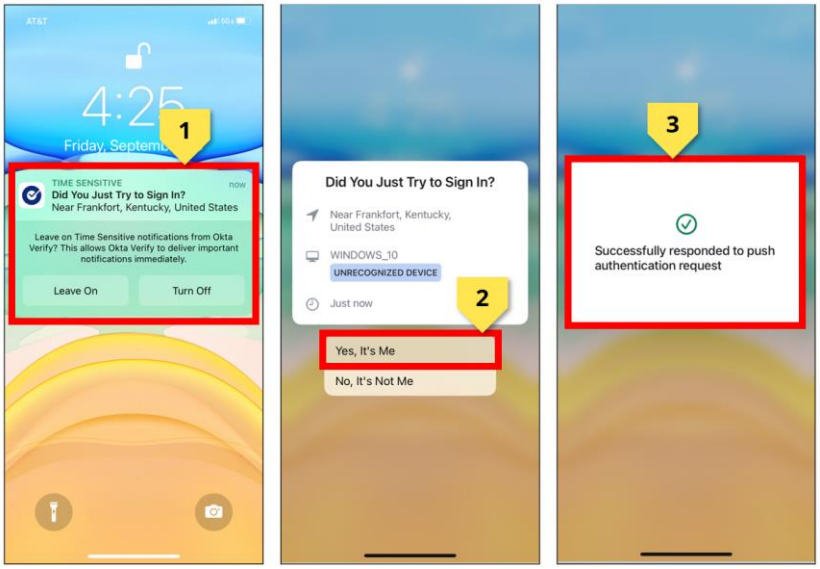


Please Note: Once the push notification has been successfully sent to the Okta Verify app, the **Get a push notification** screen displays a grayed out **Push notification sent** button.



3. To view the Okta Verify push notification, complete the following steps from your mobile device:

- *Step 1*: You will receive a push notification on your mobile device or tablet. Tap and hold the notification banner titled "**Did You Just Try to Sign In?"**.
- *Step 2*: On the notification, click the **Yes, It's Me** button.
- *Step 3*: A notification will appear on your mobile device screen letting you know that you have successfully responded to the push authentication request. You can now return to your computer where you will be redirected to the **Terms and Conditions of Use** screen of the ePartnerViewer.

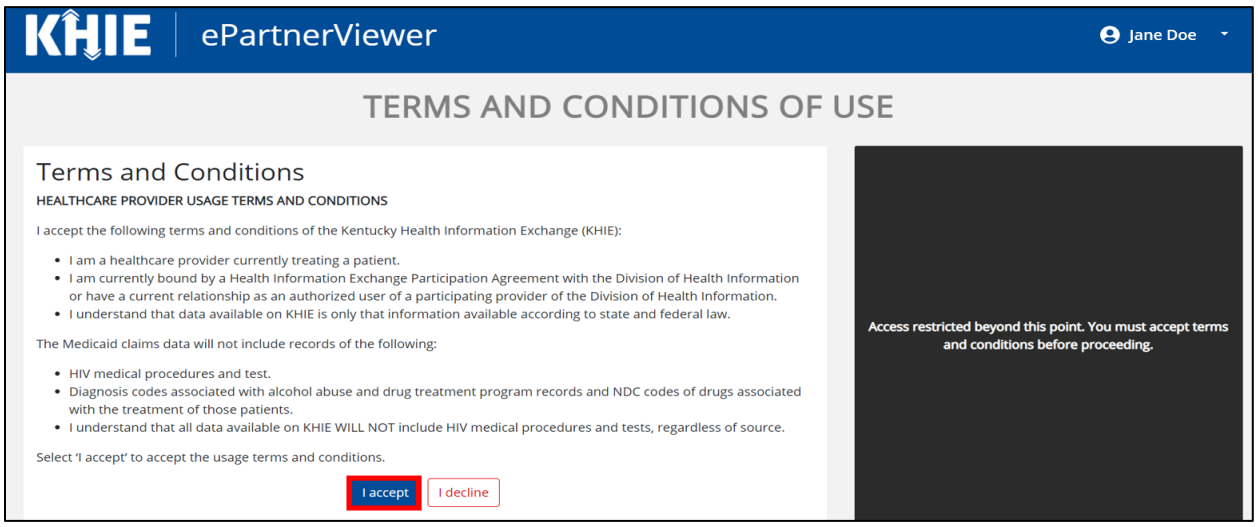


Please Note: Once you successfully respond to the Okta Verify push notification, you are automatically navigated to the **Terms and Conditions of Use** screen of the ePartnerViewer.

Terms and Conditions of Use and Logging In

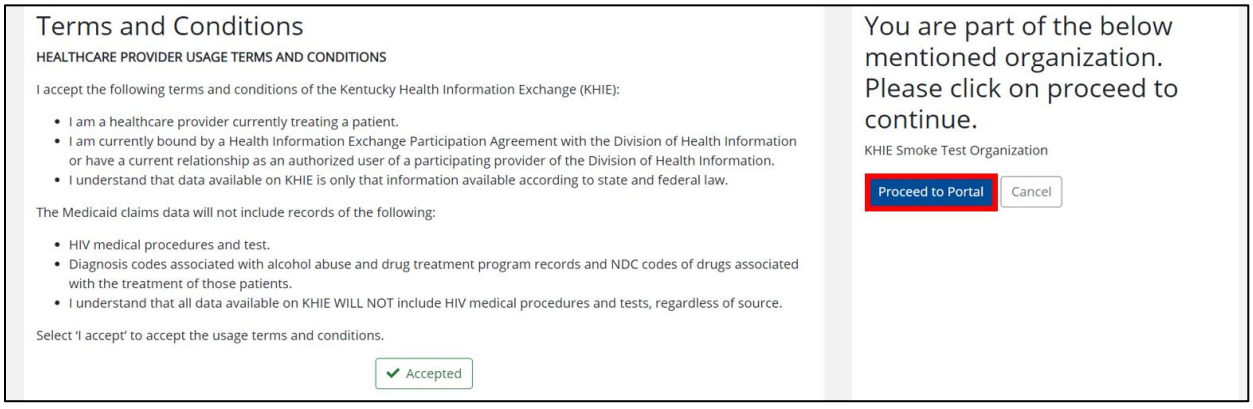
After logging into the Kentucky Online Gateway, launching the ePartnerViewer application, and completing Multi-Factor Authentication, the **Terms and Conditions of Use** page displays. Privacy and security obligations are outlined for review.

1. You must click **I Accept** every time before accessing a patient record in the ePartnerViewer.



Please Note: The right side of the Portal is grayed out and displays a message that states: *Access is restricted beyond this point. You must accept the terms and conditions before proceeding.*

2. Once you click **I Accept**, the grayed-out section becomes visible. A message appears that indicates you are associated with an Organization. (This is the name of your organization.)
3. Click **Proceed to Portal** to continue to the ePartnerViewer application.

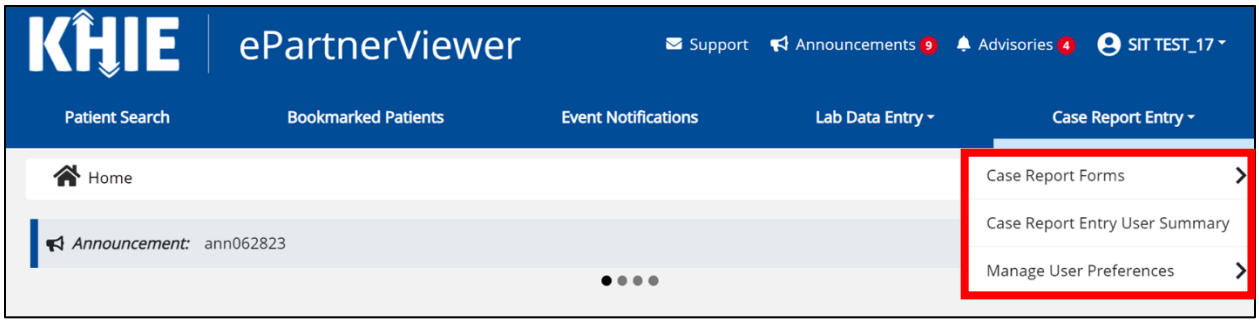


Please Note: If you click **Cancel**, a pop-up notification displays that indicates that you are *about to be logged out*. *Use of the ePartnerViewer portal is subject to the acceptance of KHIE's Terms of Use*. To proceed to the ePartnerViewer, click either **Logout Now** or **Cancel**.

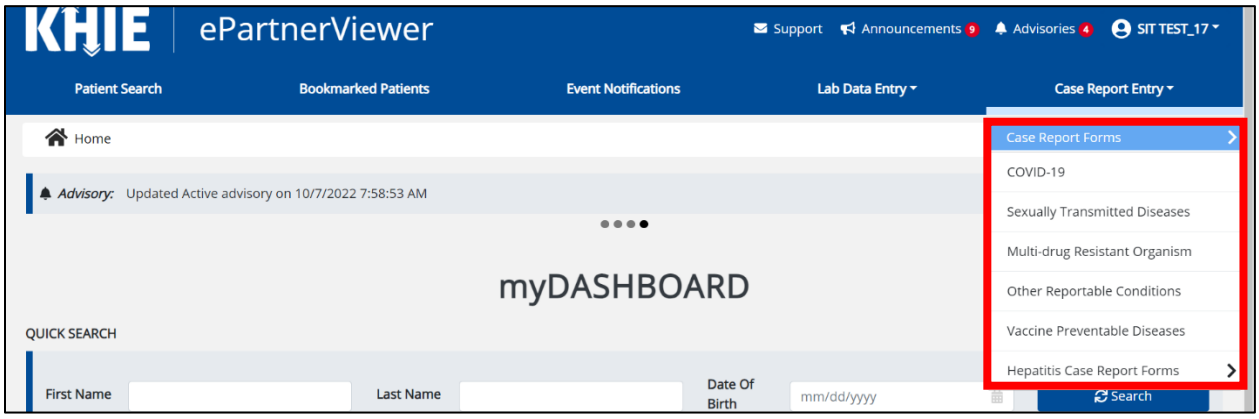
3 Understanding the Case Report Entry Dropdown Menu

The **Case Report Entry** tab dropdown menu includes the following options:

- **Case Report Forms**: Lists the different types of case reports.
- **Case Report Entry User Summary**: Displays all submitted and "In-Progress" case reports.
- **Manage User Preferences**: Offers an efficient way to enter repetitive data.



1. **Types of Case Reports**:



- **COVID-19 Case Report**:
  - Designed for Users to enter COVID-19 case reports.

Please Note: For specific information about COVID-19 case reporting, please review the ***Direct Data Entry for Case Reports: COVID-19 User Guide***.

- **Sexually Transmitted Disease (STD) Case Report**:
  - Designed for Users to enter STD case reports.

Please Note: For specific information about STD case reporting, please review the ***Direct Data Entry for Case Reports: Sexually Transmitted Diseases (STD) User Guide***.

- **Multi-drug Resistant Organism (MDRO) Case Report**:
  - Designed for Users to enter MDRO case reports.

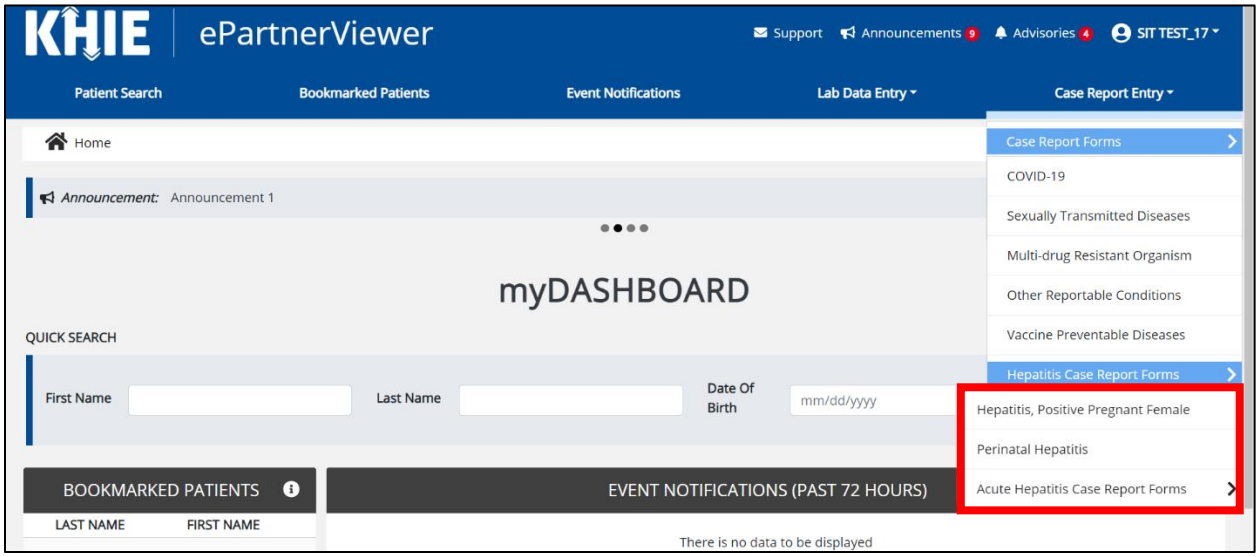
Please Note: For specific information about MDRO case reporting, please review the ***Direct Data Entry for Case Reports: Multi-Drug Resistant Organism (MDRO) User Guide***.

- **Other Reportable Conditions Case Report**:
  - Designed for Users to enter Other Reportable Conditions case reports.

Please Note: For specific information about Other Reportable Conditions case reporting, please review the ***Direct Data Entry for Case Reports: Other Reportable Conditions User Guide***.

- **Vaccine Preventable Diseases Case Report**:
  - Designed for Users to enter Vaccine Preventable Diseases case reports.

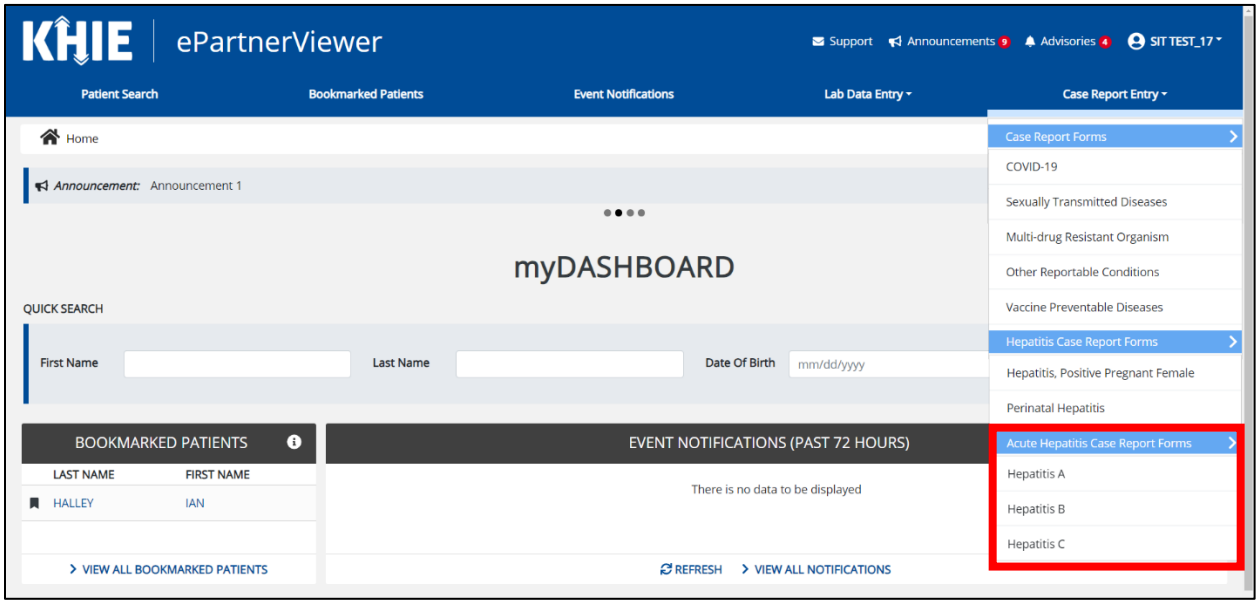
2. **Types of Hepatitis Case Reports**:



- **Hepatitis Positive Pregnant Female Case Report**:
  - Designed for Users to enter Hepatitis Positive Pregnant Female case reports.
- **Perinatal Hepatitis Case Report**:
  - Designed for Users to enter Perinatal Hepatitis case reports.

- **Acute Hepatitis Case Reports**:
  - Designed for Users to choose between the three (3) types of Acute Hepatitis case reports.

3. **Types of Acute Hepatitis Case Reports**:



- **Acute Hepatitis A Case Report**:
  - Designed for Users to enter Acute Hepatitis A case reports.

Please Note: For specific information about Acute Hepatitis A case reporting, please review the ***Direct Data Entry for Case Reports: Acute Hepatitis A User Guide***.

- **Acute Hepatitis B Case Report**:
  - Designed for Users to enter Acute Hepatitis B case reports.

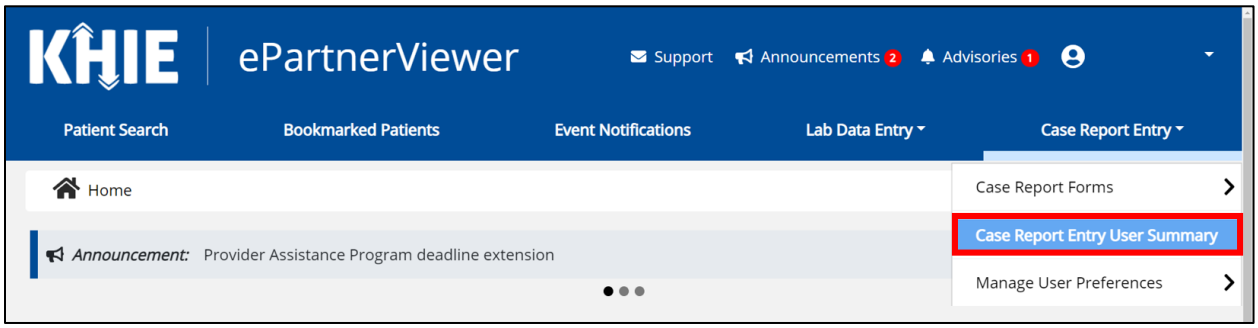
Please Note: For specific information about Acute Hepatitis B case reporting, please review the ***Direct Data Entry for Case Reports: Acute Hepatitis B User Guide***.

- **Acute Hepatitis C Case Report**:
  - Designed for Users to enter Acute Hepatitis C case reports.

Please Note: For specific information about Acute Hepatitis C case reporting, please review the ***Direct Data Entry for Case Reports: Acute Hepatitis C User Guide***.

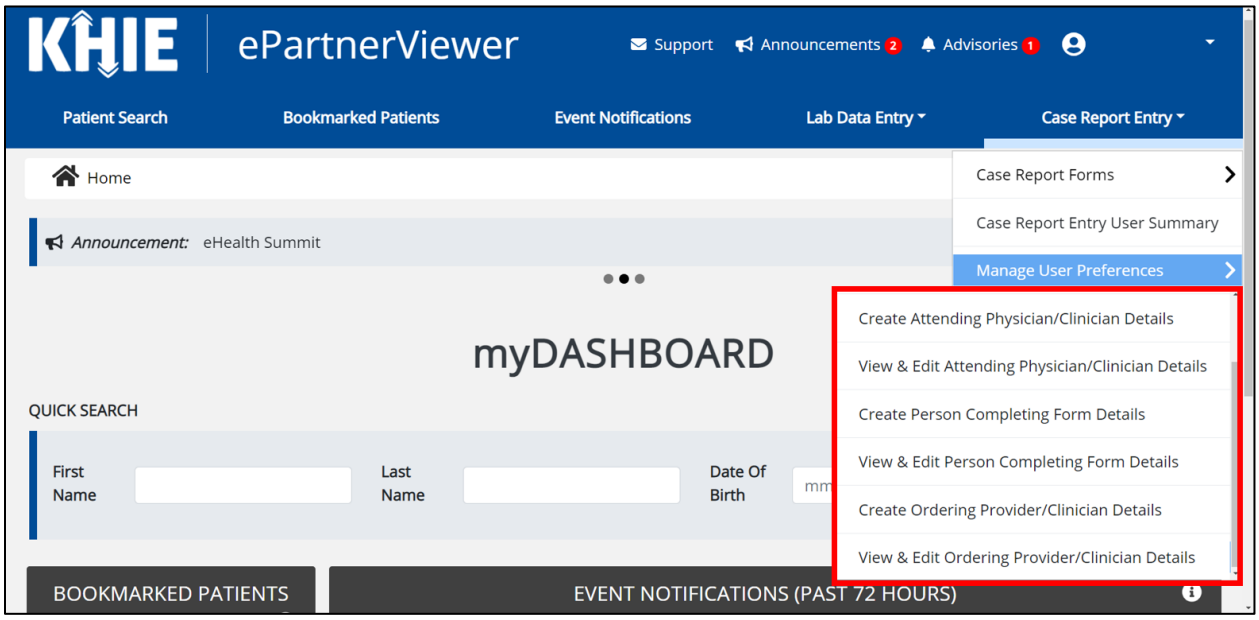
4. **Case Report Entry User Summary**:

   - Designed to provide a quick and easy way for Users to search and view all previously initiated case reports (Submitted and In-Progress) entered during a specific date range within the last six months from the current date.
   - Allows Users to view a summary of completed case reports that were previously submitted.
   - Allows Users to continue entering details for case reports that are still "In-Progress".



5. **Manage User Preferences**:

   - Designed as an efficient method for Users to enter repetitive data.
   - Allows Users to enter required case reporting details in their User Preferences which enables Users to quickly select the appropriate answers from the dropdown menu options.

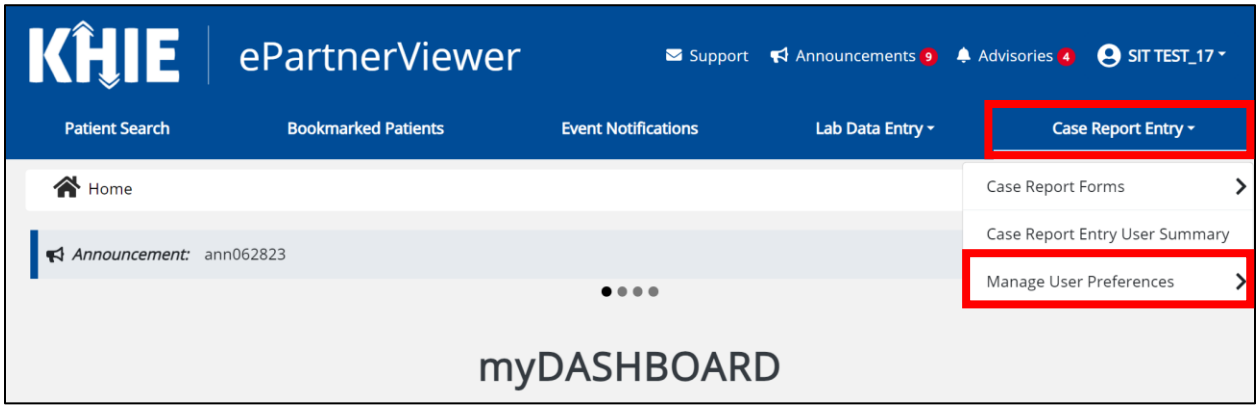


4 Manage User Preferences

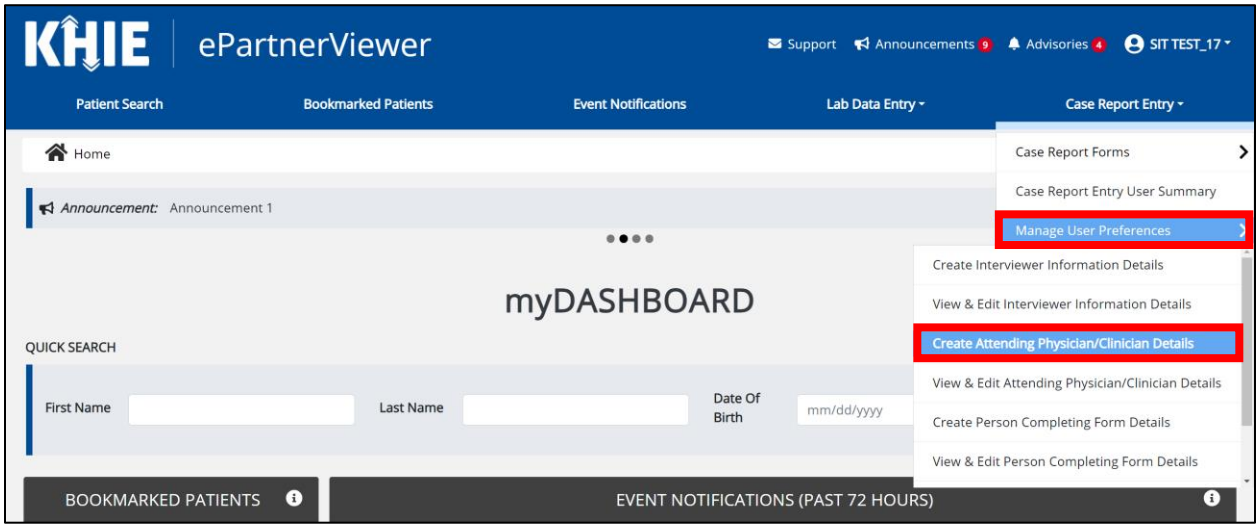
These are your User Preferences. Prior to entering your case report information, you are required to enter information about the Attending Physician/Clinician and the Person Completing Form on the **Manage User Preferences** screen. By entering these details here in your user preferences, you will be able to quickly select an Attending Physician/Clinician and the name of the Person Completing the Form from the dropdown menu options. These dropdown menus are located on the **Patient Information** screen of the Vaccine Preventable Diseases Case Report.

Create Attending Physician/Clinician Details

1. Click the **Case Report Entry** Tab located in the blue Navigation Bar at the top of the screen.
2. From the dropdown menu, select **Manage User Preferences**.

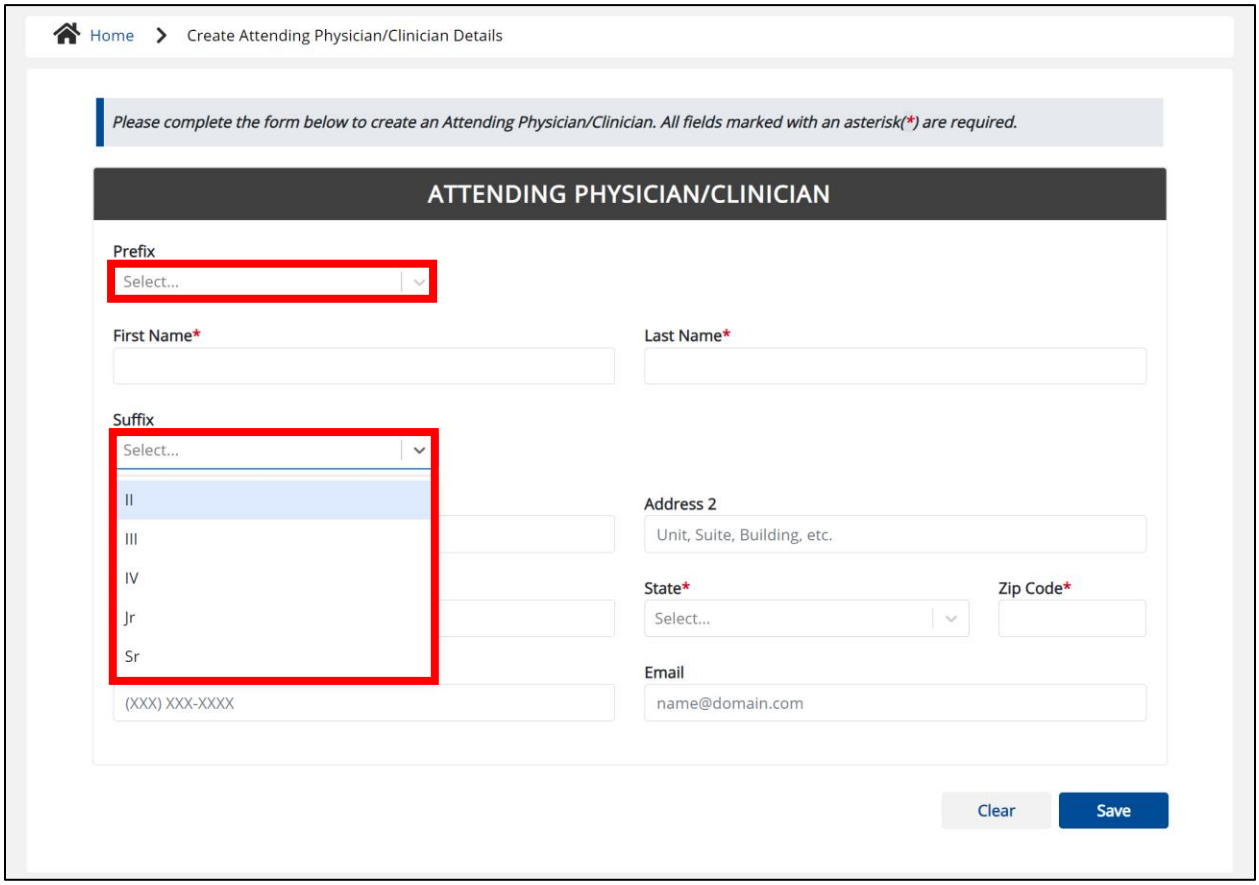


3. To enter information about an Attending Physician/Clinician, select **Create Attending Physician/Clinician Details** from the dropdown menu.

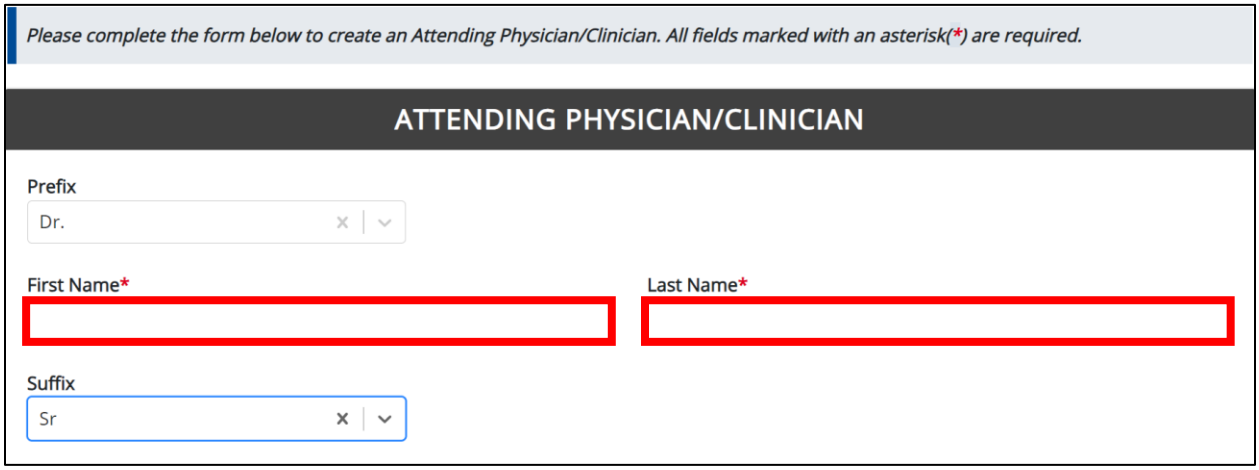


4. The **Attending Physician/Clinician** screen displays. Enter the details. Mandatory fields are marked with asterisks (*).

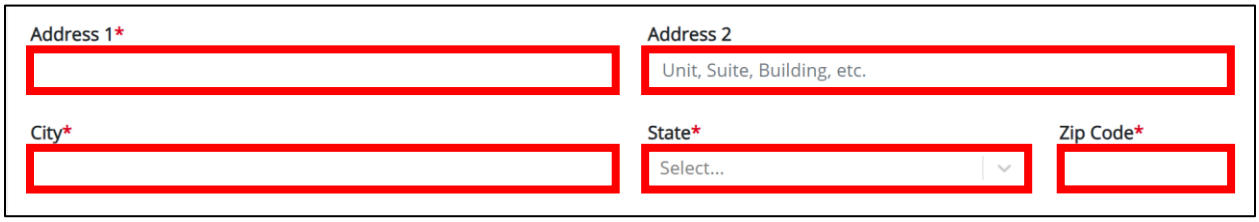
5. If available, select the appropriate **Prefix** and **Suffix** from the dropdown menus.



6. Enter the Attending Physician/Clinician's **First Name** and **Last Name**.



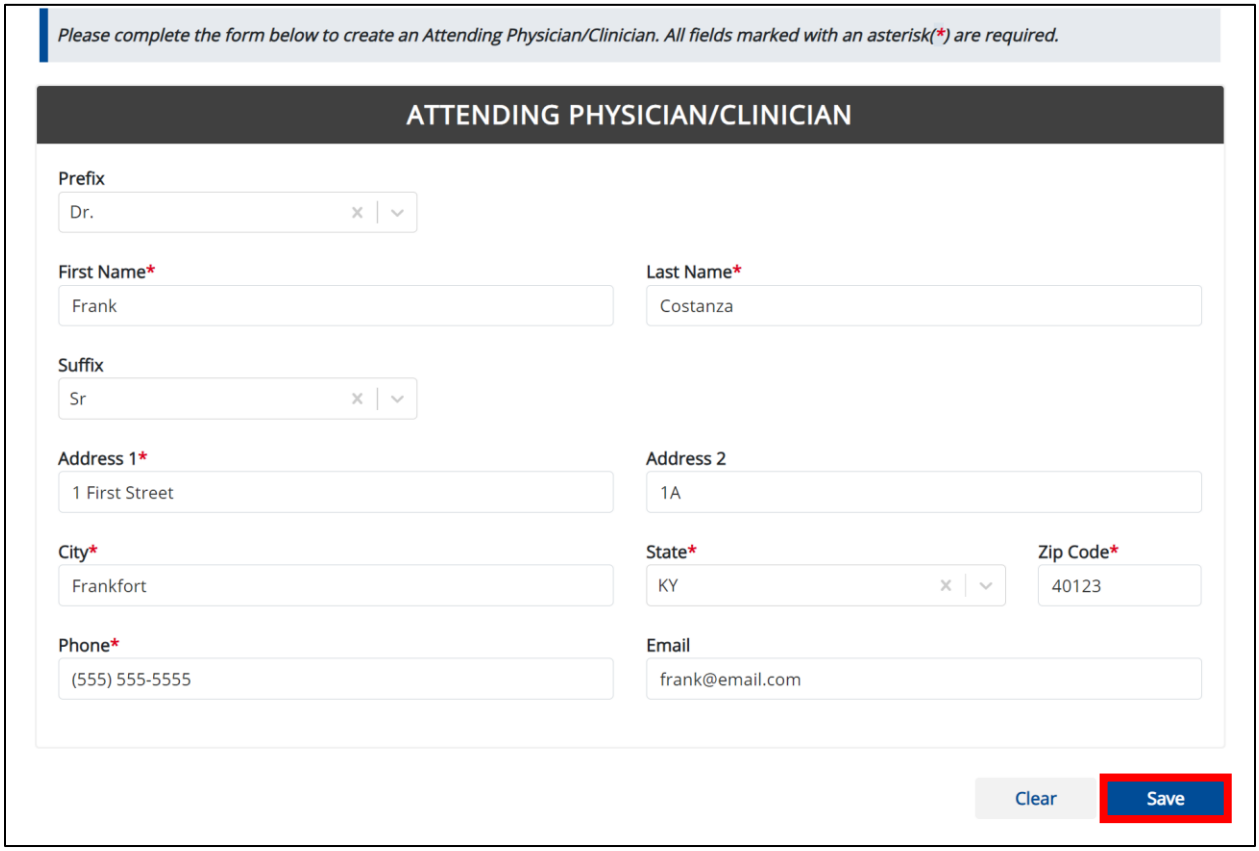
7. Enter the Attending Physician/Clinician's **Address, City, State,** and **Zip Code**.



8. Enter the Attending Physician/Clinician's **Phone Number** and **Email Address**.

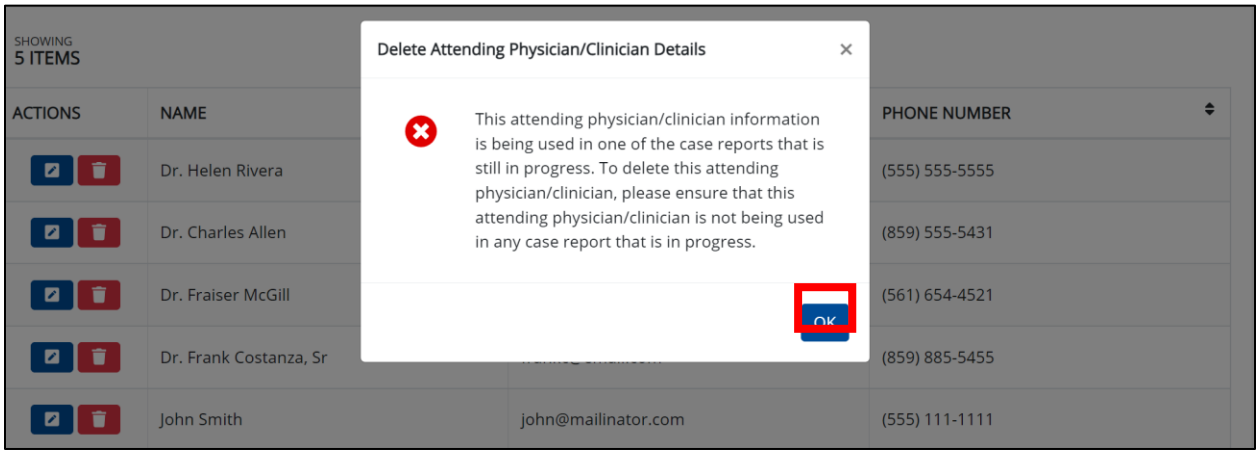
Please Note: If the information entered in the *Phone* and *Email* fields is not entered in the appropriate format, an error message displays that prevents you from proceeding to the next page until the format error is fixed.

9. After completing the mandatory fields, click **Save**.

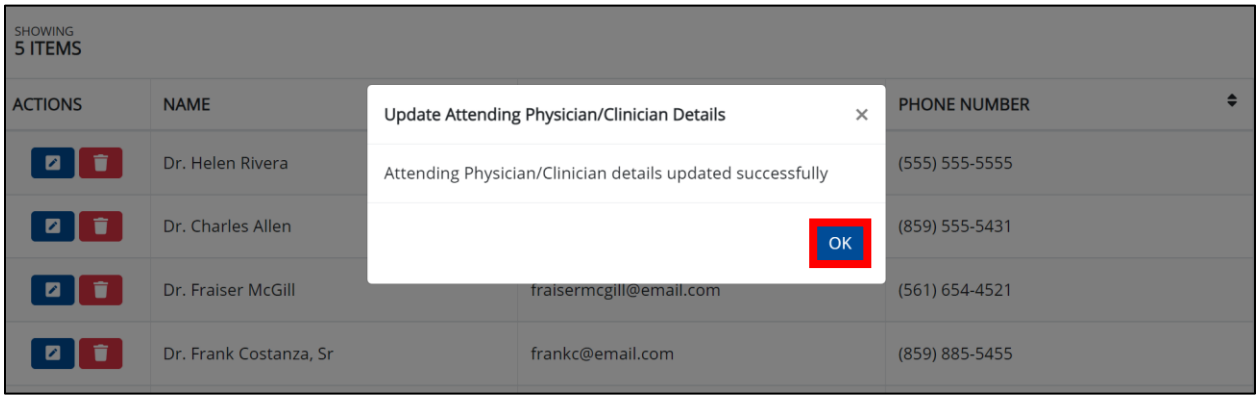


Please Note: If you enter an email address that is already associated with another Attending Physician/Clinician and click **Save**, a pop-up displays with an error message that states:
The email entered is associated with another physician/clinician you've created in your User Preferences. Please review the details and enter the correct email address.

You must click **OK** and enter the correct email address to save the Attending Physician/Clinician details and proceed to the **View & Edit Attending Physician/Clinician Details** screen.

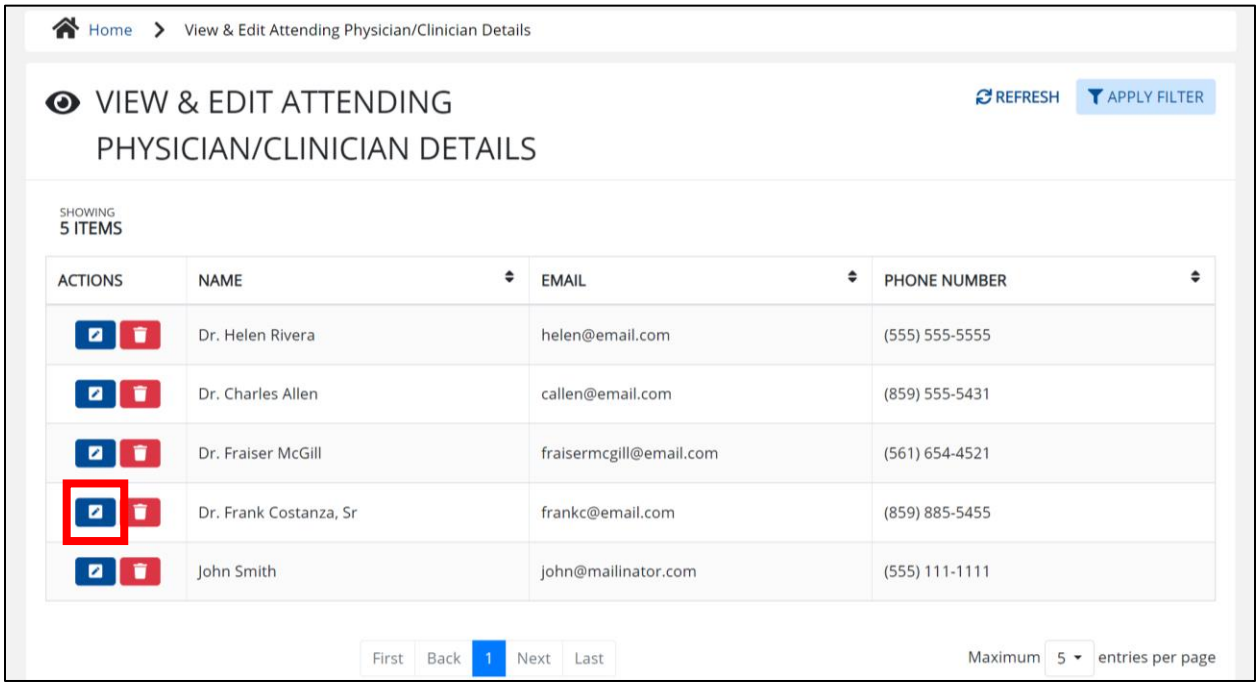


10. The *Create Attending Physician/Clinician Details* pop-up window displays. Click **OK** to proceed to the **View & Edit Attending Physician/Clinician Details** screen.

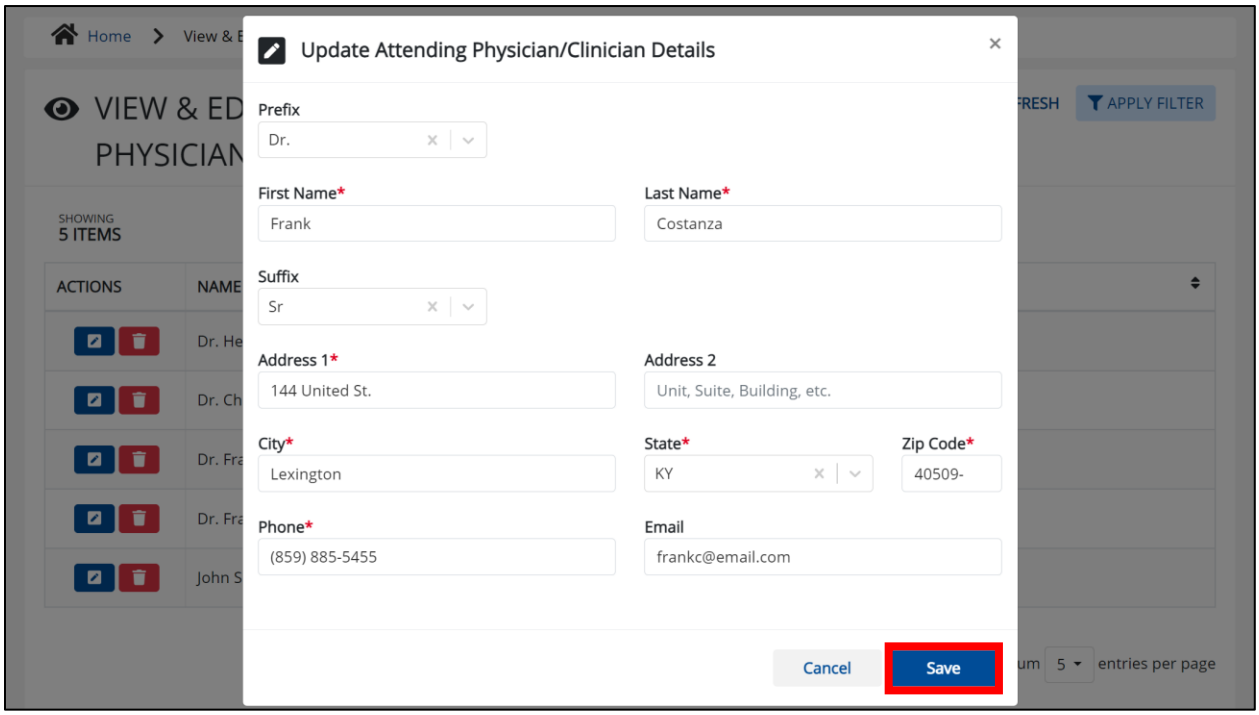


View & Edit Attending Physician/Clinician Details

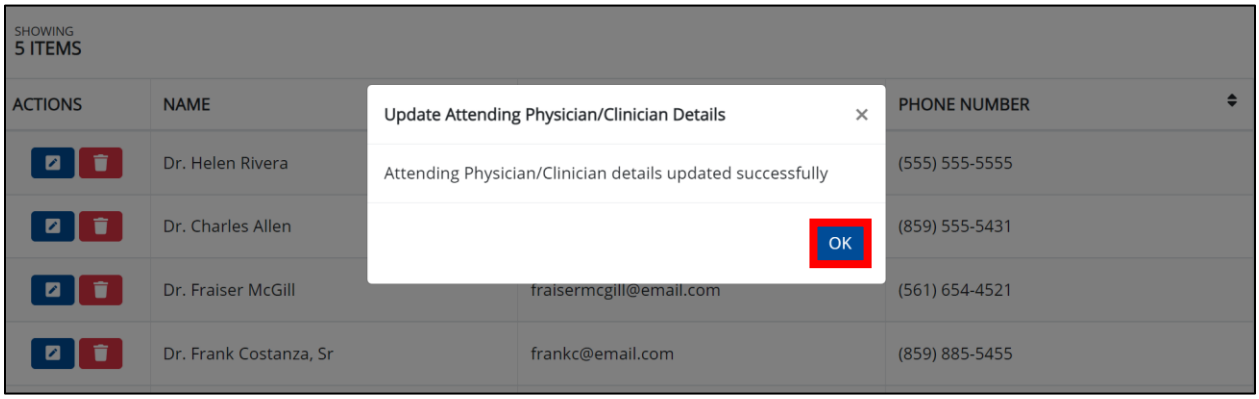
11. The **View & Edit Attending Physician/Clinician Details** screen displays. To edit details, click the **Edit** icon located next to the appropriate physician/clinician.



12. The *Update Attending Physician/Clinician Details* pop-up displays. You can make any necessary edits and click **Save** to save the updates and close out of the pop-up.

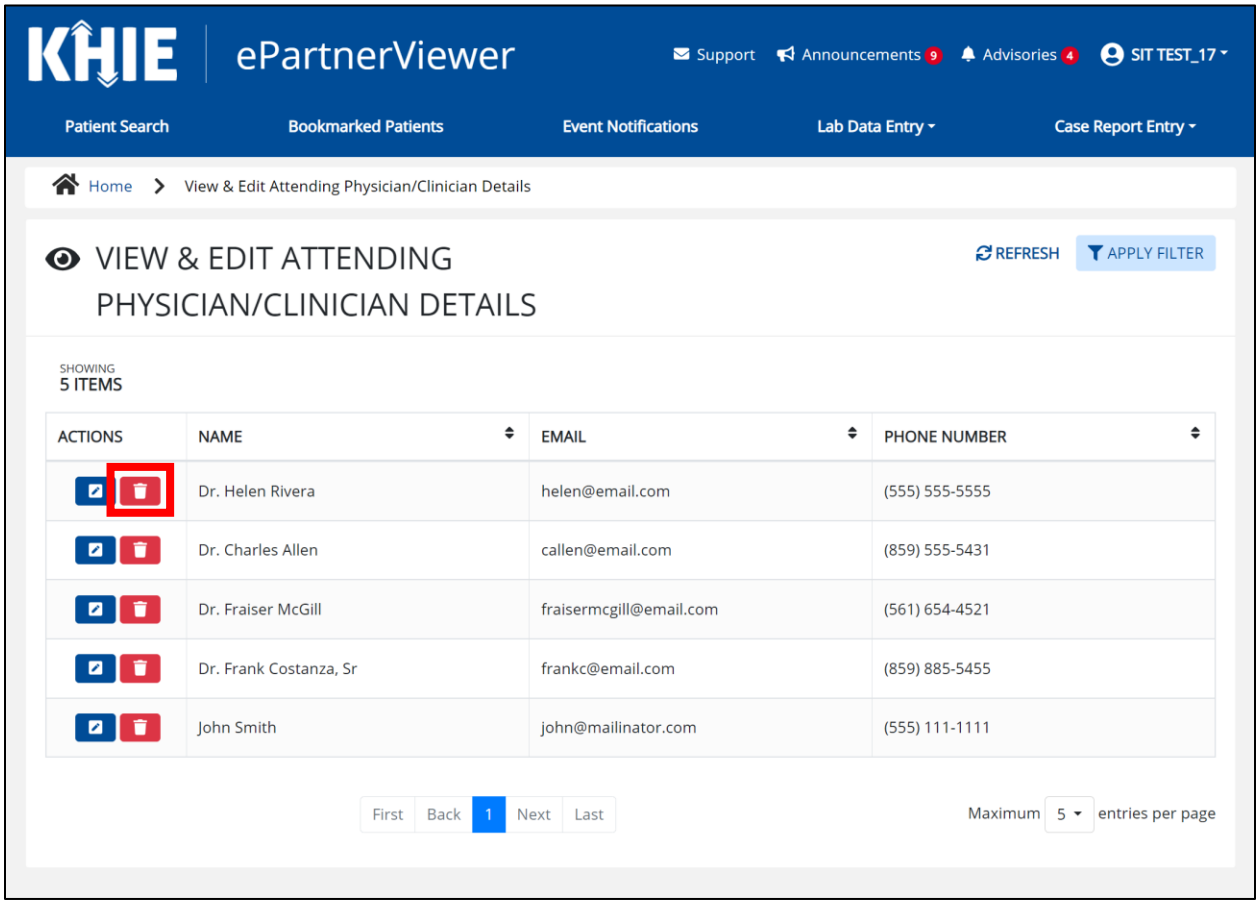


13. Once the update is successfully saved, a pop-up message displays. To proceed, click **OK**.

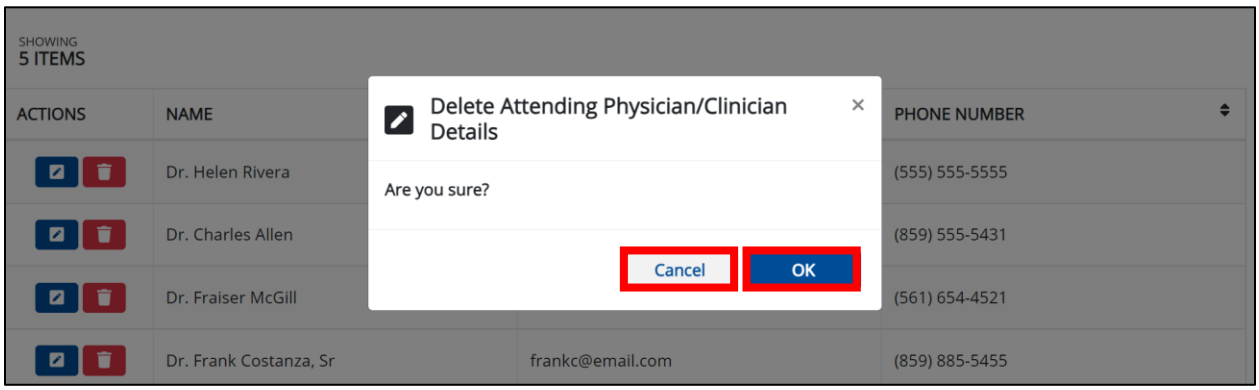


Delete Attending Physician/Clinician Details

14. To delete an Attending Physician/Clinician from the User Preferences, click the **Trash Bin Icon** located next to the appropriate Physician/Clinician.



