



Kentucky Health Information Exchange (KHIE)

Direct Data Entry for Vectorborne Diseases Case Reports (Colorado Tick Fever)

User Guide

April 2024

Copyright Notice

© 2024 Deloitte. All rights reserved.

Trademarks

"Deloitte," the Deloitte logo, and certain product names that appear in this document (collectively, the "Deloitte Marks"), are trademarks or registered trademarks of entities within the Deloitte Network. The "Deloitte Network" refers to Deloitte Touche Tohmatsu Limited (DTTL), the member firms of DTTL, and their related entities. Except as expressly authorized in writing by the relevant trademark owner, you shall not use any Deloitte Marks either alone or in combination with other words or design elements, including, in any press release, advertisement, or other promotional or marketing material or media, whether in written, oral, electronic, visual, or any other form. Other product names mentioned in this document may be trademarks or registered trademarks of other parties. References to other parties' trademarks in this document are for identification purposes only and do not indicate that such parties have approved this document or any of its contents. This document does not grant you any right to use the trademarks of other parties.

Illustrations

Illustrations contained herein are intended for example purposes only. The patients and providers depicted in these examples are fictitious. Any similarity to actual patients or providers is purely coincidental. Screenshots contained in this document may differ from the current version of the HealthInteractive asset.

Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

Document Control Information

Document Information

Document Name	Direct Data Entry for Vectorborne Diseases Case Report Forms (Colorado Tick Fever) User Guide
Project Name	KHIE
Client	Kentucky Cabinet for Health and Family Services
Document Author	Deloitte Consulting
Document Version	1.0
Document Status	Final Draft
Date Released	04/02/2024

Document Edit History

Version	Date	Additions/Modifications	Prepared/Revised by
0.1	03/25/2024	Initial Draft	Deloitte Consulting
1.0	04/02/2024	Final Draft per KHIE Review	KHIE/Deloitte Consulting

Table of Contents

- 1 Introduction5**
 - Overview 5
 - Supported Web Browsers 5
 - Mobile Device Considerations 6
 - Accessing the ePartnerViewer 6
- 2 Logging into ePartnerViewer.....7**
 - Multi-Factor Authentication 8
 - Security Code from Okta Verify App 9
 - Push Notification from Okta Verify App 10
 - Terms and Conditions of Use and Logging In..... 13
- 3 Understanding the Case Report Entry Dropdown Menu 14**
- 4 Manage User Preferences..... 19**
 - Create Attending Physician/Clinician Details 19
 - View & Edit Attending Physician/Clinician Details 22
 - Delete Attending Physician/Clinician Details 24
 - Filter Attending Physician/Clinician Details..... 26
 - Create Person Completing Form Details 27
 - View & Edit Person Completing Form Details 31
 - Delete Person Completing the Form Details 32
 - Filter Person Creating Form Details 34
- 5 Basic Features in the Case Report Entry Form35**
 - Side Navigation Bar & Pagination 35
 - Save Feature 36
 - Case Report Entry Icons..... 37
 - Conditional Questions 37
- 6 Affiliation/Organization Conditional Question 40**
 - Affiliation/Organization Conditional Answer: Yes 41
 - Affiliation/Organization Conditional Answer: No 42
 - Affiliation/Organization Validation 44
 - Change Affiliation/Organization Conditional Answer: Yes to No 47
- 7 Tips for Manually Entering Case Report Data49**
- 8 Vectorborne Diseases Case Report Form 51**
- 9 Patient Information52**
 - Person Completing Form Hyperlink..... 58
 - Attending Physician/Clinician Hyperlink..... 61
- 10 Laboratory Information.....69**
 - Adding Multiple Tests 73

- 11 Applicable Symptoms.....75**
- 12 Additional Information79**
- 13 Hospitalization, ICU, & Death Information84**
- 14 Vaccination History88**
- 15 Additional Comments89**
- 16 Review and Submit.....90**
 - Print or Download Functionality.....90
 - Click Hyperlinks to Edit96
- 17 Case Report User Entry Summary.....99**
 - Review Previously Submitted Case Reports.....101
 - Copy Previously Submitted Case Reports102
 - Continue In-Progress Case Reports108
- 18 Technical Support..... 109**
 - Toll-Free Telephone Support109
 - Email Support.....109

1 Introduction

Overview

This training manual covers KHIE’s Direct Data Entry for Vectorborne 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 Department for Public Health (DPH). 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 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:

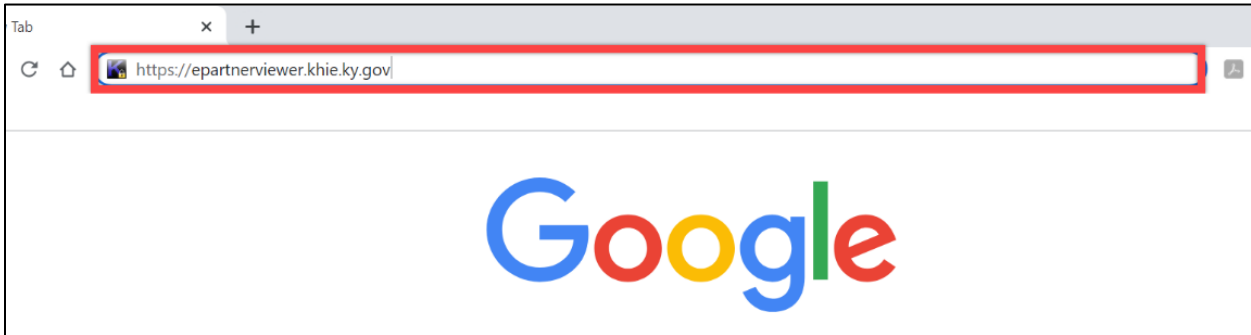
1. Users must be part of an organization with a signed Participation Agreement with KHIE.
2. Users are required to have a Kentucky Online Gateway (KOG) account.
3. Users are required to complete Multi-Factor Authentication (MFA).

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

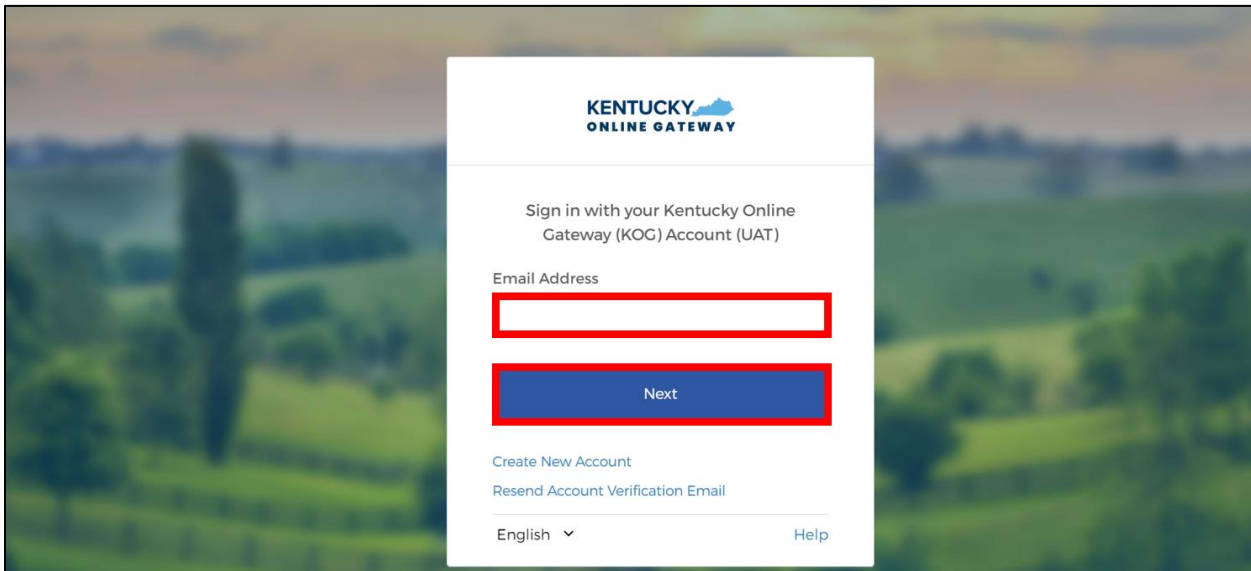
Users with the *Manual Case Reporter* role are authorized to access the Vectorborne Diseases Case Report in the ePartnerViewer. You must log into your Kentucky Online Gateway (KOG) account to access the ePartnerViewer.