15. The *Delete Attending Physician/Clinician Information Details* pop-up displays. To delete the Physician/Clinician, click **OK**. Click **Cancel** if you do not want to delete the Physician/Clinician.

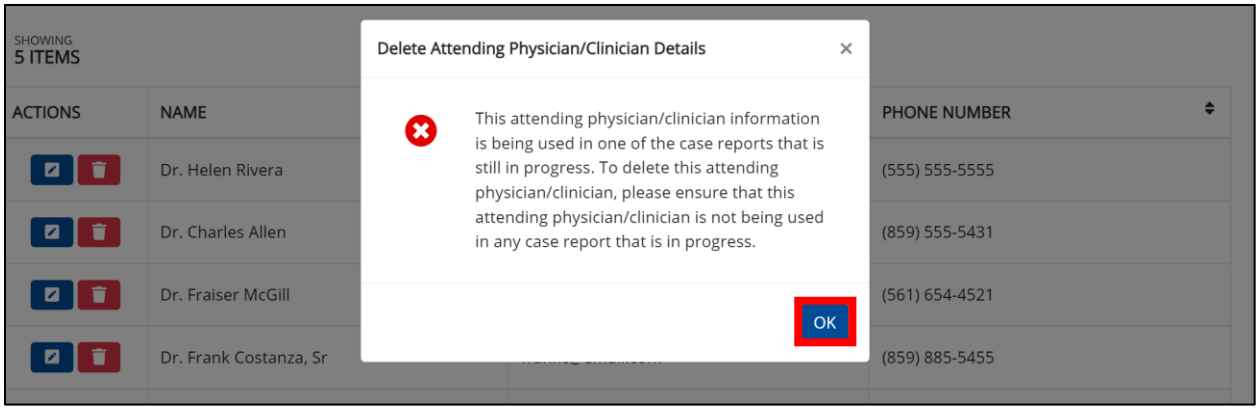


Please Note: You can delete an Attending Physician/Clinician on the **View & Edit Attending Physician/Clinician** screen as long as the Attending Physician/Clinician has not been selected for use in another case report that is still in-progress.

If you attempt to delete an attending physician/clinician who has been selected for use in a case report that has not been completed yet, a pop-up notification will display the following message: *This attending physician/clinician information is being used in a case report that is still in progress. To delete this attending physician/clinician, please ensure that this attending physician/clinician is not being used in a case report that is in progress.*

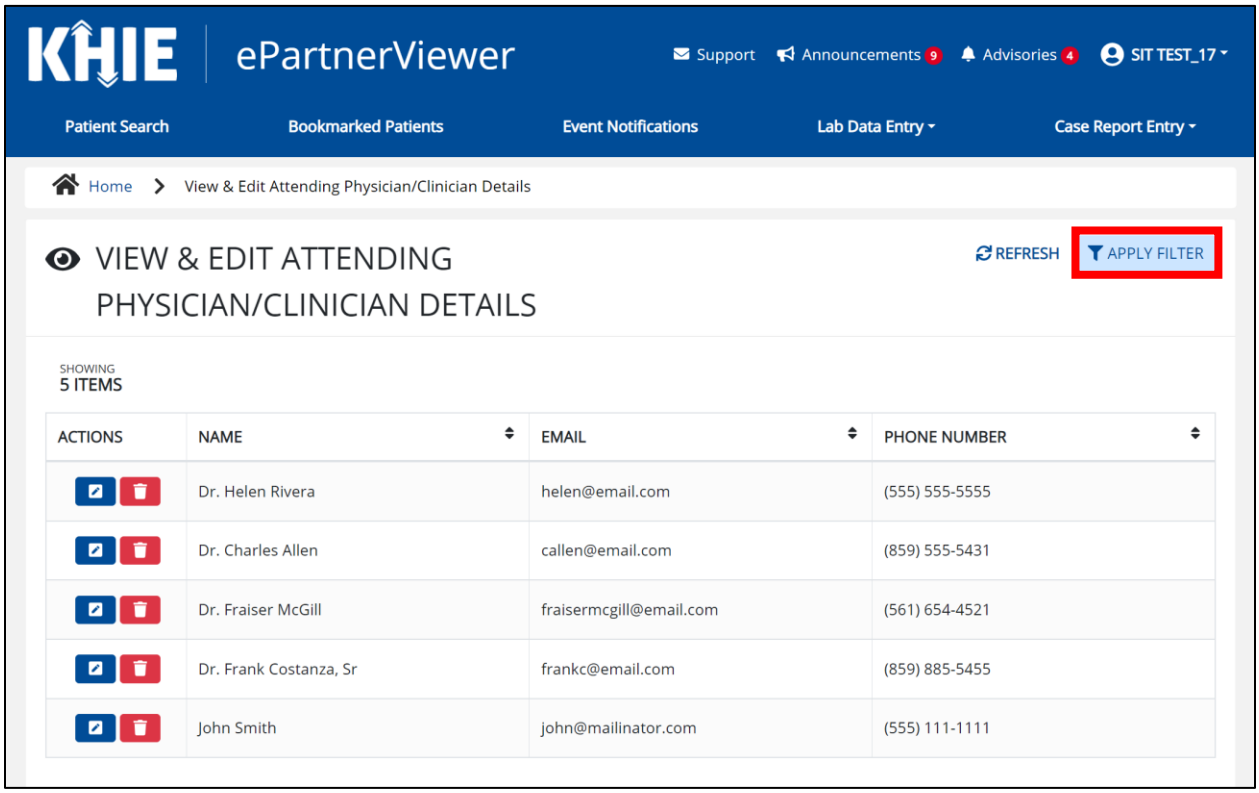
To close out of the pop-up and proceed, click **OK**.
To delete the Attending Physician/Clinician used in a case report that is still "In-Progress", you must first complete the case report.

Once the appropriate case report is complete, you can delete the Attending Physician/Clinician from your User Preferences.

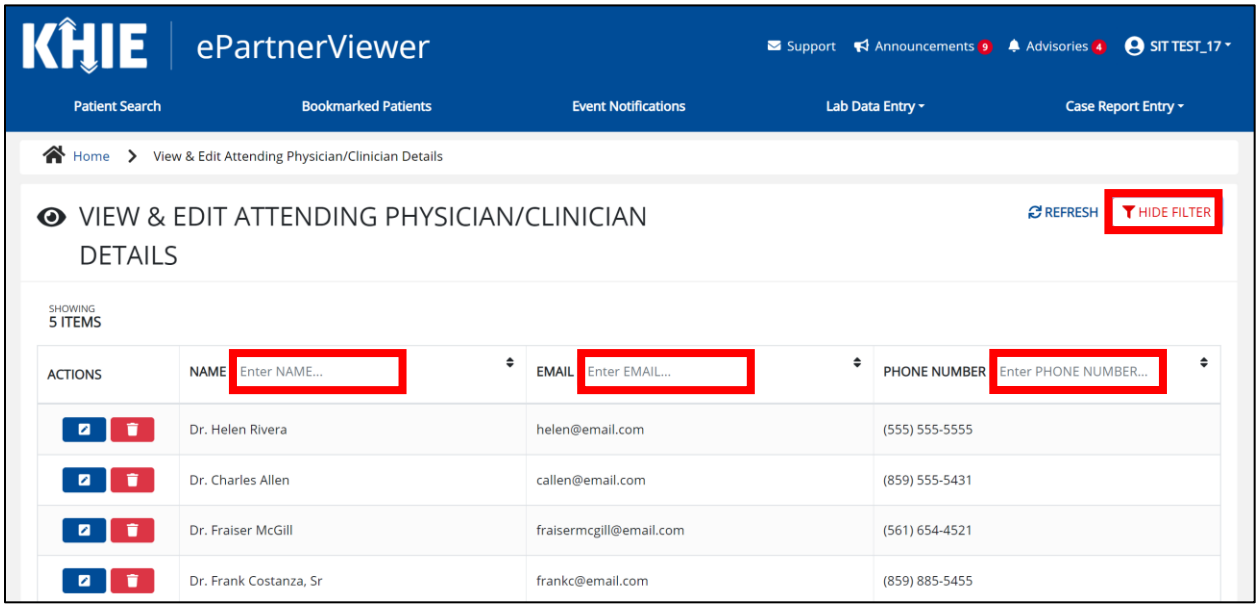


Filter Attending Physician/Clinician Details

16. To search for a specific Attending Physician/Clinician, click **Apply Filter**.



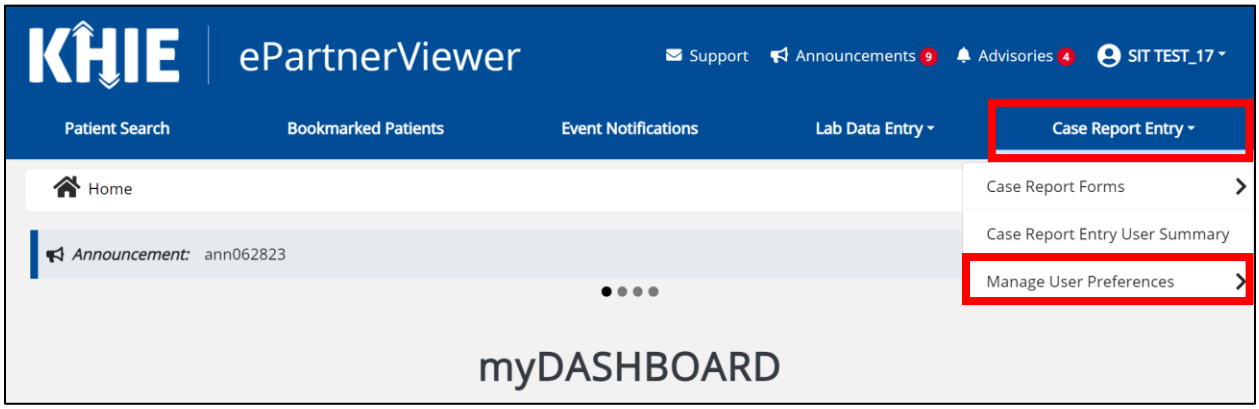
17. The Filter fields display. Search by entering the **Attending Physician/Clinician's *Name***, ***Email Address***, and/or ***Phone Number*** in the corresponding Filter fields.



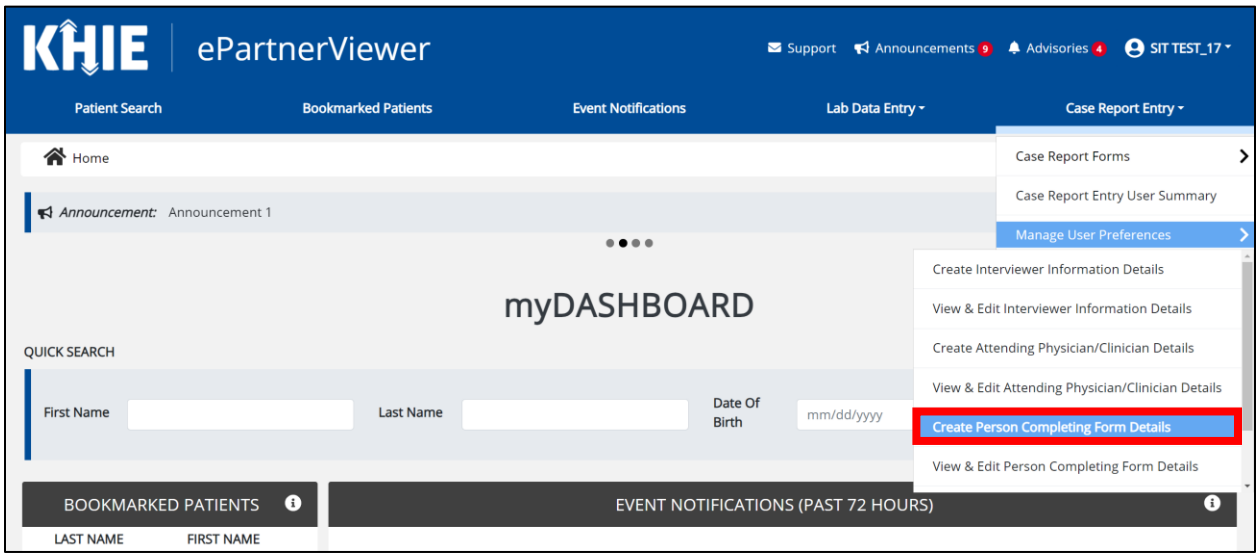
Create Person Completing Form Details

1. Click the **Case Report Entry** Tab located in the blue Navigation Bar at the top of the screen.

2. From the **Case Report Entry** Tab dropdown menu, select **Manage User Preferences**.

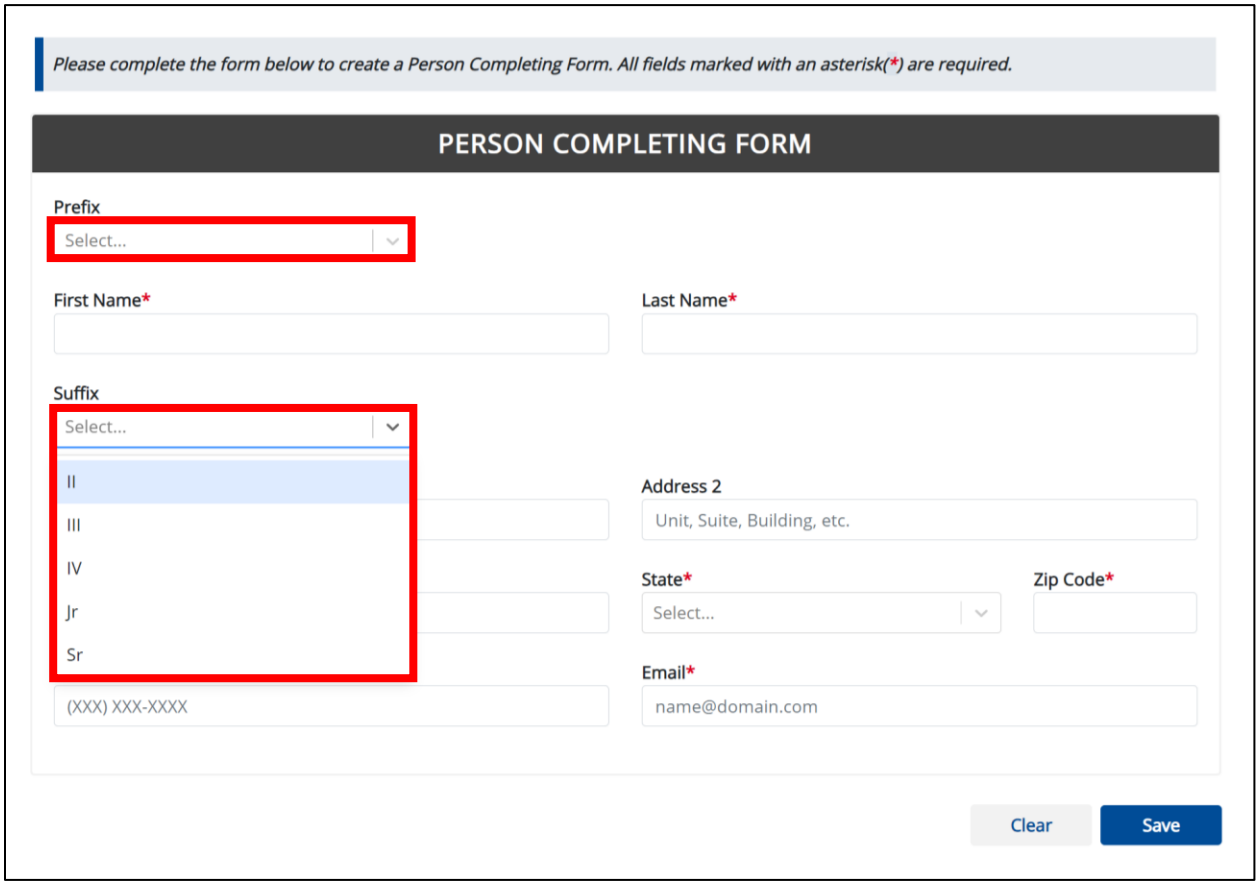


3. To enter the details about the person completing the form, select **Create Person Completing Form Details** from the dropdown menu.



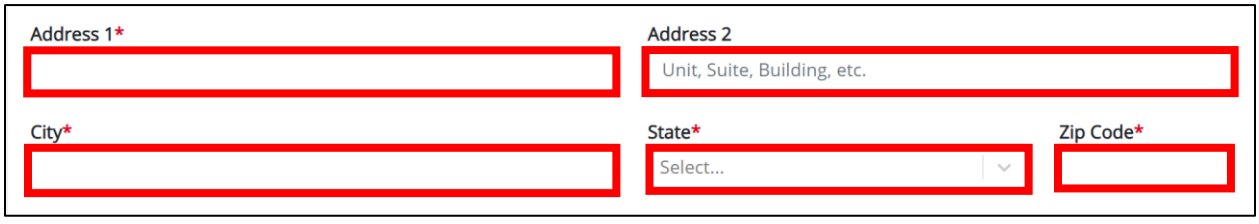
4. The **Person Completing Form** screen displays. Enter the details. Mandatory fields are marked with asterisks (*).

5. If available, select the appropriate **Prefix** and **Suffix** from the dropdown menus.



6. Enter the **First Name** and **Last Name** of the Person completing the form.

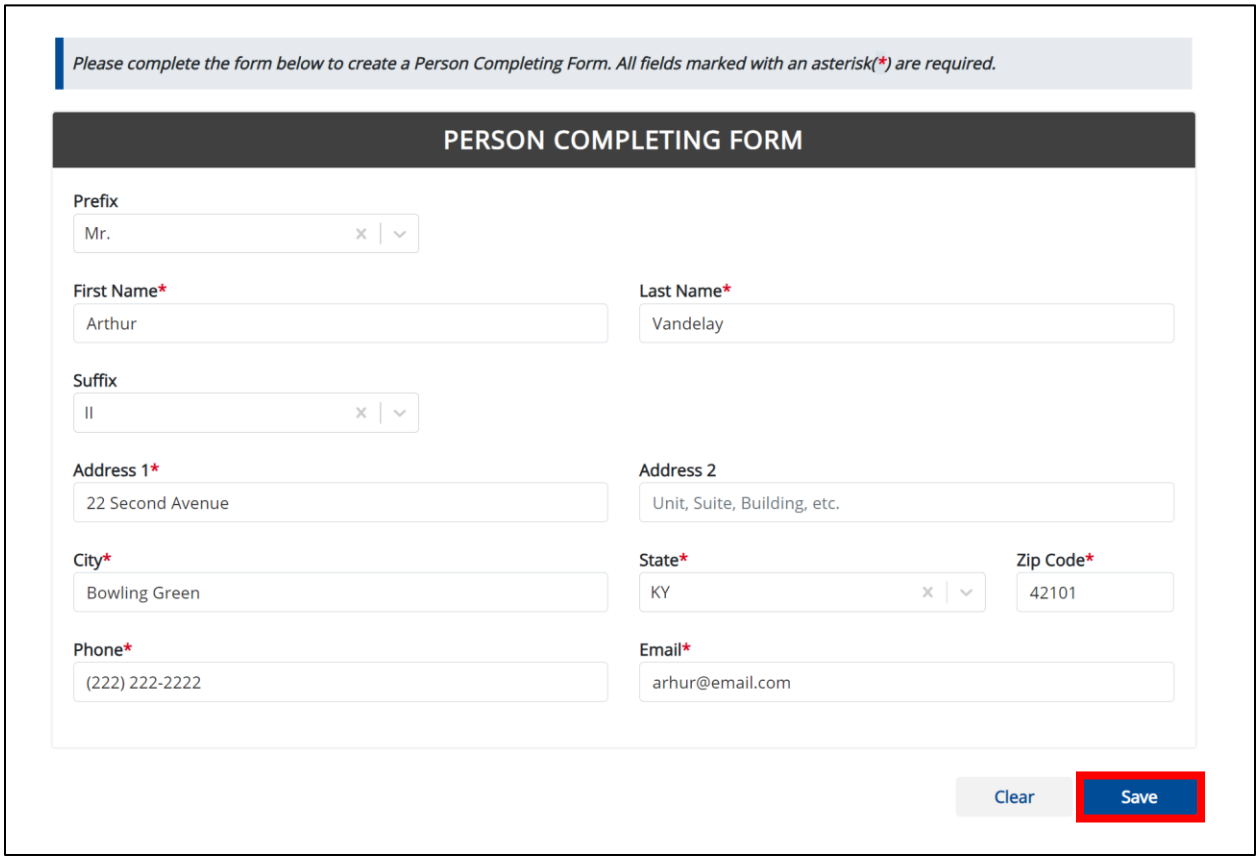
7. Enter the **Address**, **City**, **State**, and **Zip Code**.



8. Enter the **Phone Number**.
9. If available, enter the **Email Address**.

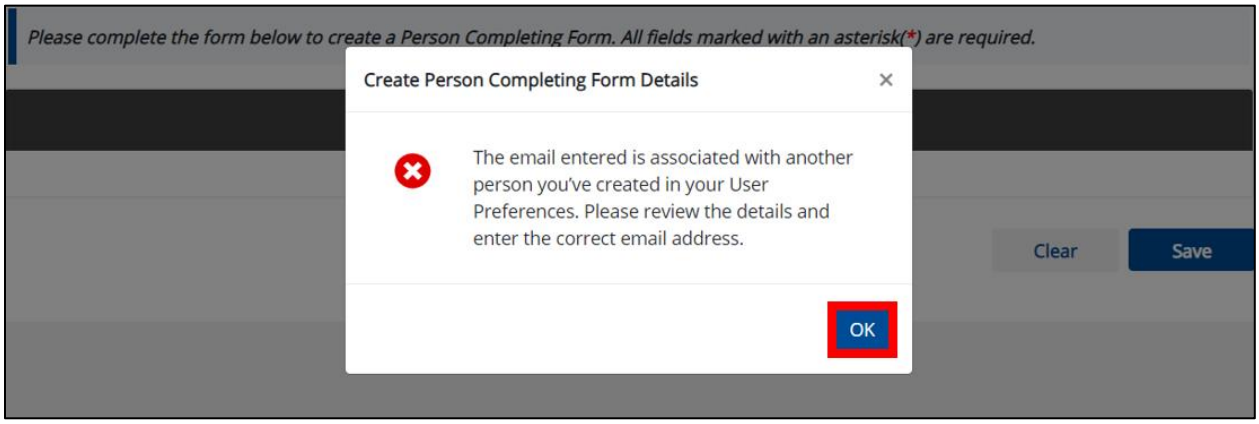
Please Note: If the information entered in the *Phone* and *Email* fields is not entered in the appropriate format, an error message displays that prevents you from proceeding to the next page until the format error is fixed.

8. After completing the mandatory fields, click **Save**.

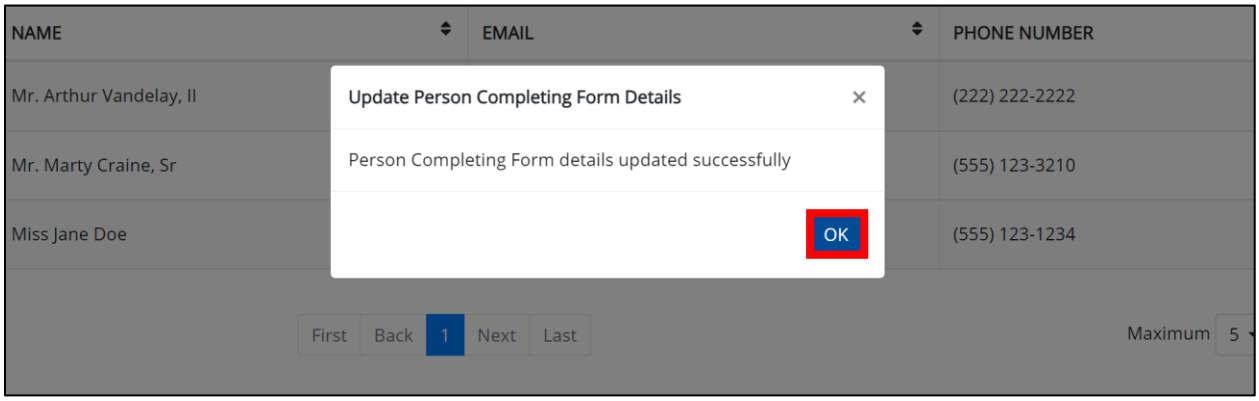


Please Note: If you enter an email address that is already associated with another Person Completing Form and click **Save**, a pop-up displays with an error message that states:
The email entered is associated with another person you've created in your User Preferences. Please review the details and enter the correct email address.

You must click **OK** and enter the correct email address to save the Person Completing Form details and proceed to the **View & Edit Person Completing Form Details** screen.

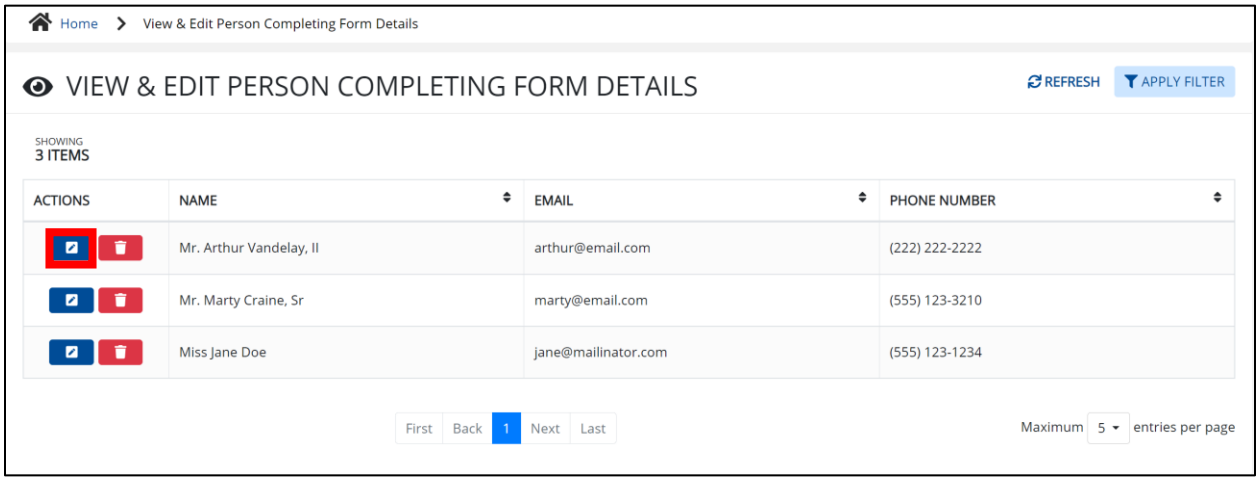


9. The *Create Person Completing Form Details* pop-up window displays. Click **OK** to proceed to the **View & Edit Person Completing Form Details** screen.

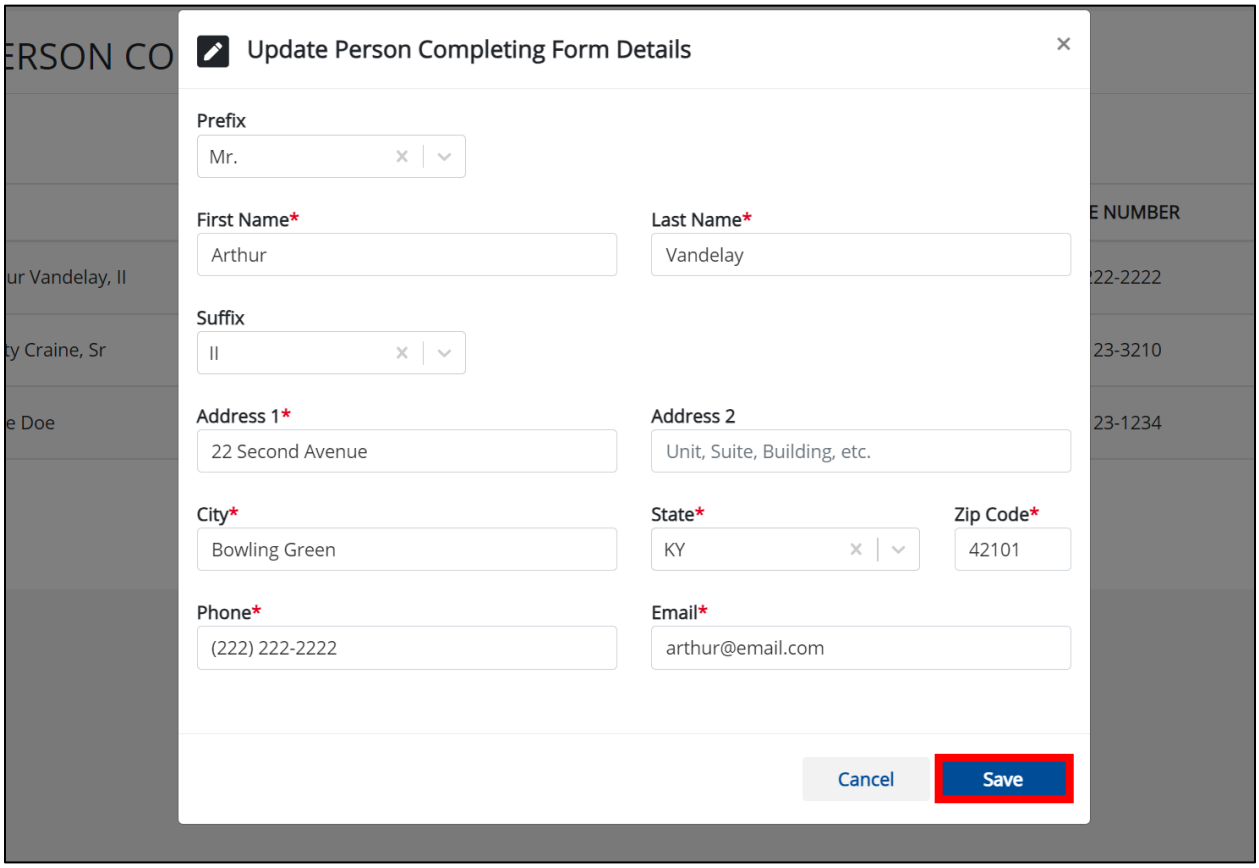


View & Edit Person Completing Form Details

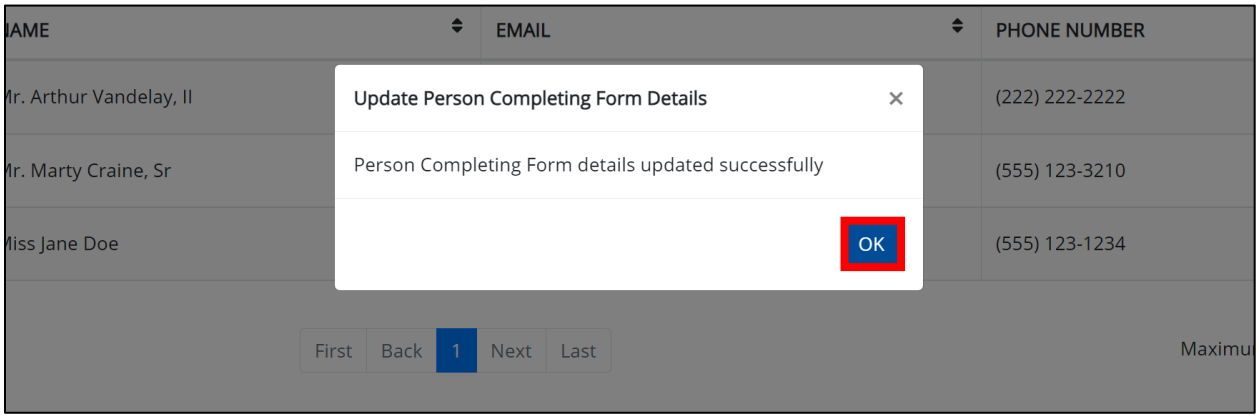
10. The **View & Edit Person Completing Form Details** screen displays. To edit details, click the **Edit** icon located next to the appropriate person.



11. The *Update Person Completing Form Details* pop-up displays. You can make any necessary edits and click **Save** to save the updates and close out of the pop-up.

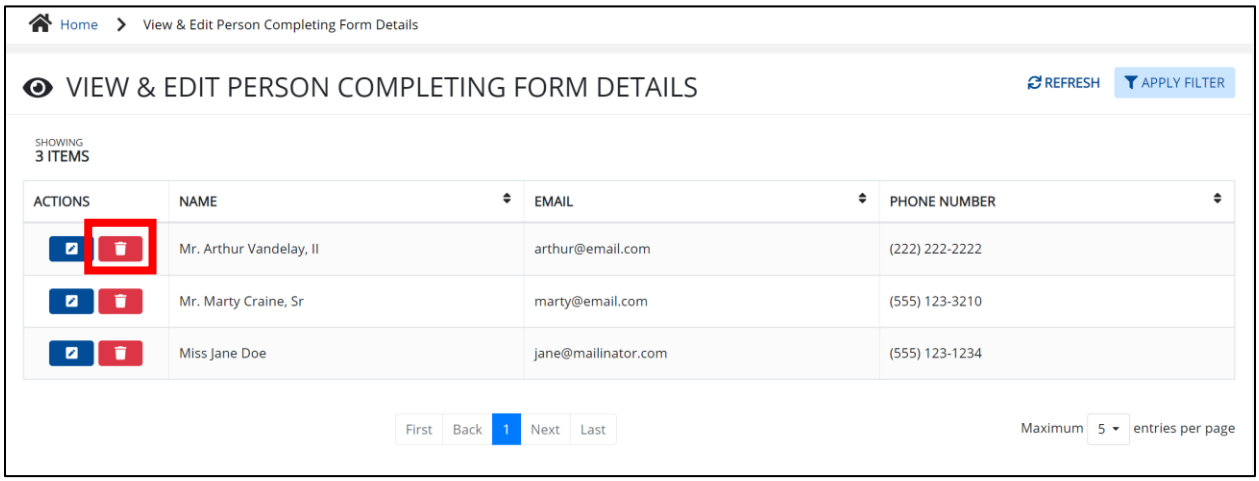


12. Once the update is successfully saved, a pop-up message displays. To proceed, click **OK**.

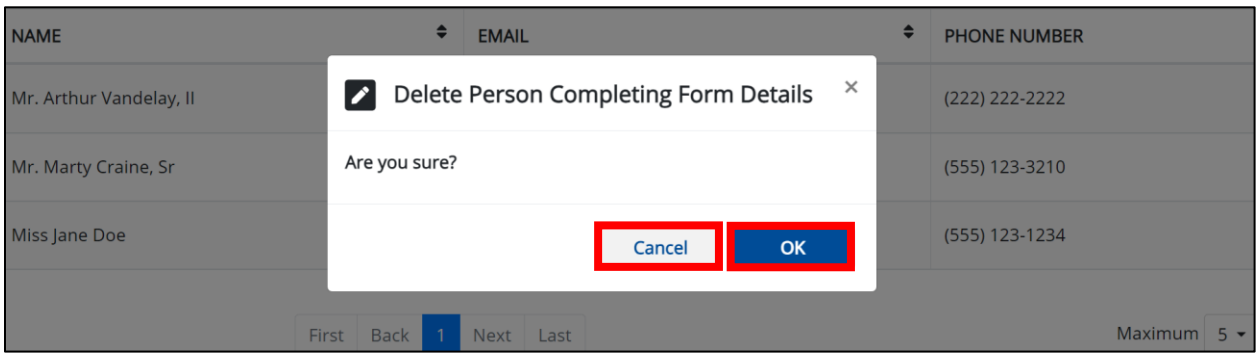


Delete Person Completing the Form Details

13. To delete someone from the User Preferences, click the **Trash Bin Icon** located next to the appropriate person.



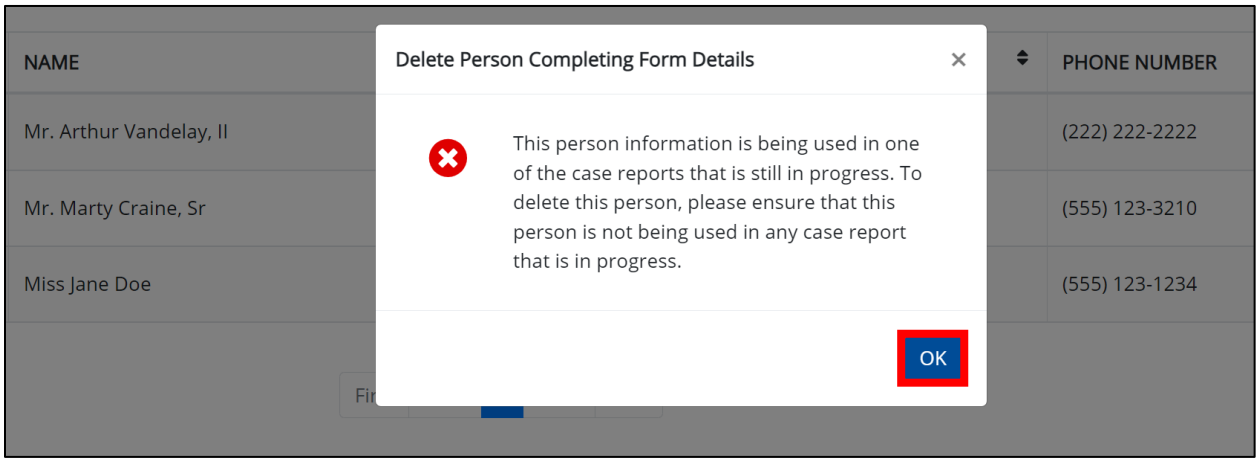
14. The *Person Completing Form Details* pop-up displays. To delete, click **OK**. Click **Cancel** if you do not want to delete the person completing the form.



Please Note: You can delete a person on the **View & Edit Person Completing Form Details** screen as long as that person has not been selected for use in a case report that is still in-progress. If you attempt to delete a person who has been selected for use in a case report that has not been completed yet, a pop-up notification will display the following message:

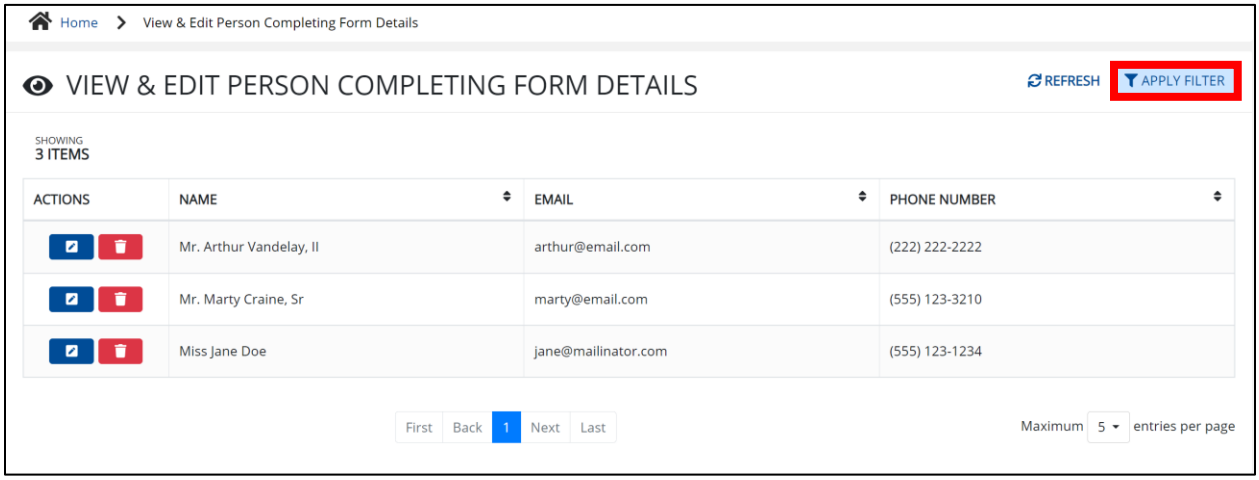
This person information is being used in a case report that is still in progress. To delete this person, please ensure that this person is not being used in any case report that is progress.

To close out of the pop-up and proceed, click **OK**.
To delete the details of a person used in a case report that is still "In-Progress", you must first complete the case report. Once the appropriate case report is complete, you can delete the Person Completing Form details from your User Preferences.

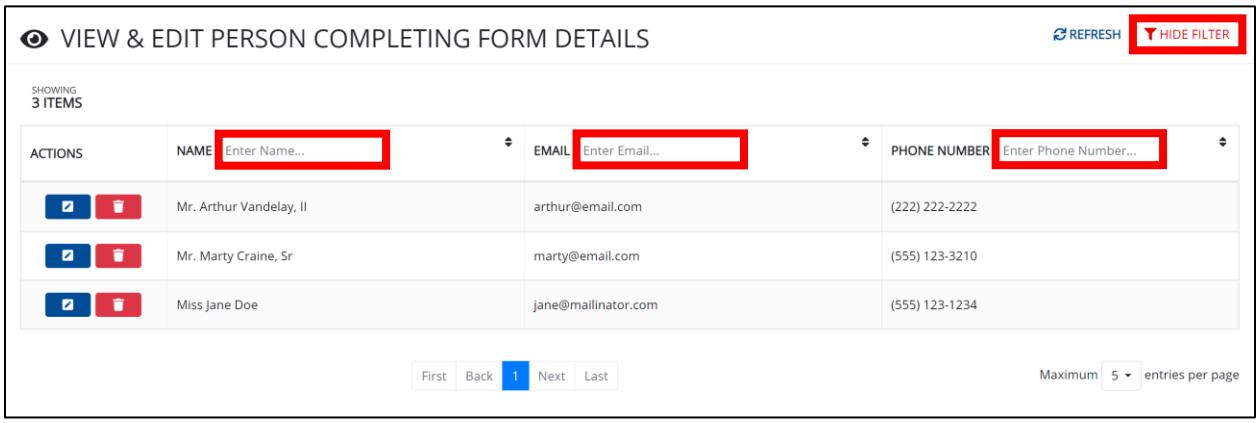


Filter Person Creating Form Details

15. To search for a specific person in the User Preferences, click **Apply Filter**.



16. The Filter fields display. Search by entering the ***Name***, ***Phone Number***, and/or ***Email Address*** of the person completing the form in the corresponding Filter fields.



5 Basic Features in the Case Report Entry Form

This section describes the basic features of the Case Report Form in the ePartnerViewer.

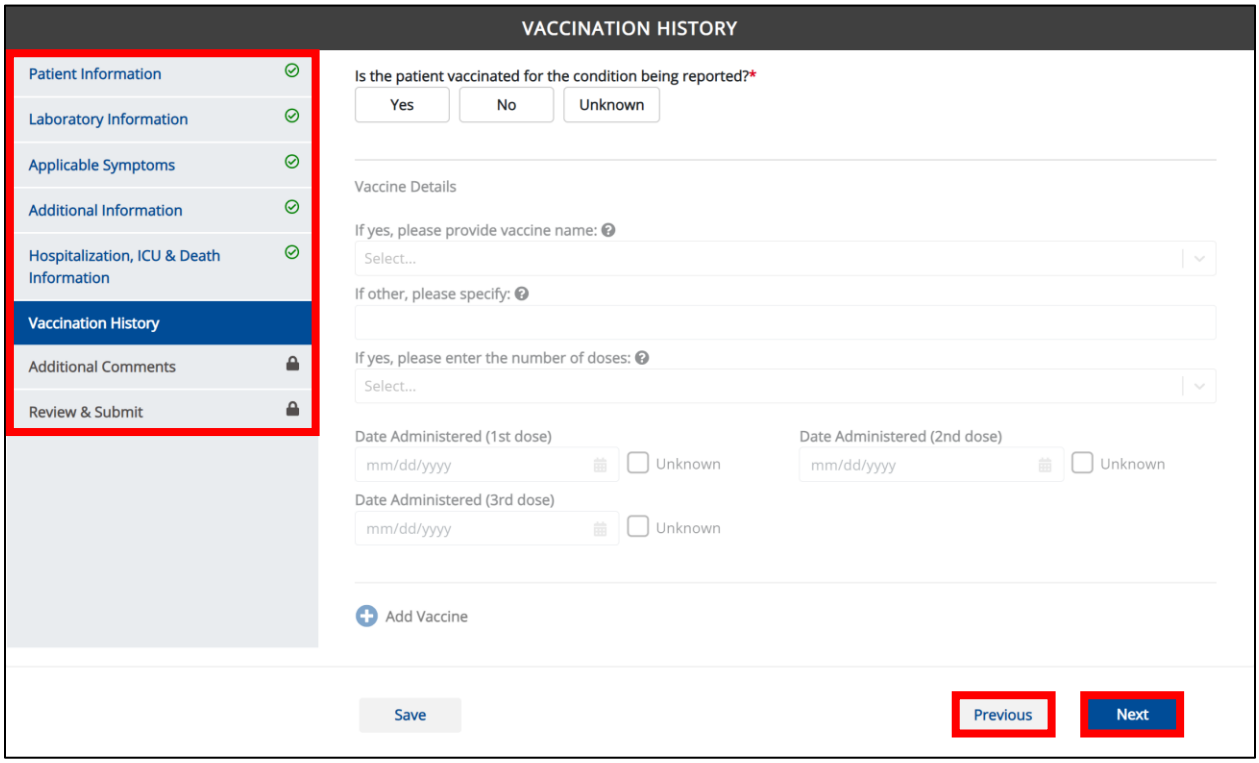
Side Navigation Bar & Pagination

On the left side of the Case Report, tabs located in the **Side Navigation Bar** provide users the ability to go to the different screens within a Case Report. You can also use the pagination buttons to move to the next screen or to any previous screen.

1. Using the side navigation bar, you can navigate to any previously completed screen. Click the **hyperlink** of a previously completed screen to navigate to that specific screen.

2. Click **Previous** to go to the previous screen.

3. When all required fields have been completed on the current screen, click **Next** to proceed to the next screen.



Save Feature

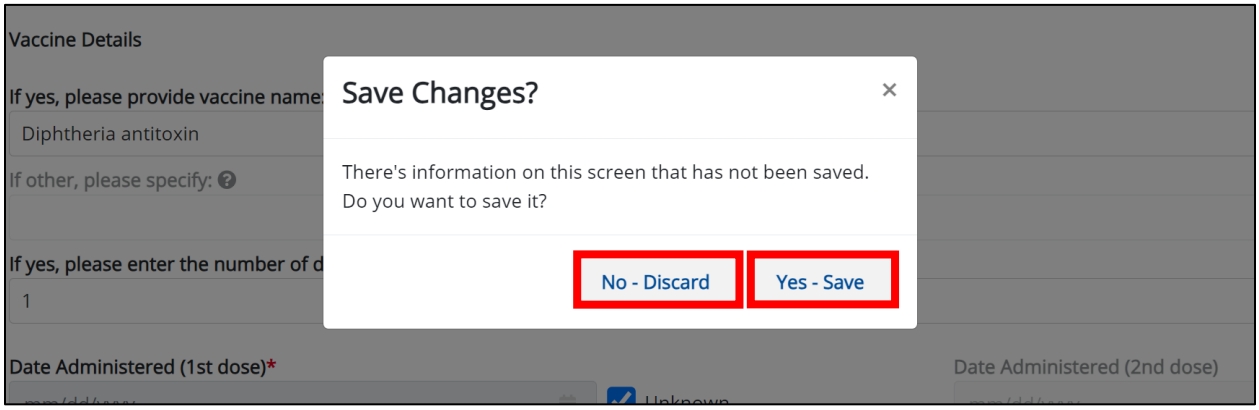
The **Save** feature allows Users to complete the case report form in multiple sessions. You must **save** the information you have entered in order to return later to the place you left off previously.

1. When all required fields have been completed, click **Save** at the bottom of the screen to save the current section.

2. If you click on a previously completed screen on the side navigation bar, the *Save Changes* pop-up will display. You have the option to save or discard the changes on the current screen before navigating to another screen.

- If you click ***Yes – Save*** and all the required fields are entered on the current screen, you will navigate to the intended screen. (If you have not completed all the required fields on the current screen, you will not be allowed to save the data.) To navigate to the desired screen, you must first complete all the required fields on the current screen.

- If you click ***No – Discard***, you will navigate to the intended screen without saving any changes on the current screen. This means that none of the data entered on the current screen will be saved.



Case Report Entry Icons

Case Reports may contain Icons that serve as visual indicators to draw the user's attention to specific information.

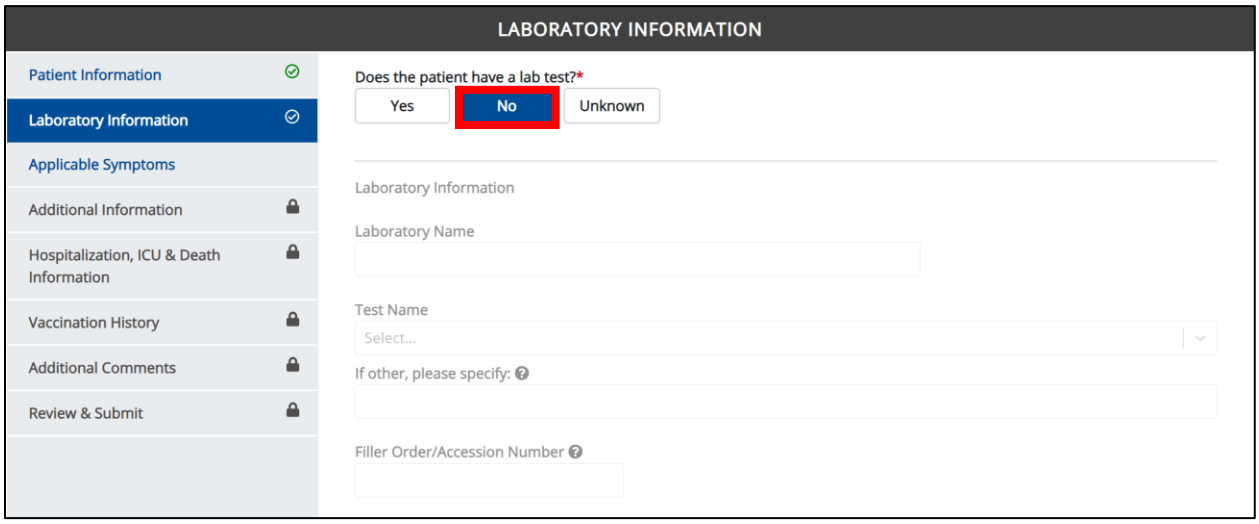
Icon Descriptions:

Icon	Name	Description
Section 8 of 10	**Progress Bar**	Indicates the percentage of completion.
	Lock	Indicates the sections that are not yet accessible; Users must enter all the required fields on the current screen and click **Next** to unlock the next screen.
	Green Checkmark	Indicates the sections that are complete.

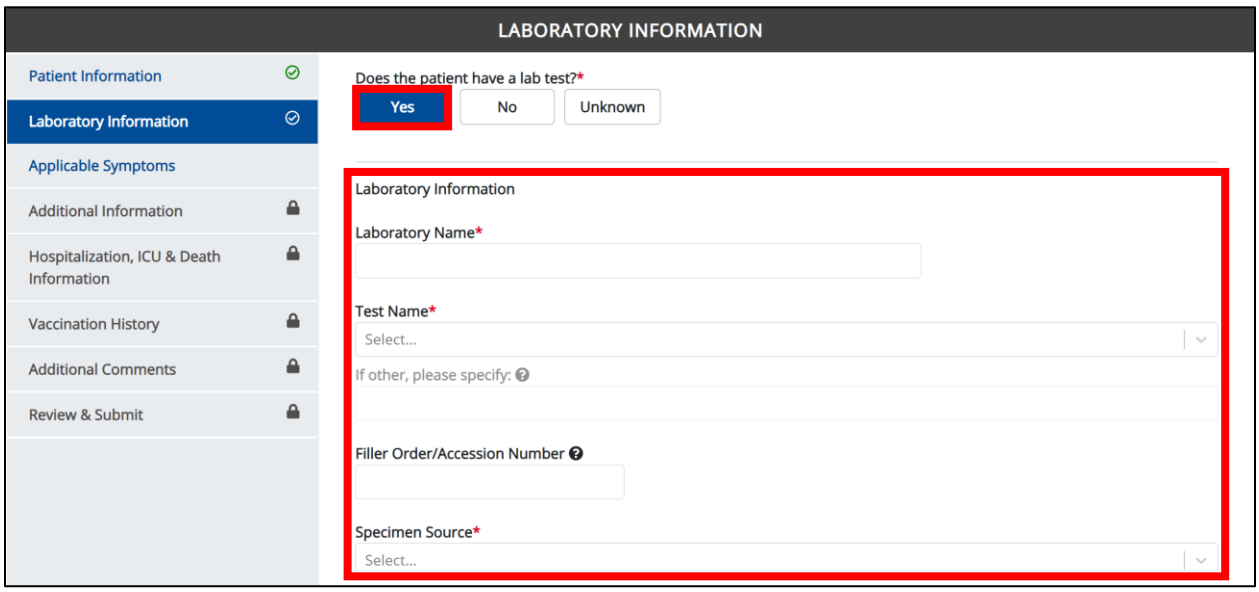
Conditional Questions

Conditional Questions are those questions that are asked based on your responses to the previous questions. The Vaccine Preventable Diseases Case Report has multiple screens with conditional questions. Based on the answer selected for conditional questions, certain subsequent fields on the screen will be enabled or grayed out and disabled.

- For example, if you select ***No*** to the conditional question at the top of the **Laboratory Information** screen of the Vaccine Preventable Diseases Case Report, the subsequent fields will be grayed out and disabled.

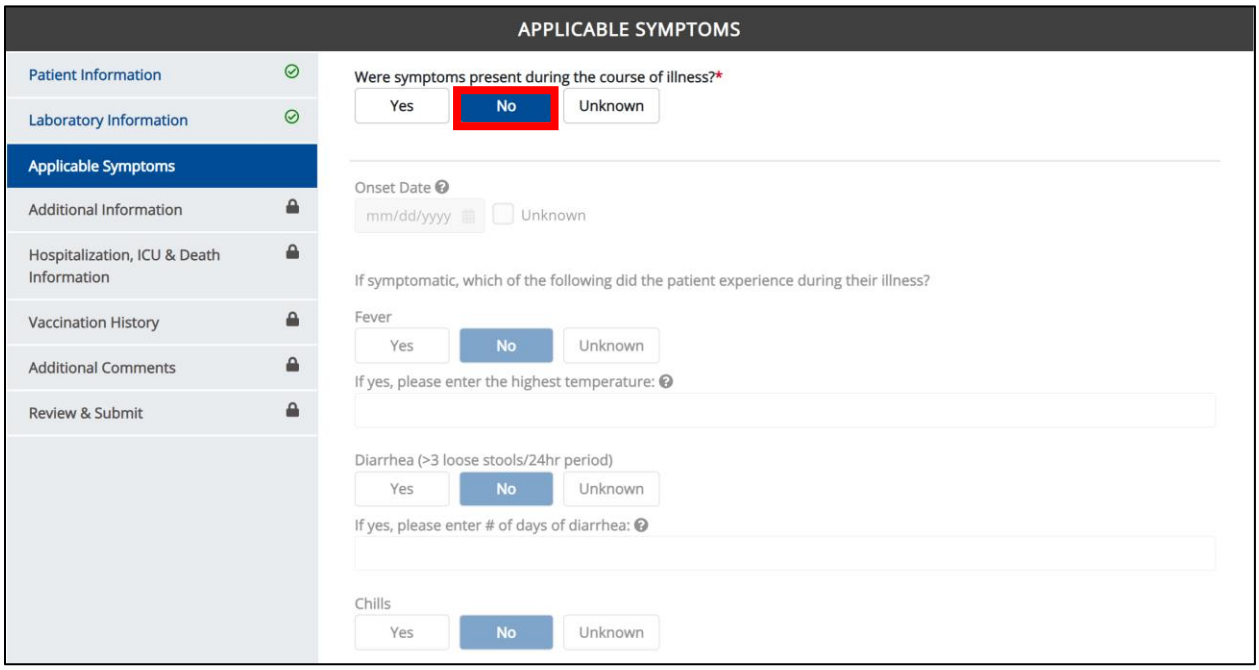


- If you select ***Yes*** to the conditional question at the top of the **Laboratory Information** screen, the subsequent laboratory-related fields are enabled.

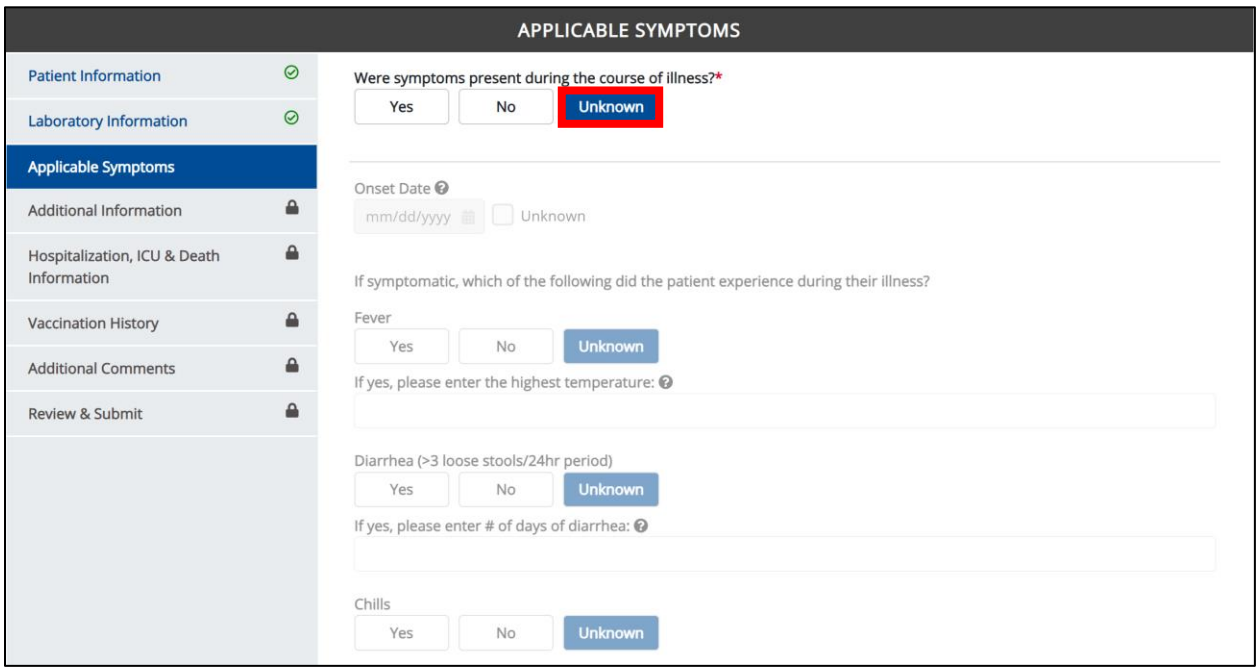


Additionally, if ***No*** or ***Unknown*** is selected for certain conditional questions, the screen will be disabled and the subsequent fields will be marked as ***No*** or ***Unknown***, based on the selected answer. These conditional questions are found on the **Applicable Symptoms** and **Additional Information** screens.

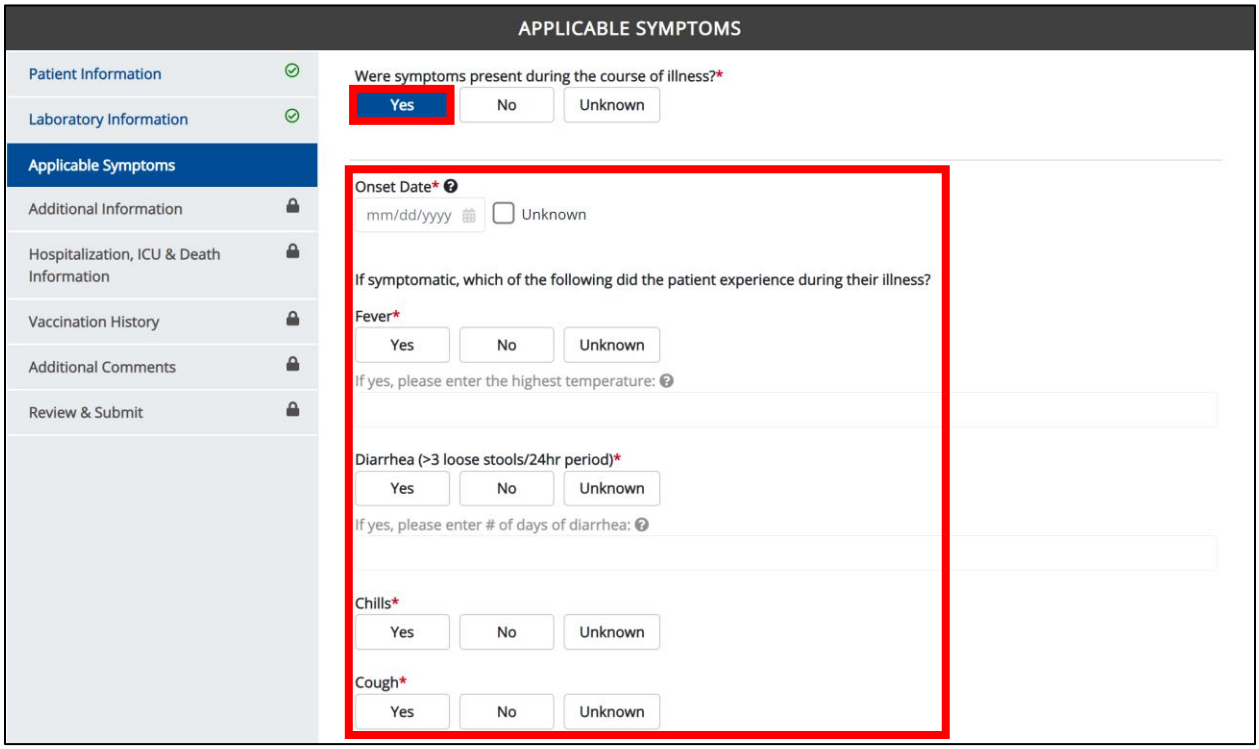
- For example, if you select ***No*** to the conditional question at the top of the **Applicable Symptoms** screen, all subsequent fields will be disabled and labeled as ***No***.



- If you select ***Unknown*** to the conditional question at the top of the **Applicable Symptoms** screen, all subsequent fields will be disabled and labeled as ***Unknown***.



- If you select ***Yes*** to the conditional question at the top of the **Applicable Symptoms** screen, the subsequent fields are enabled.



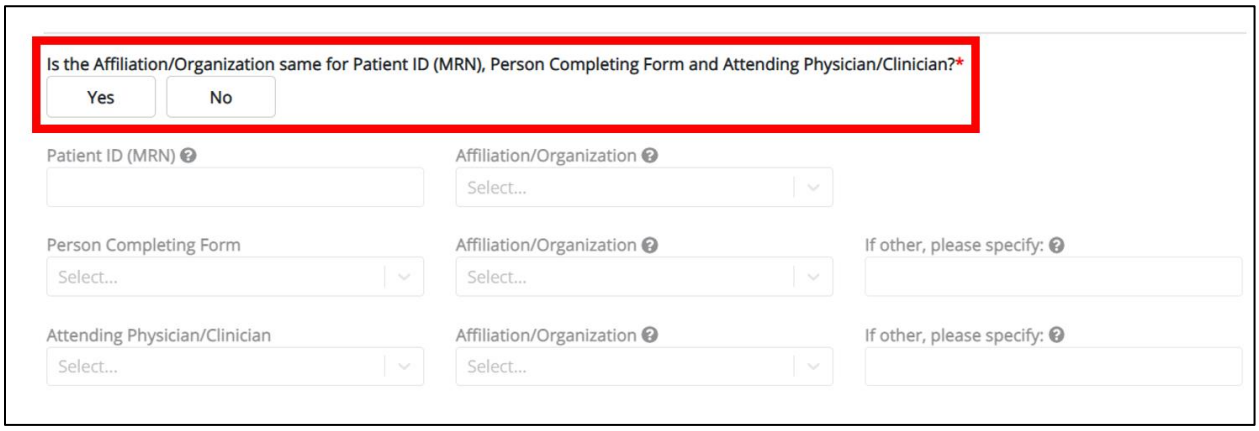
6 Affiliation/Organization Conditional Question

Certain conditional questions apply only to the subsequent fields within the section. Based on the selection to a conditional question, certain subsequent fields in that section are enabled.

This applies to the conditional Affiliation/Organization question on the **Patient Information** screen:

Is the Affiliation/Organization the same for Patient ID (MRN), Person completing Form, Attending Physician/Clinician?

Based on the selected answer to the conditional question, you can apply the **same** Affiliation/Organization to the Patient ID (MRN), the Person Completing the Form, and the Attending Physician/Clinician; **OR** you can apply a **different** Affiliation/Organization to each.



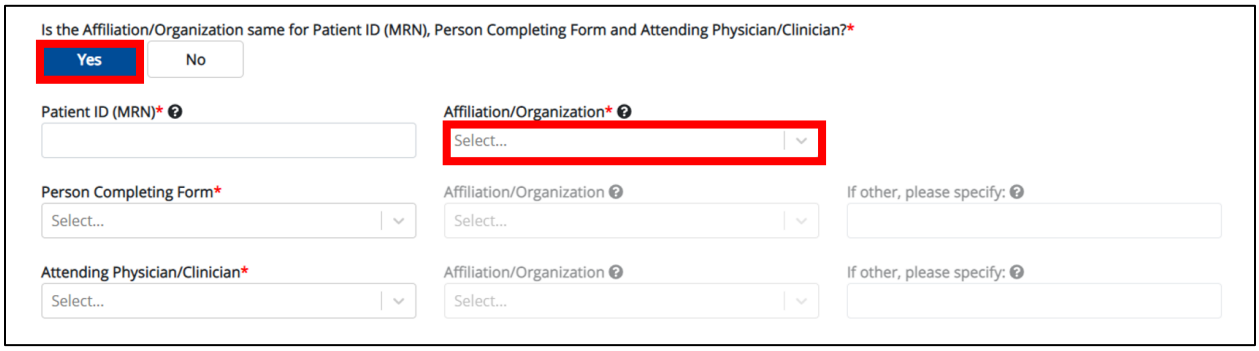
- Select ***Yes*** to apply the **same** Affiliation/Organization to the Patient ID (MRN), the Person Completing the Form, and the Attending Physician/Clinician.
- Select ***No*** to apply **different** Affiliation/Organizations to the Patient ID (MRN), the Person Completing the Form, and the Attending Physician/Clinician.

Affiliation/Organization Conditional Answer: Yes

If ***Yes*** is selected for the conditional Affiliation/Organization question, the **same** Affiliation/Organization is applied to the Patient ID (MRN), the Person Completing the Form, and the Attending Physician/Clinician.

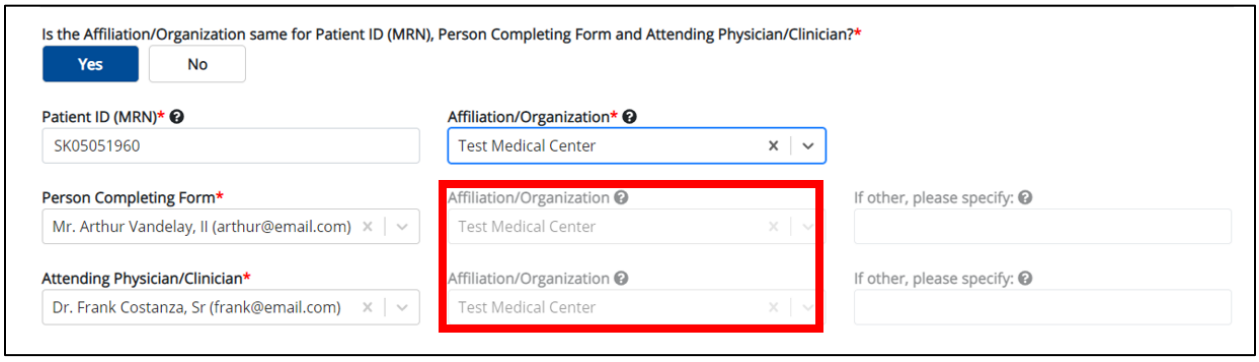
- Only **one** *Affiliation/Organization* field is enabled. You must complete the Affiliation/Organization field that corresponds to the Patient ID (MRN). The *Affiliation/Organization* fields for the Person Completing Form and the Attending Physician/Clinician are disabled.

1. From the dropdown menu, select the **Affiliation/Organization** for the Patient ID (MRN).



- Once the Affiliation/Organization is selected for the Patient ID (MRN), this selection will display in the disabled *Affiliation/Organization* fields.

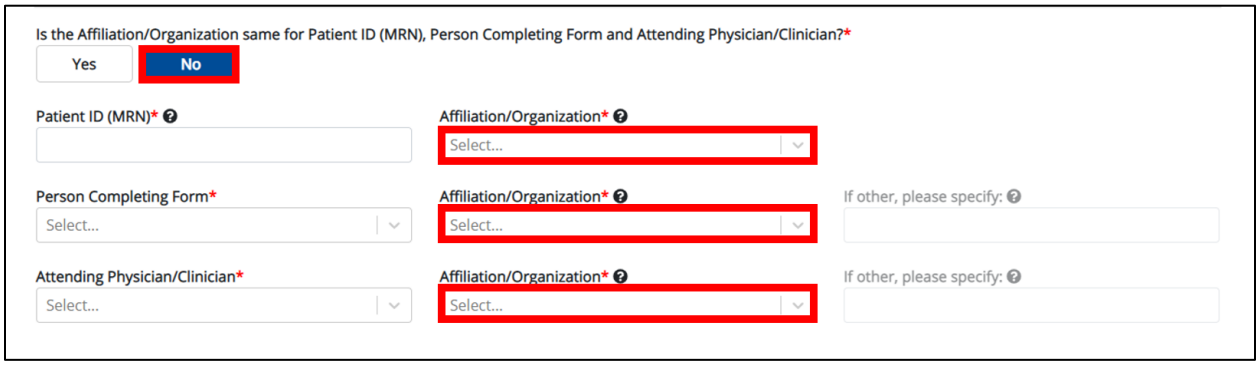
- This means the **same** Affiliation/Organization is applied to the Patient ID (MRN), the Person Completing Form, and the Attending Physician/Clinician.



Affiliation/Organization Conditional Answer: No

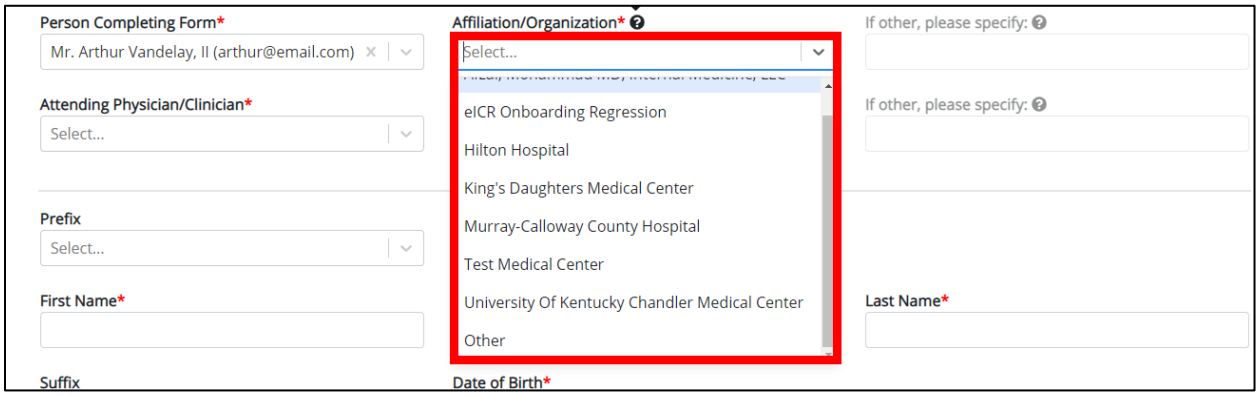
If ***No*** is selected for the conditional Affiliation/Organization question, a **different** Affiliation/Organization can be applied to the Patient ID (MRN), the Person Completing the Form, and the Attending Physician/Clinician.

- **Each** of the three (3) *Affiliation/Organization* fields are enabled.
- You must individually complete **each** of the *Affiliation/Organization* fields respectively for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician.

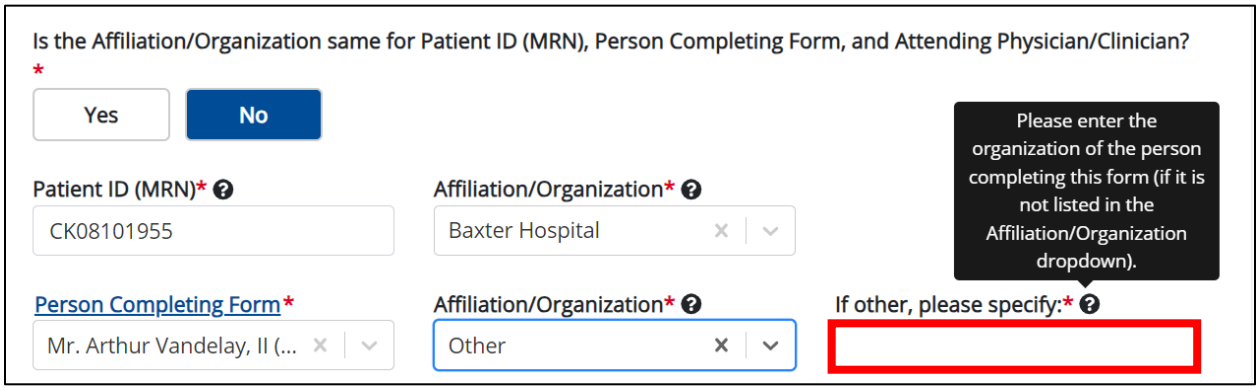


1. From the dropdown menu, select the **Affiliation/Organization** for the Patient ID (MRN).

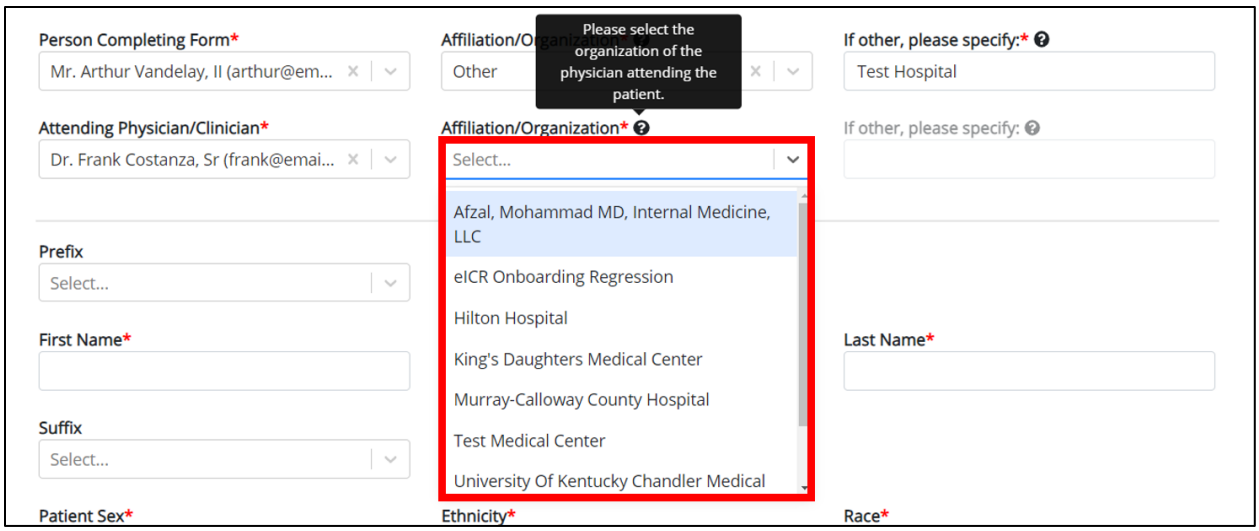
2. From the dropdown menu, select the **Affiliation/Organization** for the Person Completing Form.



Please Note: If you select ***Other*** from the *Affiliation/Organization* dropdown menu for the Person Completing Form, the following subsequent textbox is enabled: *If other, please specify*. You must enter the **name of the affiliation/organization**.



3. From the dropdown menu, select the **Affiliation/Organization** for the Attending Physician/Clinician.

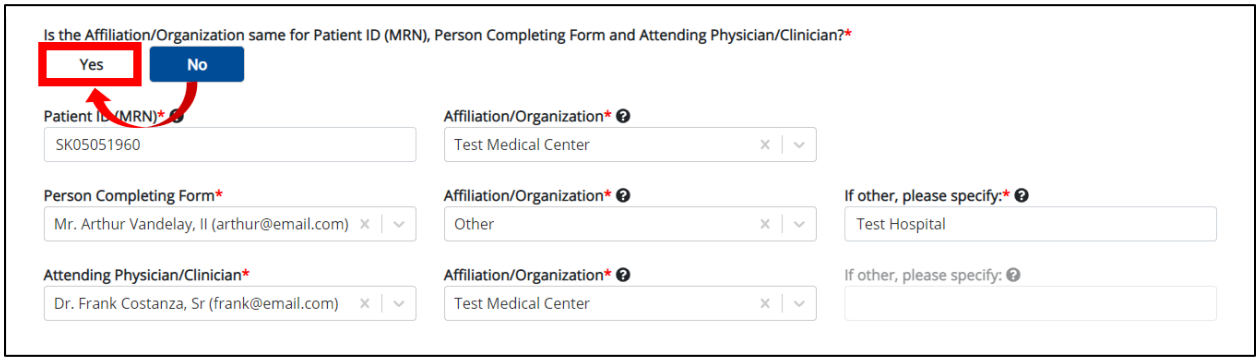


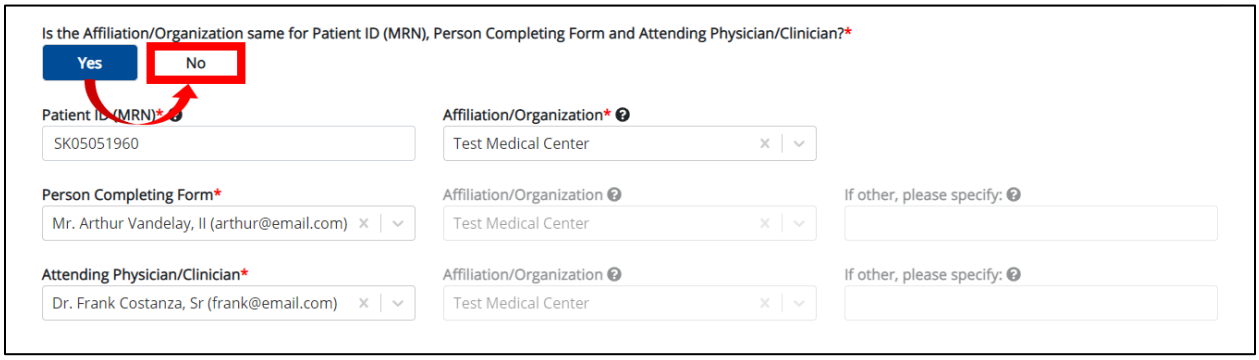
Please Note: If you select ***Other*** from the *Affiliation/Organization* dropdown menu for the Attending Physician/Clinician, the subsequent textbox is enabled: *If other, please specify*. You must enter the **name of the Affiliation/Organization**.

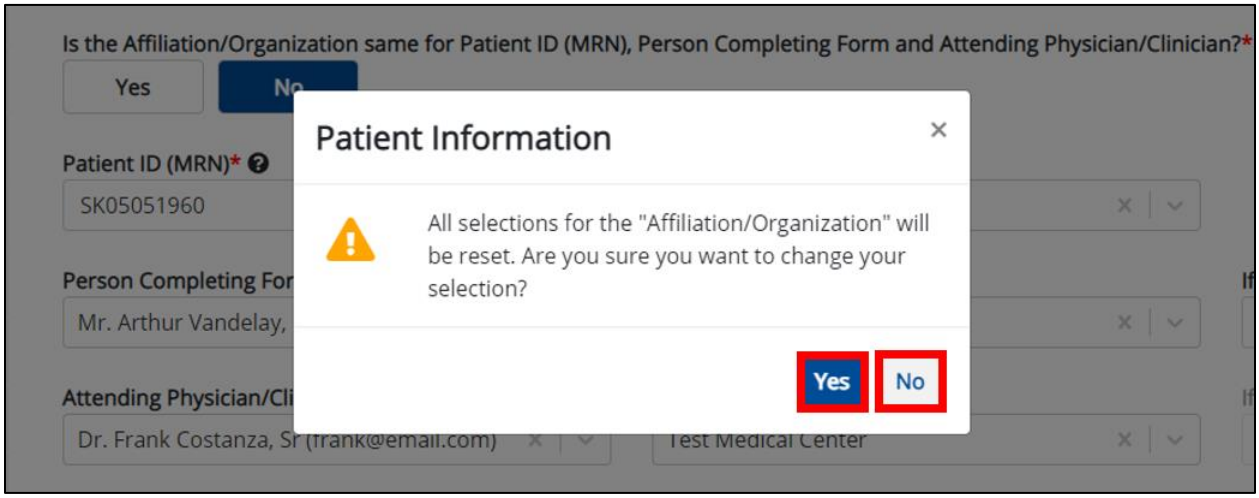
Affiliation/Organization Validation

If, after completing the *Affiliation/Organization* section, you change your answer to the conditional question from ***No*** to ***Yes*** or vice versa, a pop-up will display to confirm the change in answer.

A pop-up displays with a message that states: ***All selections for the "Affiliation/Organization" will be reset. Are you sure you want to change your selection?***



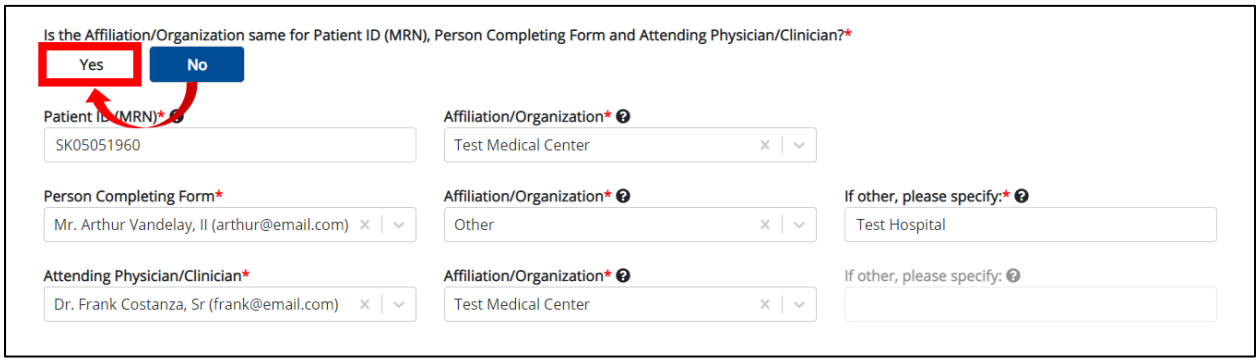




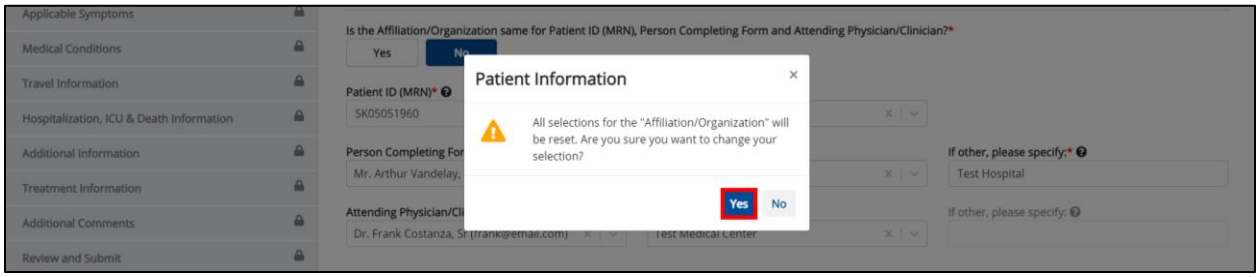
- To reset the Affiliation/Organization selection(s), click ***Yes***.
- To save the selected Affiliation/Organization selection(s), click ***No***.

Change Affiliation/Organization Conditional Answer: No to Yes

If, after completing the *Affiliation/Organization* section, you change your answer to the conditional question from ***No*** to ***Yes***, a pop-up message will display.



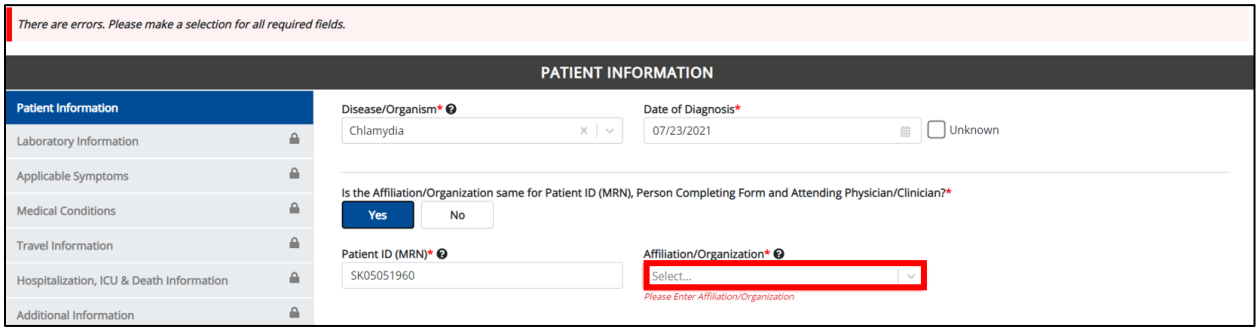
1. To reset your previous Affiliation/Organization selections for the Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician, click ***Yes*** on the pop-up.



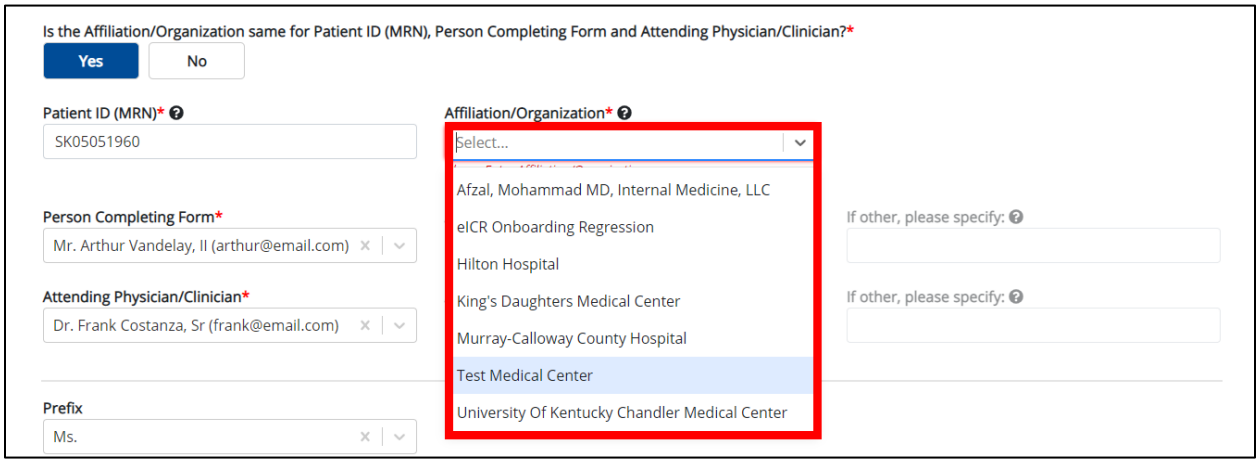
2. An error message prevents you from proceeding until an Affiliation/Organization is selected. You must select the **Affiliation/Organization** for the Patient ID (MRN) in order to proceed.

- Your previous Affiliation/Organization selections for the Person Completing Form and the Attending Physician/Clinician have been reset.

- The *Affiliation/Organization* fields for the Person Completing Form and the Attending Physician/Clinician are now blank and disabled.

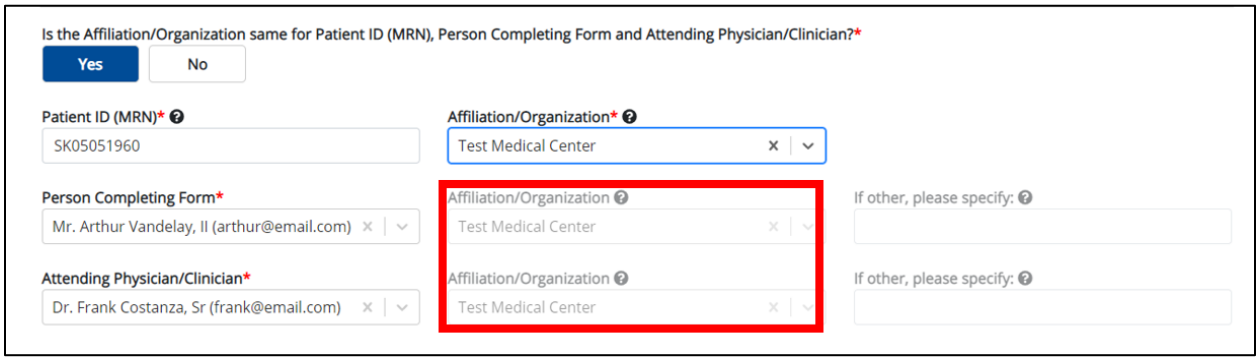


3. From the dropdown menu, select the **Affiliation/Organization** for the Patient ID (MRN).



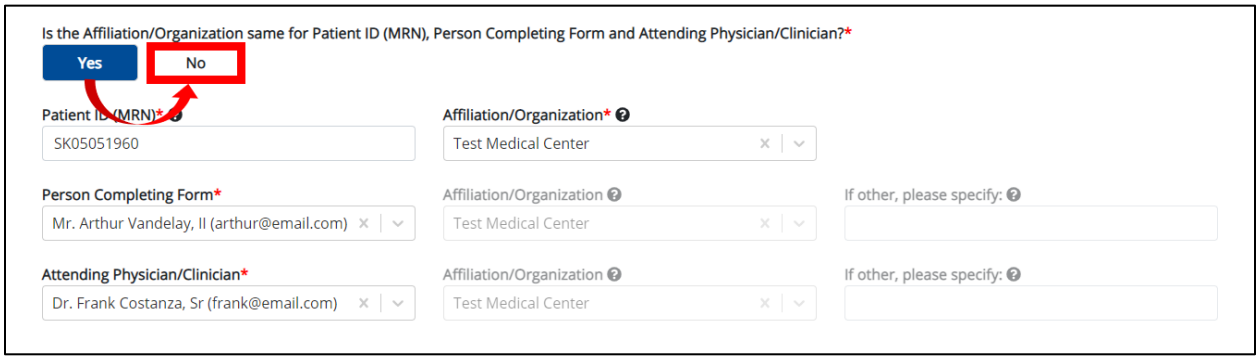
4. The **Affiliation/Organization** selected for the Patient ID (MRN) will display in disabled *Affiliation/Organization* fields for the Person Completing Form and the Attending Physician/Clinician.

- This means the **same** Affiliation/Organization will be applied to the Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician.

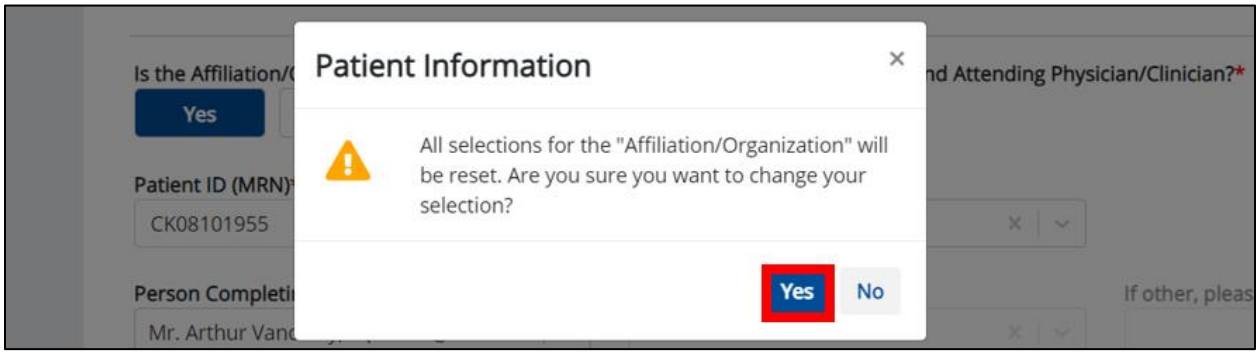


Change Affiliation/Organization Conditional Answer: Yes to No

If, after completing the *Affiliation/Organization* section, you change your answer to the conditional question from ***Yes*** to ***No***, a pop-up will display.

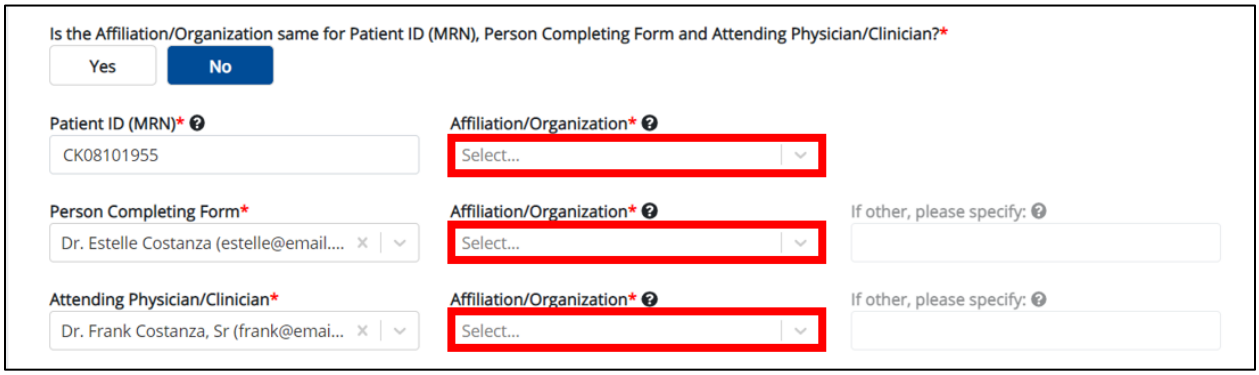


1. To reset your previous Affiliation/Organization selection for the Patient ID (MRN), click ***Yes*** on the pop-up.

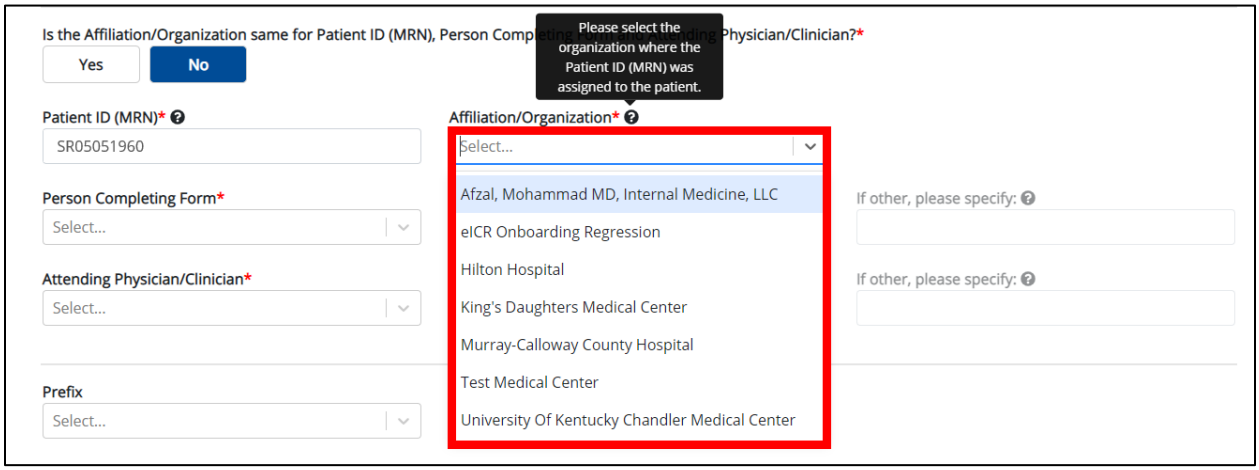


2. You must individually complete **<u>each</u>** of the *Affiliation/Organization* fields corresponding to Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician.

- Your previous Affiliation/Organization selection for the Patient ID (MRN) has been reset.
- **<u>All</u>** three (3) of the *Affiliation/Organization* fields are enabled. This means a different Affiliation/Organization can be selected for each field.

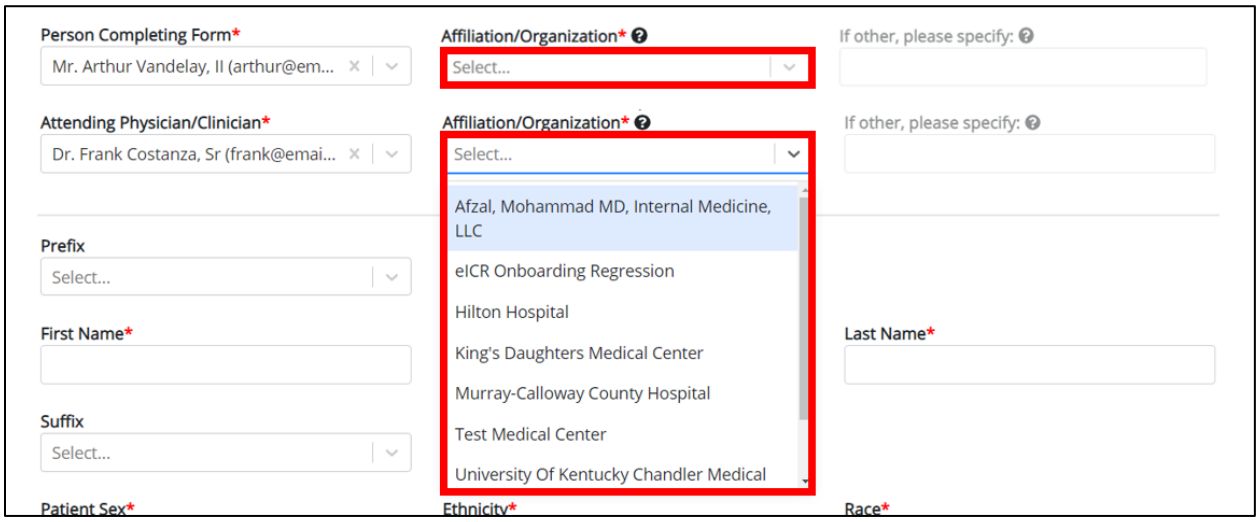


3. From the dropdown menu, select the **Affiliation/Organization** for the Patient ID (MRN).



4. From the dropdown menu, select the **Affiliation/Organization** for the Person Completing Form.

5. From the dropdown menu, select the **Affiliation/Organization** for the Attending Physician/Clinician.



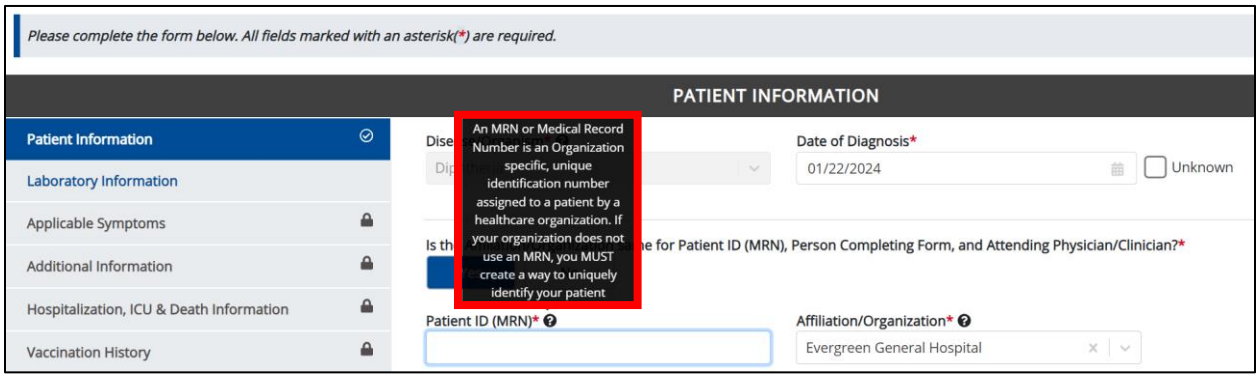
Please Note: If you select ***Other*** from the *Affiliation/Organization* dropdown menu for the Person Completing Form or the Attending Physician/Clinician, the following subsequent textbox is enabled: *If other, please specify*. You must enter the name of the **affiliation/organization**.