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



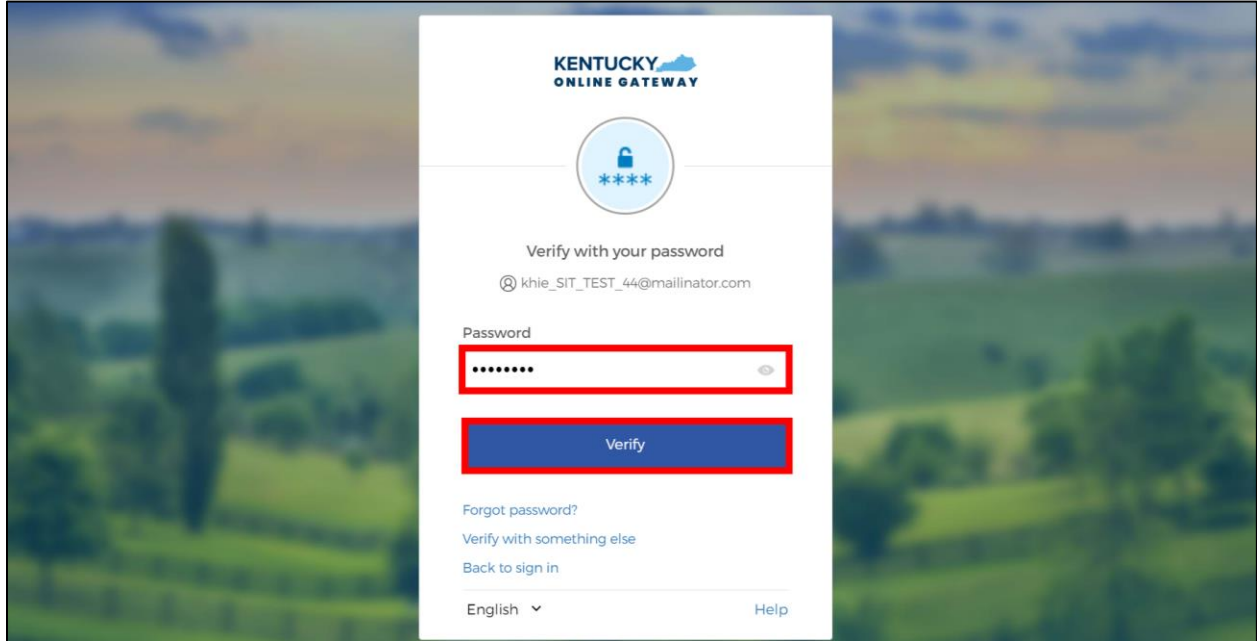
Please Note: The ePartnerViewer does **not** support Microsoft Internet Explorer. To access the ePartnerViewer, Users must use a modern browser such as Google Chrome, Microsoft Edge, Apple Safari, or Mozilla Firefox.

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



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

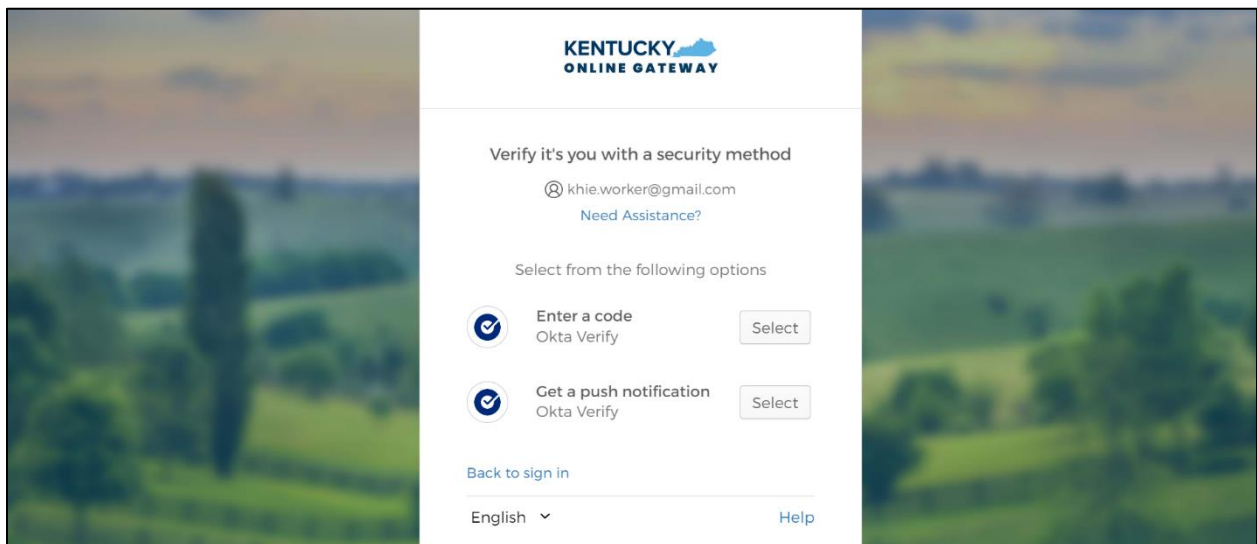
3. Enter your **Password**. Click **Verify**.