7 Tips for Manually Entering Case Report Data

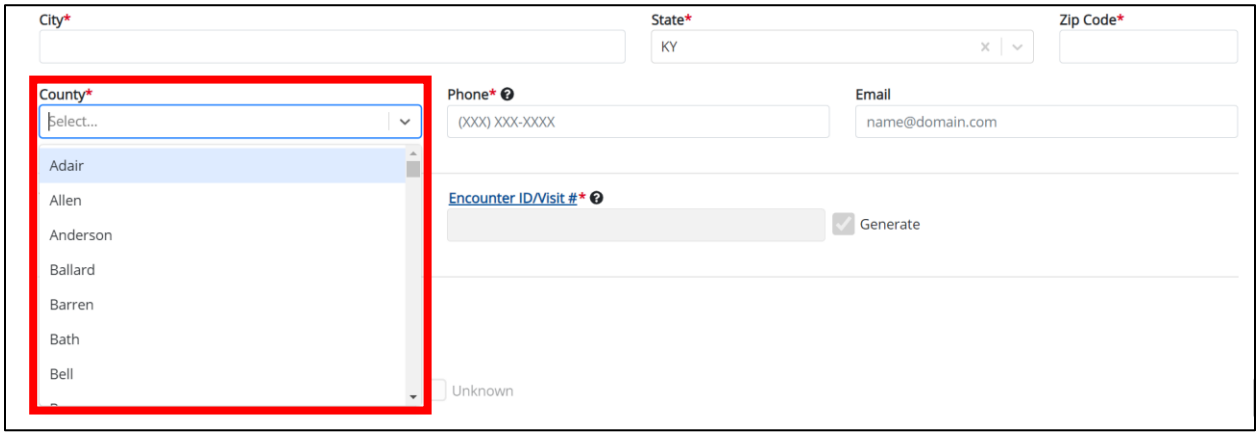
Become familiar with these tips prior to entering case reports. When entering data, please keep these key notes in mind:

- There are **mandatory** fields marked with **red asterisks** (*). These fields must be completed in order to proceed. In addition to completing the mandatory fields, you are encouraged to enter as much information as possible.

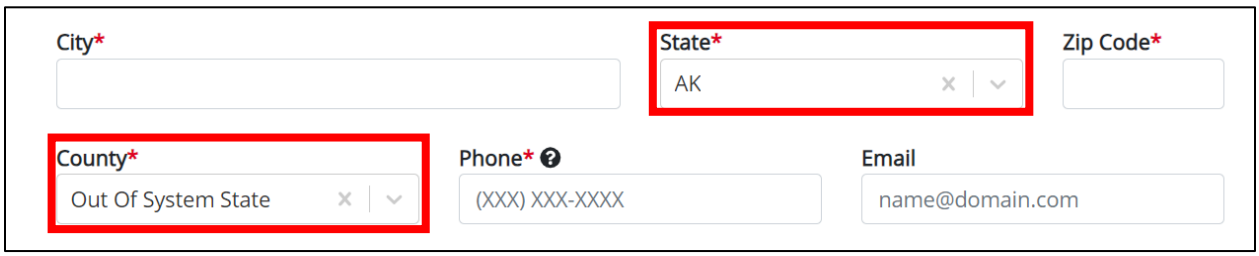
- *Help Icons* are available to guide you while entering data in the fields.



For entering address information, all States are available for selection in the *State* field dropdown menu. When you select the **State of Kentucky**, all Kentucky counties are available for selection in the *County* dropdown menu.

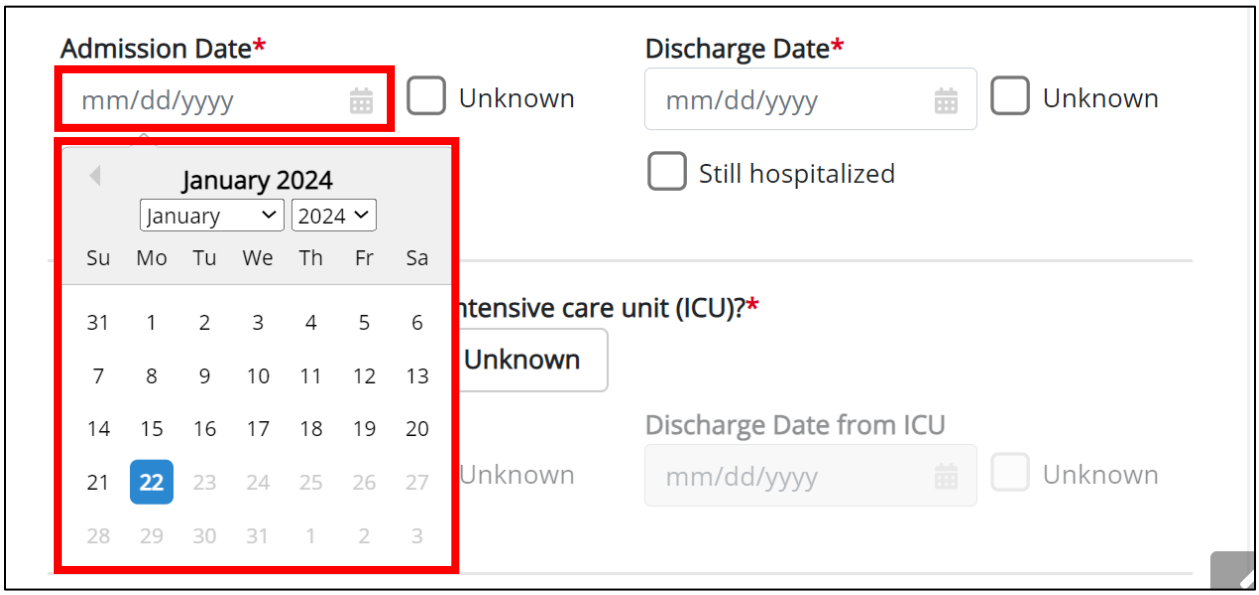


- However, when you select **any state other than Kentucky**, the system will display the message *Out of System State* and will not display counties in the *County* dropdown menu.

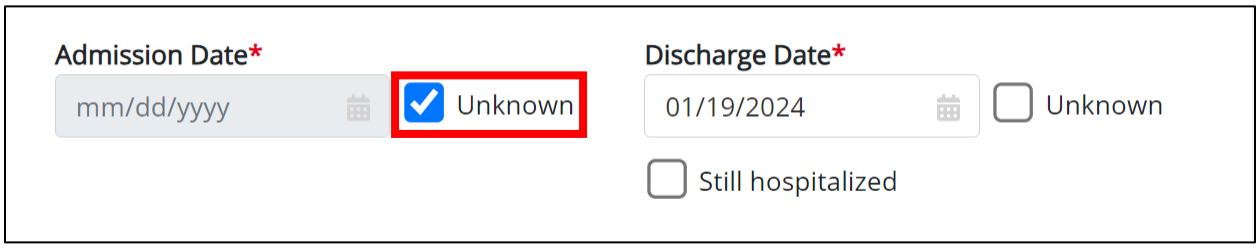


1. Enter dates by entering 2 digits for the month, 2 digits for the day, and 4 digits for the year.

- You can also click the *Date* field to bring up a calendar. You can click a **date on the calendar** or use the field dropdown menus to select the month and the year.



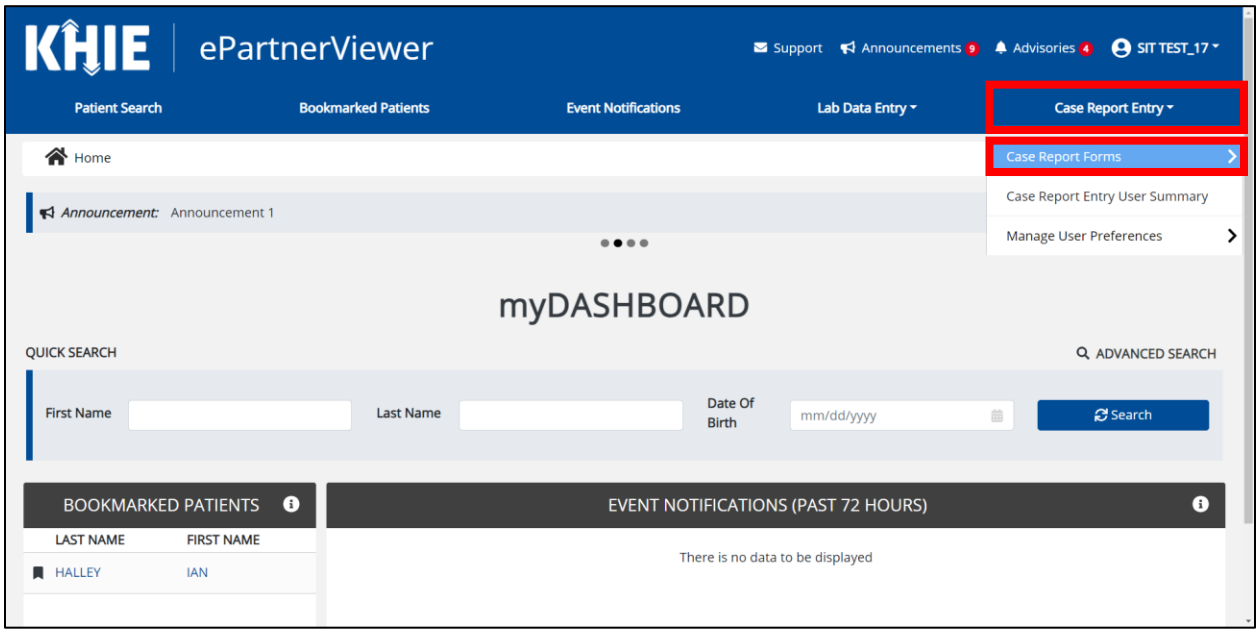
- If the date is unknown, you have the option to click the ***Unknown*** checkbox.



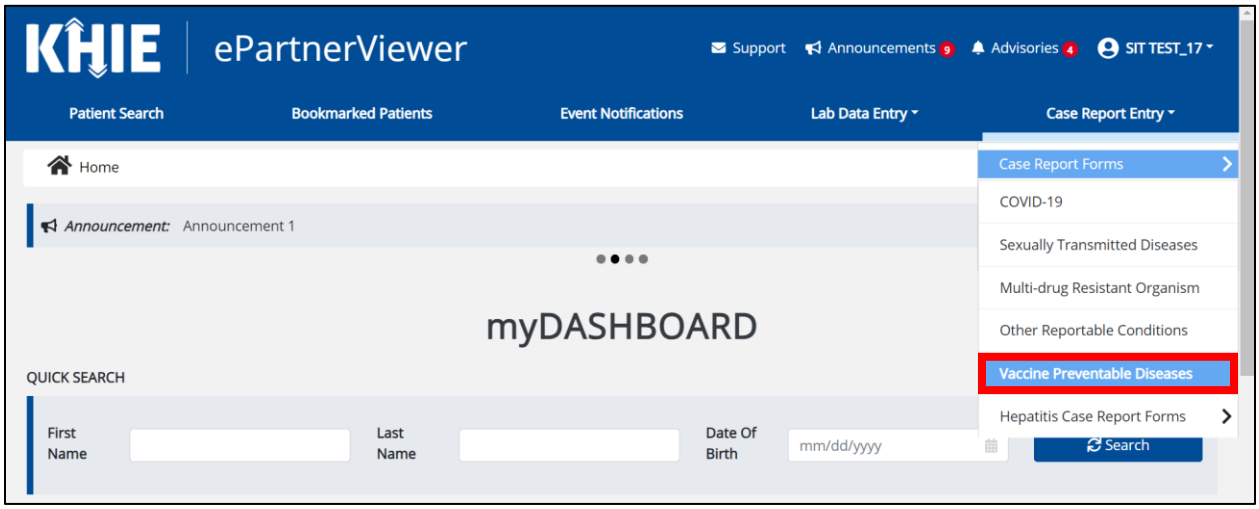
8 Vaccine Preventable Diseases Case Report Form

Users with the *Manual Case Reporter* Role are authorized to access the Vaccine Preventable Diseases Case Report Form in the ePartnerViewer.

1. To enter Vaccine Preventable Diseases case report information, click the **Case Report Entry** Tab in the blue Navigation Bar at the top of the screen, then select **Case Report Forms** from the dropdown menu.

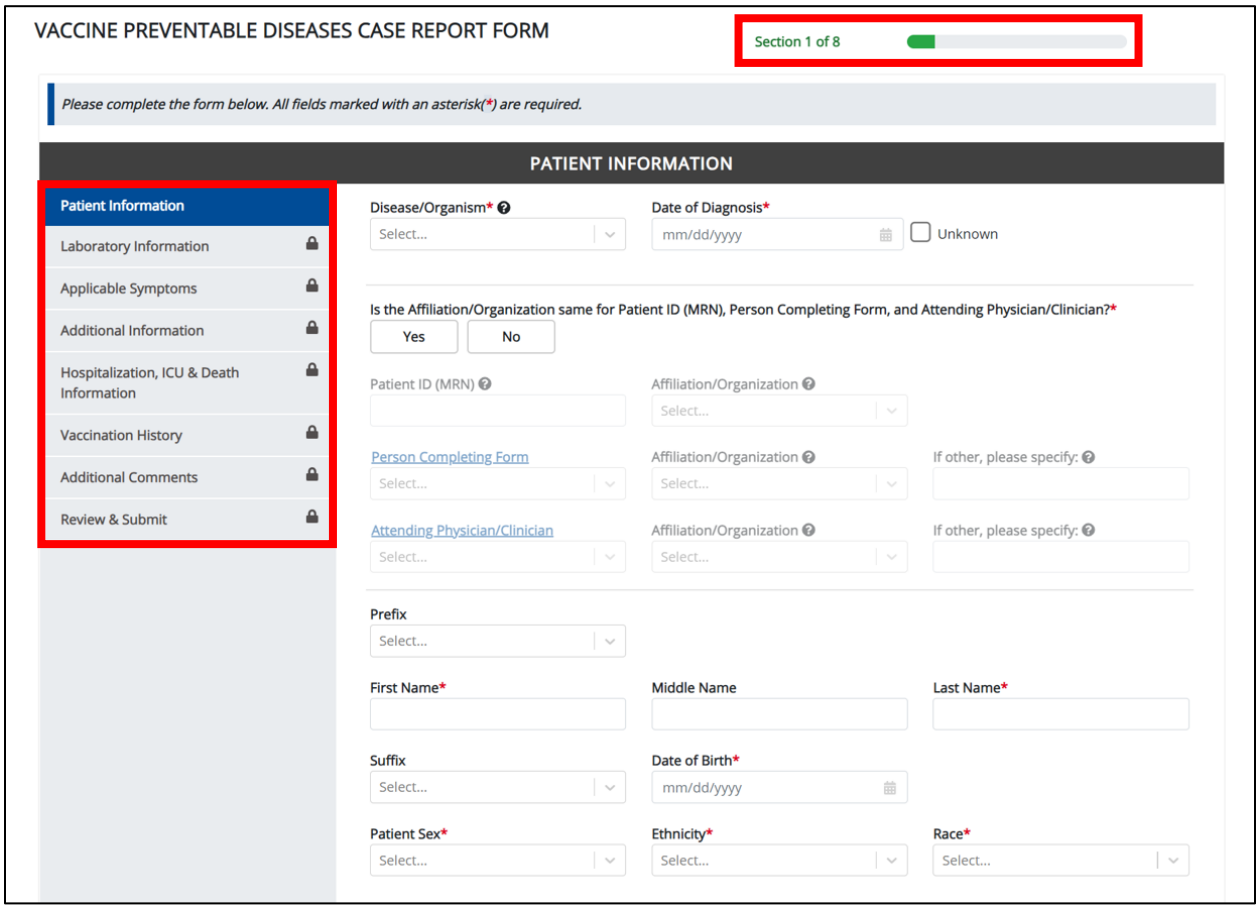


2. Select **Vaccine Preventable Diseases** from the dropdown menu.



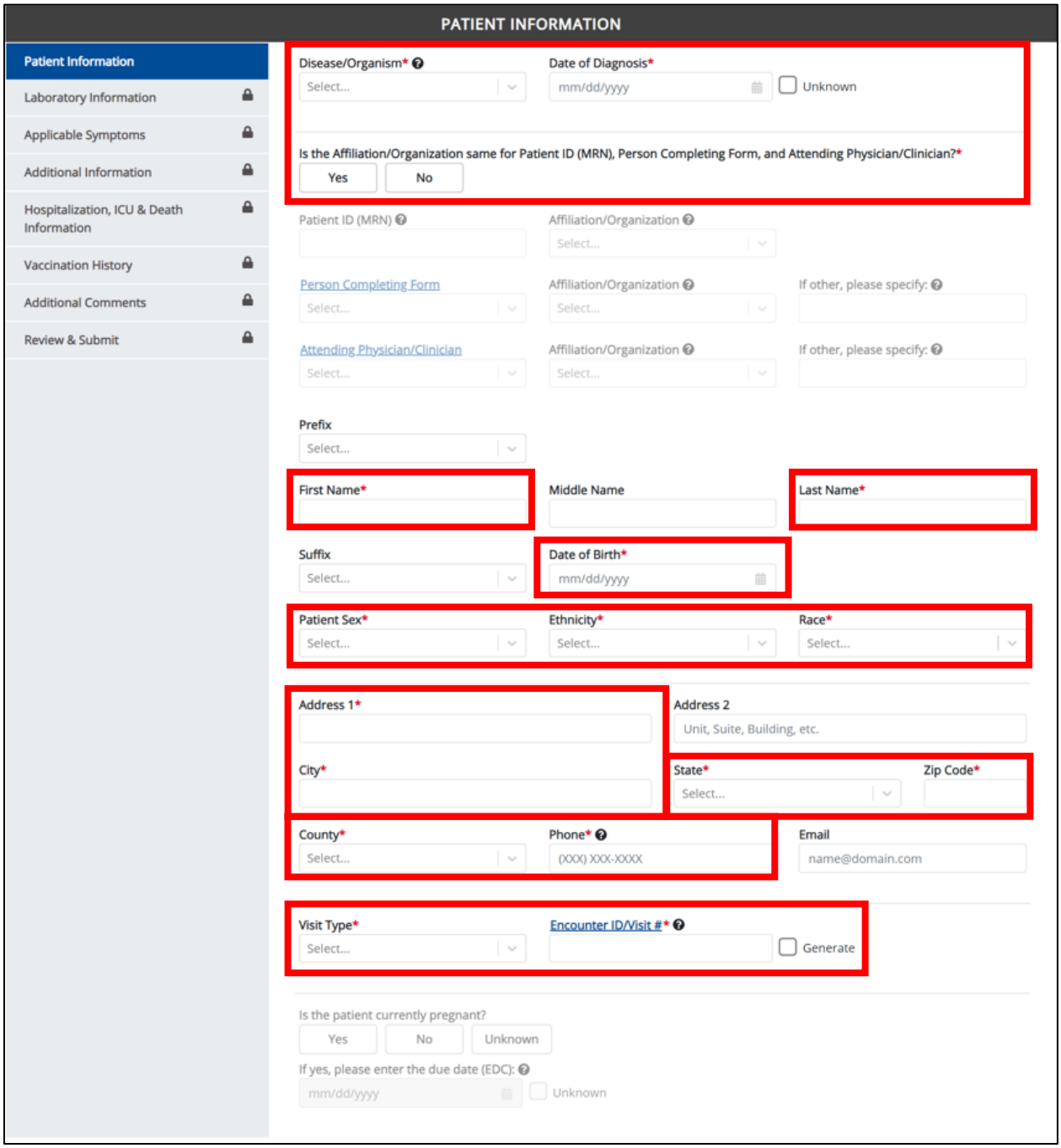
9 Patient Information

The Vaccine Preventable Diseases Case Report Form is an eight-step process where Users enter (1) **Patient Information**, (2) **Laboratory Information**, (3) **Applicable Symptoms**, (4) **Additional Information**, (5) **Hospitalization, ICU & Death Information**, (6) **Vaccination History**, and (7) **Additional Comments**. **Review and Submit** (8) is where Users must review the information they have entered **and** submit the Vaccine Preventable Diseases Case Report.



Please Note: This user guide outlines the generic workflow for the **Vaccine Preventable Diseases Case Report Form**. All examples and screenshots used in this guide are simulated with the condition ***Diphtheria***.

1. You must complete the mandatory fields on the **Patient Information** screen.

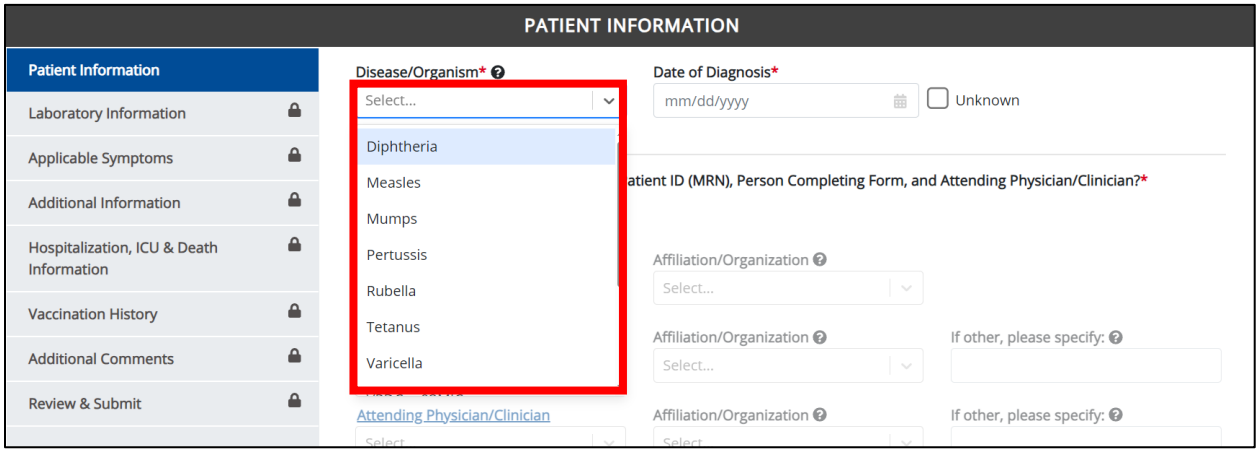


Please Note: The *Is the patient currently pregnant?* field is enabled and required only when the *Patient Sex* field is marked as ***Female***.

Please Note: You are required to enter the details associated with the *Person Completing Form* and the *Attending Physician/Clinician* prior to entering Vaccine Preventable Diseases information. If you access the Vaccine Preventable Diseases Case Report without previously entering these details, the **Patient Information** screen is disabled and displays an error message.

You must click the hyperlink associated with the **Person Completing Form** and the **Attending Physician/Clinician** located in the error message banner to navigate to the appropriate **User Preferences** screens and create the *Person Completing Form* and *Attending Physician/Clinician* before entering Vaccine Preventable Diseases Case Report details.

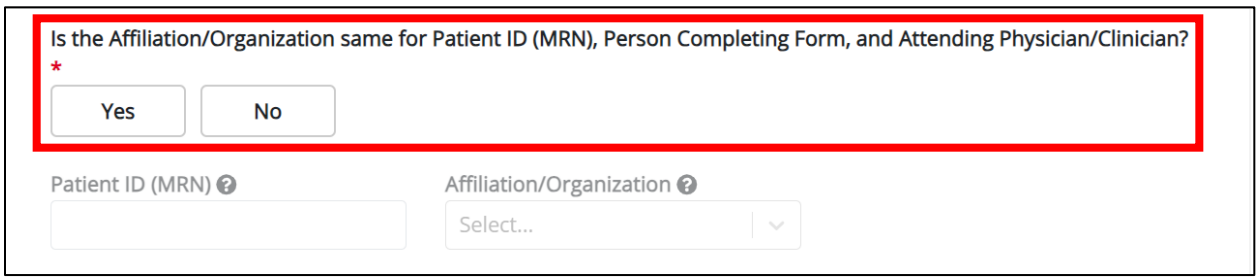
2. To start the Vaccine Preventable Diseases Case Report entry, select the appropriate **Disease/Organism** from the *Disease/Organism* dropdown on the **Patient Information** screen.



3. Enter the **Date of Diagnosis**.

- If the date of diagnosis is unknown, click the ***Unknown*** checkbox.

4. Select the **appropriate answer** for the conditional field: *Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form and Attending Physician/Clinician?*

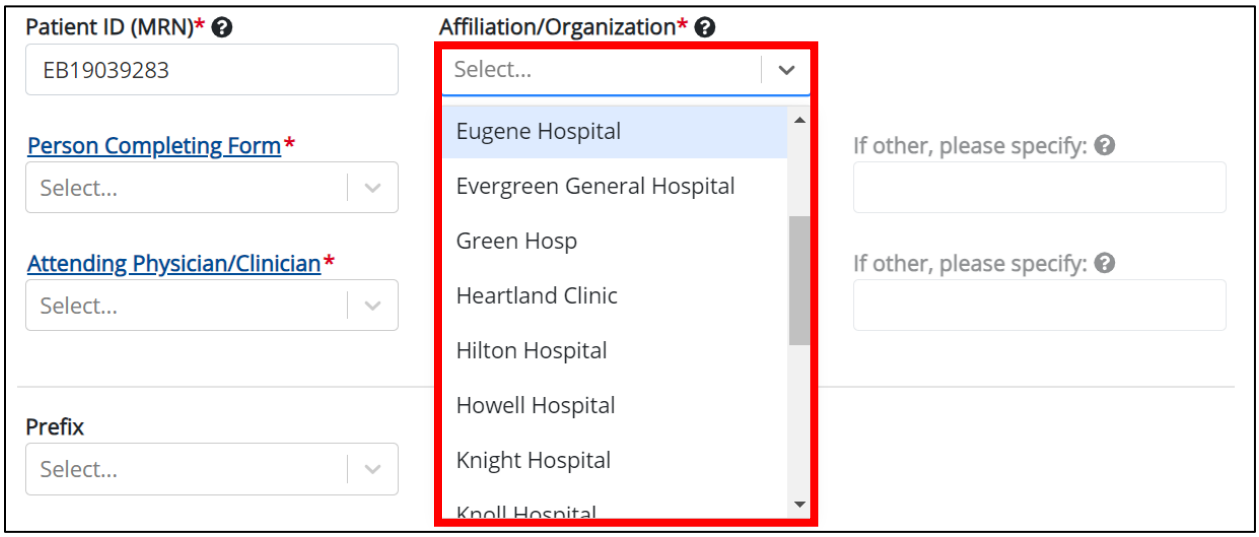


- Click ***Yes*** to apply the **same** Affiliation/Organization to the Patient ID (MRN), the Person Completing the Form, and the Attending Physician/Clinician.

- Click ***No*** to select a **different** Affiliation/Organization for the Patient ID (MRN), Person Completing Form, and the Attending Physician/Clinician.

5. Enter the patient's **Medical Record Number (MRN)** in the *Patient ID (MRN)* field. An MRN 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 so that the patient is registered in the KHIE system.

6. From the dropdown menu, select the **Affiliation/Organization** that applies to the Patient ID (MRN).



Please Note: If ***Yes*** is selected for the conditional field: *Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form and Attending Physician/Clinician?* the same Affiliation/Organization will apply to each.

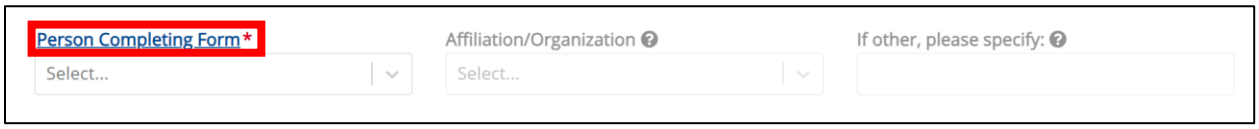
The *Affiliation/Organization* field is enabled only for the Patient ID (MRN). The **Affiliation/Organization** selected for the Patient ID (MRN) will display in the disabled *Affiliation/Organization* fields for the Person Completing Form and the Attending Physician/Clinician.

7. From the dropdown menu, select the name of the **Person Completing Form**.

Please Note: If the appropriate name does not display in the *Person Completing Form* dropdown, you must create details for a new Person Completing Form by clicking the ***Person Completing Form*** hyperlink.

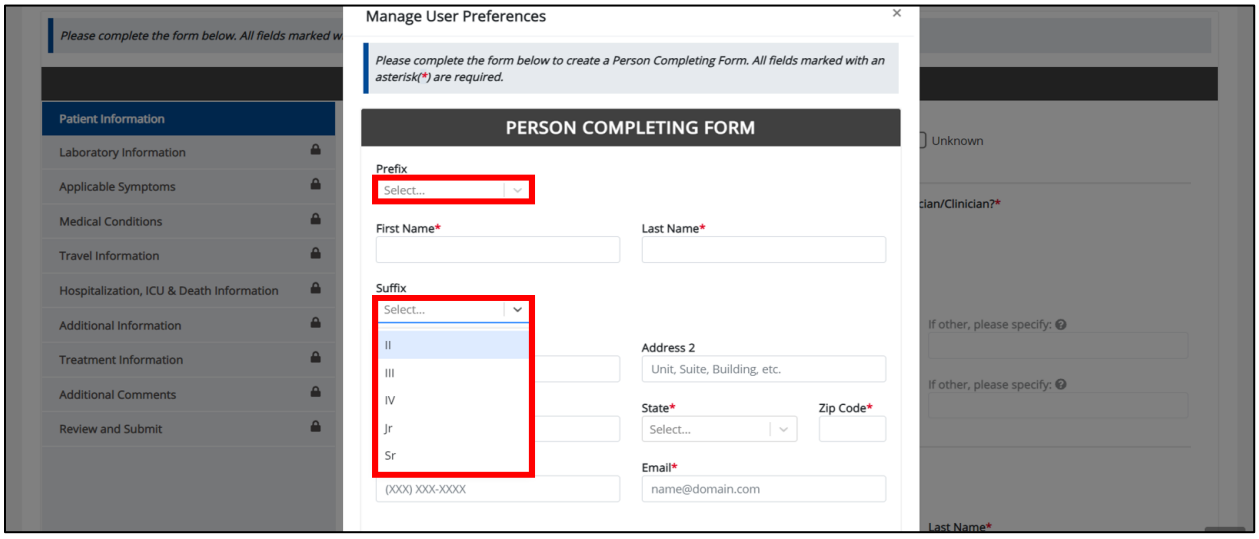
Person Completing Form Hyperlink

8. To create details for a new Person Completing Form, click the ***Person Completing Form*** hyperlink.



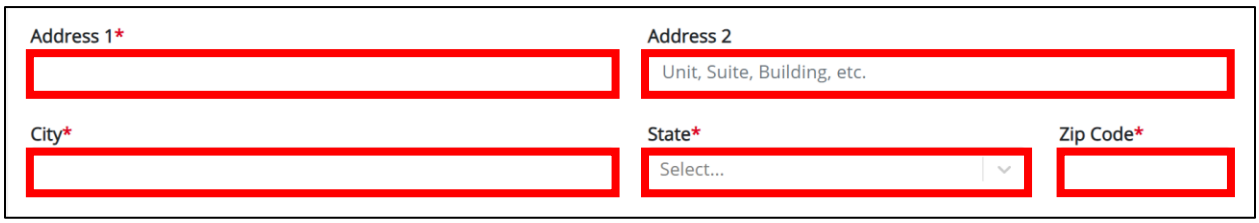
9. The *Person Completing Form* Pop-Up displays. Enter the details. Mandatory fields are marked with asterisks (*).

10. If available, select the appropriate **Prefix** and **Suffix** from the dropdown menus.



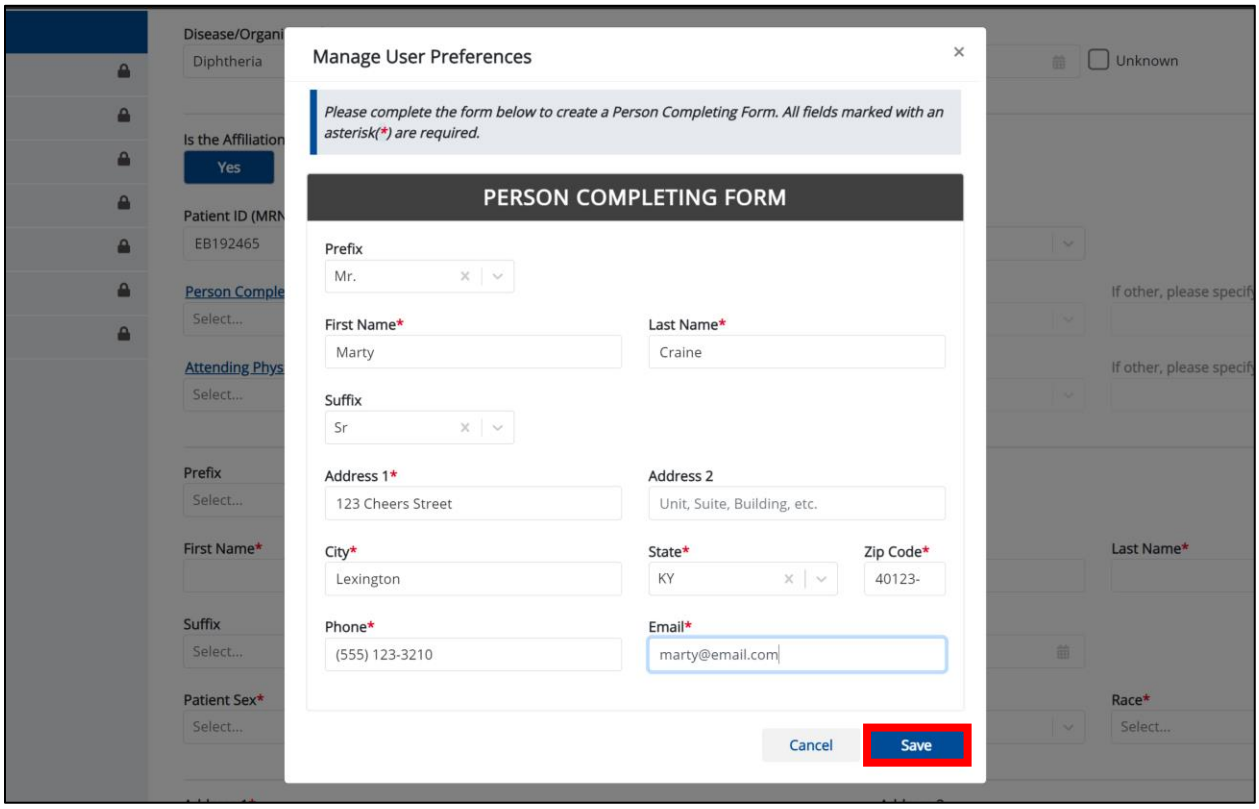
11. Enter the **First Name** and **Last Name** of the Person Completing the Form.

12. Enter the **Address**, **City**, **State**, and **Zip Code**.

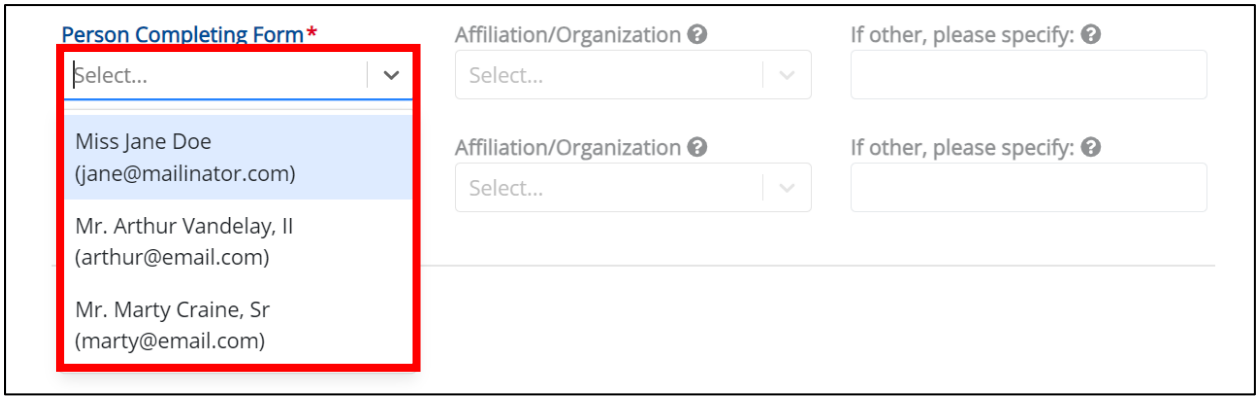


13. Enter the **Phone Number** and **Email Address**.

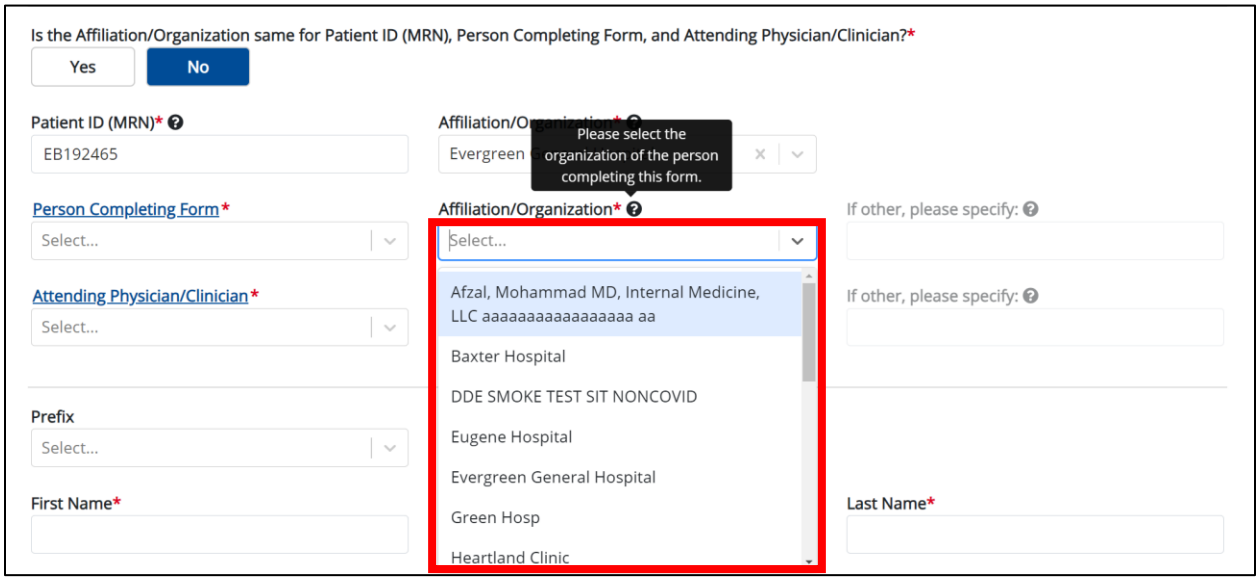
14. After completing the mandatory fields, click **Save**.



15. Once the new Person Completing Form details have been saved, the *Person Completing Form* dropdown menu is automatically updated and displays the new name of the Person Completing Form. From the dropdown menu, select the **new name of the Person Completing Form**.

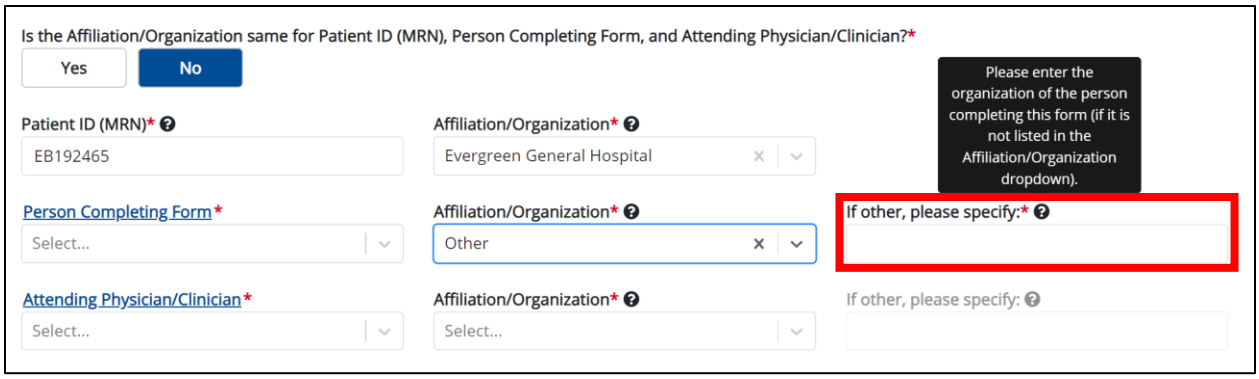


16. If applicable, select the **Affiliation/Organization** that applies to the Person Completing the Form.



Please Note: The *Affiliation/Organization* field that applies to the Person Completing Form is enabled only if you selected ***No*** to the conditional question: *Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form and Attending Physician/Clinician*?

- If ***Other*** is selected from the dropdown menu, the subsequent field is enabled. Enter the name of the **organization associated with the person completing the form** in the subsequent textbox: *If other, please specify*.



17. Select the **Attending Physician/Clinician** from the dropdown menu.

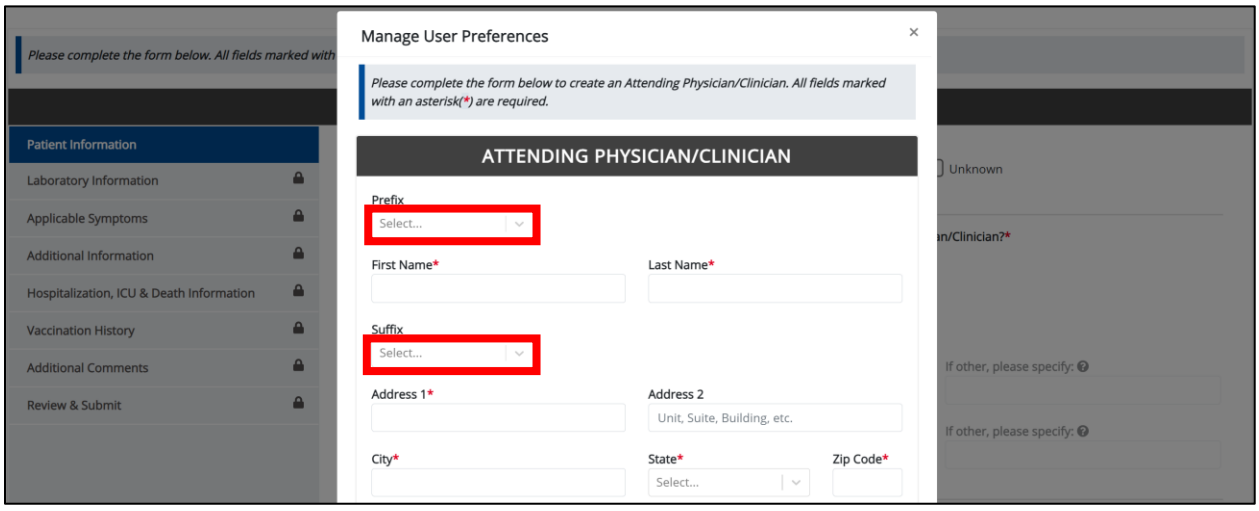
Please Note: If the appropriate name does not display in the Attending Physician/Clinician dropdown, you must create details for a new Attending Physician/Clinician by clicking the ***Attending Physician/Clinician*** hyperlink.

Attending Physician/Clinician Hyperlink

18. To create a new Attending Physician/Clinician, click the ***Attending Physician/Clinician*** hyperlink.

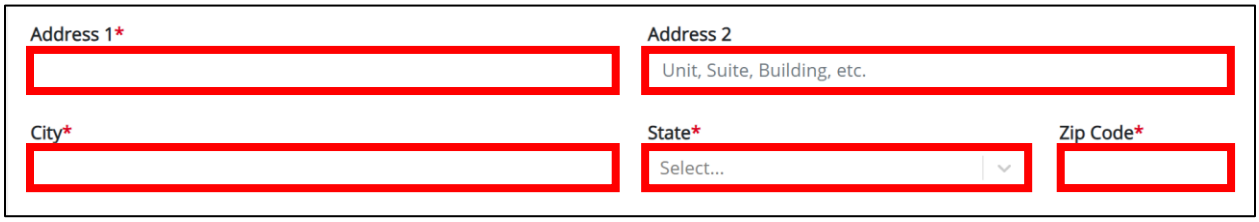
19. The *Attending Physician/Clinician* Pop-Up displays. Enter the details. Mandatory fields are marked with asterisks (*).

20. If available, select the appropriate **Prefix** and **Suffix** from the dropdown menus.



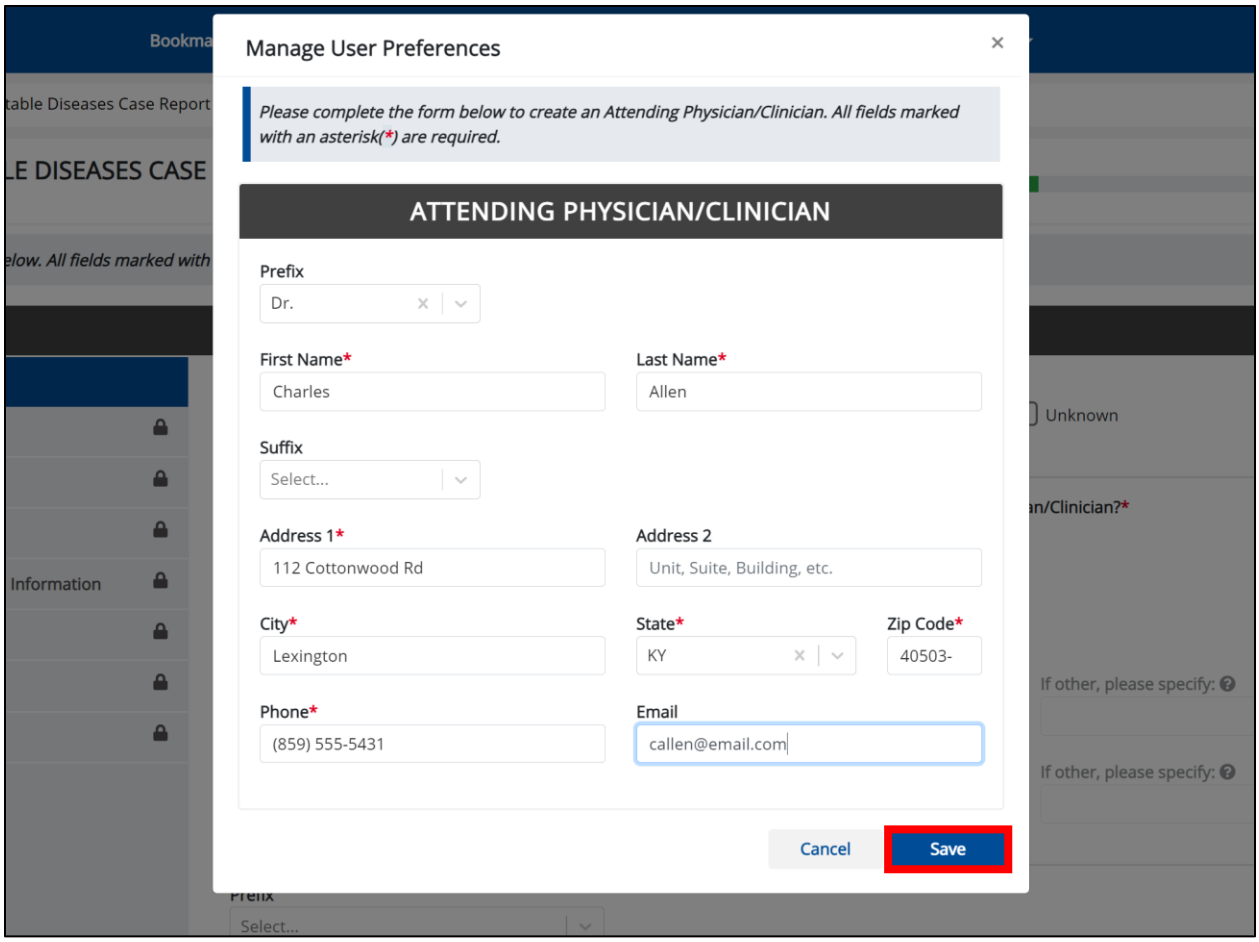
21. Enter the Attending Physician/Clinician's **First Name** and **Last Name**.

22. Enter the **Address**, **City**, **State**, and **Zip Code**.



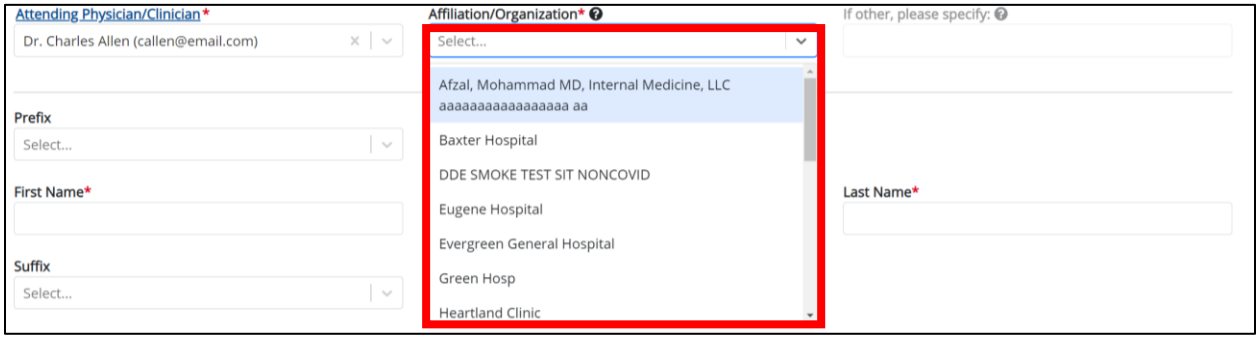
23. Enter the Attending Physician/Clinician's **Phone Number** and **Email Address**.

24. After completing the mandatory fields, click **Save**.



25. Once the new Attending Physician/Clinician details have been saved, the *Attending Physician/Clinician* dropdown menu is automatically updated and displays the new Attending Physician/Clinician. Select the **new Attending Physician/Clinician** from the dropdown menu.

26. If applicable, select the **Affiliation/Organization** that applies to the physician attending the patient.

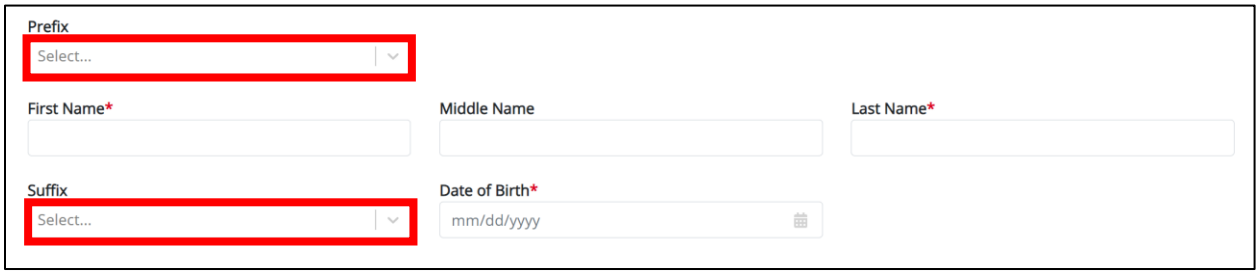


Please Note: The *Affiliation/Organization* field that applies to the Attending Physician/Clinician is enabled only when you select ***No*** to the conditional question: *Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form and Attending Physician/Clinician*?