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:

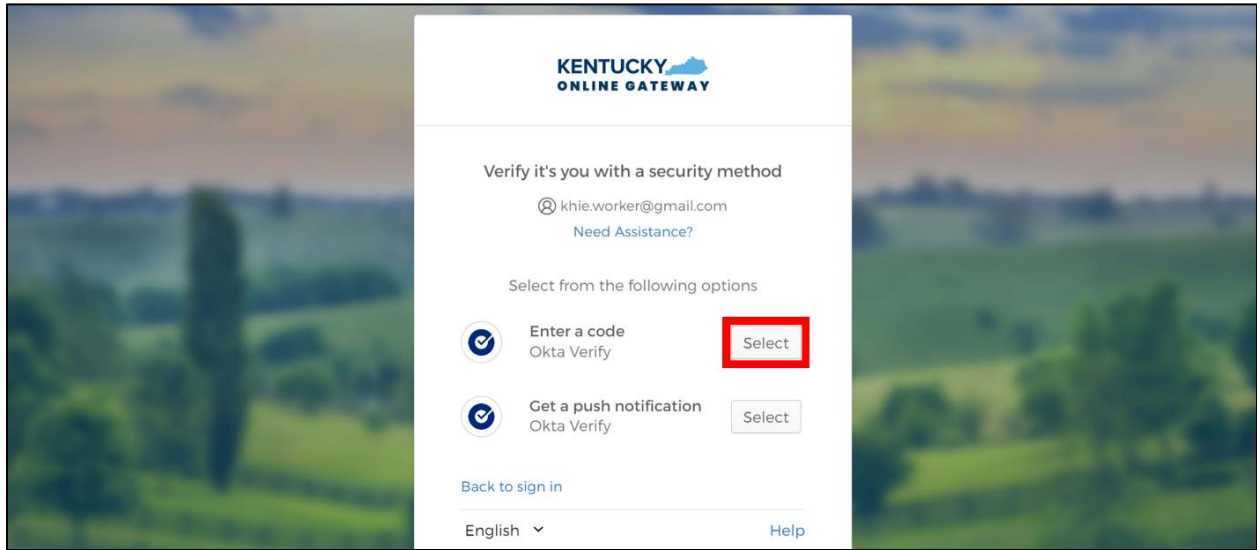
- Use a security code from the Okta Verify app.
- Use the push notification from the Okta Verify app.



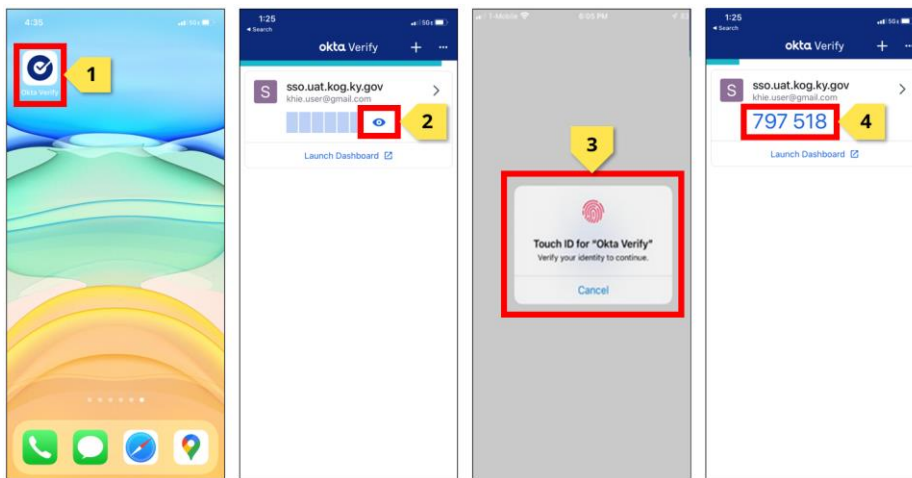
Security Code from Okta Verify App

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

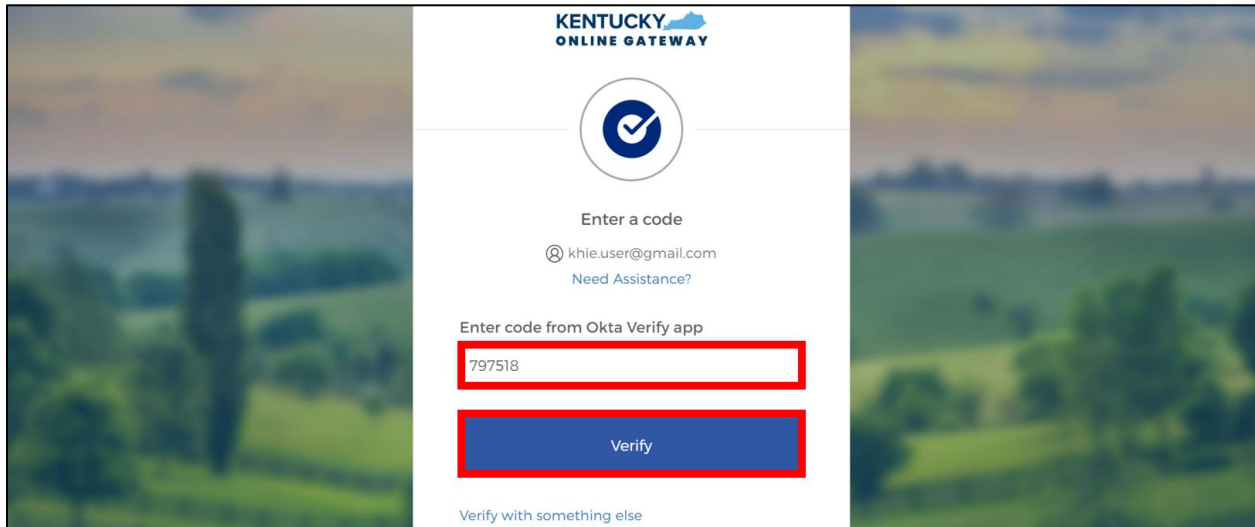
1. After logging into KOG, you are navigated to the **Verify it's you with a security method** screen. Click the **Select** button next to **Enter a code**.



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.



- 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.