- If ***Other*** is selected from the dropdown menu, the subsequent field is enabled. You must enter the name of the **organization associated with the attending physician/clinician** in the subsequent textbox: *If other, please specify*.

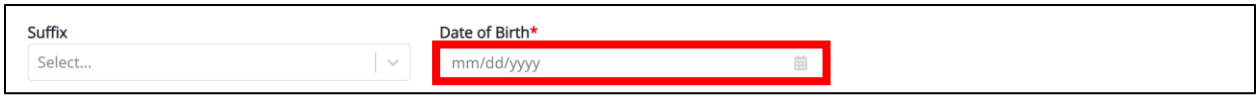
Please Note: Additional information on the Affiliation/Organization section of the **Patient Information** screen is covered in *Section 6 Affiliation/Organization Conditional Question*.

27. If available for the patient, select the **Prefix** and **Suffix** from the dropdown menus.



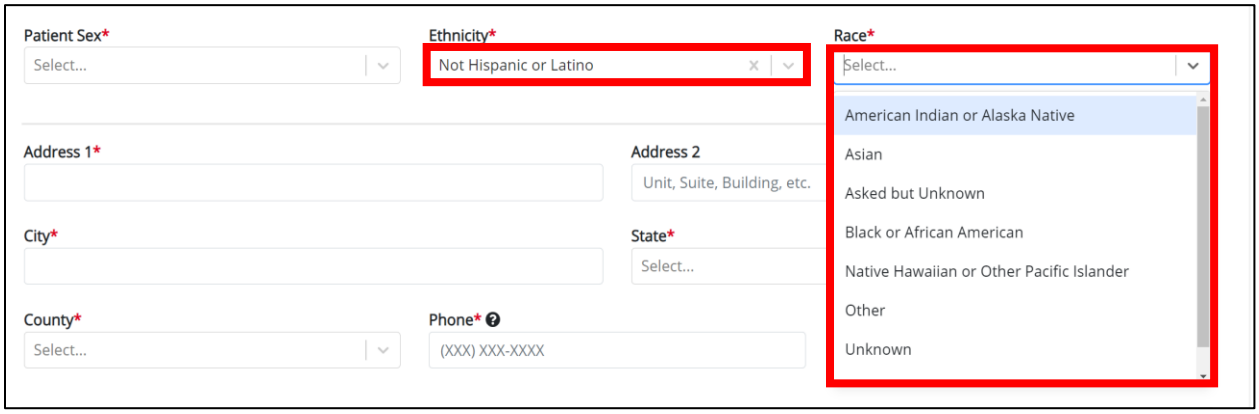
28. Enter the patient's **First Name** and **Last Name**. If available, enter the patient's **Middle Name**.

29. Enter the patient's **Date of Birth**.



30. Select the **Patient Sex** from the dropdown menu.

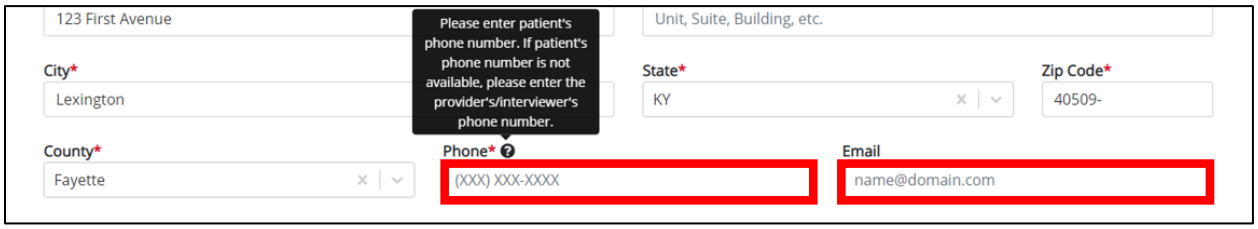
31. Select the patient's **Ethnicity** and **Race** from the appropriate dropdown menus.



32. Enter the patient's **Street Address**, **City**, **State**, **Zip Code**, and **County**.

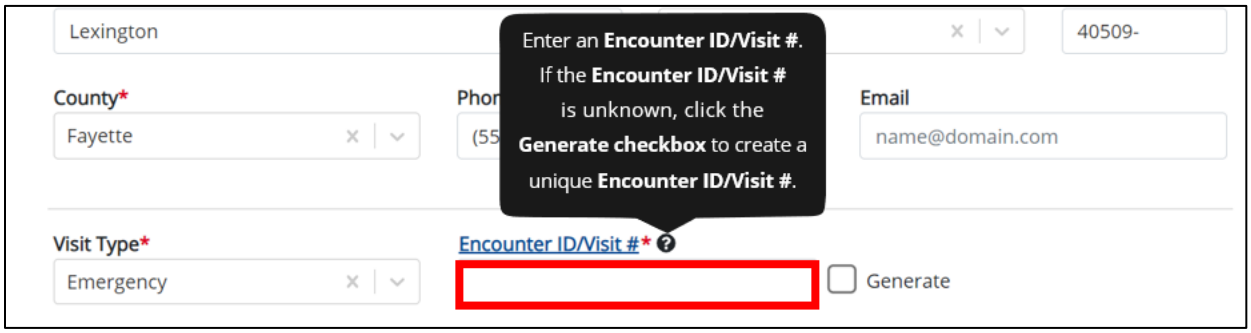
33. Enter the patient's **Phone Number**.

34. If available, enter the patient's **Email Address**.

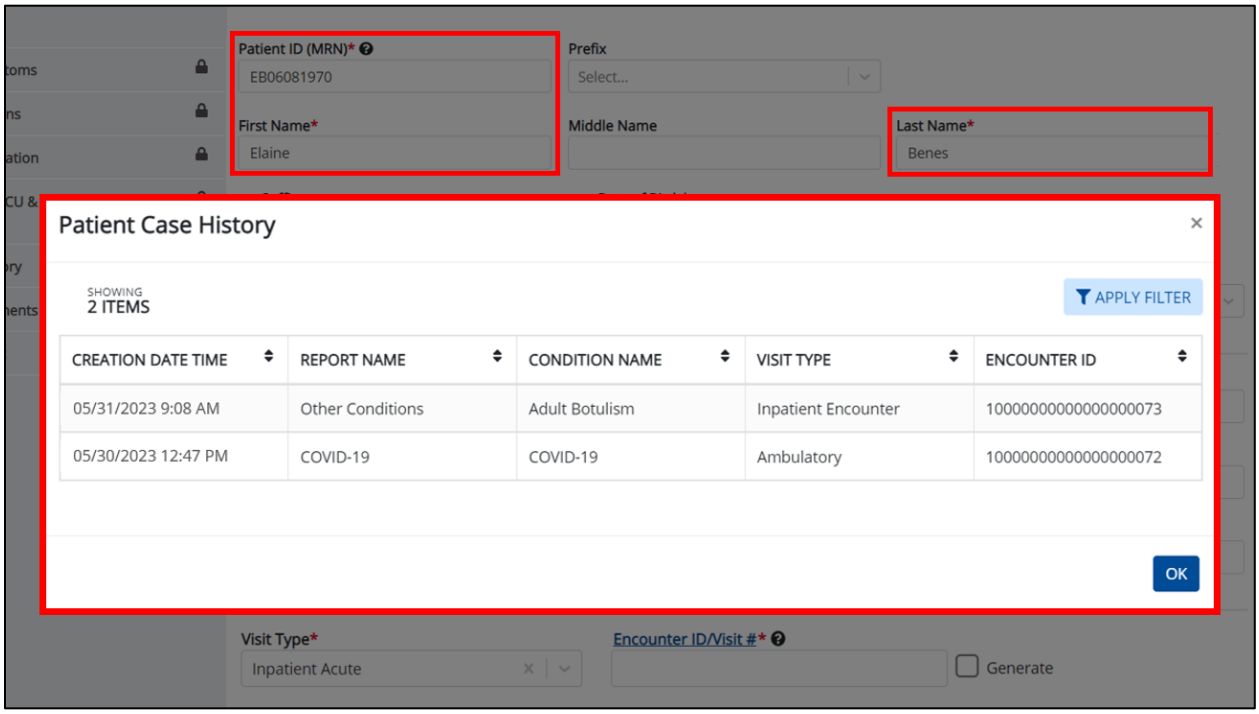


35. Select the **type of patient visit** from the *Visit Type* dropdown menu.

- The *Encounter ID/Visit #* field allows users to enter a **unique 20-digit Encounter ID/Visit #**.



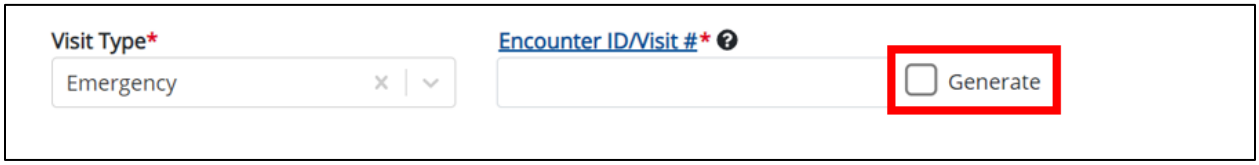
- The ***Encounter ID/Visit #*** hyperlink allows users to view the *Patient Case History* which includes the historical case report details and Encounter IDs (when available) that were previously submitted for the patient. The *Patient Case History* search is based on the **Patient First Name**, **Last Name** and **Patient ID (MRN)** entered.



Please Note: The *Patient Case History* will display only those historical case reports that include the *Visit Type* and *Encounter ID/Visit #* field values.

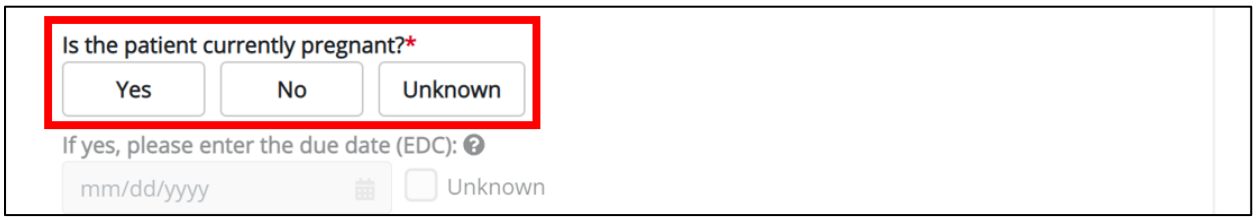
The *Patient Case History* pop-up is a new feature and will **not** display case reports submitted before the *Visit Type* and *Encounter ID/Visit #* fields were included on all case reports.

- The ***Generate*** checkbox triggers the system to generate a **unique 20-digit Encounter ID/Visit #** if the Encounter ID/Visit # is unknown.



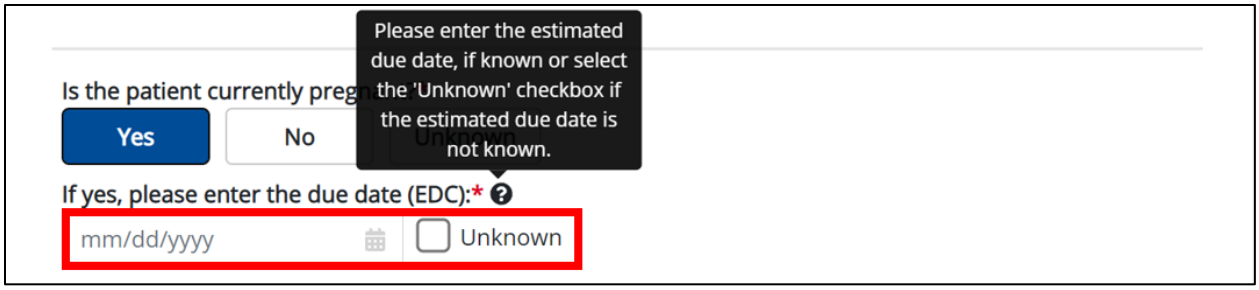
- Upon clicking the ***Generate*** checkbox, the *Encounter ID/Visit #* field will be greyed out and disabled. The *Encounter ID/Visit #* field will display the system-generated Encounter ID/Visit # only after the **Patient Information** screen has been completed and saved.

36. If applicable, select the **appropriate answer** to *Is the patient currently pregnant?*



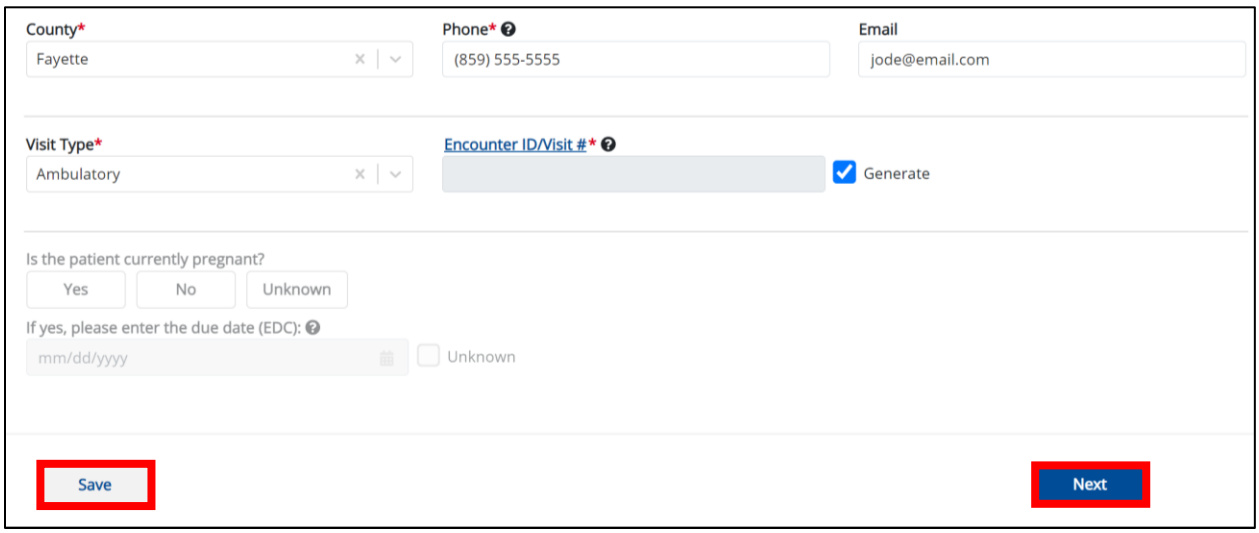
Please Note: The *Is the patient currently pregnant?* field is enabled only when the *Patient Sex* field is marked as ***Female***.

- If ***Yes*** is selected for the *Is the patient currently pregnant?* field, the subsequent field is enabled. Enter the **estimated due date (EDC)** in the subsequent field: *If yes, please enter the due date (EDC)*. If the due date is unknown, click the ***Unknown*** **checkbox**.



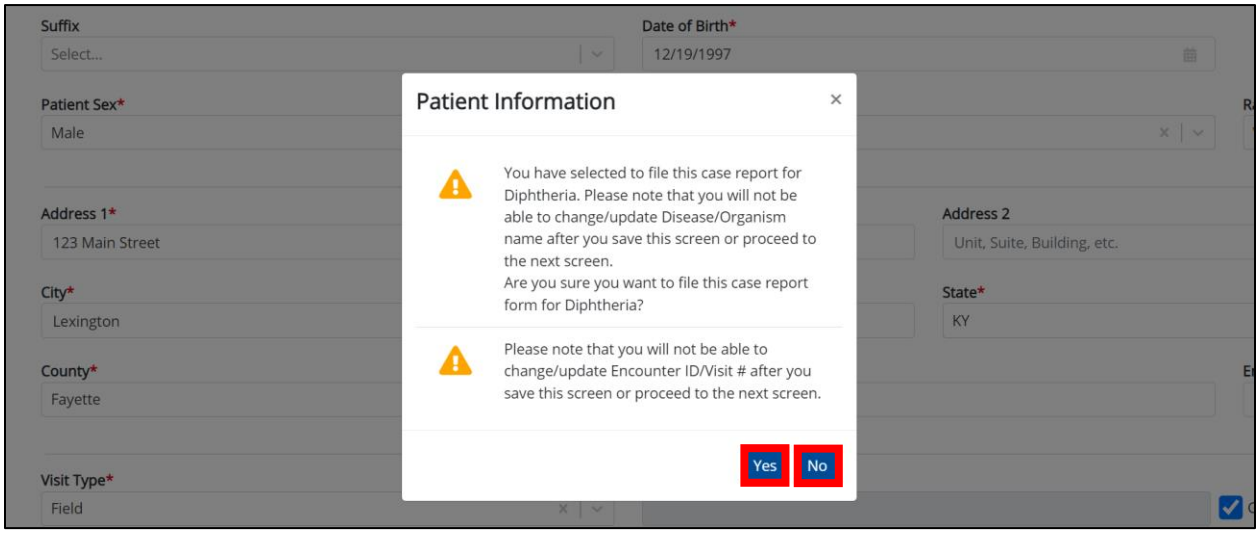
Please Note: If ***No*** or ***Unknown*** is selected for the *Is the patient currently pregnant?* field, the subsequent field is disabled: *If yes, please enter the due date (EDC)*.

37. When the **Patient Information** screen has been completed, click **Save** to save your progress or click **Next** to proceed to the **Laboratory Information** screen.



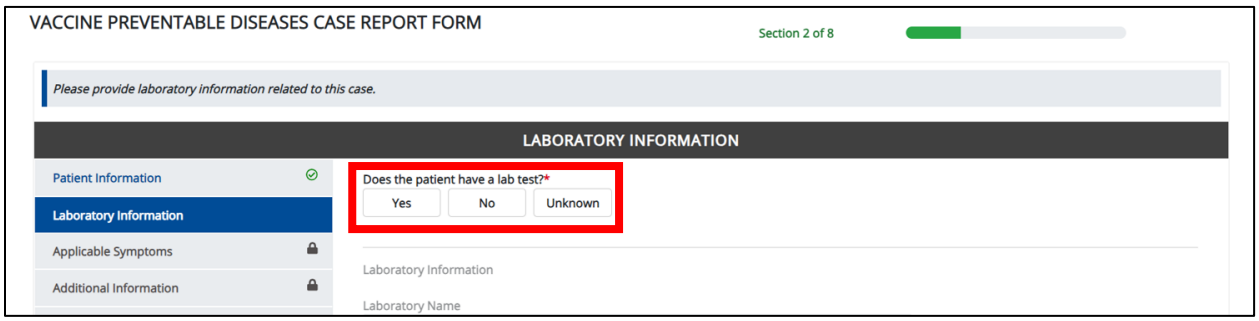
38. Upon clicking **Save** or **Next**, the *Patient Information* pop-up displays the following messages to confirm the selected **Disease/Organism** and the **Encounter ID/Visit #** for the case report:
    - *You have selected to file this case report for [selected Disease/Organism]. Please note that you will not be able to change/update Disease/Organism name after you save this screen or proceed to the next screen. Are you sure you want to file this case report form for [Disease/Organism]?*
    - *Please note that you will not be able to change/update Encounter ID/Visit # after you save this screen or proceed to the next screen.*

39. To proceed, click ***Yes*** on the *Patient Information* pop-up to confirm the selected **Disease/Organism** and the **Encounter ID/Visit #.** Clicking ***Yes*** will save the completed **Patient Information** screen.

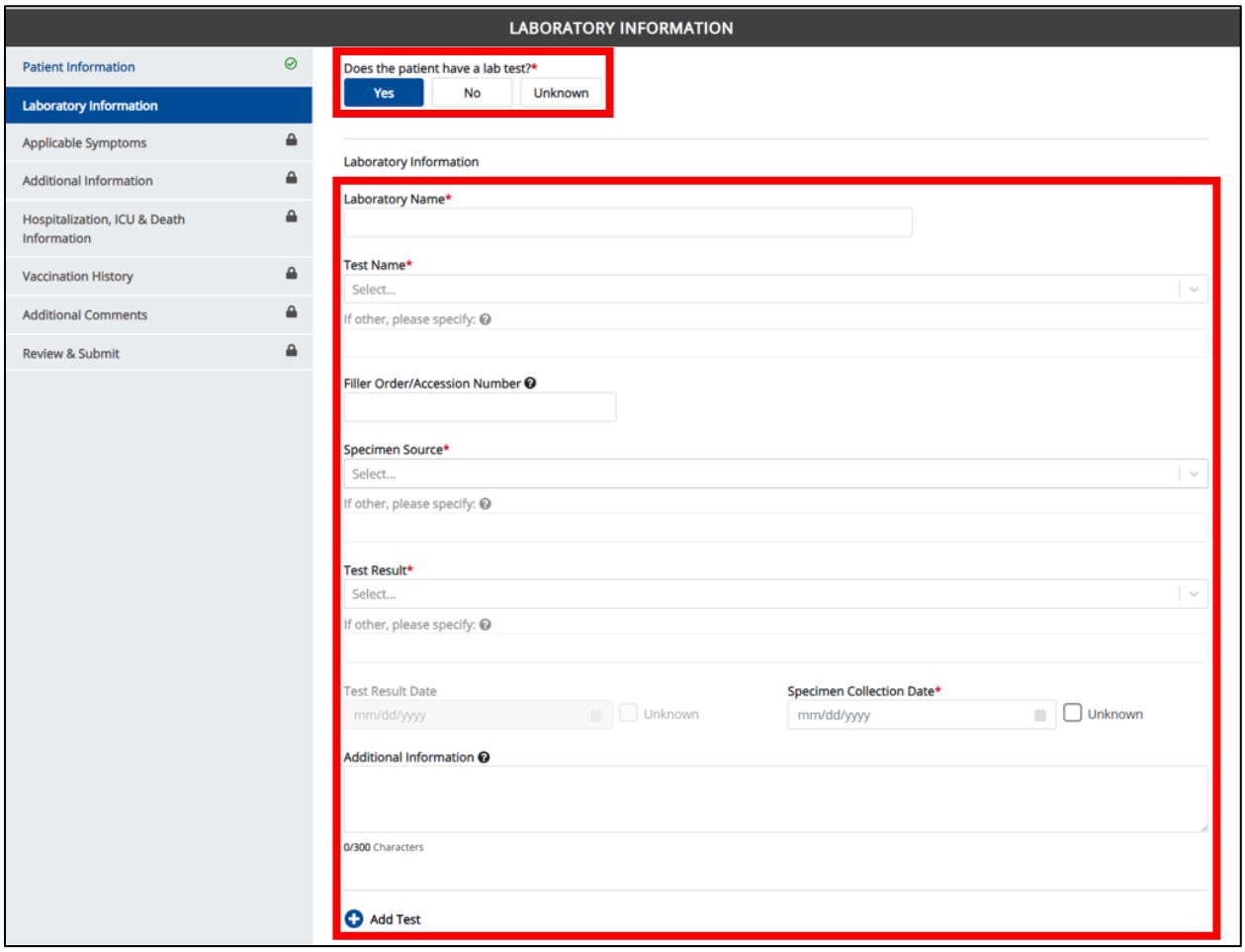


10 Laboratory Information

1. On the **Laboratory Information** screen, select the **appropriate answer** for the conditional question at the top: *Does the patient have a lab test?*



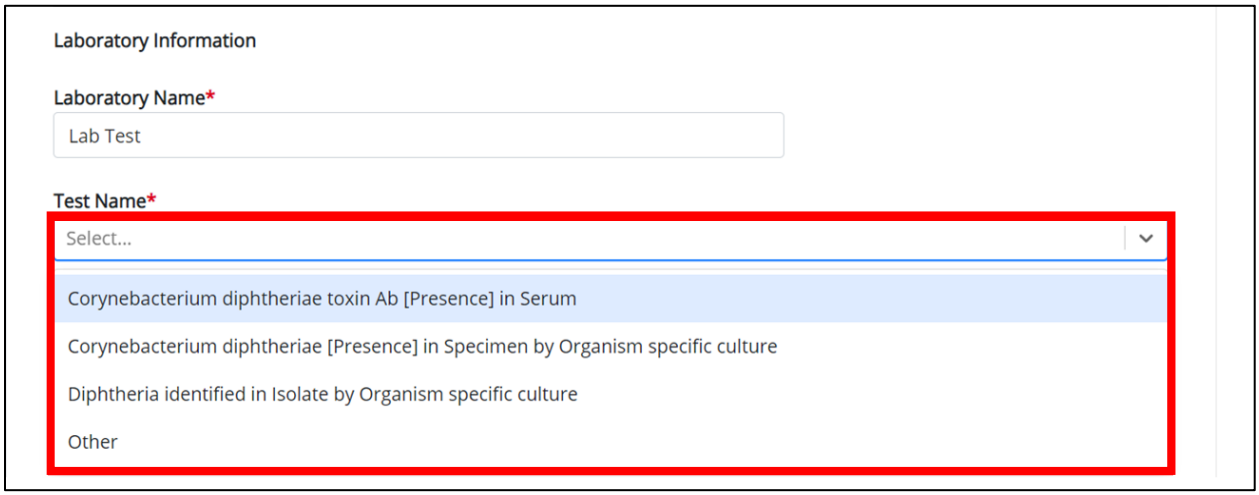
2. If ***Yes*** is selected, the subsequent lab-related fields on the screen are enabled. You must enter details for a lab test.



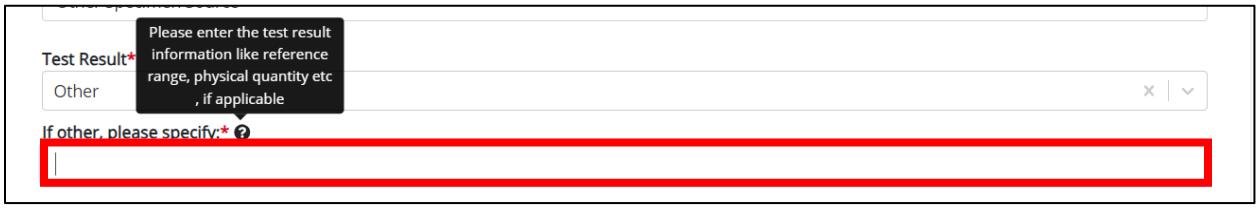
Please Note: If ***No*** or ***Unknown*** is selected, all the subsequent fields on the screen are disabled.

3. Enter the **Laboratory Name** in the textbox.

4. Select the appropriate **Test Name** from the *Test Name* dropdown menu.

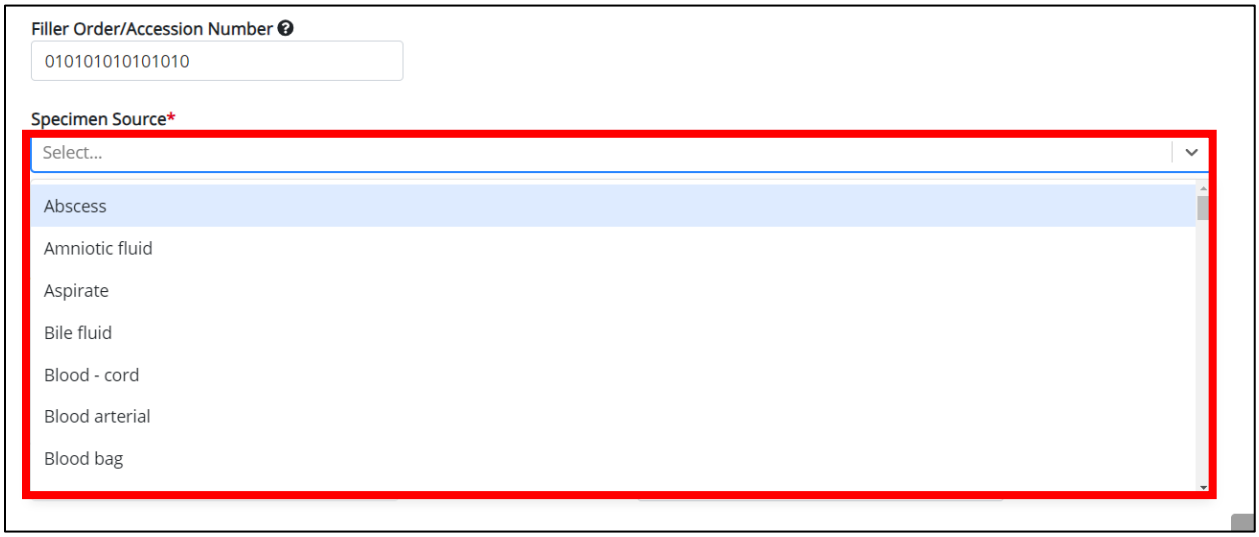


- If ***Other*** is selected from the dropdown menu, the subsequent field is enabled. You must enter the **Test Name** in the subsequent textbox: *If other, please specify*.



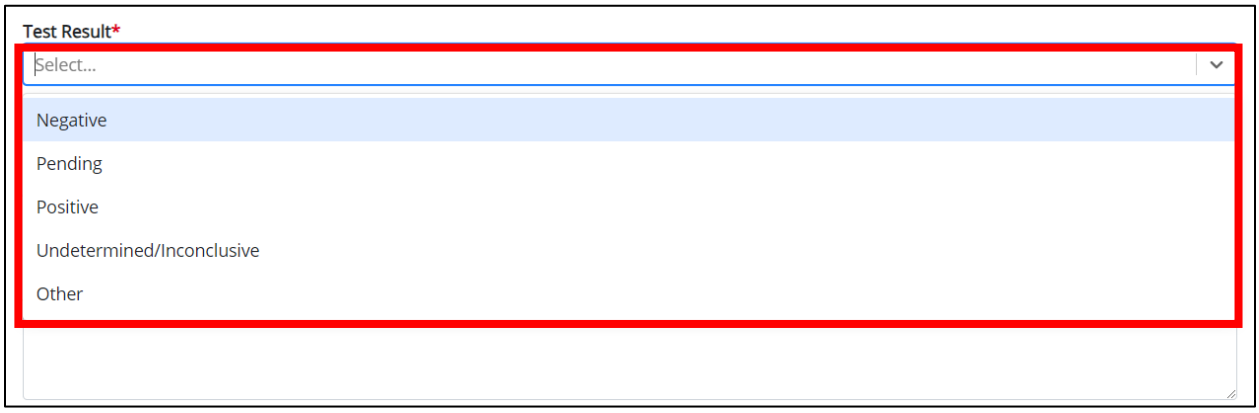
5. If applicable, enter the **Filler Order/Accession Number** in the textbox.

6. Select the appropriate **Specimen Source** from the *Specimen Source* dropdown menu.



- If ***Other*** is selected from the dropdown menu, the subsequent field is enabled. You must enter the **Specimen Source** in the subsequent textbox: *If other, please specify*.

7. Select the appropriate **Test Result** from the *Test Result* dropdown menu.



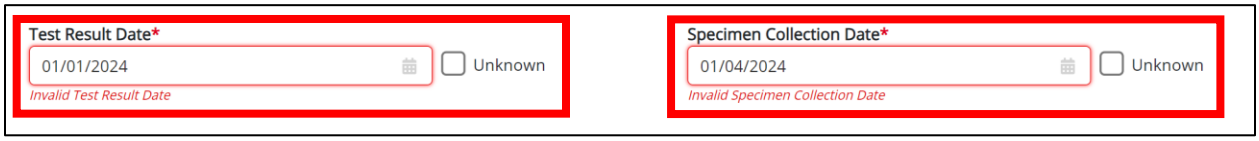
- If ***Other*** is selected from the dropdown menu, the subsequent field is enabled. You must enter the **Test Result** in the subsequent textbox: *If other, please specify*.

8. Enter the **Specimen Collection Date**.

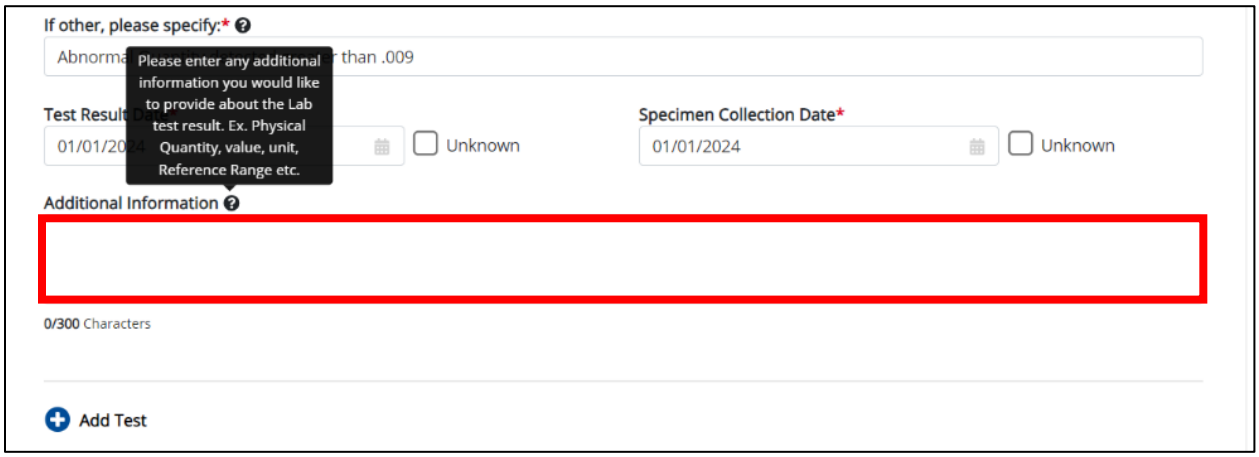
Please Note: The Specimen Collection Date cannot occur **after** the Test Result Date. The Specimen Collection Date must occur on the **same date** or any date **BEFORE** the Test Result Date. If you enter a Specimen Collection Date that occurs **after** the Test Result Date, both fields are marked as invalid.

If you click **Next**, the **Laboratory Information** screen displays an error banner with a message that states: *There are errors. Please make a selection for all required fields*.

To proceed, you must enter a valid Specimen Collection Date that occurs **on** or **before** the Test Result Date.

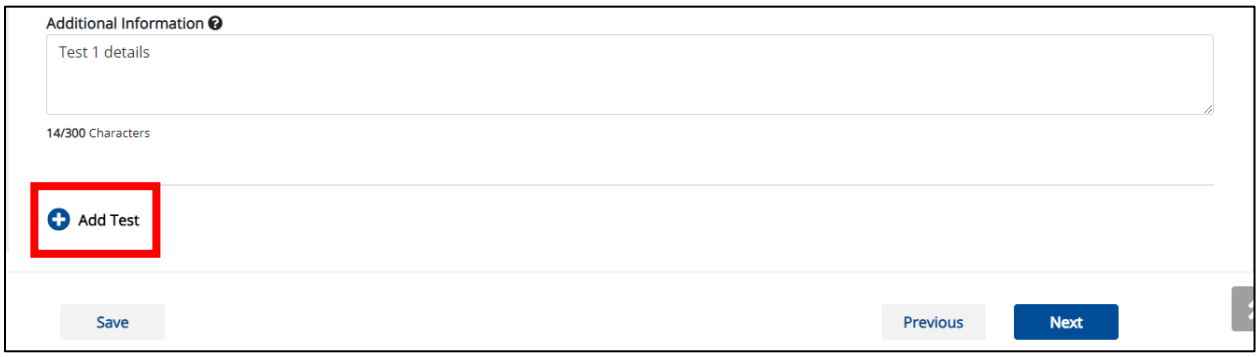


9. If applicable, enter **additional notes about the lab tests** in the *Additional Information* textbox.



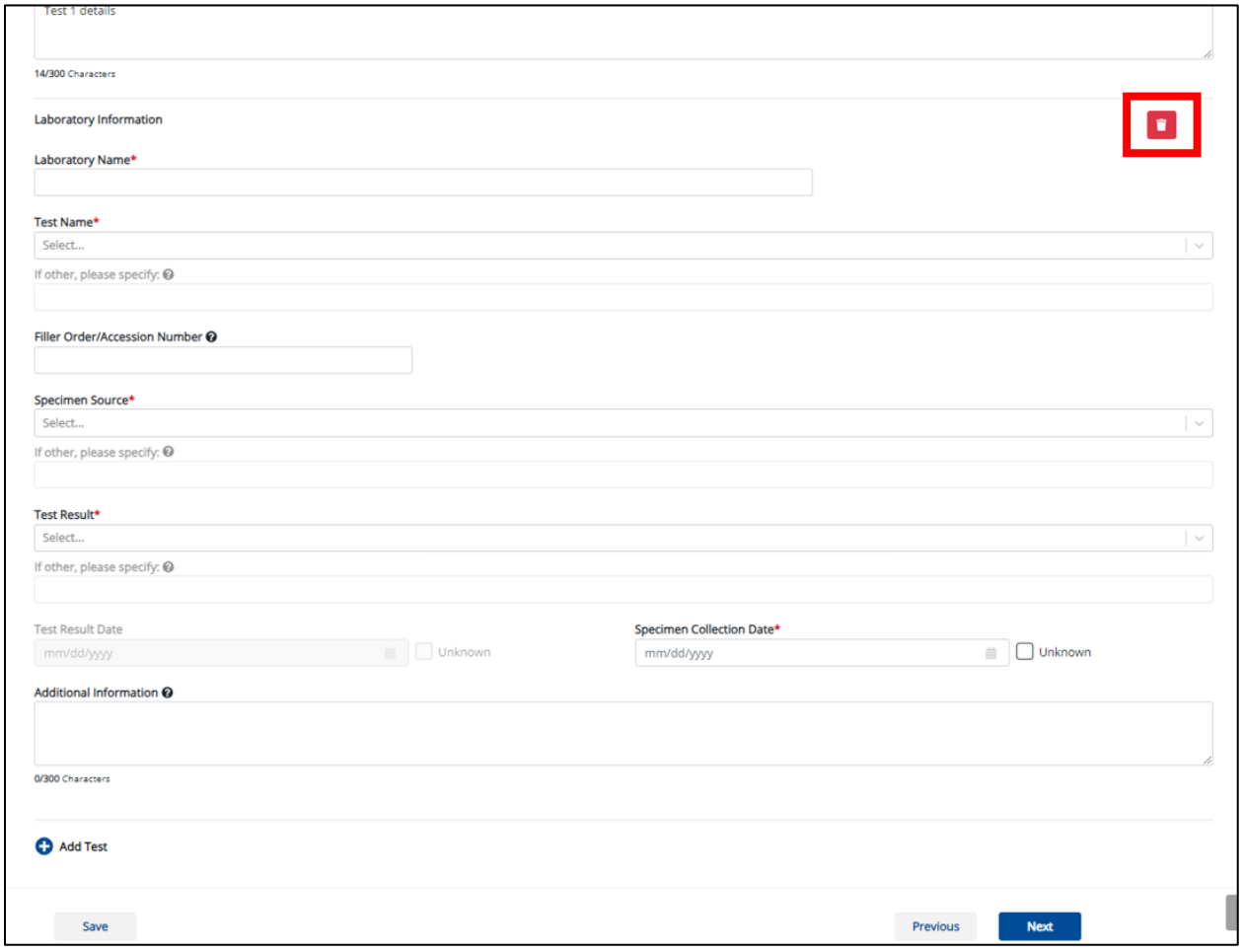
Adding Multiple Tests

10. Click **Add Test** to log the details for multiple tests. This means that you can easily enter additional test details on the same patient.

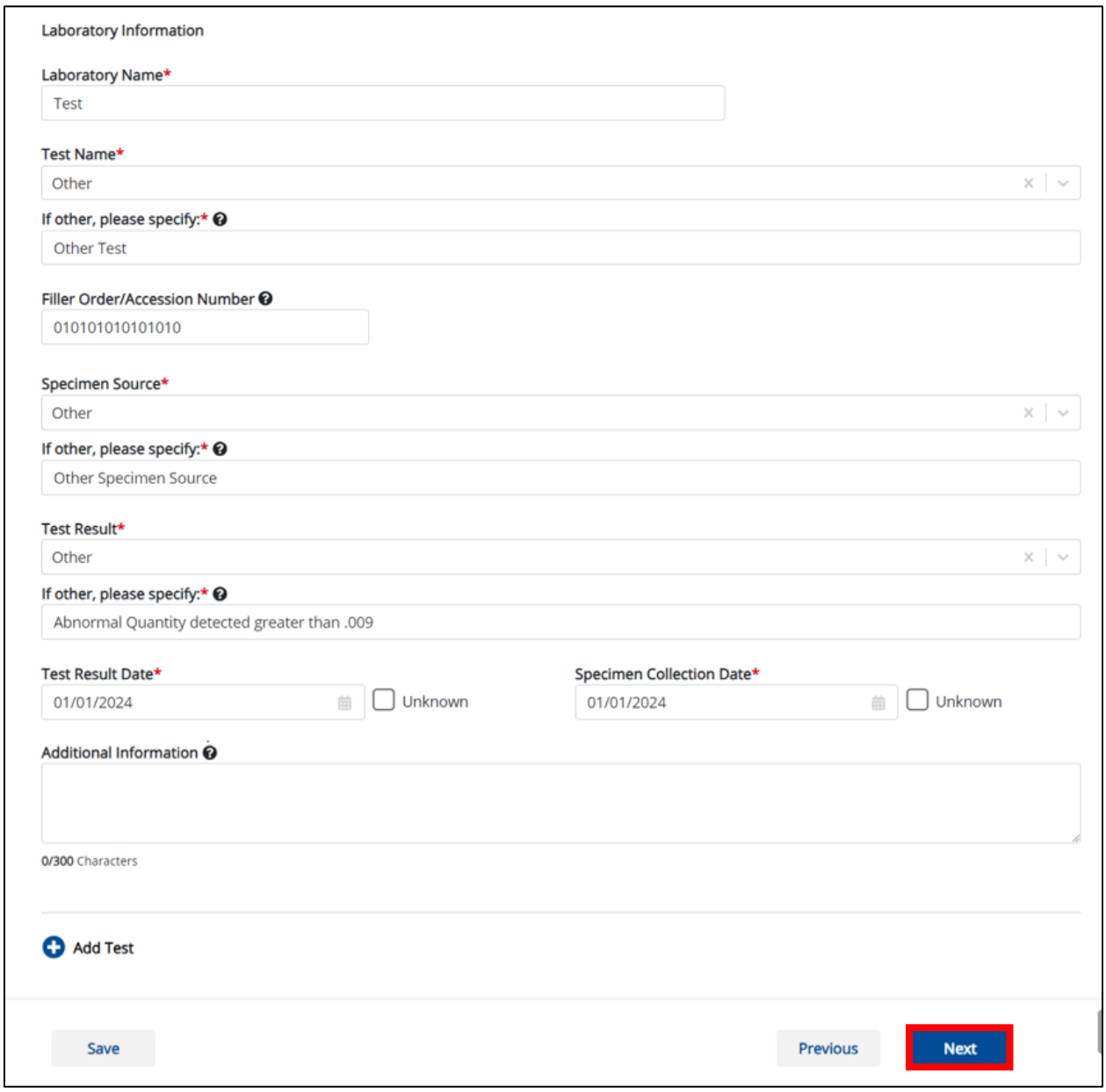


Please Note: When you click the **Add Test** button, at least one lab test section must be entered.

- To delete an additional lab test section, click the **Trash Bin Icon** located at the top right.

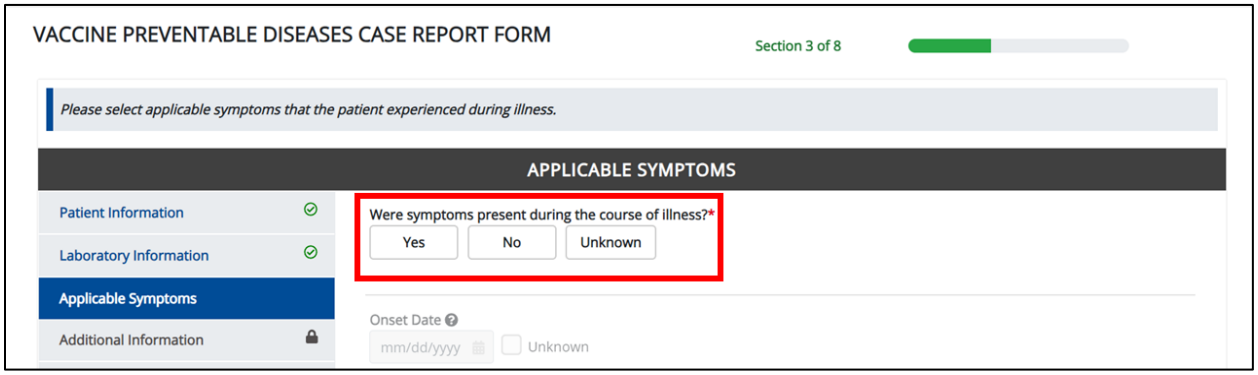


11. Once the **Laboratory Information** screen is complete, click **Next** to proceed to the **Applicable Symptoms** screen.

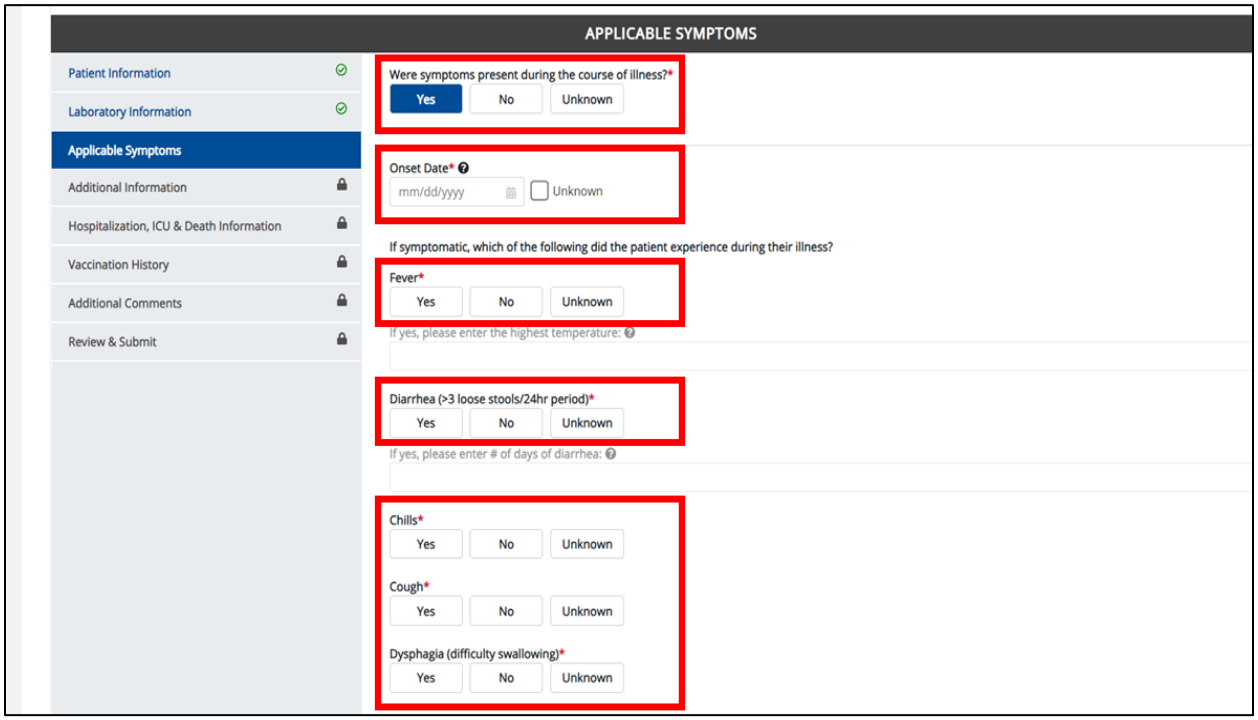


11 Applicable Symptoms

1. On the **Applicable Symptoms** screen, select the appropriate answer for the conditional question at the top: *Were symptoms present during the course of illness*?



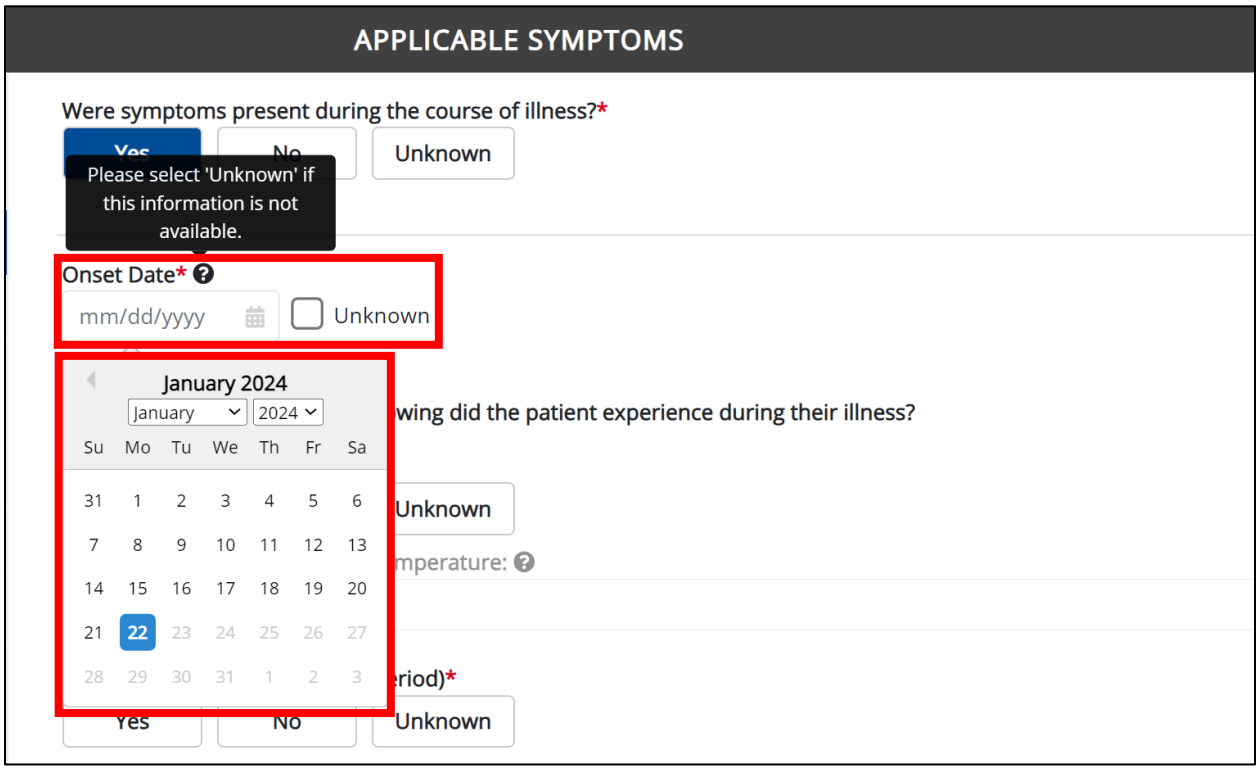
2. If ***Yes*** is selected for the conditional question, the subsequent fields on the screen are enabled.