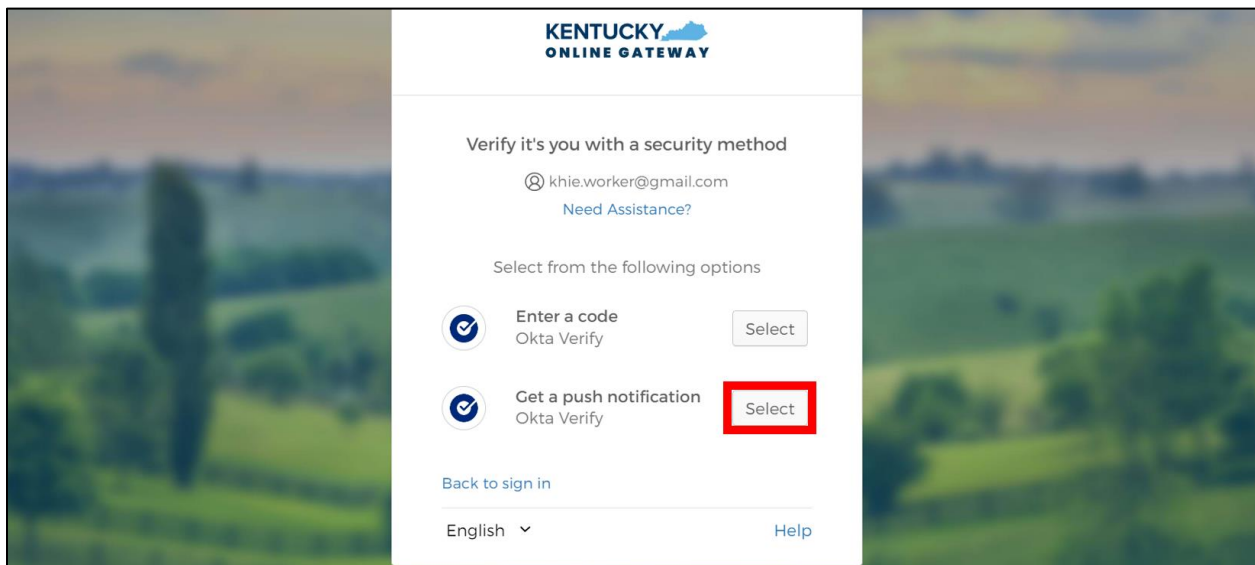


Please Note: Once you enter the code from the Okta Verify app, you are automatically navigated to the **Terms and Conditions of Use** screen. For more information, please review the *Terms and Conditions of Use and Logging In* sub-section of this chapter.