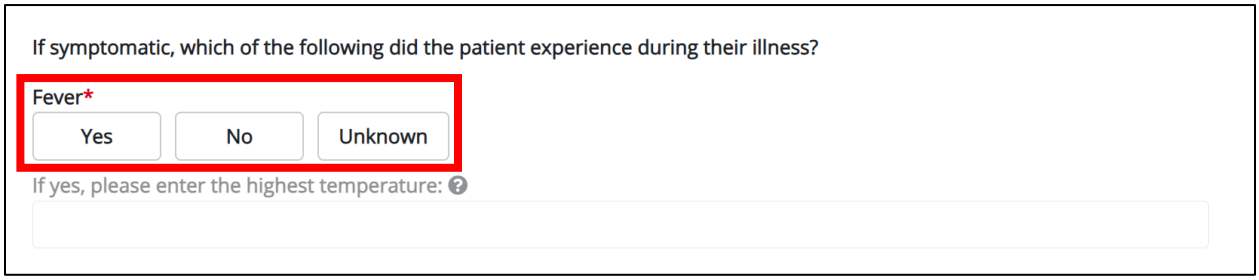
Please Note: If ***No*** is selected for the conditional question, all subsequent symptom fields are disabled and marked with ***No***. If ***Unknown*** is selected for the conditional question, all subsequent symptom fields are disabled and marked as ***Unknown***.

3. Enter the **Onset Date** for the symptoms.

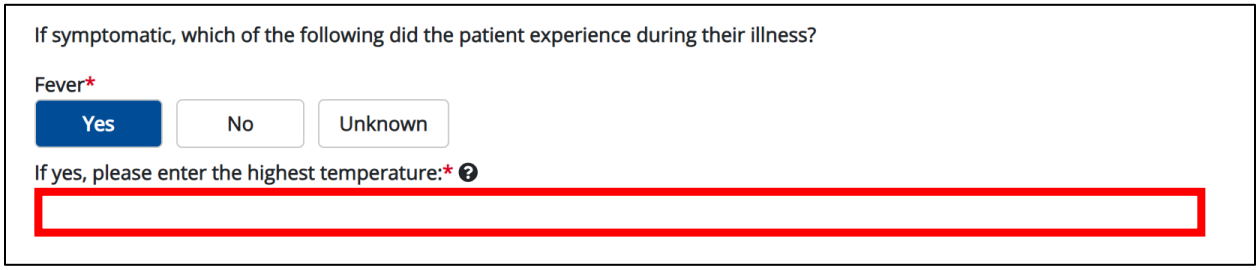
- If the onset date is unknown, click the ***Unknown*** **checkbox**.



4. To report whether the patient had a fever during the illness, select the **appropriate answer** for the field: *Fever.*



- If ***Yes*** is selected, the subsequent field is enabled. Enter the **patient's highest temperature** in the subsequent textbox: *If yes, please specify*.



5. To report the patient had diarrhea during the illness, select the **appropriate answer** for the field: *Diarrhea (>3 loose stools/24hr period).*

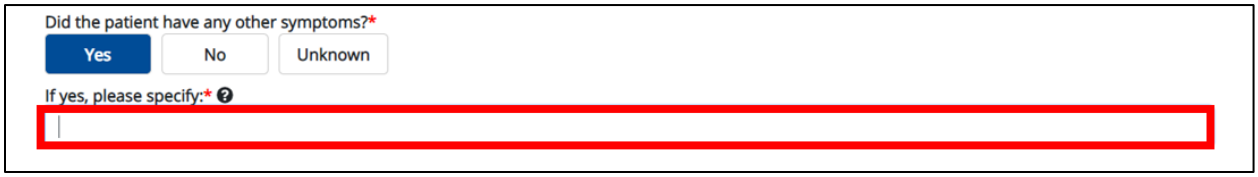
- If ***Yes*** is selected, the subsequent field is enabled. Enter the **number of days with diarrhea** in the subsequent textbox: *If yes, please enter number of days with diarrhea*.

6. If the patient is symptomatic for ***Diphtheria***, select the **appropriate answers** for the following fields to indicate the symptoms the patient experienced during illness:

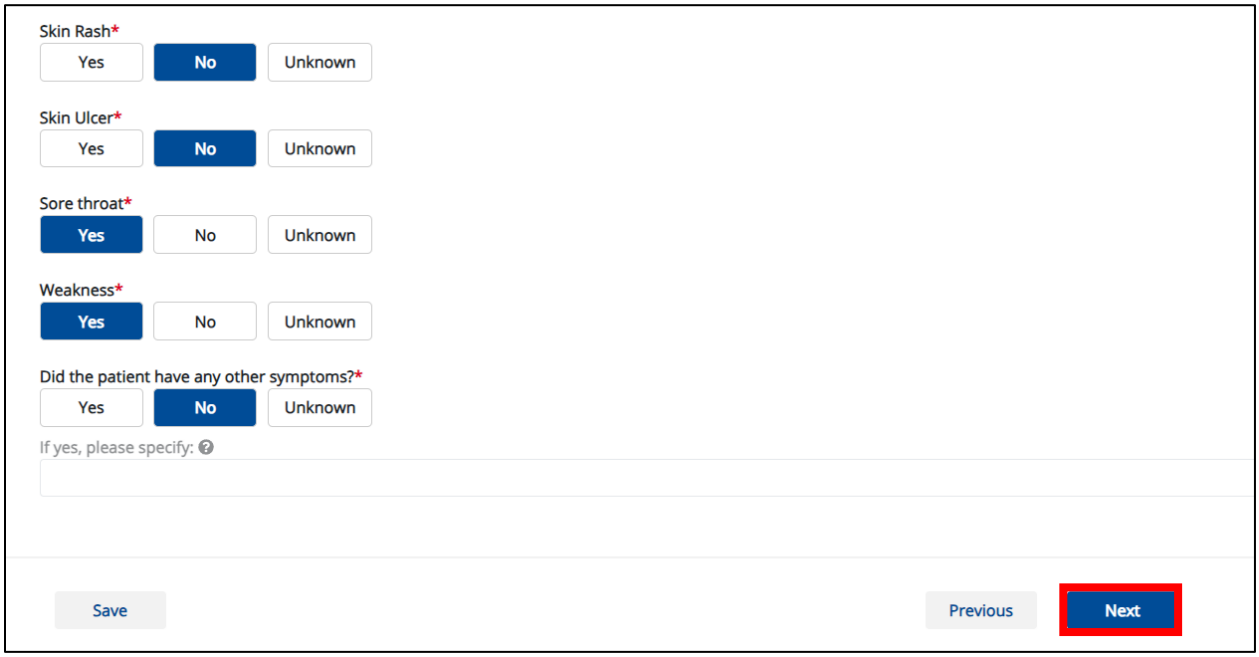
Please Note: This user guide shows the generic workflow for the **Vaccine Preventable Diseases Case Report Form**. The **Applicable Symptoms** screen dynamically populates symptoms based on the selected condition. All examples and screenshots used in this guide are simulated with the condition ***Diphtheria***.

7. To report additional symptoms not listed on the screen, select the **appropriate answer** for the field: *Did the patient have any other symptoms*?

- If ***Yes*** is selected, the subsequent field is enabled. Enter the **patient's other symptoms** in the subsequent textbox: *If yes, please specify*.

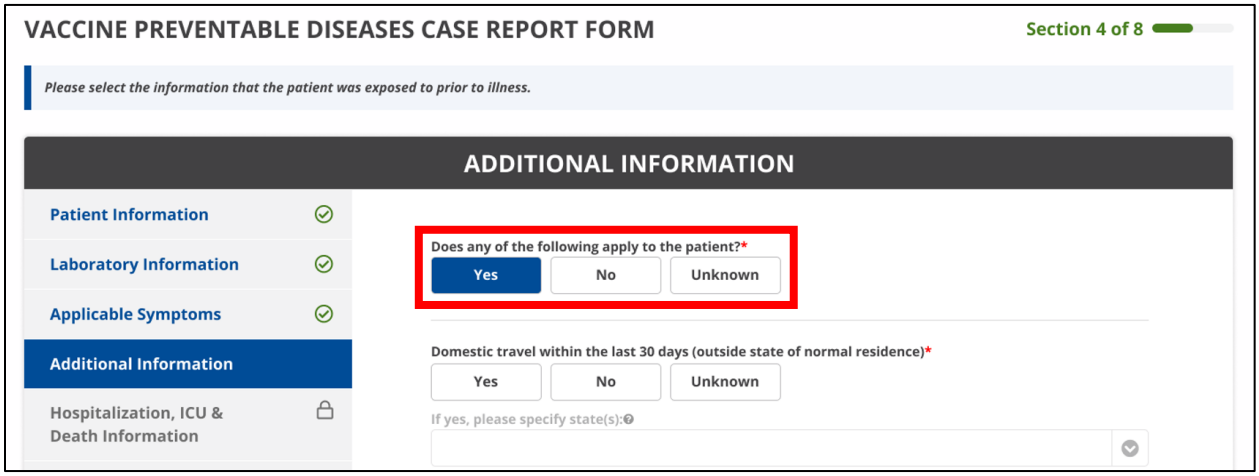


8. Once complete, click **Next** to proceed to the **Additional Information** screen.

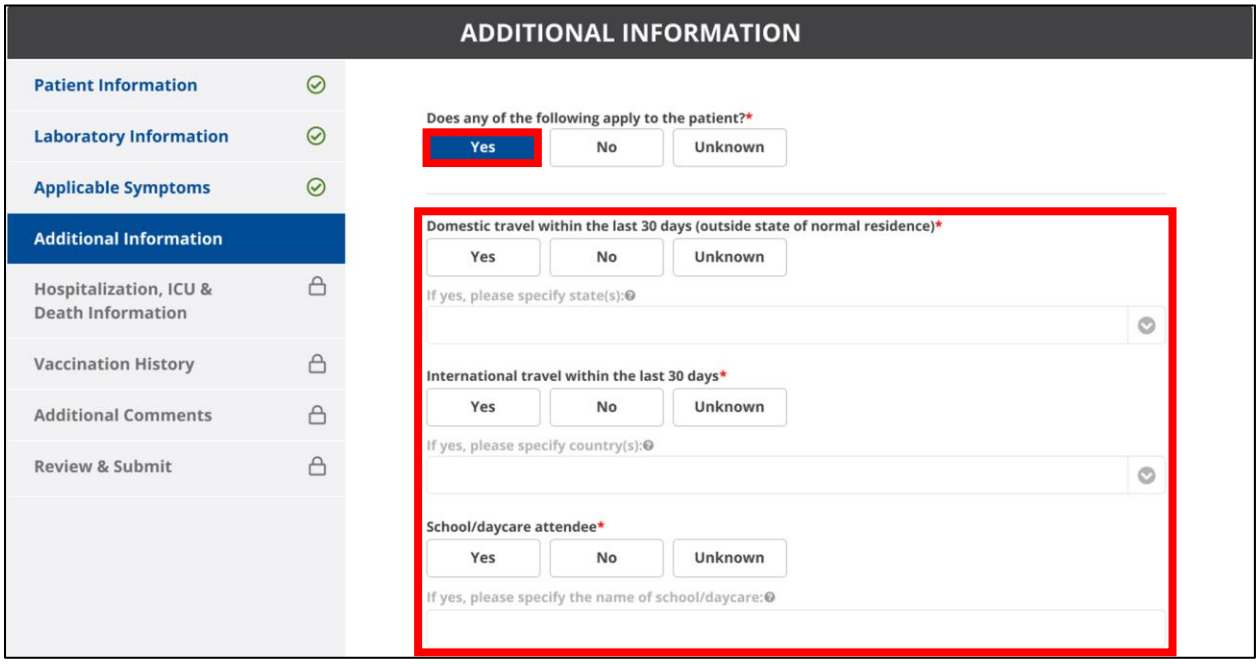


12 Additional Information

1. On the **Additional Information** screen, select the **appropriate answer** for the conditional question at the top: *Does any of the following apply to the patient?*



2. If ***Yes*** is selected for the conditional question, the subsequent fields on the screen are enabled.

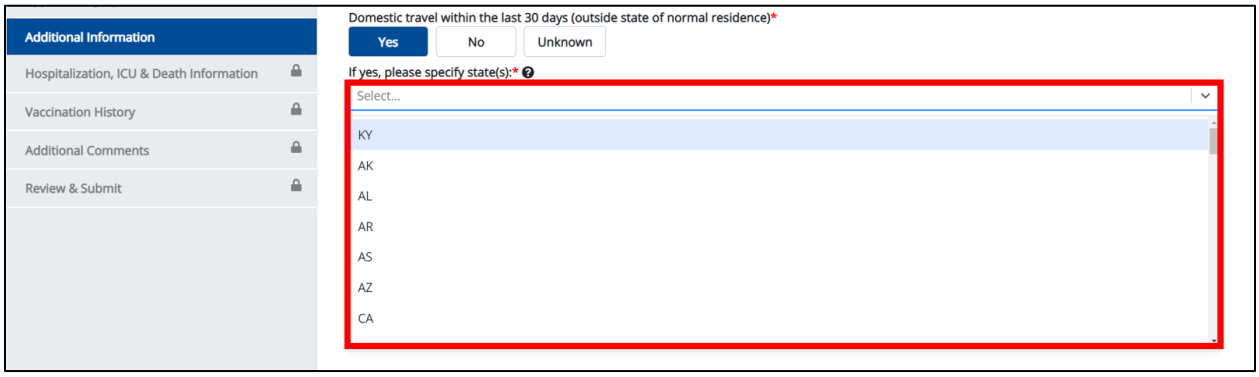


Please Note: If ***No*** is selected for the conditional question, all subsequent symptom fields are disabled and marked with ***No***.

If ***Unknown*** is selected for the conditional question, all subsequent symptom fields are disabled and marked as ***Unknown***.

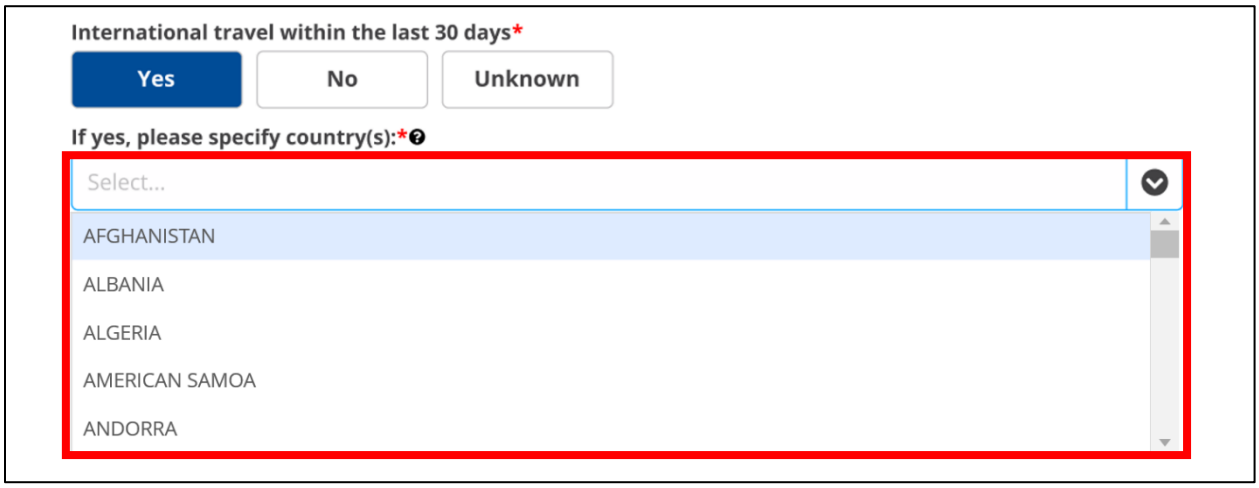
3. Select the **appropriate answer** for the field: *Domestic travel within the last 30 days (outside state of normal residence)*.

- If ***Yes*** is selected for the *Domestic travel (outside state of normal residence)* field, the subsequent *If yes, please specify state(s)* field is enabled. From the multi-select dropdown menu, select the **state(s) the patient traveled**.



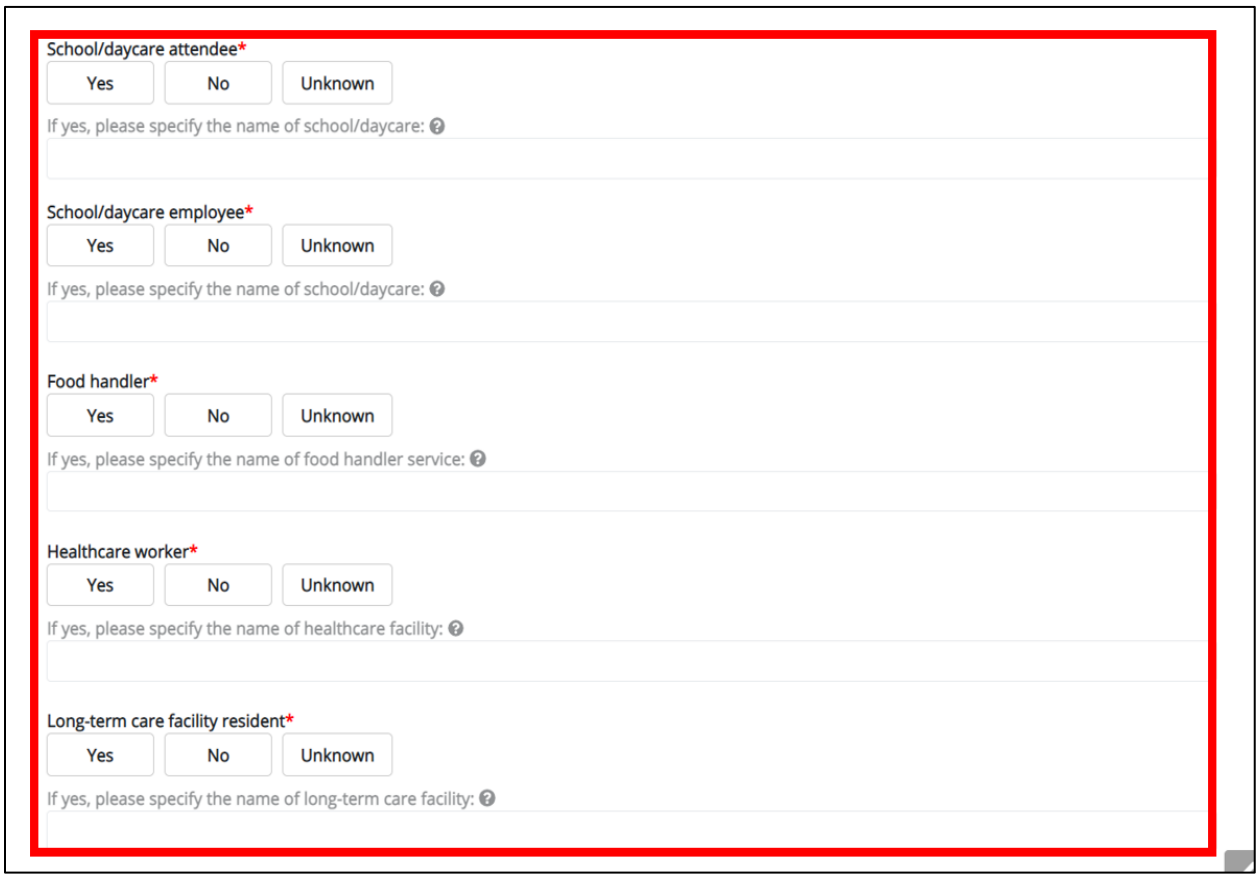
4. Select the **appropriate answer** for the field: *International travel within last 30 days*.

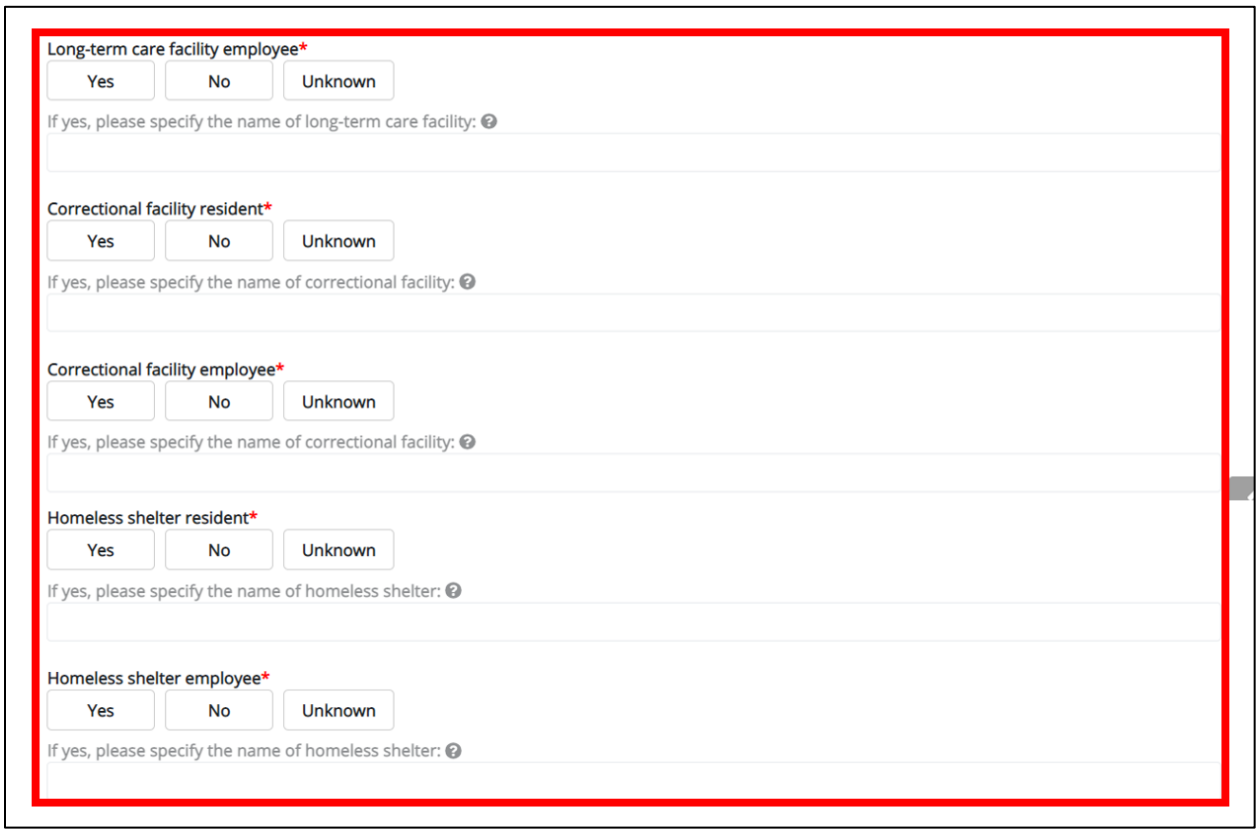
- If ***Yes*** is selected, the subsequent field *If yes, please specify country(s)* is enabled. From the multi-select dropdown menu, select the **country or countries in which the patient traveled**.

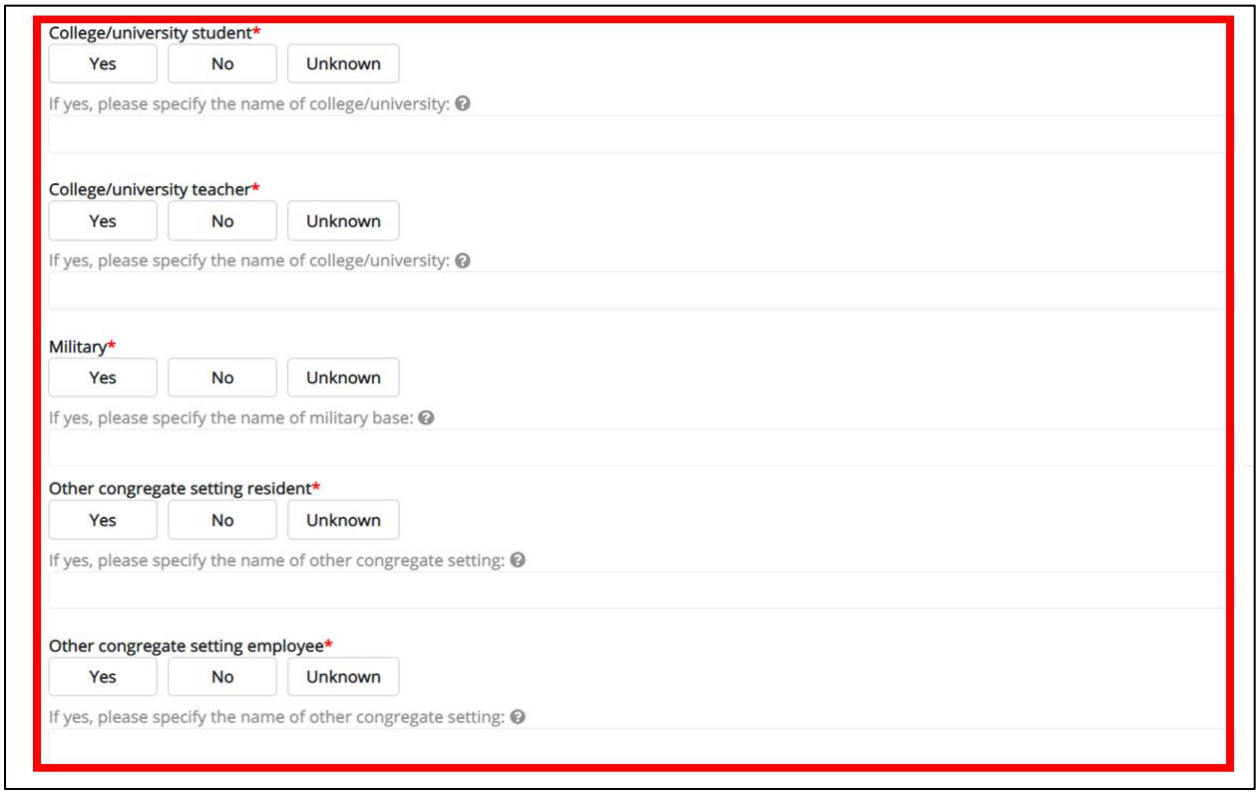


5. Select the **appropriate answers** for the following fields to indicate descriptions that apply to the patient:

- *School/daycare attendee*
- *School/daycare employee*
- *Food handler*
- *Healthcare worker*
- *Long-term care facility resident*
- *Long-term care facility employee*
- *Correctional facility resident*
- *Correctional facility employee*
- *Homeless shelter resident*
- *Homeless shelter employee*
- *College/university student*
- *College/university teacher*
- *Substance abuse or misuse*
- *Military*
- *Other congregate setting resident*
- *Other congregate setting employee*

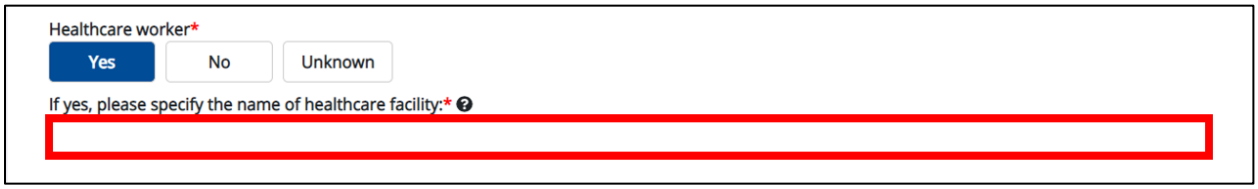



Long-term care facility employee*
Yes
No
Unknown
If yes, please specify the name of long-term care facility:
Correctional facility resident*
Yes
No
Unknown
If yes, please specify the name of correctional facility:
Correctional facility employee*
Yes
No
Unknown
If yes, please specify the name of correctional facility:
Homeless shelter resident*
Yes
No
Unknown
If yes, please specify the name of homeless shelter:
Homeless shelter employee*
Yes
No
Unknown
If yes, please specify the name of homeless shelter:


College/university student*
Yes
No
Unknown
If yes, please specify the name of college/university:
College/university teacher*
Yes
No
Unknown
If yes, please specify the name of college/university:
Military*
Yes
No
Unknown
If yes, please specify the name of military base:
Other congregate setting resident*
Yes
No
Unknown
If yes, please specify the name of other congregate setting:
Other congregate setting employee*
Yes
No
Unknown
If yes, please specify the name of other congregate setting:

Please Note: If ***Yes*** is selected for **any** of the descriptive questions, the subsequent textbox is enabled for Users to specify the name of appropriate setting.

For example, if ***Yes*** is selected for the *Healthcare worker* field, the subsequent textbox field is enabled. To proceed, you must enter the **name of the healthcare facility** in the subsequent field: *If yes, please specify the name of the healthcare facility*.

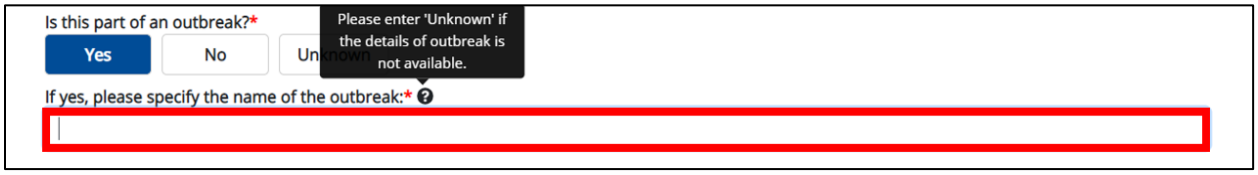


6. Select the **appropriate answer** for the field: *Did the patient inject drugs not prescribed by a doctor*?

7. Select the **appropriate answer** for the field: *Did the patient use street drugs, but not inject*?

8. Select the **appropriate answer** for the field: *Is this part of an outbreak*?

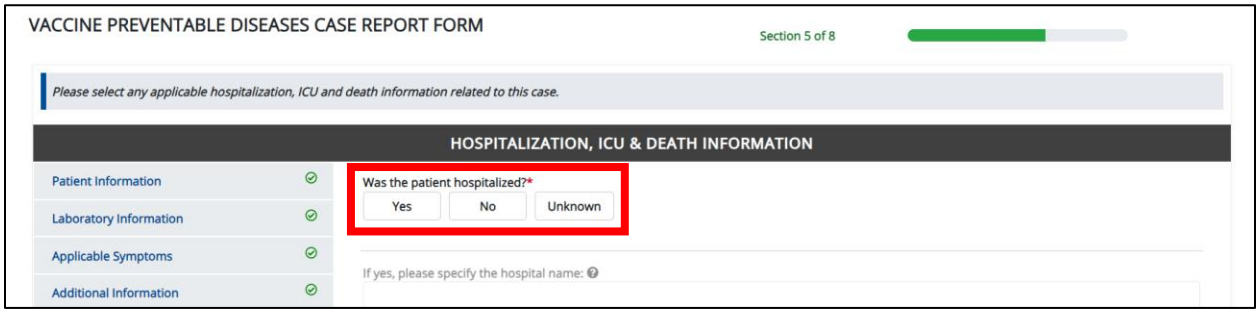
- If ***Yes*** is selected, the subsequent field is enabled. Enter **the name of the outbreak** in the subsequent textbox: *If yes, please specify name of the outbreak*.



9. Once complete, click **Next** to proceed to the **Hospitalization, ICU & Death Information** screen.

13 Hospitalization, ICU & Death Information

1. On the **Hospitalization, ICU & Death Information** screen, select the **appropriate answer** for the conditional question at the top: *Was the patient hospitalized*?



2. If ***Yes*** is selected for the conditional question, the subsequent hospitalization-related fields and ICU-related fields on the screen are enabled.

Please Note: If ***No*** or ***Unknown*** is selected for the conditional question, all subsequent hospitalization-related fields and ICU-related fields are disabled.

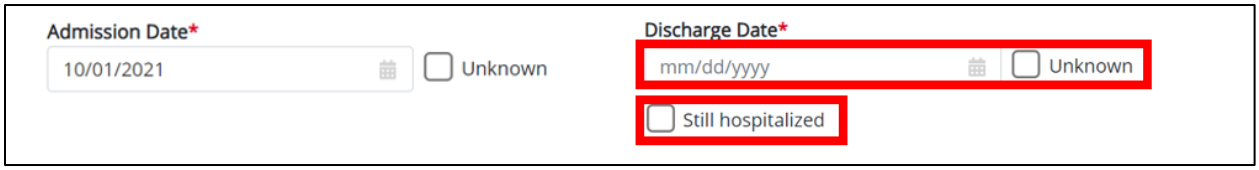
Death-related questions are not impacted by the selected answer for the conditional question: *Was the patient hospitalized?*

3. If the patient has been hospitalized, enter the **name of the hospital where the patient is/was hospitalized** in the textbox: *If yes, please specify the hospital name*.

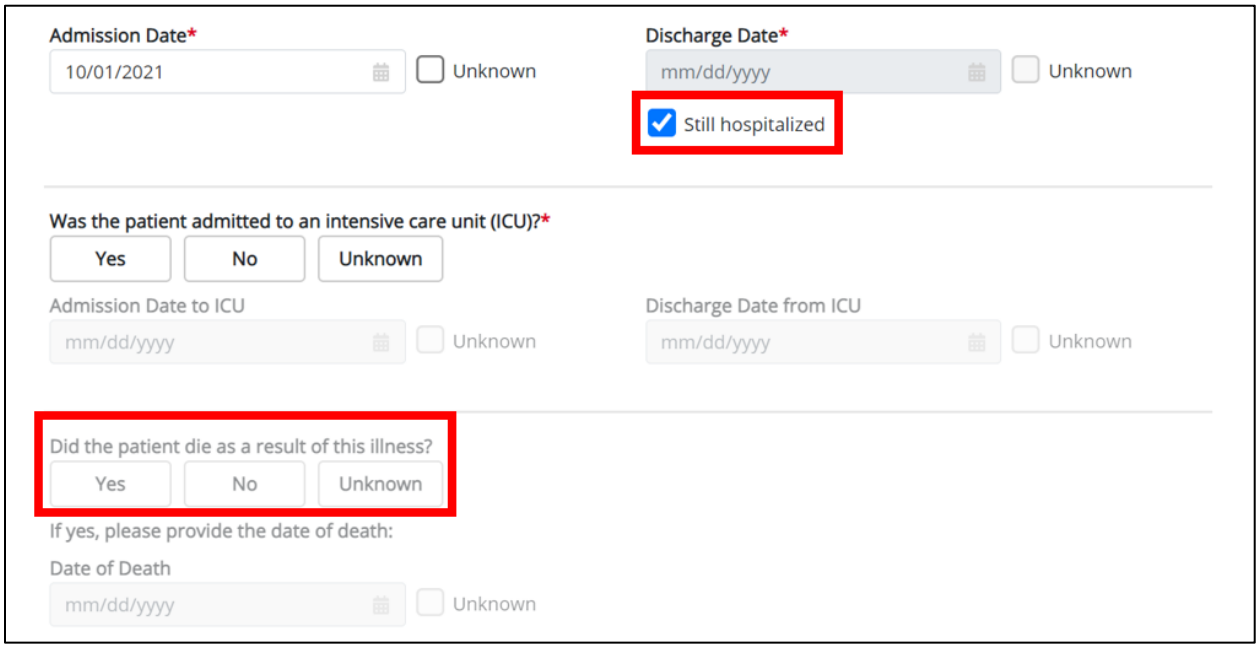
4. Enter the patient's hospitalization **Admission Date**. If the Admission Date is unknown, click the ***Unknown*** **checkbox**.

5. Enter the patient's hospitalization **Discharge Date**.

- If the patient is still hospitalized, click the ***Still Hospitalized*** checkbox.



- If the ***Still Hospitalized*** checkbox is selected, the subsequent death-related field is disabled: *Did the patient die as a result of this illness?*

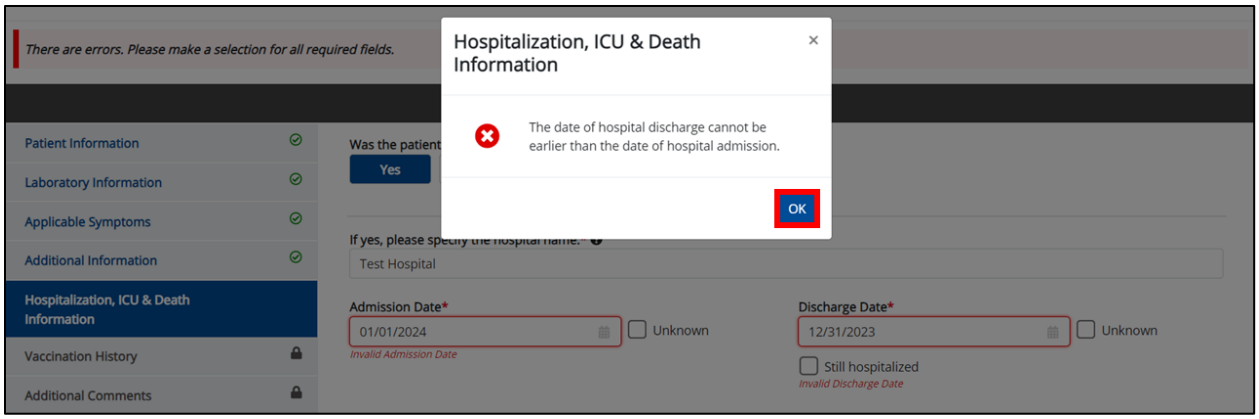


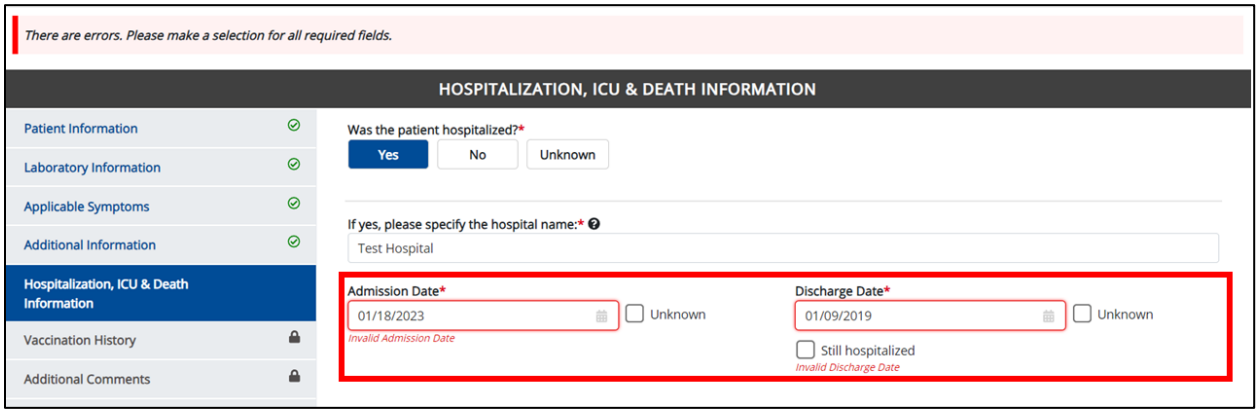
Please Note: The Admission Date **cannot** occur **after** the Discharge Date. The Admission Date must occur on the **same date** or any date **BEFORE** the Discharge Date.

If you enter an Admission Date that occurs after the Discharge Date and click **Next**, both fields are marked as invalid, and the screen is grayed out and displays a pop-up message that states:

The date of hospital discharge cannot be earlier than the date of hospital admission.

To proceed, you must click **OK** and enter a valid Discharge Date that occurs **on** or **after** the Admission Date.



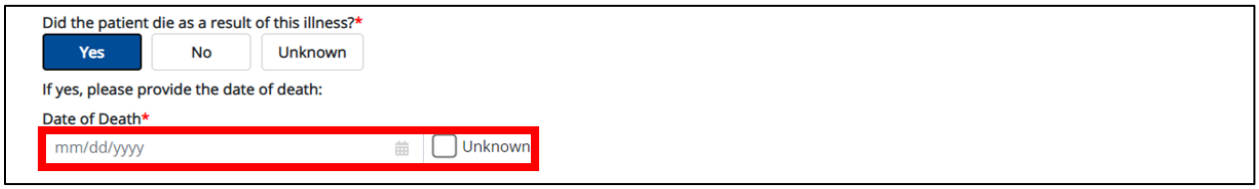


6. Select the **appropriate answer** for the field: *Was the patient admitted to an intensive care unit (ICU)*?

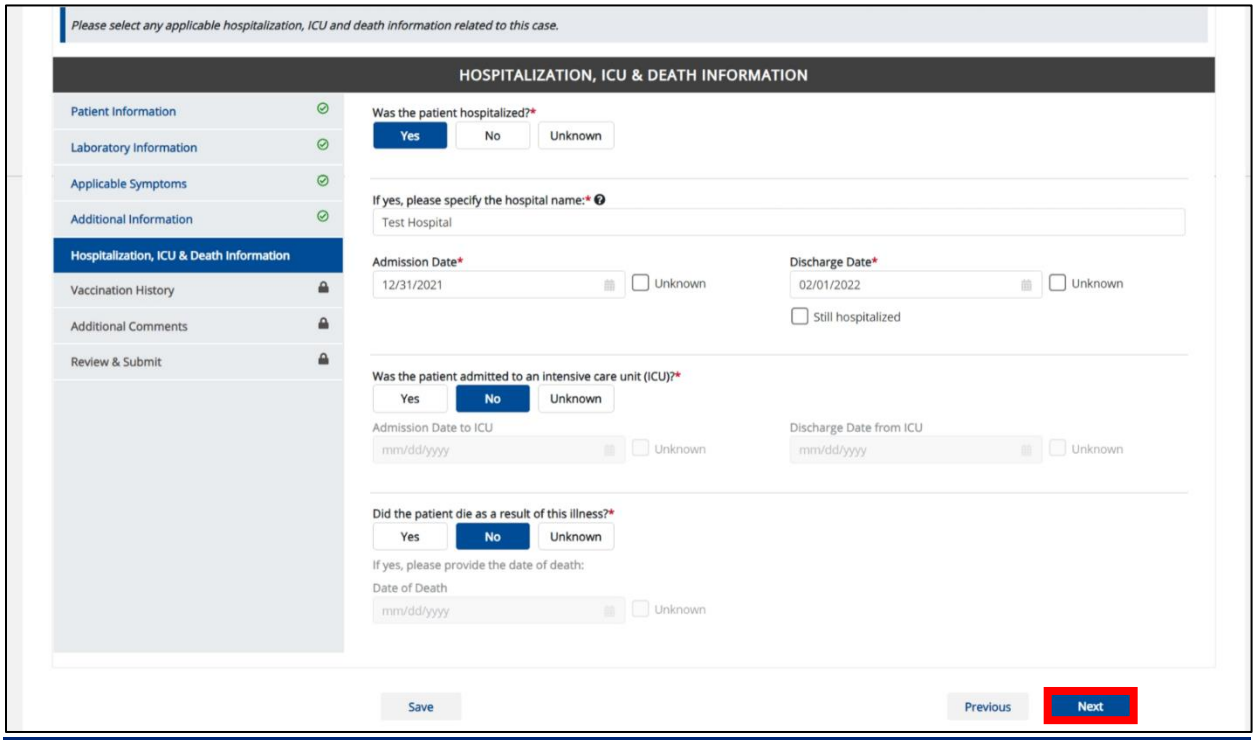
- If ***Yes*** is selected, the subsequent *Admission Date to ICU* and *Discharge Date from ICU* fields are enabled. Enter the dates for the **Admission Date to ICU** and the **Discharge Date from ICU**.

7. If applicable, select the **appropriate answer** for the field: *Did the patient die as a result of this illness*?

- If ***Yes*** is selected, the subsequent *Date of Death* field is enabled. Enter the patient's **Date of Death**.

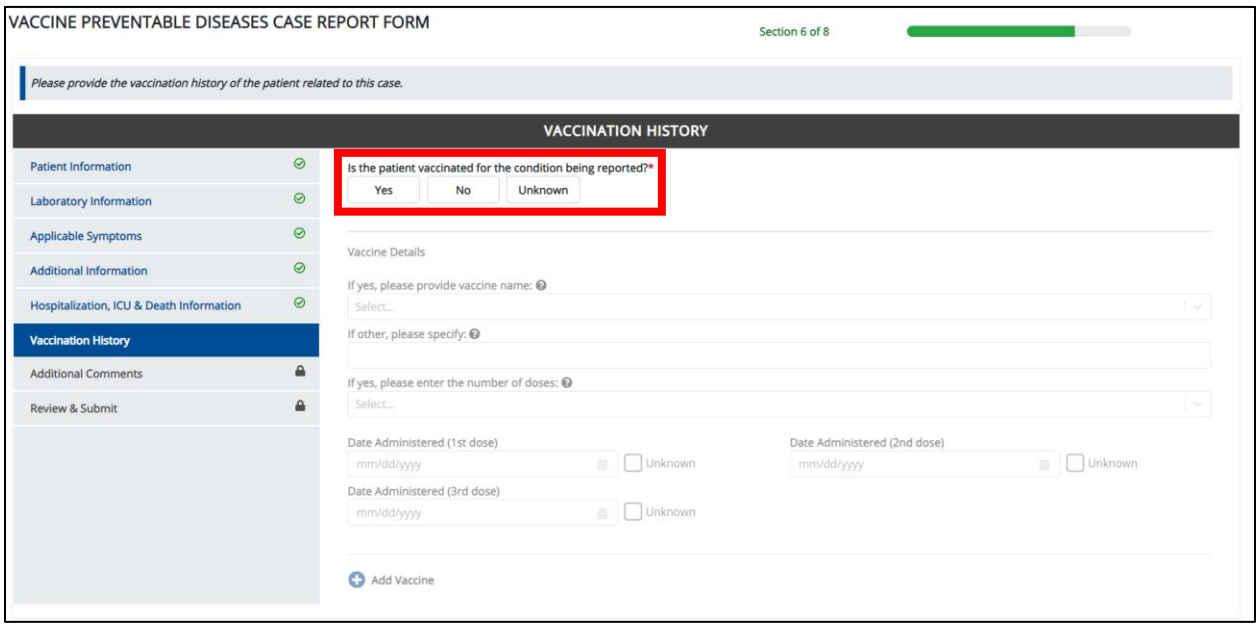


8. Once complete, click **Next** to proceed to the **Vaccination History** screen.

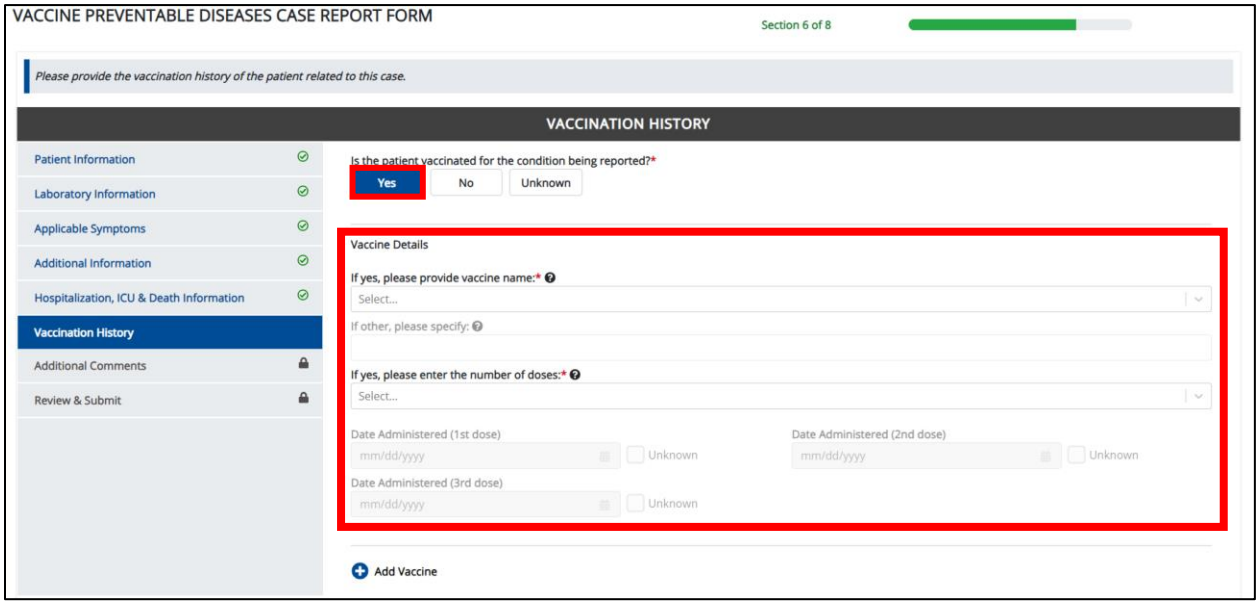


14 Vaccination History

1. On the **Vaccination History** screen, select the **appropriate answer** for the conditional question at the top: *Is the patient vaccinated for the condition being reported*?

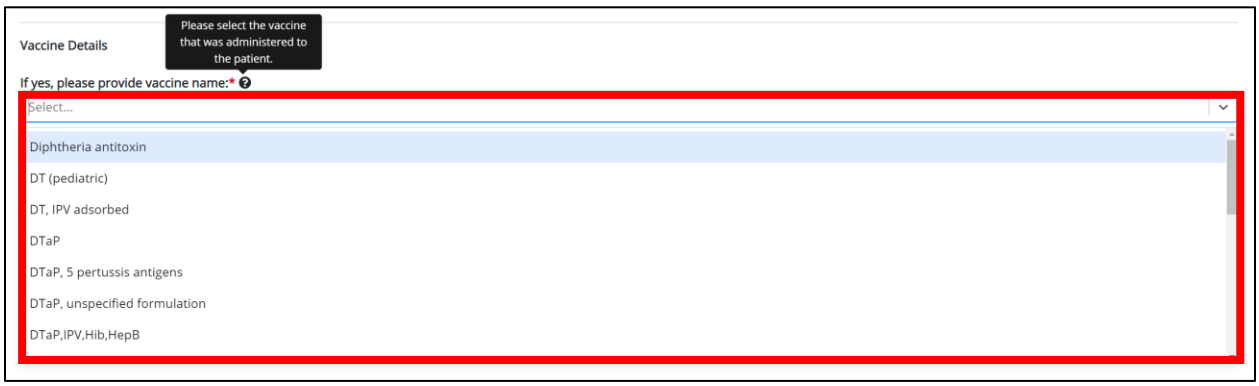


2. If ***Yes*** is selected for the conditional question, the subsequent fields on the screen are enabled.



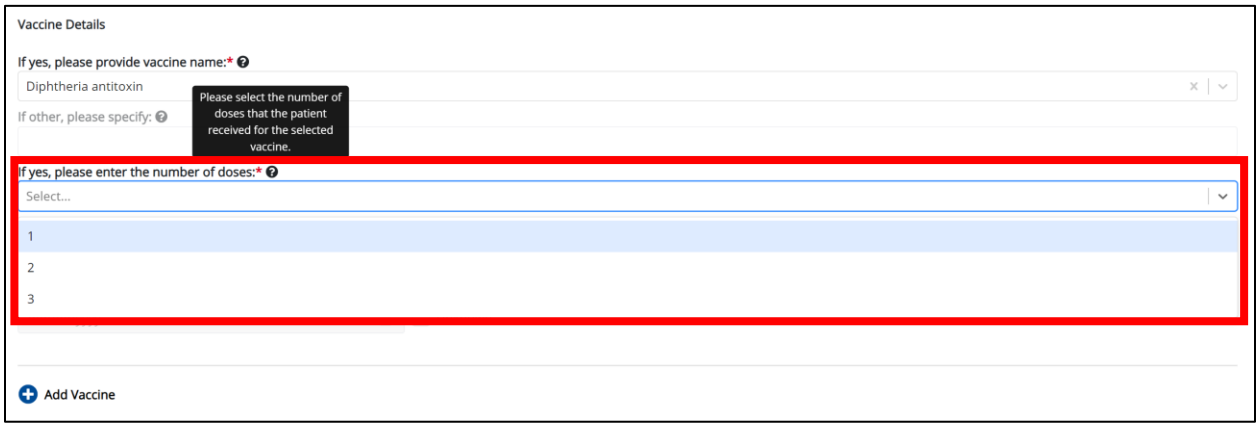
Please Note: If ***No***, or ***Unknown*** is selected for the conditional question, all subsequent fields are disabled.

3. Select the **appropriate vaccine name** from the subsequent dropdown menu: *If yes, please provide vaccine name.*

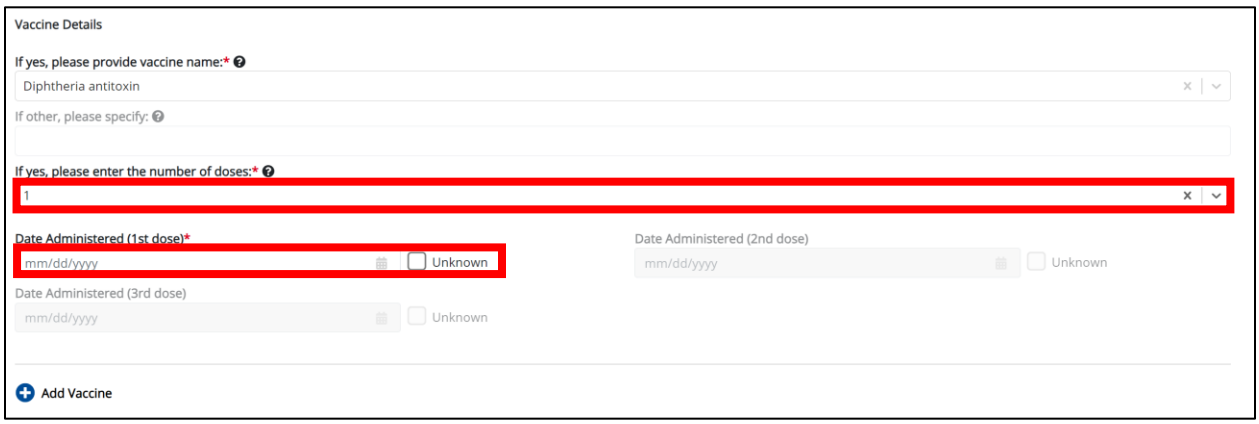


- If ***Other*** is selected, the subsequent field is enabled. Enter the **vaccine name** in the subsequent textbox field: *If other, please specify*.

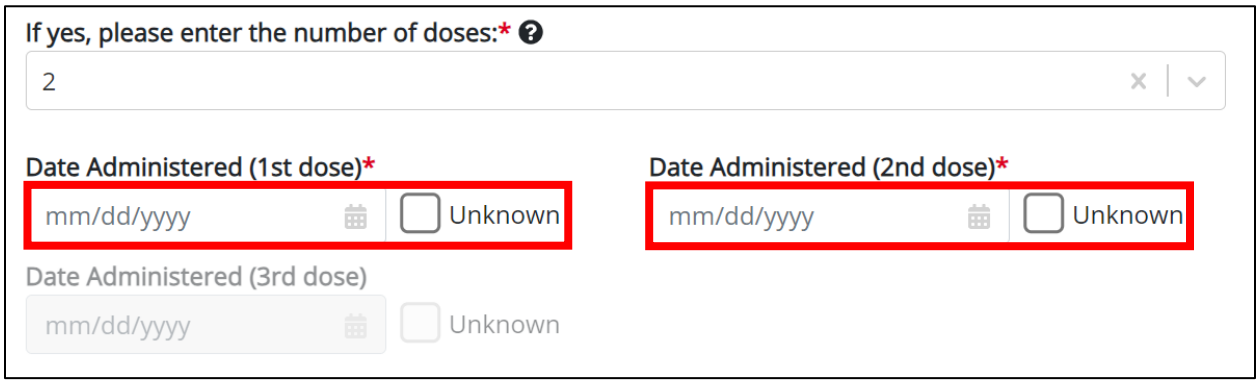
4. For the subsequent textbox field: *If yes, please enter the number of doses,* select the **number of doses received** from the dropdown menu: *If yes, please enter the number of doses.*



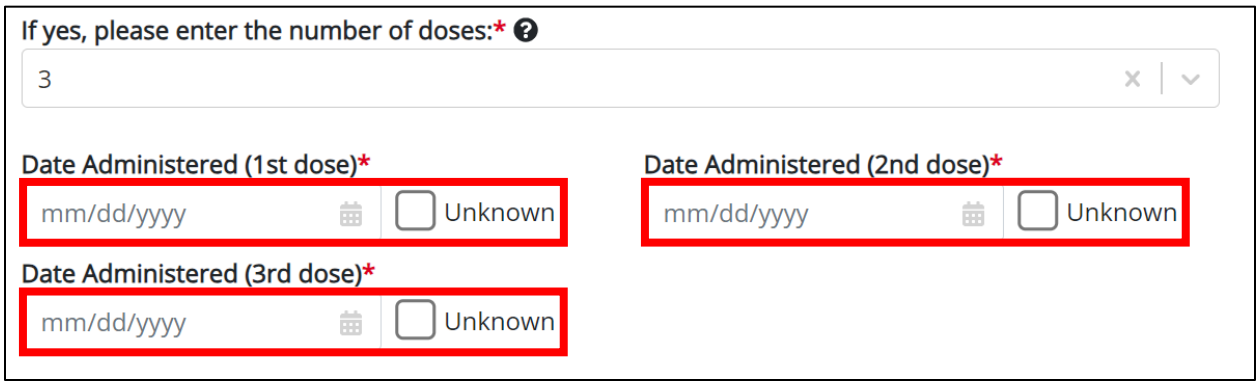
- If ***1*** is selected as the number of doses, the *Date Administered (1st dose)* field is enabled. Enter the **Date Administered (1st Dose)**.



- If ***2*** is selected as the number of doses, both of the subsequent fields are enabled: *Date Administered (1st dose)* and *Date Administered (2nd dose)*. Enter the **Date Administered (1st dose)** and **Date Administered (2nd dose)** in the appropriate fields.

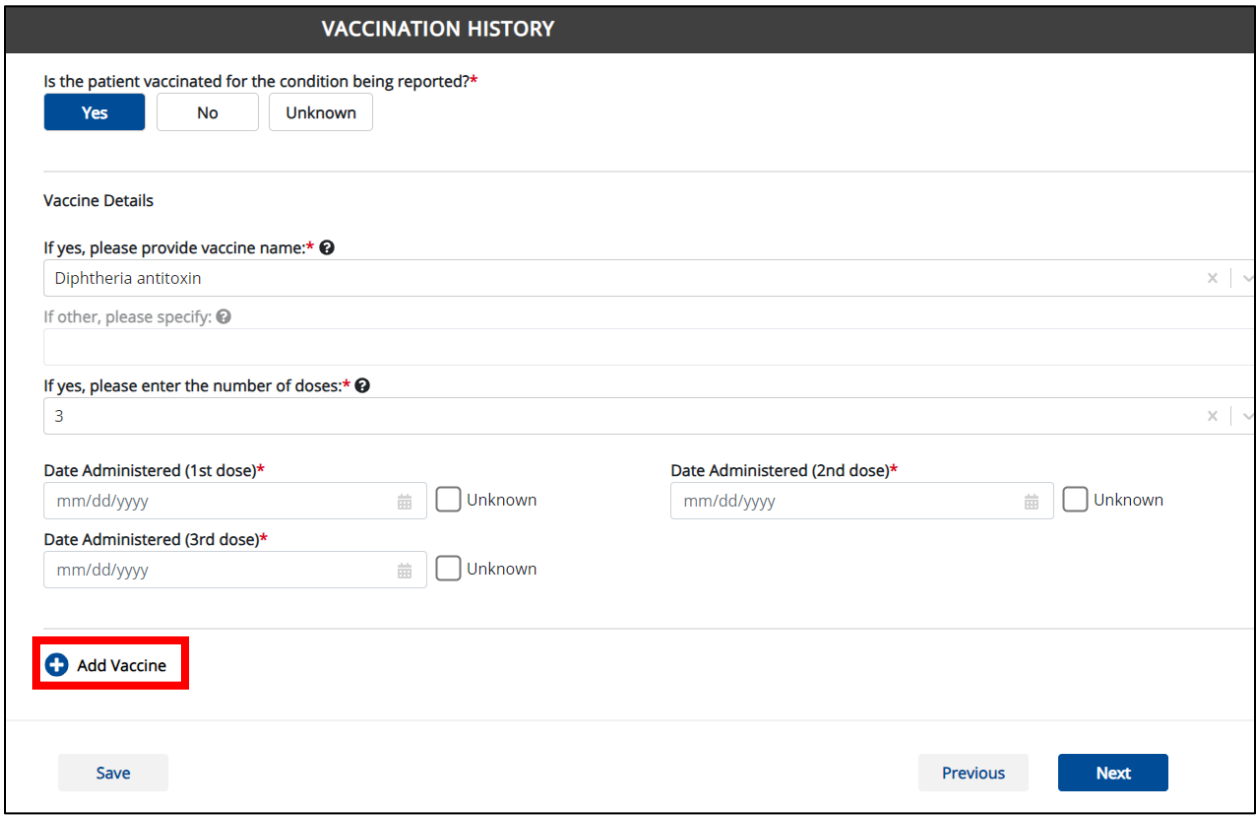


- If ***3*** is selected as the number of doses, the following subsequent fields are enabled: *Date Administered (1st dose)*, *Date Administered (2nd dose)*, and *Date Administered (3rd dose)*. Enter the **Date Administered (1st dose)**, **Date Administered (2nd dose)**, and **Date Administered (3rd dose)** in the appropriate fields.

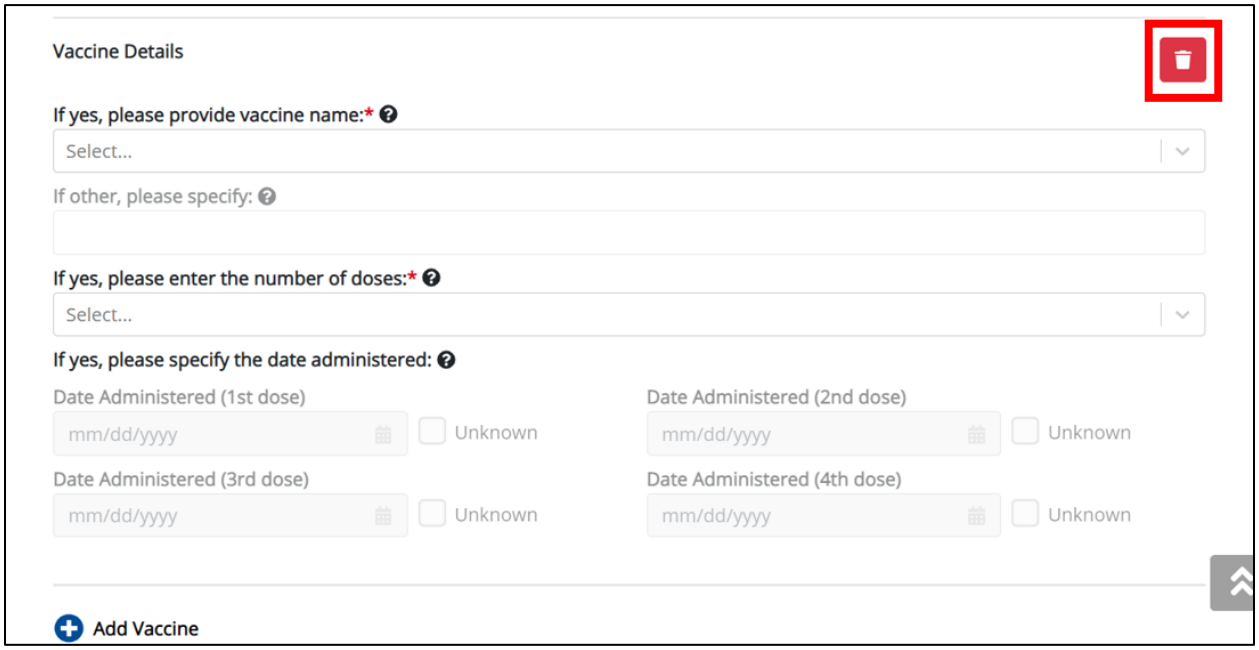


Adding Multiple Vaccines

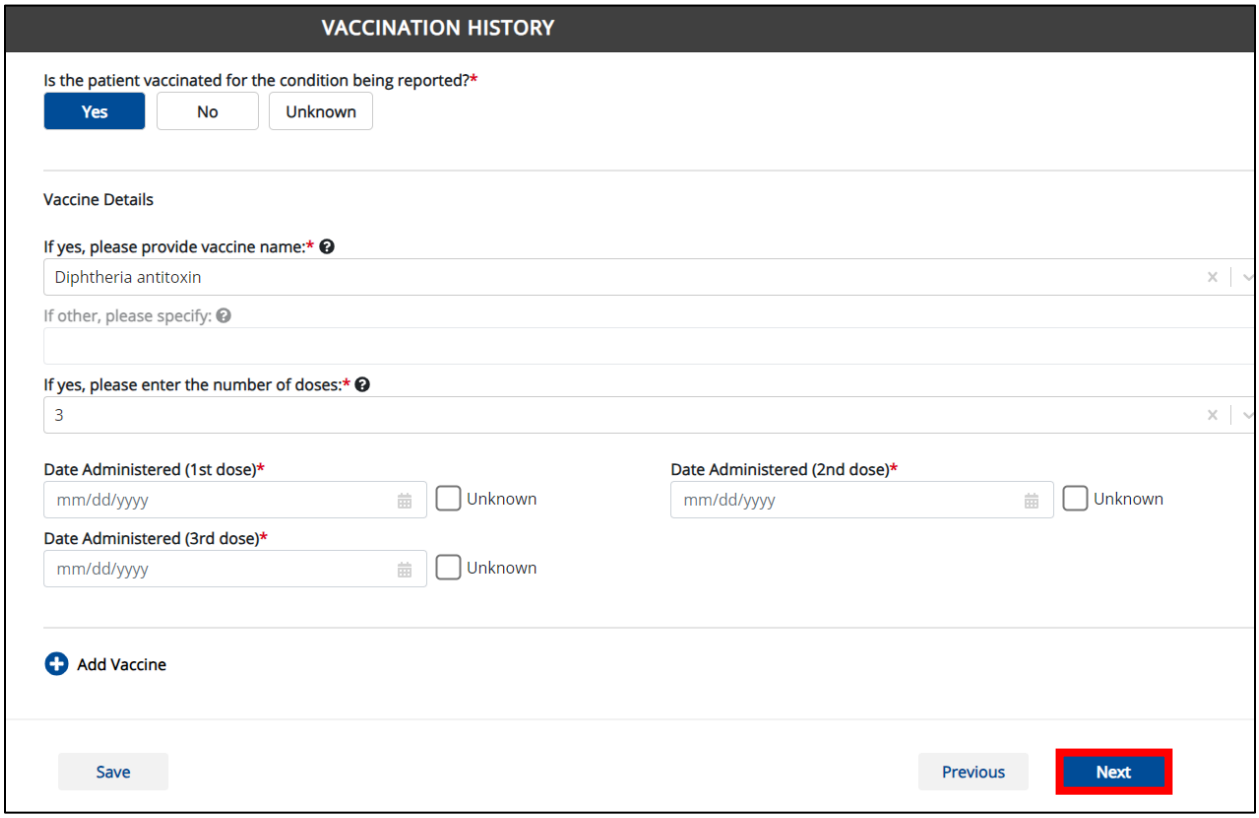
5. Click **Add Vaccine** to log the details for multiple vaccines.



- To delete an additional vaccine, click the **Trash Bin Icon** located at the top right.

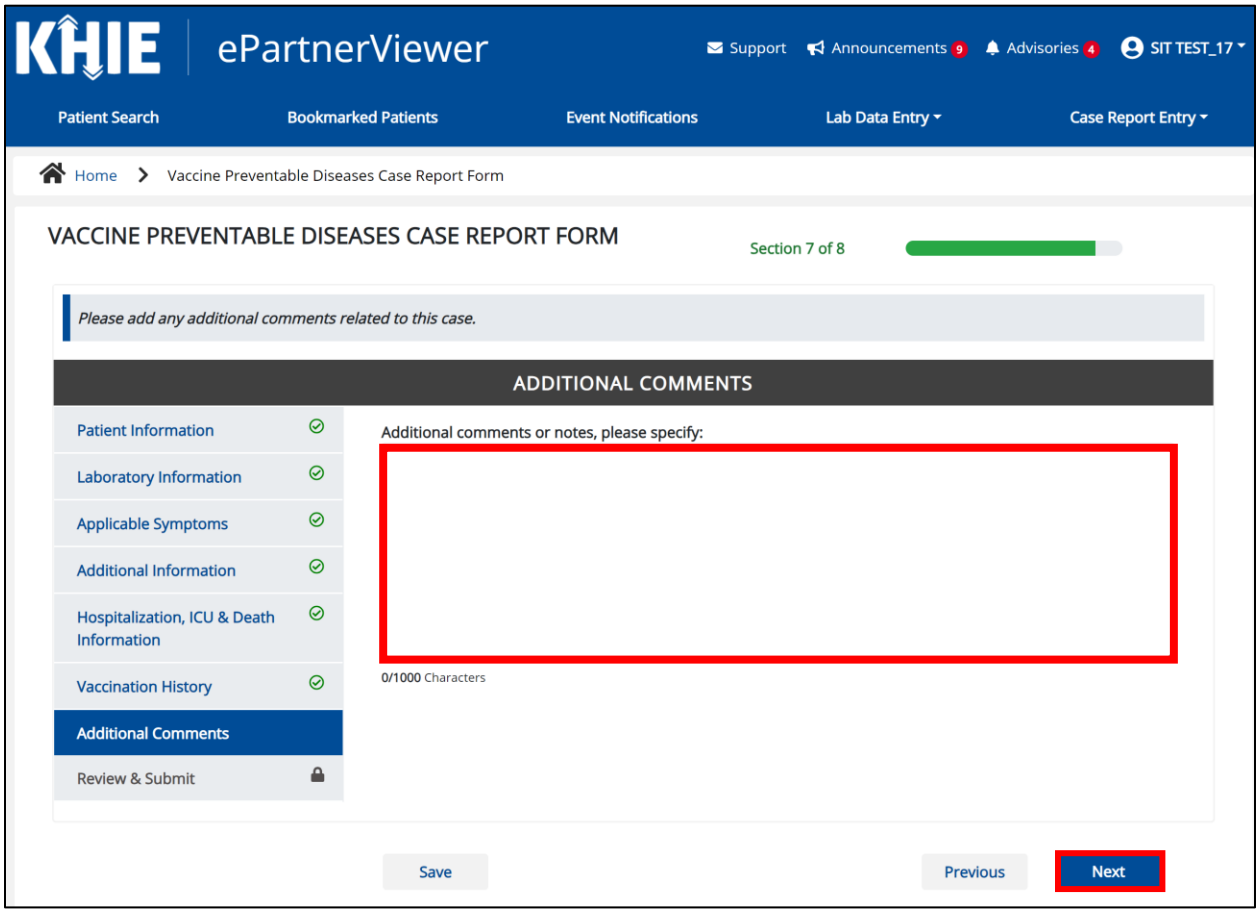


6. Once complete, click **Next** to proceed to the **Additional Comments** screen.



15 Additional Comments

1. On the **Additional Comments** screen, if applicable, enter **additional comments or notes about the patient**.
2. Once complete, click **Next** to proceed to the **Review & Submit** screen.



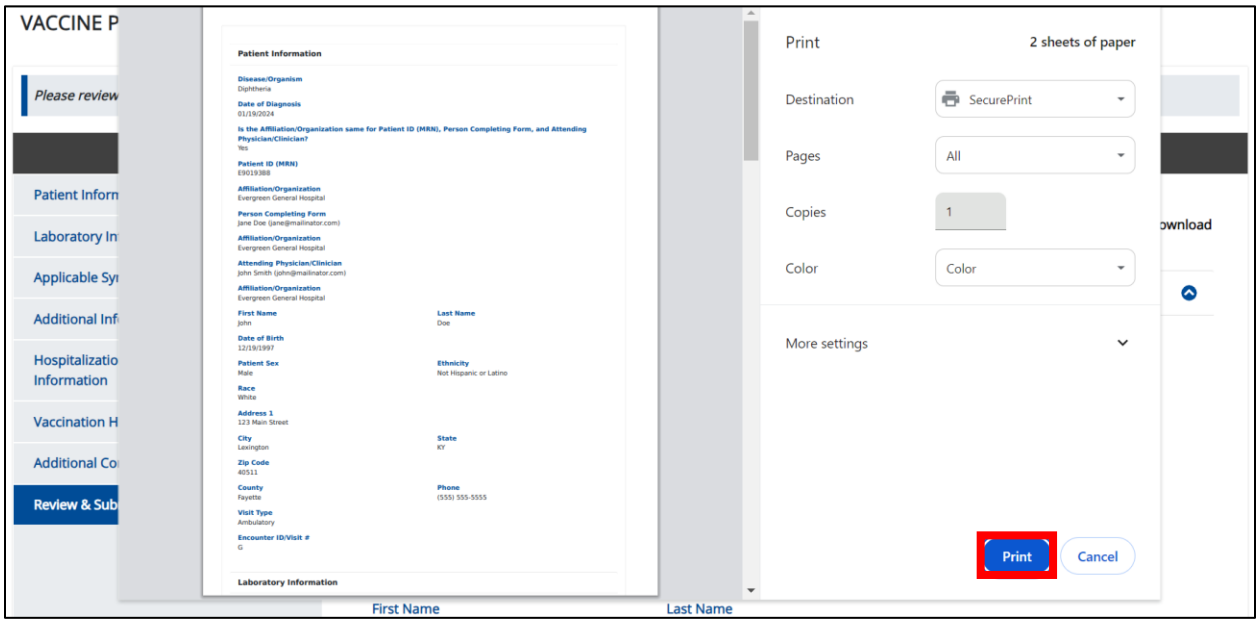
16 Review and Submit

The **Review and Submit** screen displays a summary of the information you have entered. Prior to submitting the case report, review the information on this screen to verify its accuracy. You must click **Submit** to submit the case report form.

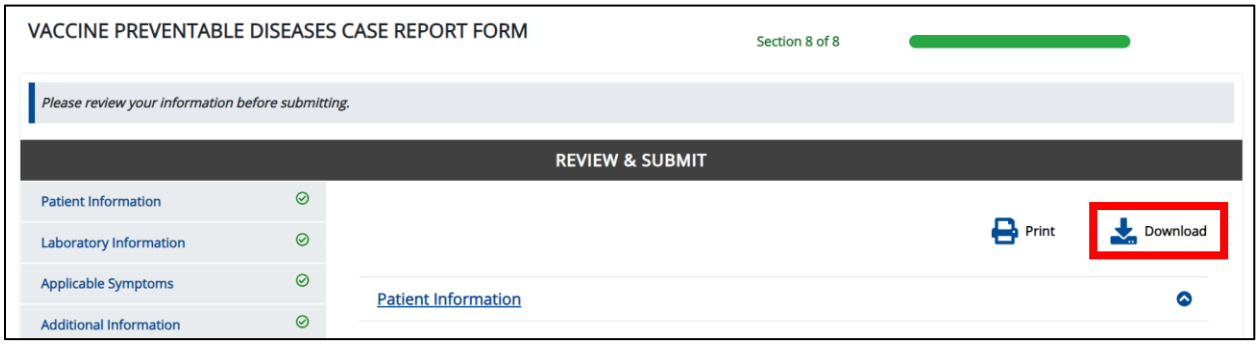
Print or Download Functionality

1. Click **Print** to print the case report.

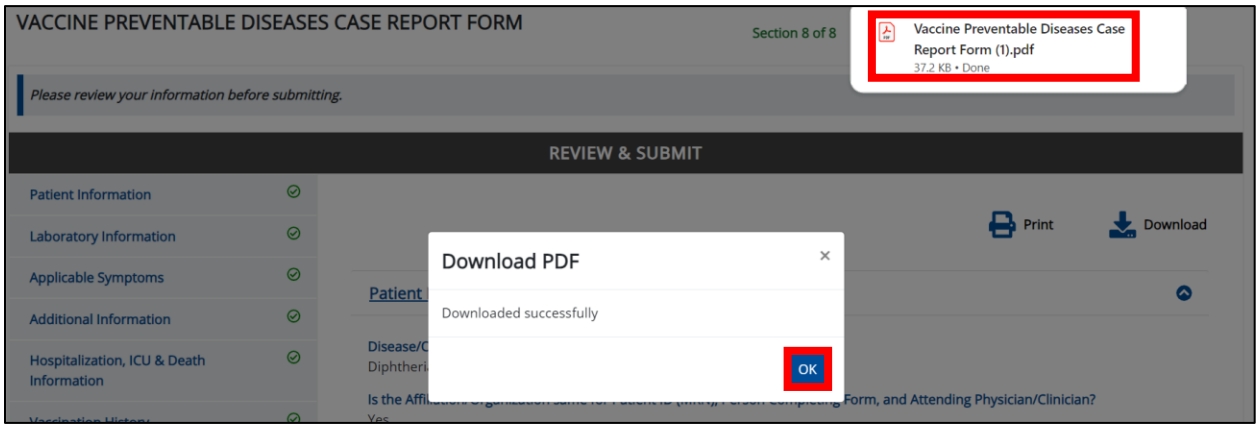
- Upon clicking **Print**, a *Print Preview* will display. Click **Print** to print the case report.



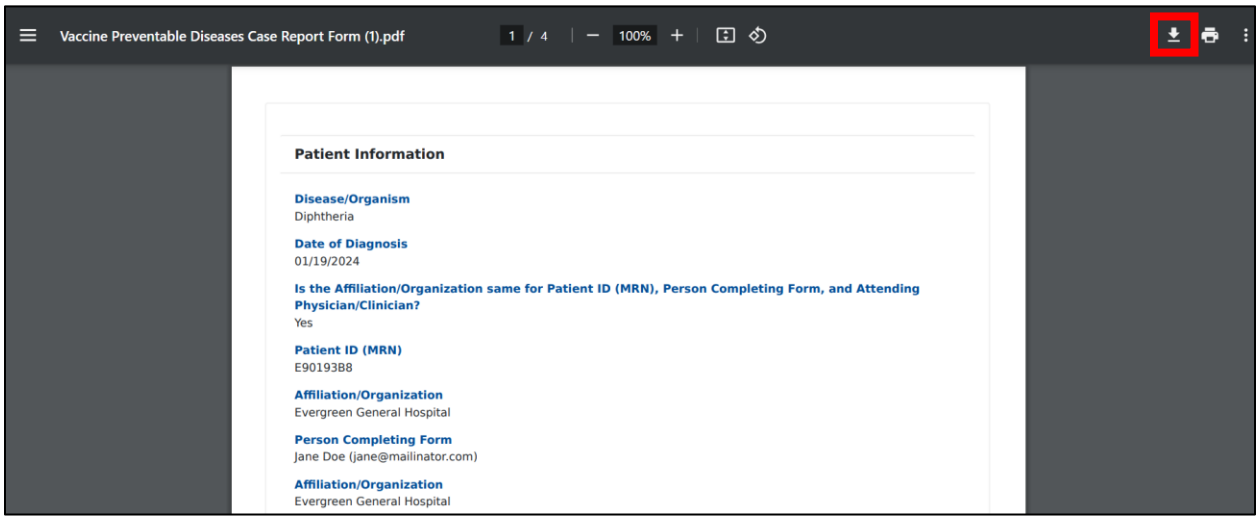
2. Click **Download** to download a PDF version of the case report.



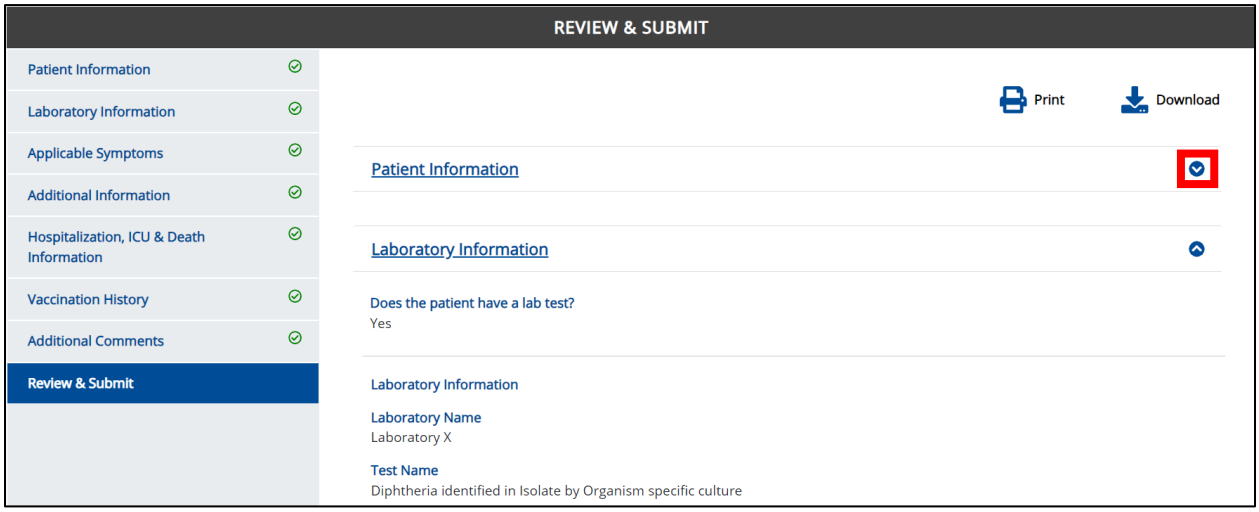
- Once the download is complete, a pop-up will display. Click **OK** to close out of the pop-up.
- To view the downloaded case report, click the **PDF** icon at the top right.



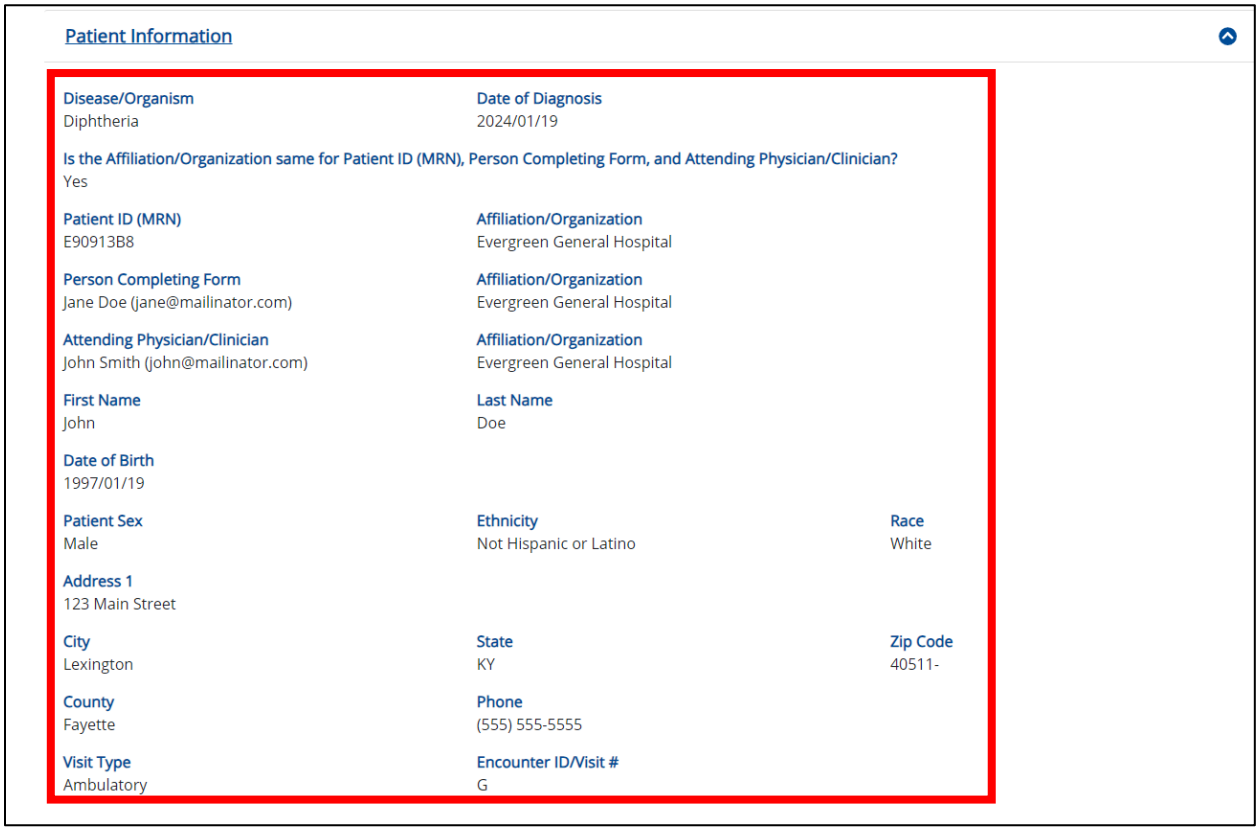
- A PDF of the case report will display in a separate tab. Click the **Download Icon** at the top right to download a PDF version of the case report to your computer.
- Review the information.



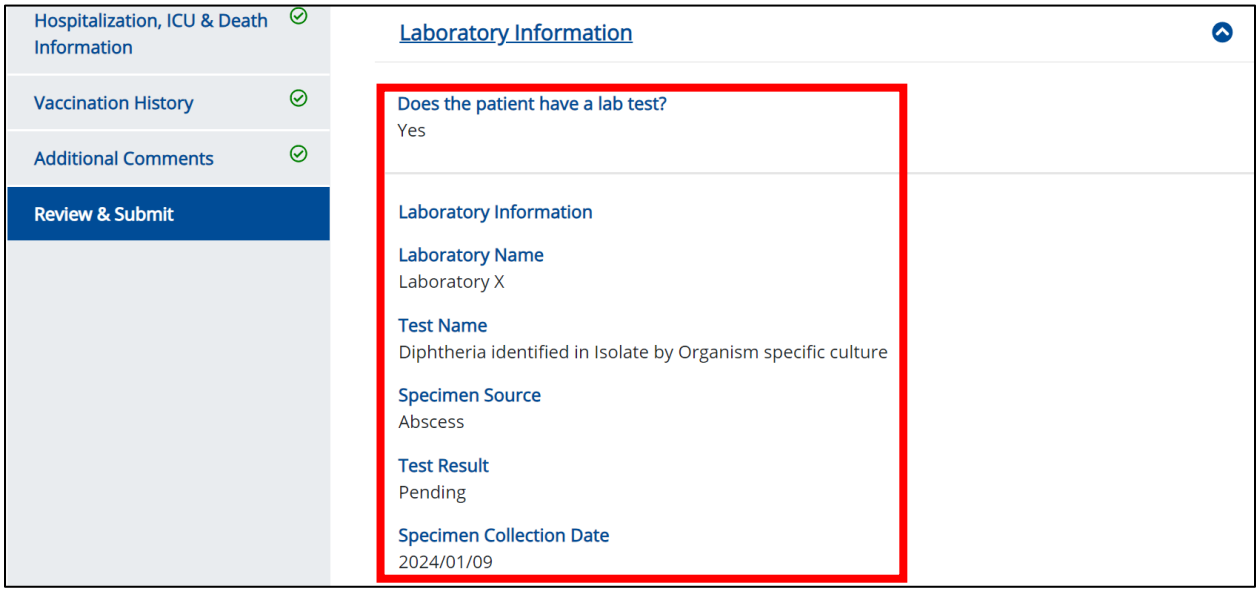
- Click the **caret icon** on any section header to hide or display the details for that section.



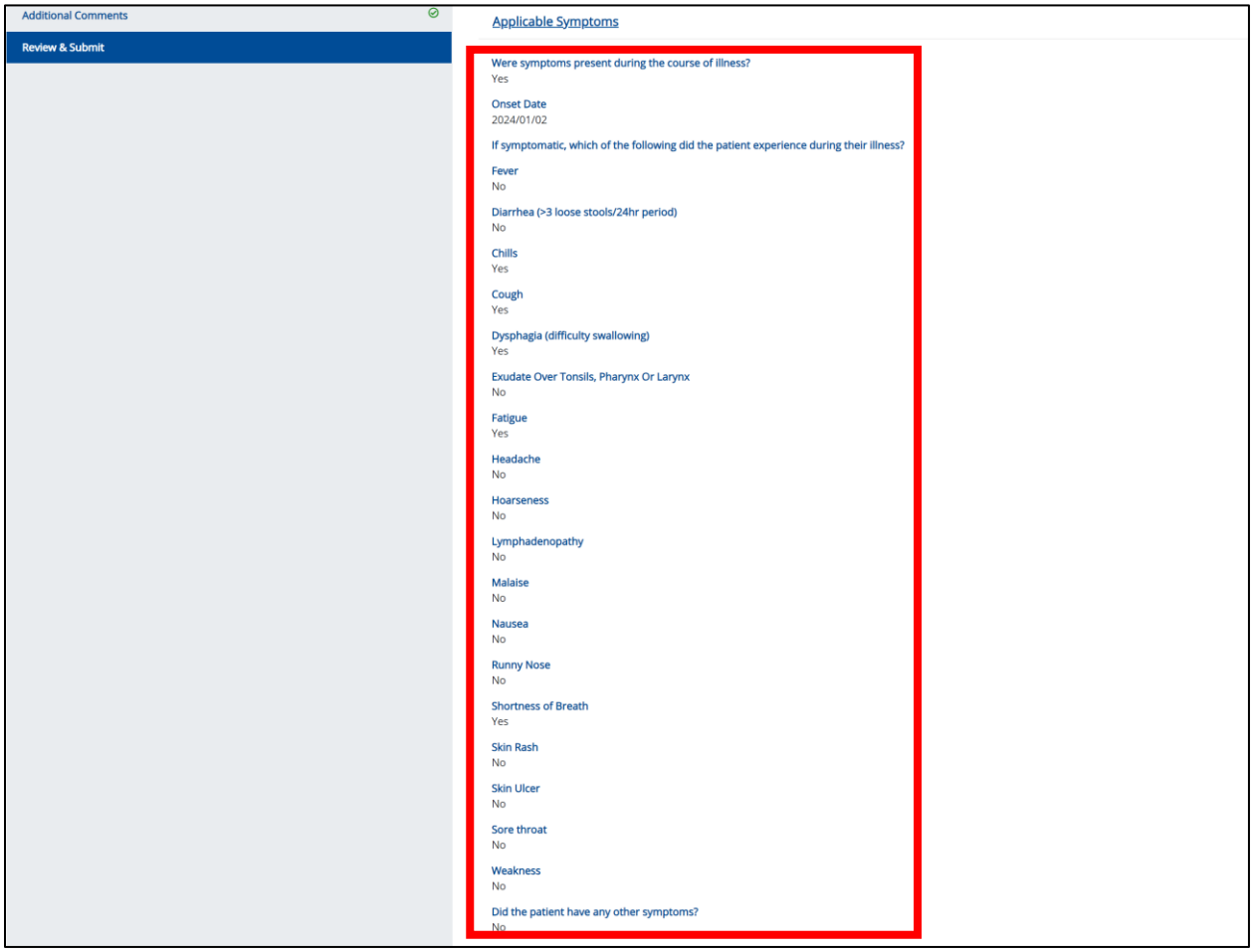
3. Review the *Patient Information* section.



4. Review the *Laboratory Information* section.



5. Review the *Applicable Symptoms* section.



6. Review the *Additional Information* section.

Additional Information

Does any of the following apply to the patient:
Yes

Domestic travel within the last 30 days (outside state of normal residence)
Yes

If yes, please specify state(s):
KY

International Travel within the last 30 days
No

School/daycare attendee
No

School/daycare employee
No

Food handler
No

Healthcare worker
Yes

If yes, please specify the name of healthcare facility:
General Hospital

Long-term care facility resident
No

Long-term care facility employee
No

Correctional facility resident
No

Correctional facility employee
No

Homeless shelter resident
No

Homeless shelter employee
No

College/university student
No

College/university teacher
No

Military
No

Other congregate setting resident
No

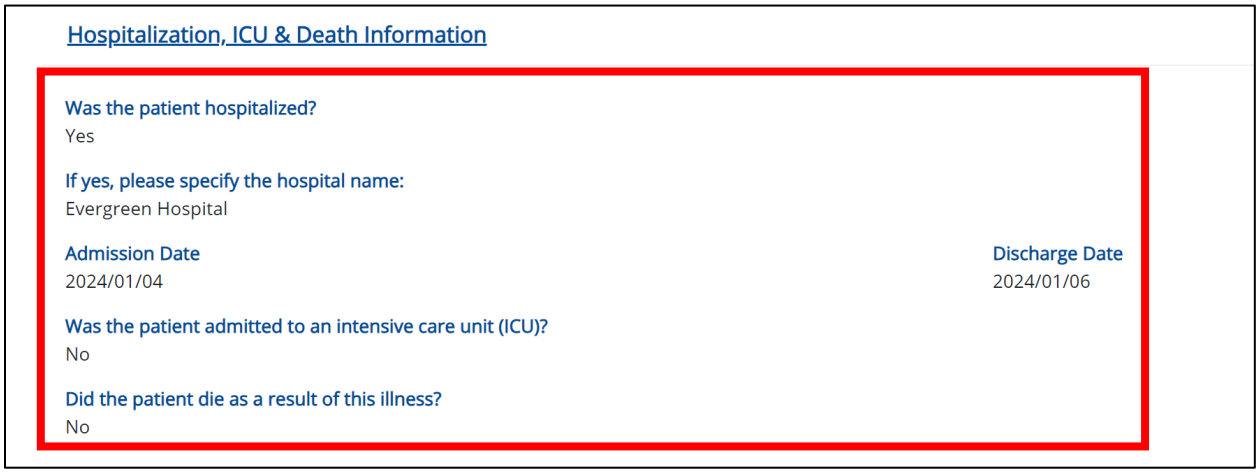
Other congregate setting employee
No

Did the patient inject drugs not prescribed by a doctor?
No

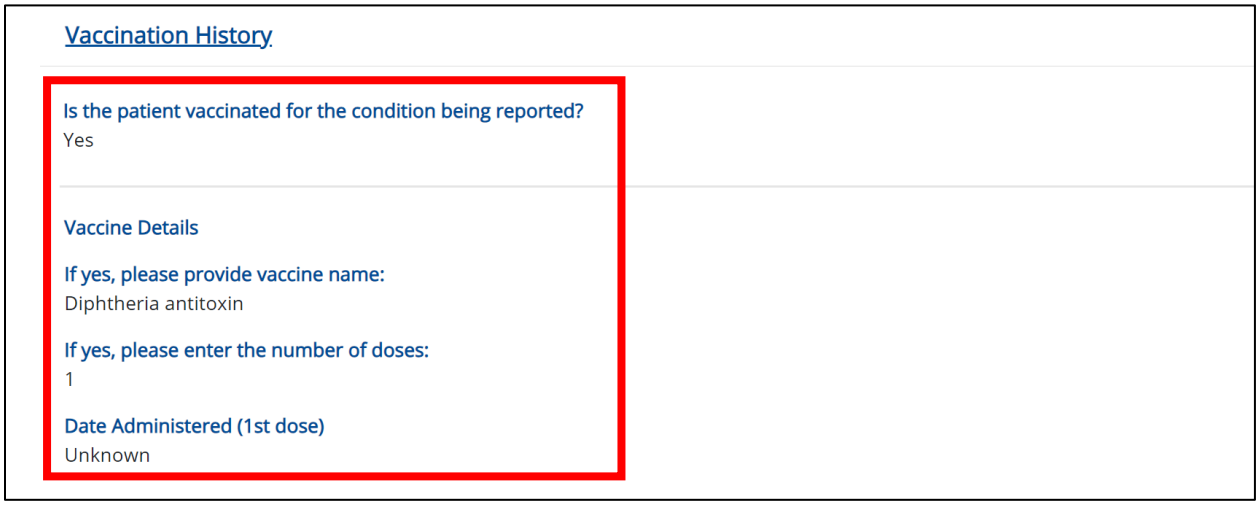
Did the patient use street drugs, but not inject?
No

Is this part of an outbreak?
No

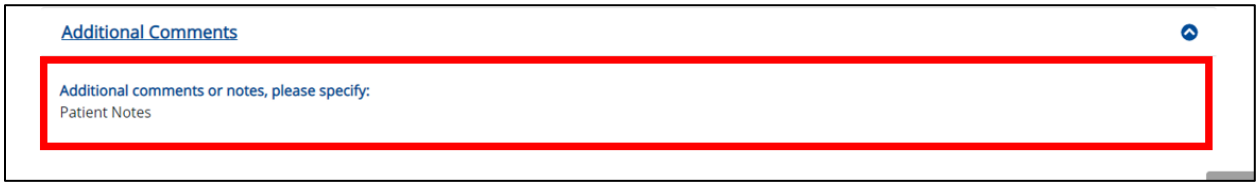
7. Review the *Hospitalization, ICU & Death Information* section.



8. If applicable, review the *Vaccination History* section.



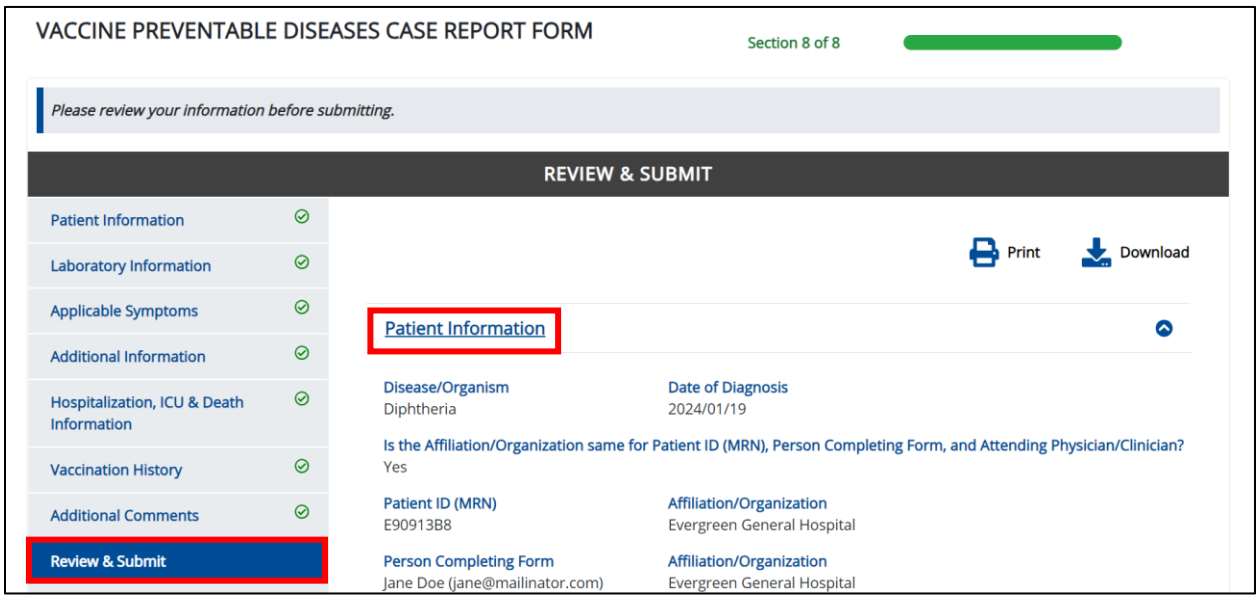
9. Review the *Additional Comments* section.



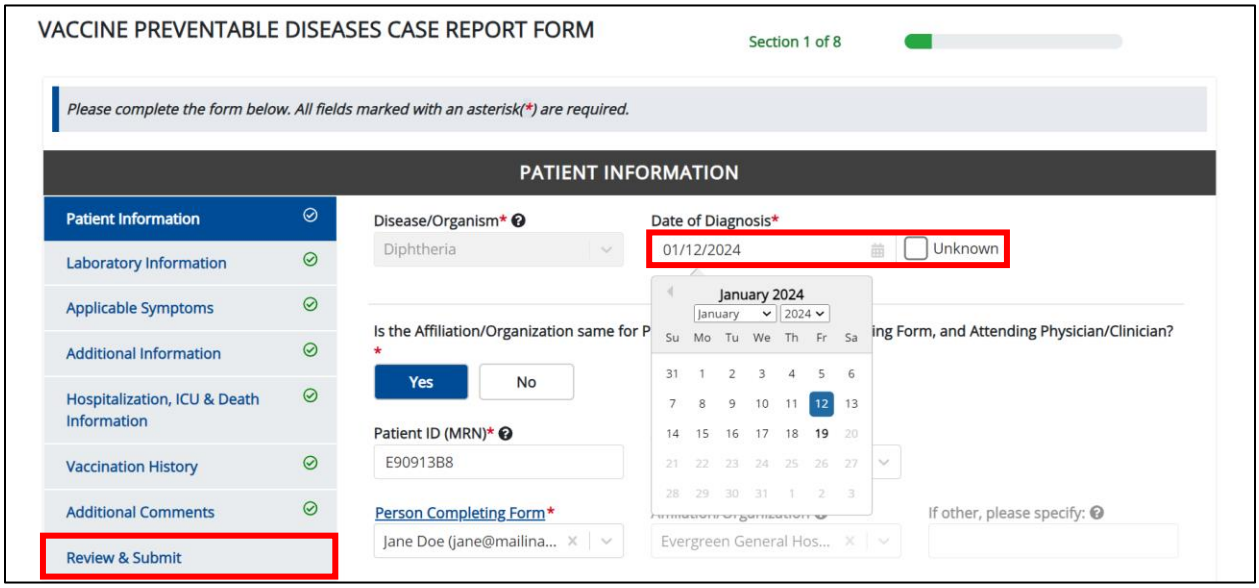
Click Hyperlinks to Edit

10. If after reviewing, changes are required, click the corresponding **section header hyperlink** or the **side navigation bar tab** to navigate to the appropriate screen or section to edit the information.

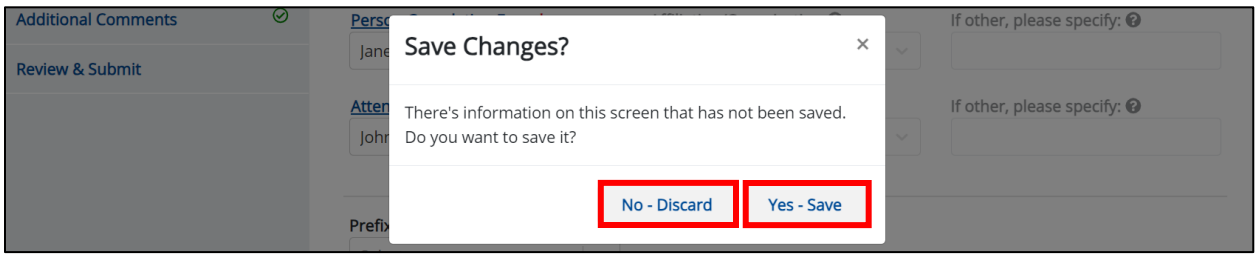
- Click the **section header hyperlink** or the **side navigation bar tab** to navigate to the intended page. For example, to navigate to the **Patient Information** screen, click the **Patient Information hyperlink** in the section header or the side navigation bar.