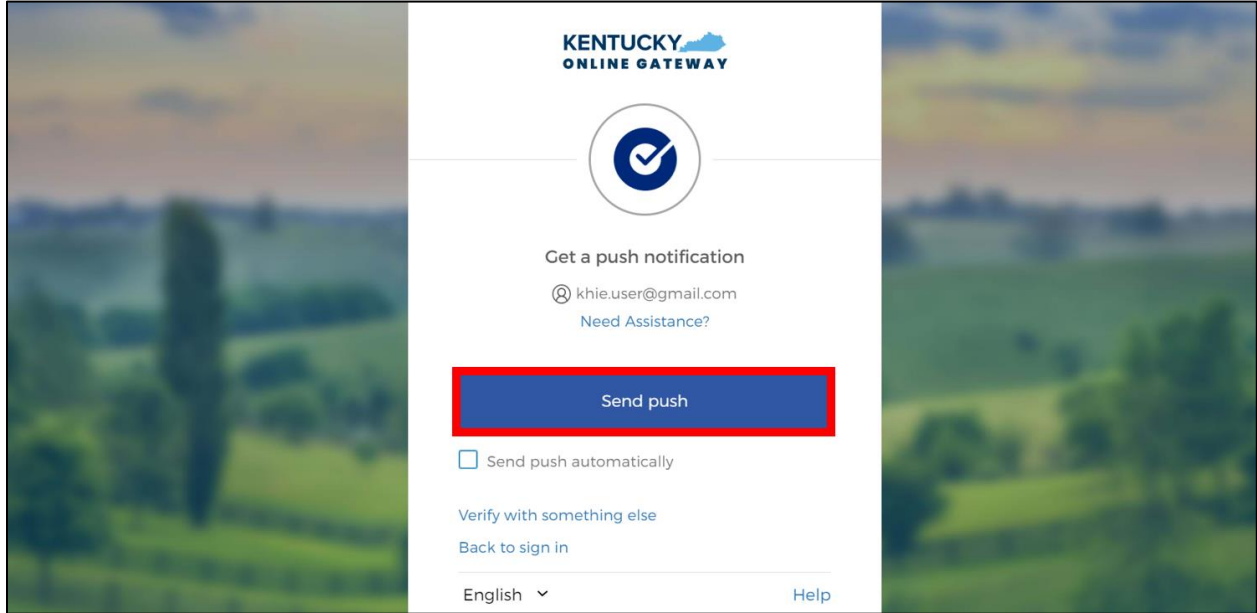
Push Notification from Okta Verify App

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

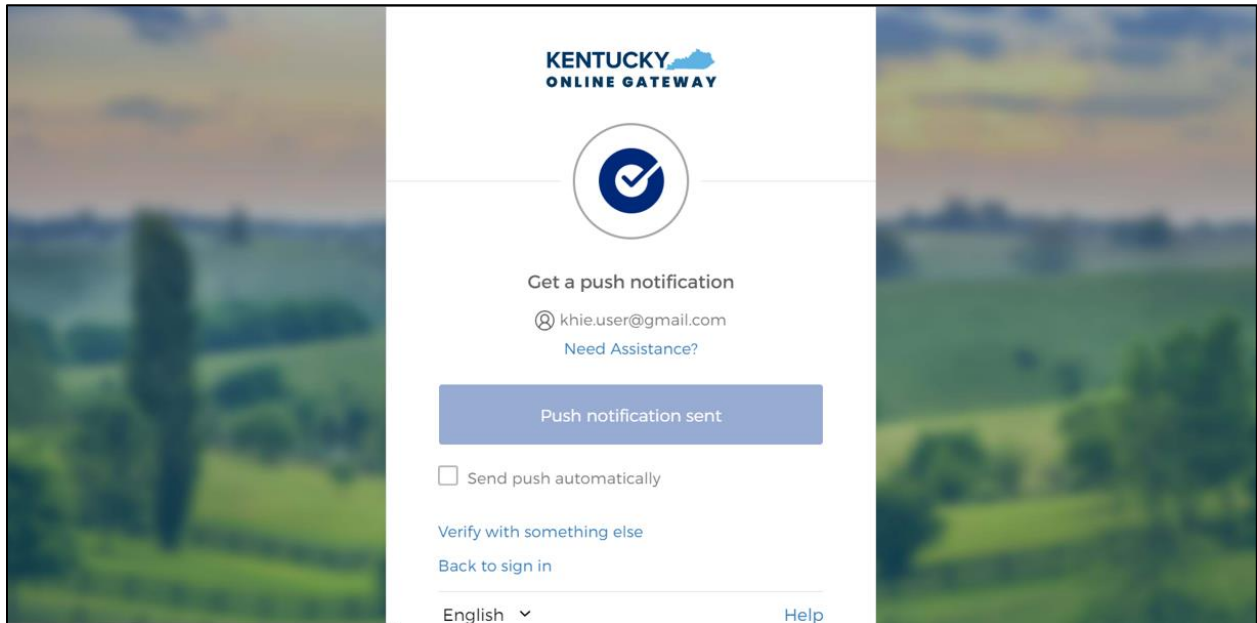
- After logging into KOG, you are navigated to the **Verify it's you with a security method** screen. Click the **Select** button next to **Get a push notification**.



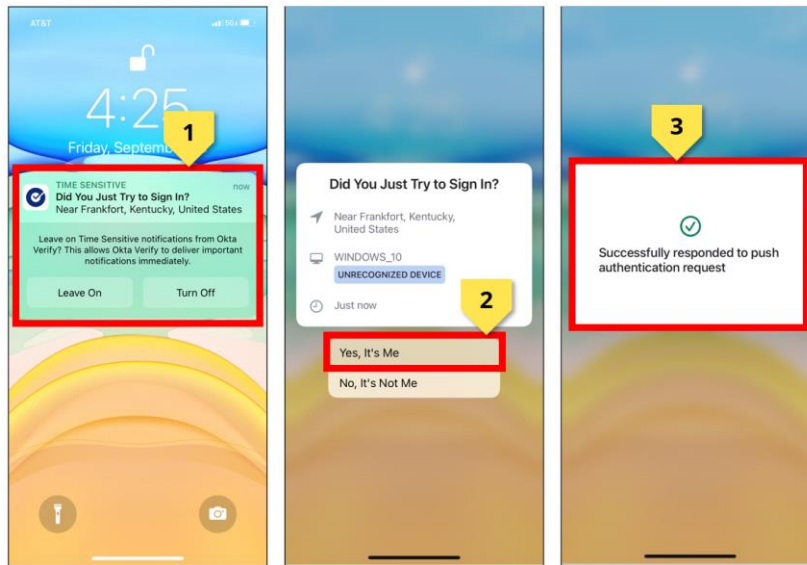
2. The **Get a push notification** screen displays. Click **Send Push**.