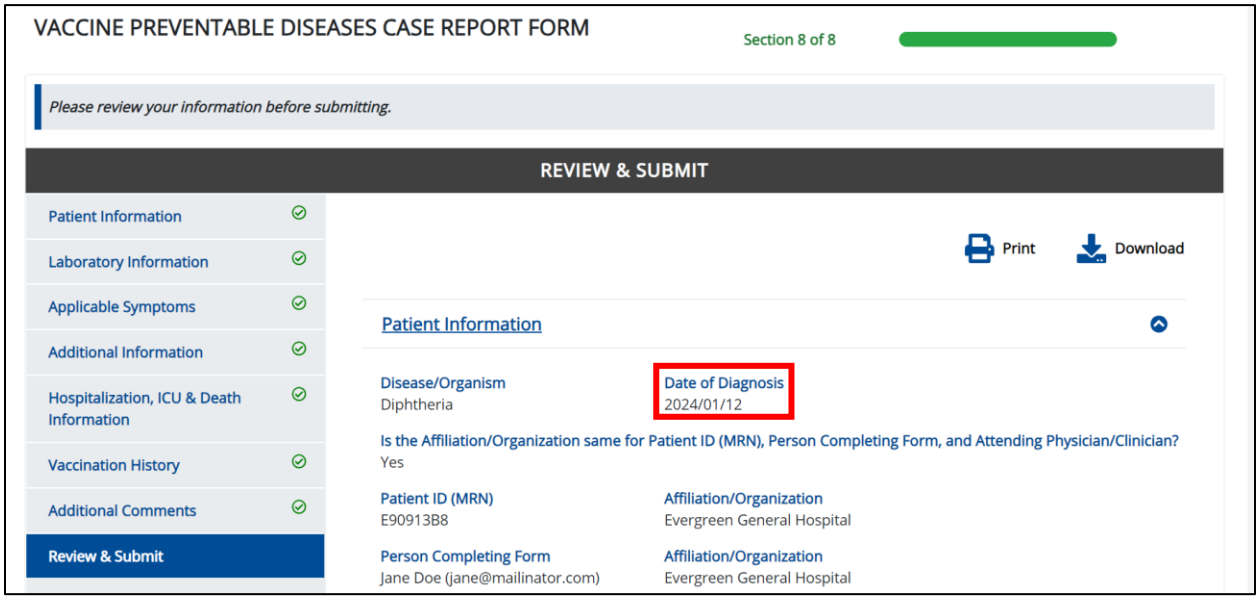
11. Once the appropriate edits have been made, click the **Review and Submit** tab on the side navigation bar to navigate back to the **Review and Submit** screen.



12. The *Save Changes* pop-up displays. To save the edits and navigate back to the **Review and Submit** screen, click ***Yes – Save***. To discard the edits, click ***No – Discard***.

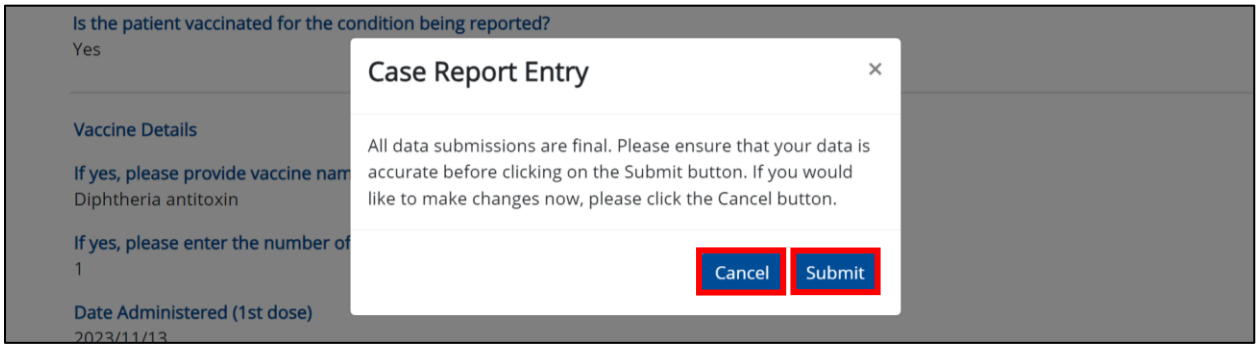


13. Review your edits on the **Review and Submit** screen.



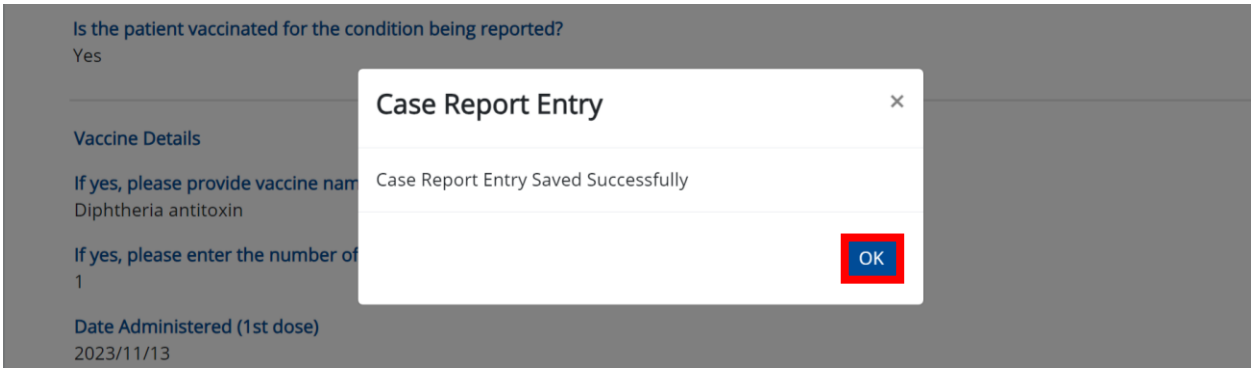
14. After verifying the information is accurate and/or the appropriate changes have been made, you must click **Submit** to submit the Vaccine Preventable Diseases Case Report Entry.

- All case report submissions are final. You have one more opportunity to select **Cancel** to continue reviewing the Case Report or click **Submit** to submit the report.



Please Note: Once a case report has been submitted, it is final. Should you later discover that you have entered inaccurate information, please use the **Support Tab** in the ePartnerViewer to report this information.

15. Click **OK** to acknowledge the case report has been submitted successfully.



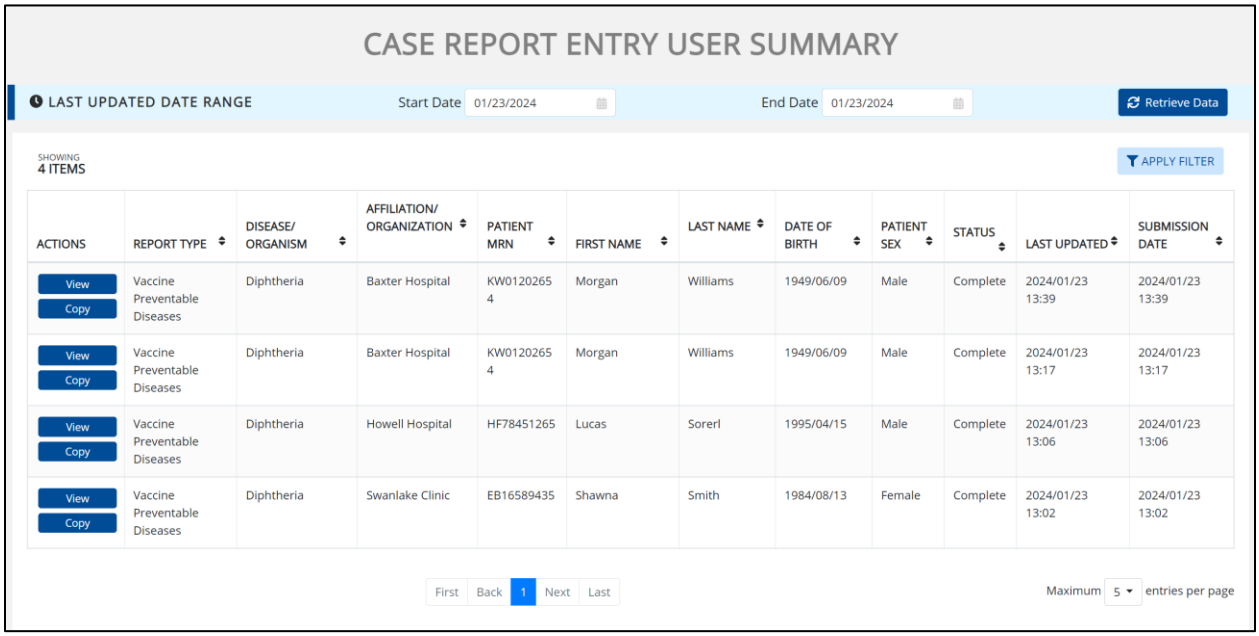
Please Note: Clicking **OK** when the case report entry has been submitted successfully will automatically navigate you to the **Case Report Entry User Summary** screen.

Congratulations! You have submitted the Vaccine Preventable Diseases Case Report using KHIE's Direct Data Entry Functionality.

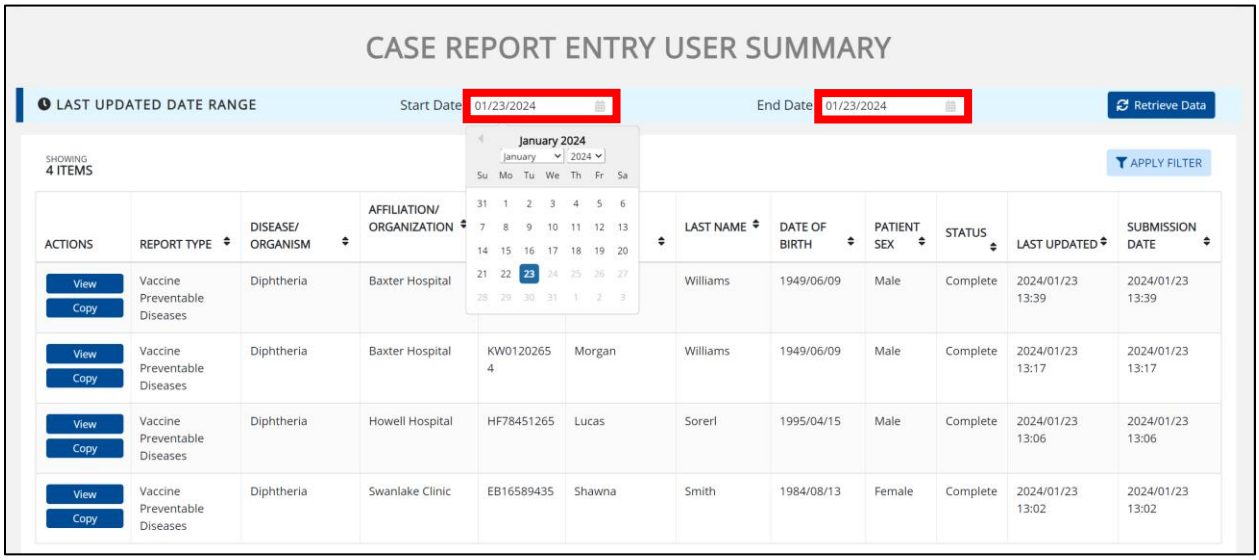
Please visit the KHIE website at **https://khie.ky.gov/Public-Health/Pages/Electronic-Case-Reporting-.aspx** to access additional training resources and find information on reporting requirements from the Kentucky Department for Public Health.

17 Case Report User Entry Summary

The **Case Report Entry User Summary** screen displays all submitted and in-progress case reports you have entered. By default, the **Case Report Entry User Summary** screen displays the case reports from the last updated date. Use the Date Range buttons to do a custom search for previous case reports entered within the last 6 months.



1. To retrieve case reports for a specific date range within the last 6 months, enter the appropriate **Start Date** and **End Date**.
2. Click **Retrieve Data** to generate the case reports.

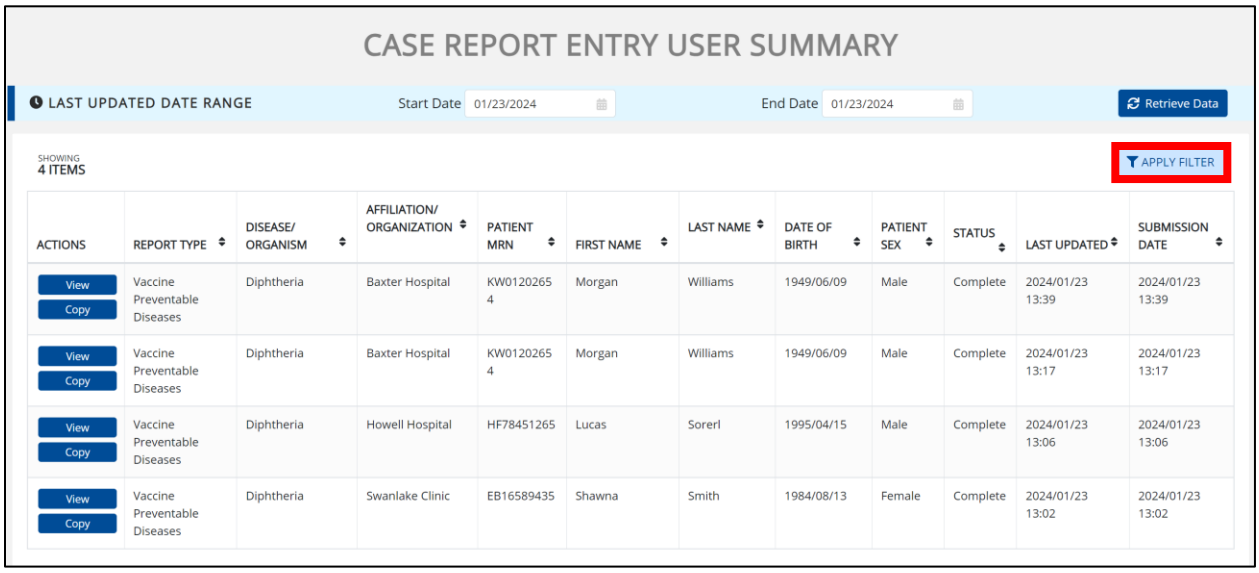


Please Note: The **Start Date** must be within the last six months from the current date. The following error message displays when Users search for a Start Date that occurred more than six months ago: *Please select a Start Date that is within the last six months from today's date.*

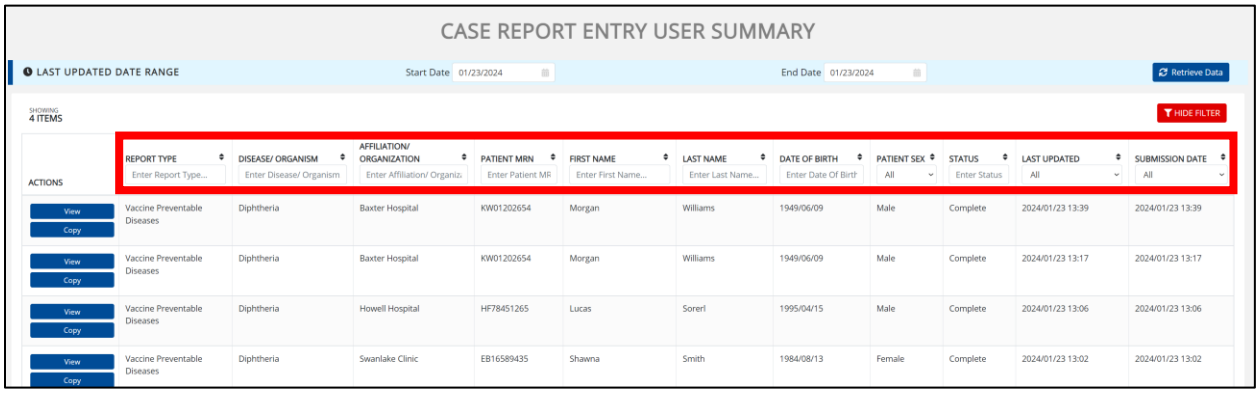
To proceed, you must enter a **Start Date** that occurred within the last six months.

3. Click **Retrieve Data** to display the search results.

4. To search for a specific case report, click **Apply Filter**.

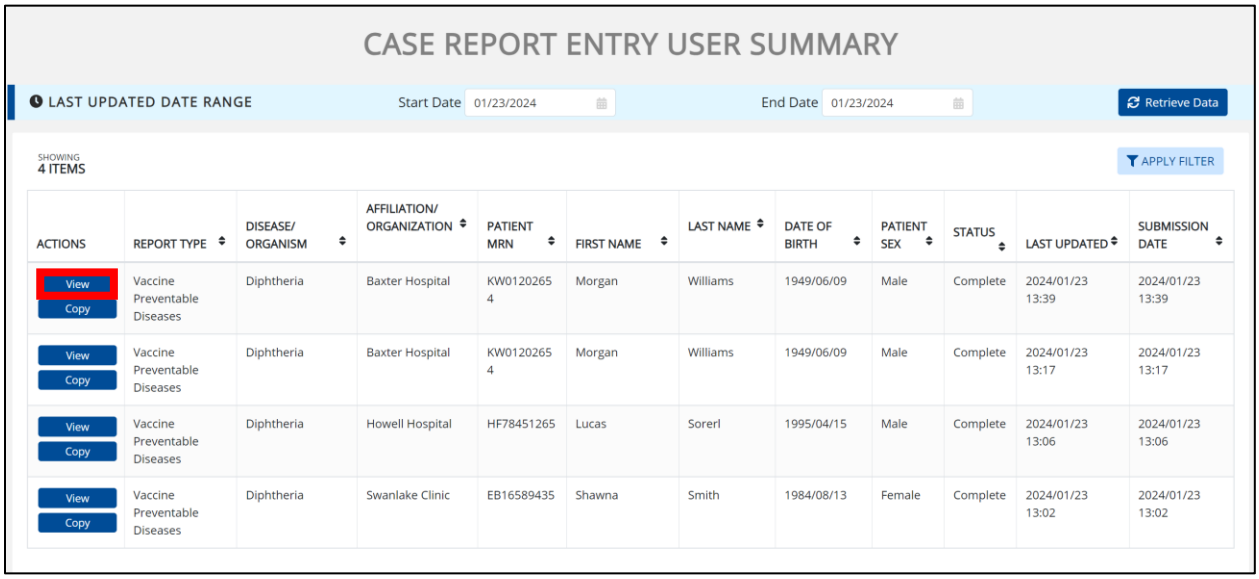


5. The Filter fields displays. Search by entering the ***Report Type, Disease/Organism, Affiliation/Organization***, ***Patient MRN***, ***First Name***, ***Last Name***, ***Date of Birth, Patient Sex, Status, Last Updated Date***, and/or ***Submission Date*** in the corresponding Filter fields.

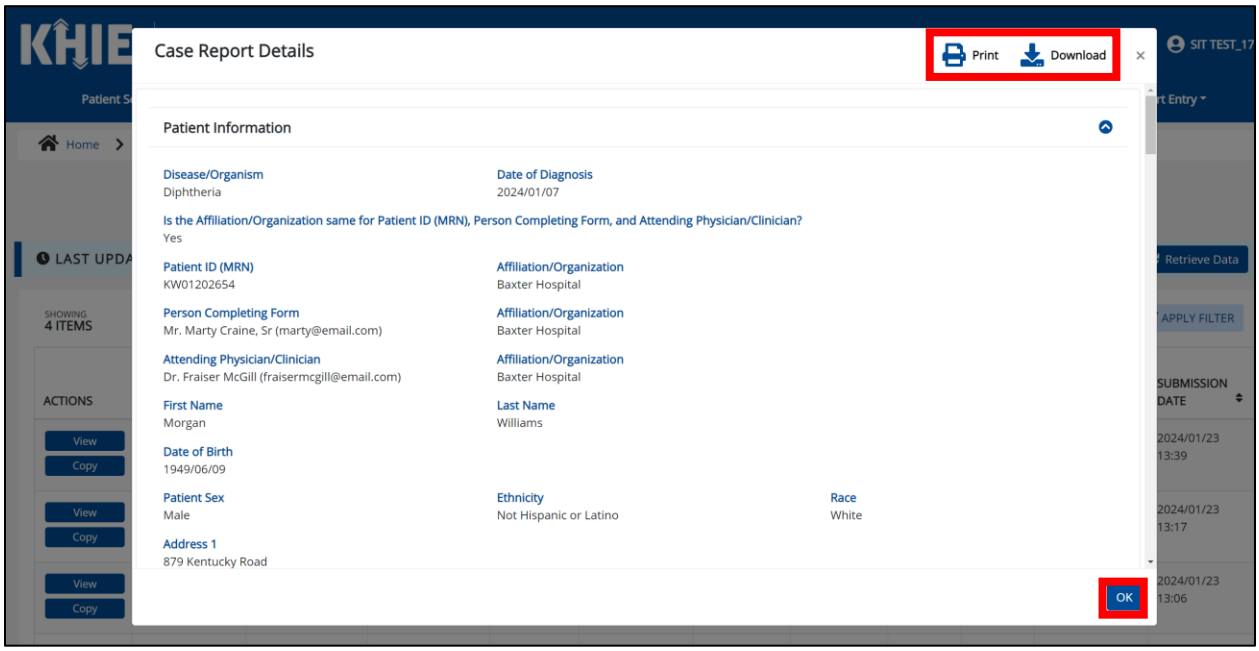


Review Previously Submitted Case Reports

1. To review a summary of a complete case report that has been previously submitted, click **View** located next to the appropriate case report.



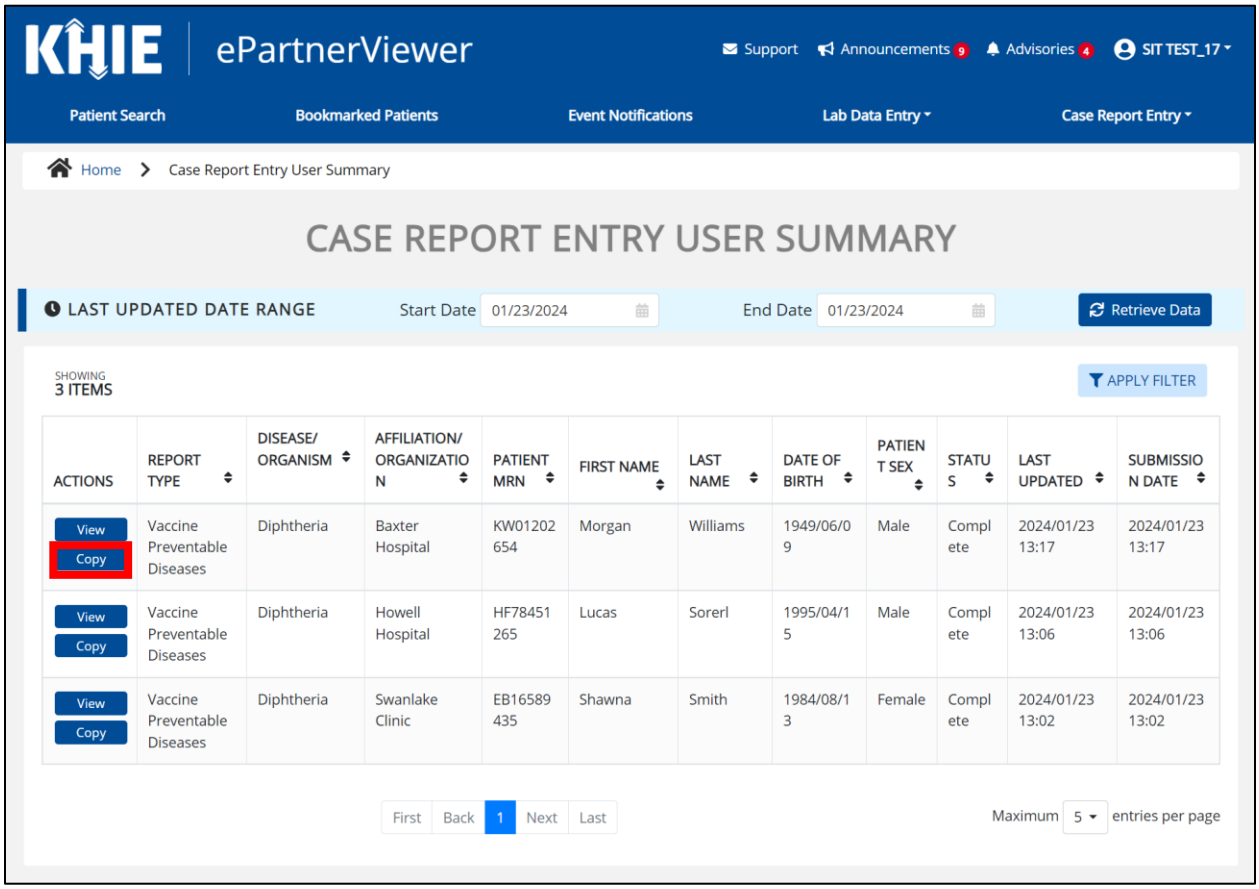
2. The Case Report Details pop-up displays a summary of the previously submitted case report.
   - Click **Print** to print the case report.
   - Click **Download** to download a PDF version of the case report.
3. Click **OK** to close out of the pop-up.



Copy Previously Submitted Case Reports

The **Copy** feature allows Users to copy the information from a completed case report, make edits, and then submit as a new case report for the same patient. That means you can copy the information from a previously submitted case report into a new case report and update the information, as appropriate, and then submit as a new case report for the patient.

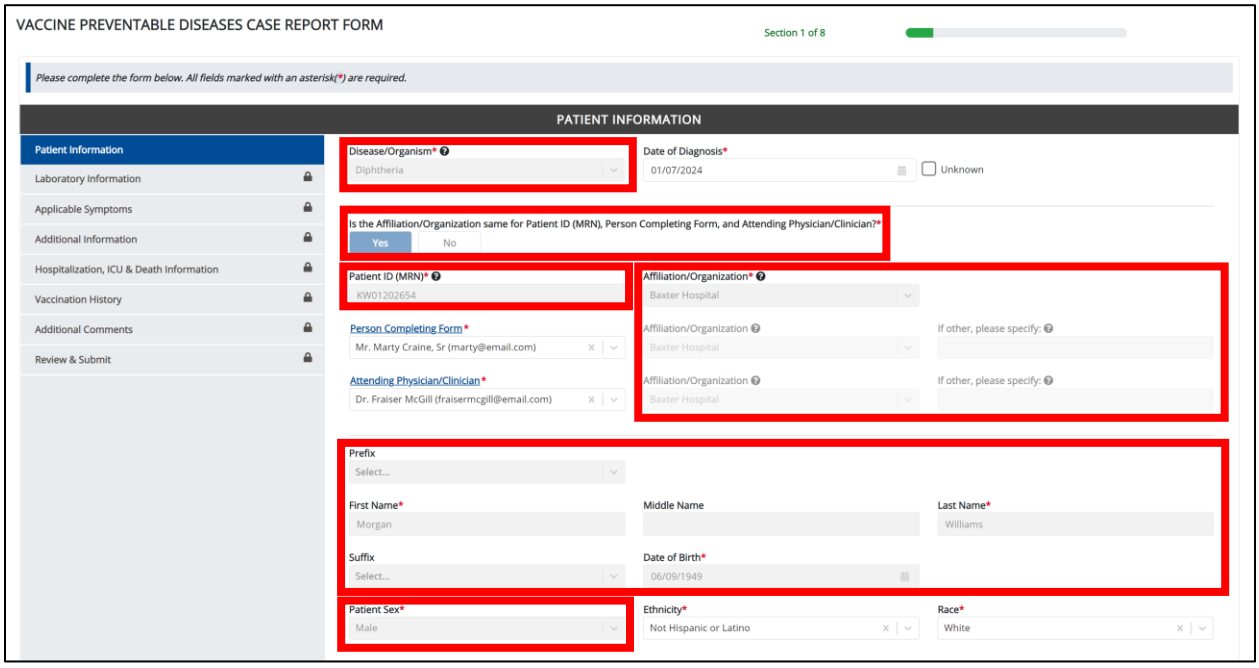
1. To copy the information from a completed case report that has been previously submitted, click **Copy** located next to the appropriate case report.



Please Note: Clicking **Copy** will automatically navigate you to the **Patient Information** screen of the Vaccine Preventable Diseases Case Report.

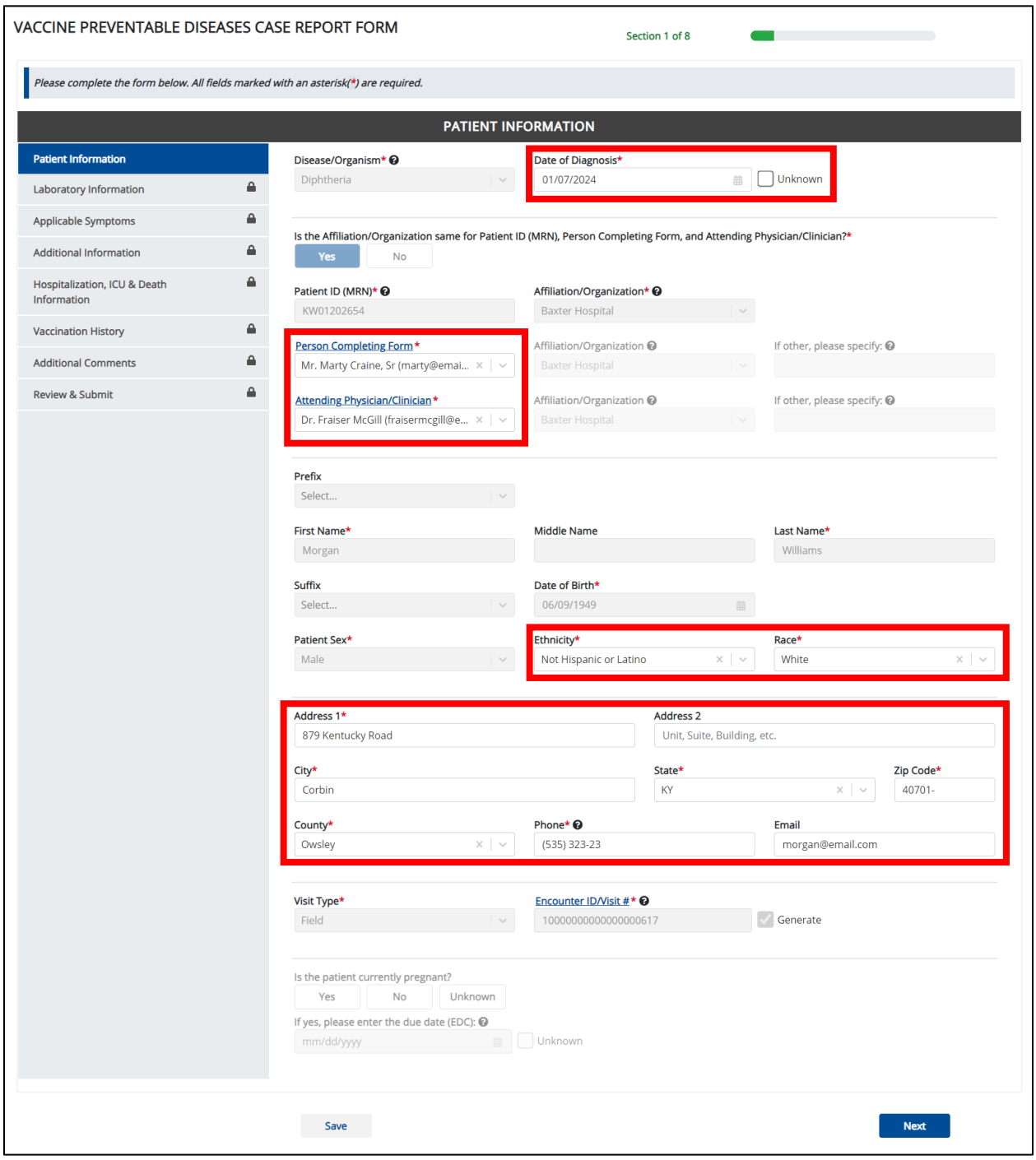
By default, the **Patient Information** screen displays the information entered on the previously submitted Vaccine Preventable Diseases case report. Users can change the information entered in any of the enabled fields and submit a new Vaccine Preventable Diseases case report for the patient. However, Users **cannot** change the disease/organism, affiliation/organization, and patient demographic fields, all of which are grayed out and disabled:

- *Disease/Organism*
- *Patient ID (MRN)*
- *Affiliation/Organization*
- *Prefix*
- *Suffix*
- *First Name*
- *Middle Name*
- *Last Name*
- *Date of Birth*
- *Patient Sex*



Please Note: The Disease/Organism, Affiliation/Organism, and the patient demographic fields are the only disabled fields. All other fields on the **Patient Information** screen and all subsequent screens are enabled. You can edit any of the enabled fields on any or all the screens.

2. To submit a new case report with updated information, **edit the appropriate information** in the enabled fields, as applicable.

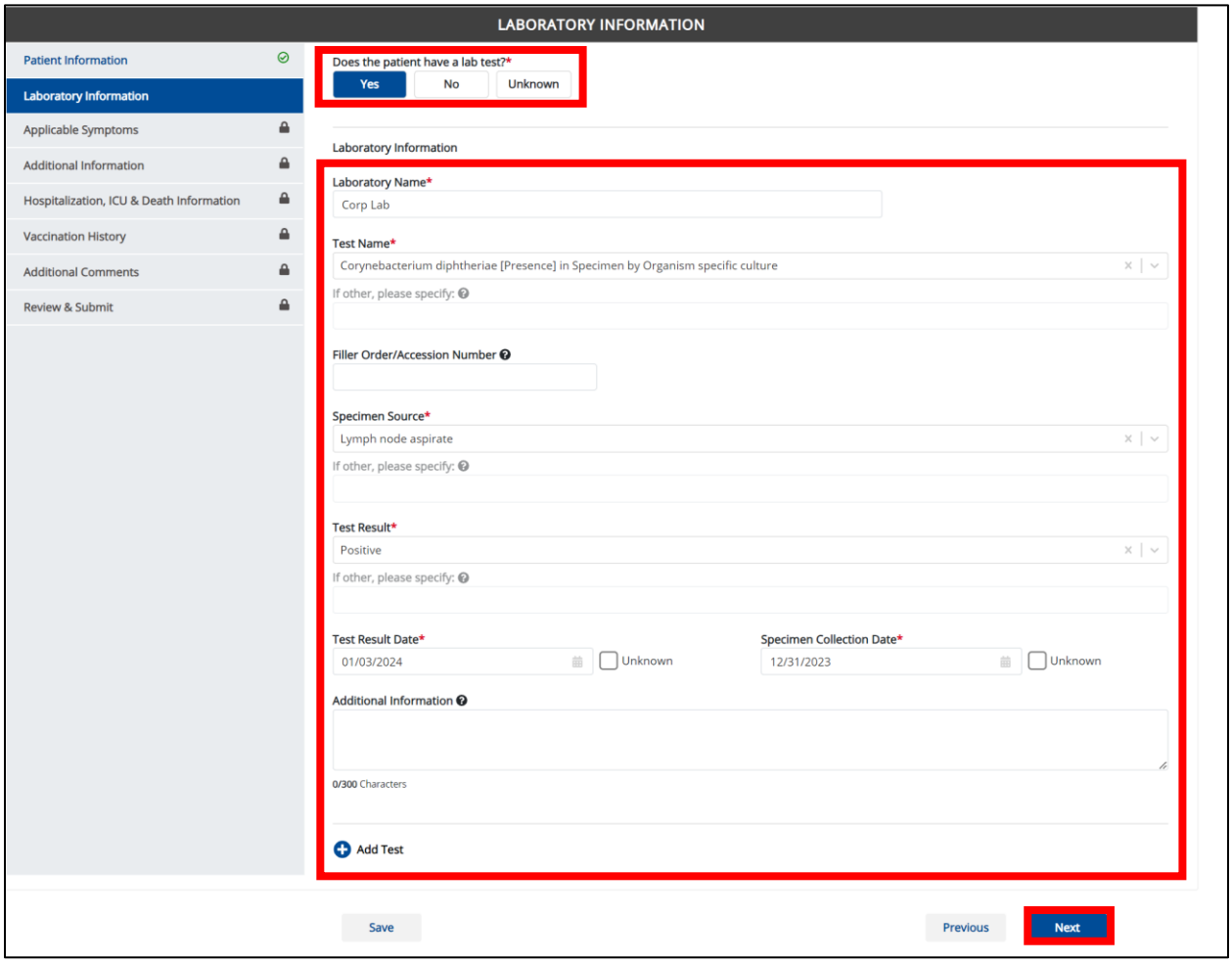


Please Note: The *Is the patient currently pregnant?* field is enabled only when the *Patient Sex* field is marked as ***Female***.

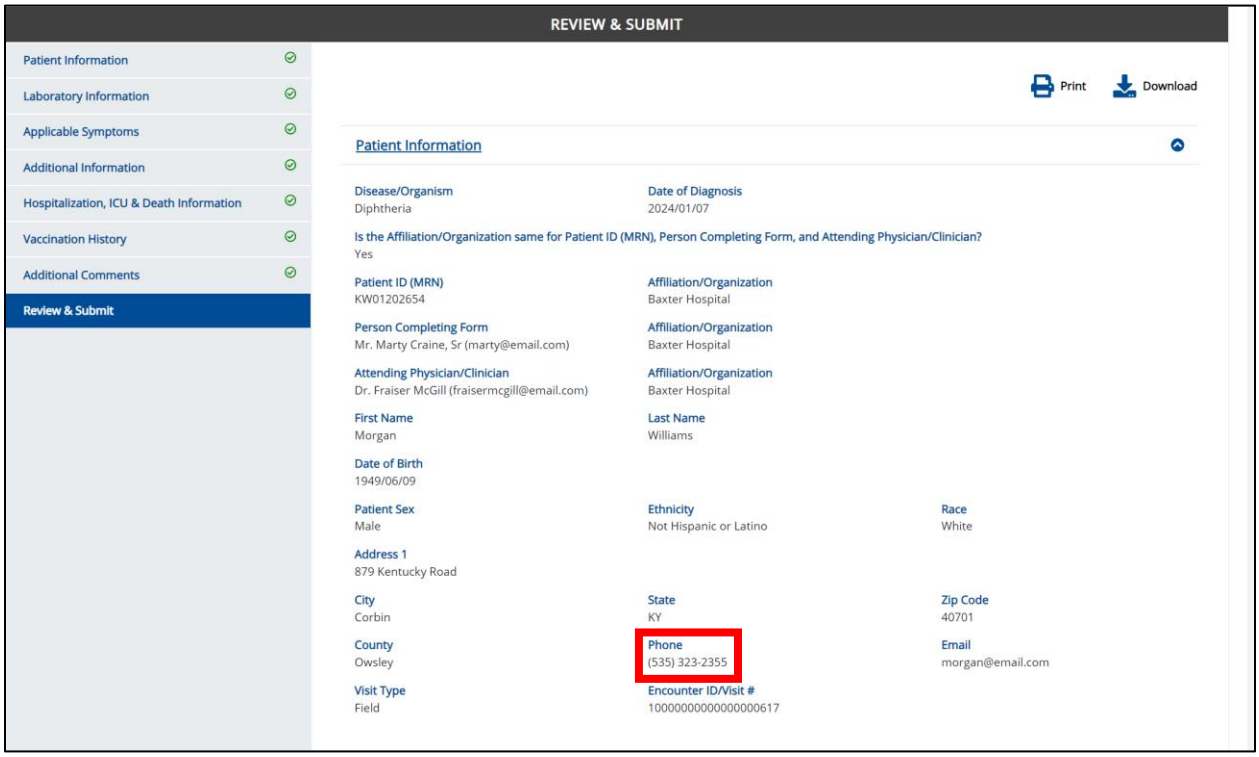
3. Once the appropriate edits have been made, click **Next** to proceed to the **Laboratory Information** screen.

4. On each subsequent screen, **edit the appropriate information** in the enabled fields, as applicable.

5. Once the appropriate edits have been made on the subsequent screens, click **Next** until you navigate back to the **Review and Submit** screen.



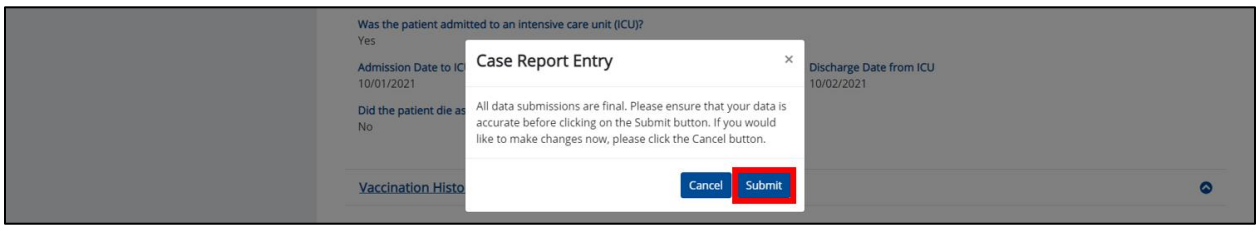
6. Review your edits on the **Review and Submit** screen.



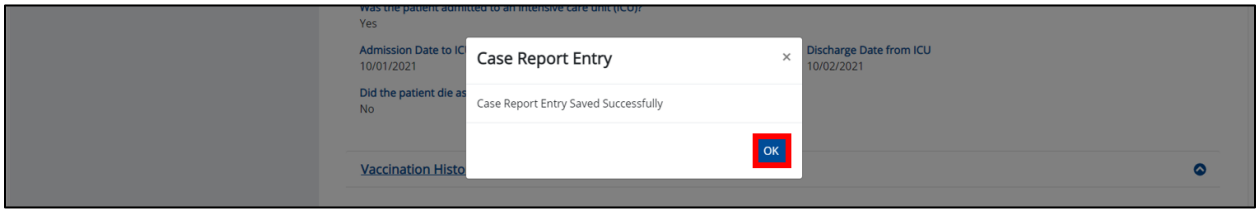
7. After verifying the information is accurate and/or the appropriate changes have been made, you must click **Submit** to submit the Vaccine Preventable Diseases Case Report Entry.

Please Note: The new case report is not a continuation of the previously submitted case report for the patient.

8. All case report submissions are final. You have one more opportunity to select **Cancel** to continue reviewing the Case Report or click **Submit** to submit the report.

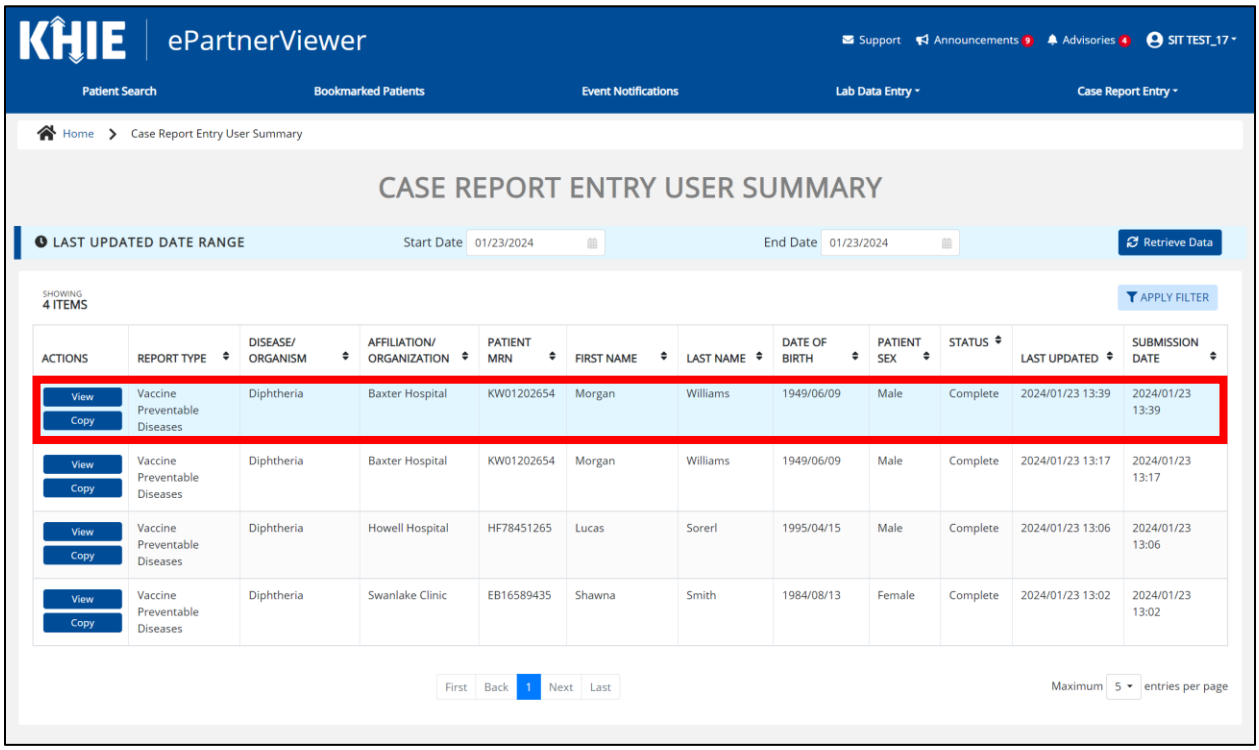


9. Click **OK** to acknowledge the case report has been submitted successfully.



Please Note: Clicking **OK** when the case report entry has been submitted successfully will automatically navigate you to the **Case Report Entry User Summary** screen.

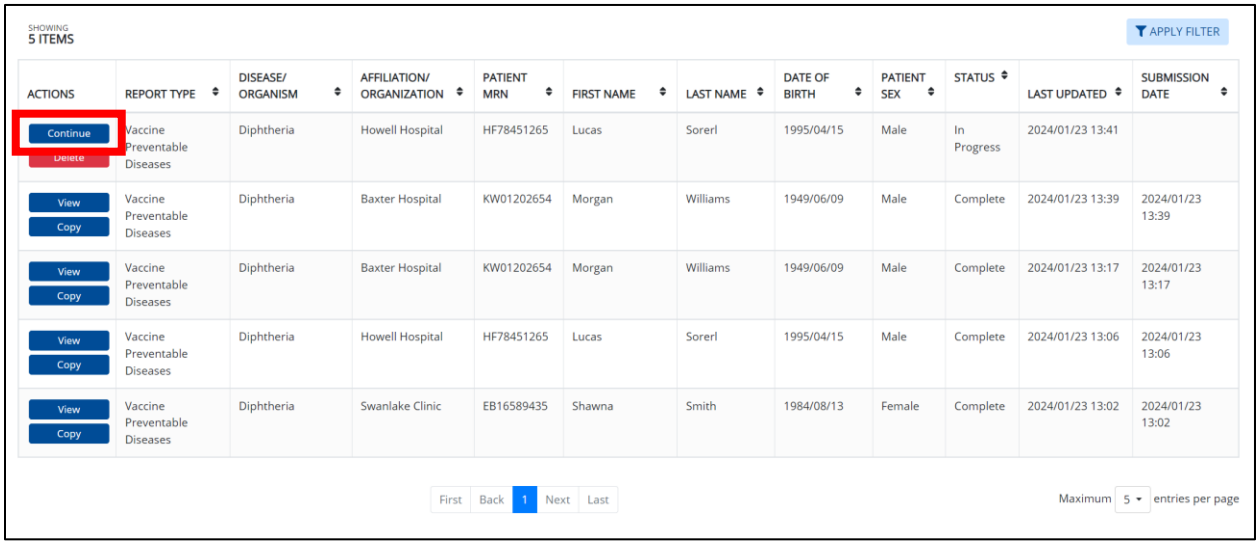
10. On the **Case Report Entry User Summary** screen, review the new case report submission.



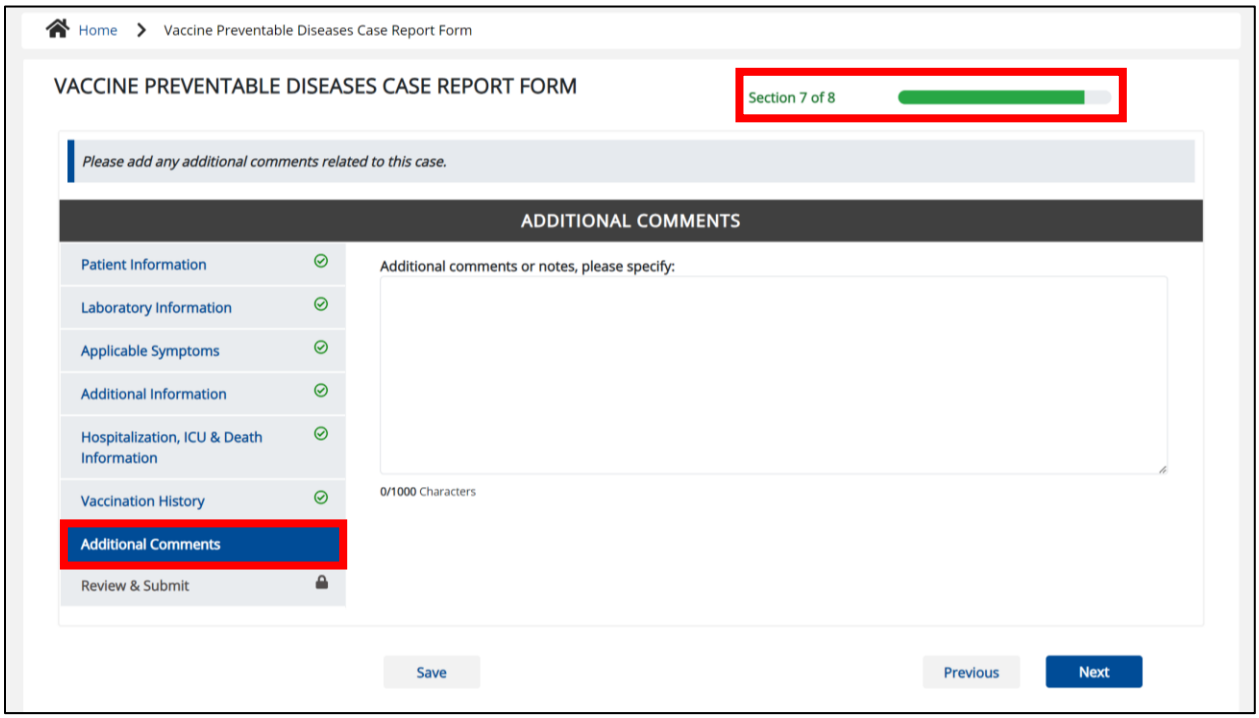
Continue In-Progress Case Reports

The **Save** feature allows Users to complete the case report in multiple sessions. That means you can start a case entry, save it, and then return later to complete it. You must save the information you have entered in order to return later to the section where you left off.

1. To continue working on a case report that is currently in-progress, click **Continue** located next to the appropriate case report.



2. Clicking **Continue** automatically navigates to the section of the case report where you left off.



18 Technical Support

Toll-Free Telephone Support

For questions and assistance regarding the ePartnerViewer, please call 1 (800) 633-6283.

Email Support

To submit questions or request support regarding the ePartnerViewer, please email KHIESupport@ky.gov.

Please Note: To seek assistance or log issues, you can use the **Support Tab** located in the blue navigation bar at the top of the screen in the ePartnerViewer.