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.

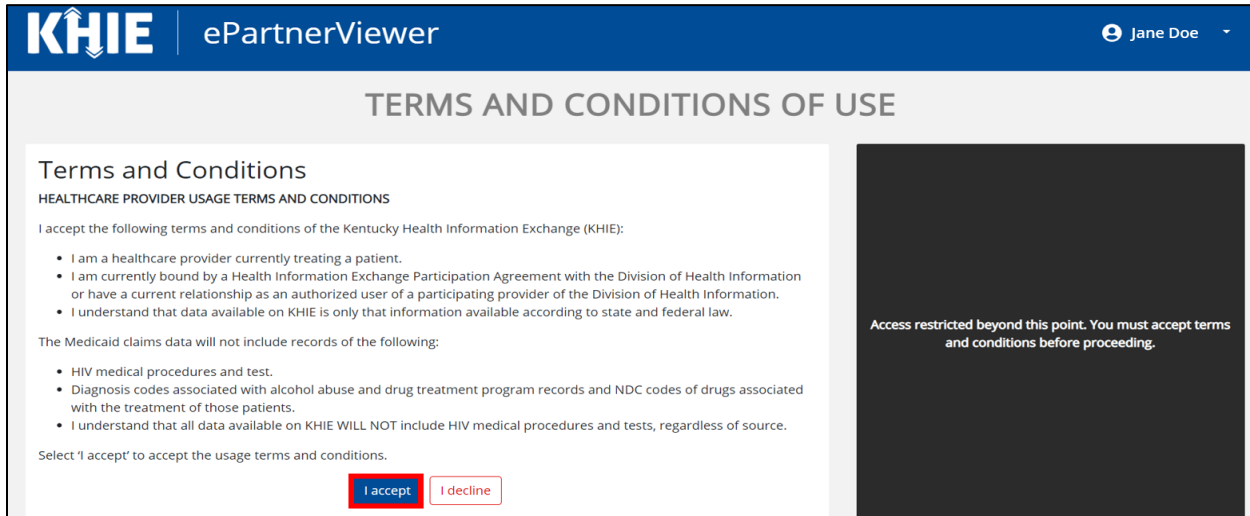


Please Note: Once you successfully respond to the Okta Verify push notification, you are automatically navigated to the **Terms and Conditions of Use** screen of the ePartnerViewer.

Terms and Conditions of Use and Logging In

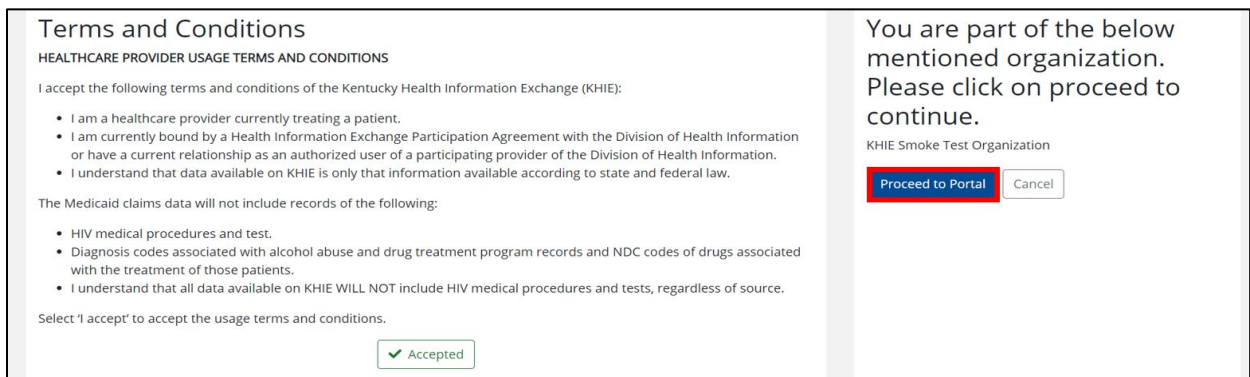
After logging into the Kentucky Online Gateway, launching the ePartnerViewer application, and completing Multi-Factor Authentication, the **Terms and Conditions of Use** page displays. Privacy and security obligations are outlined for review.

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.

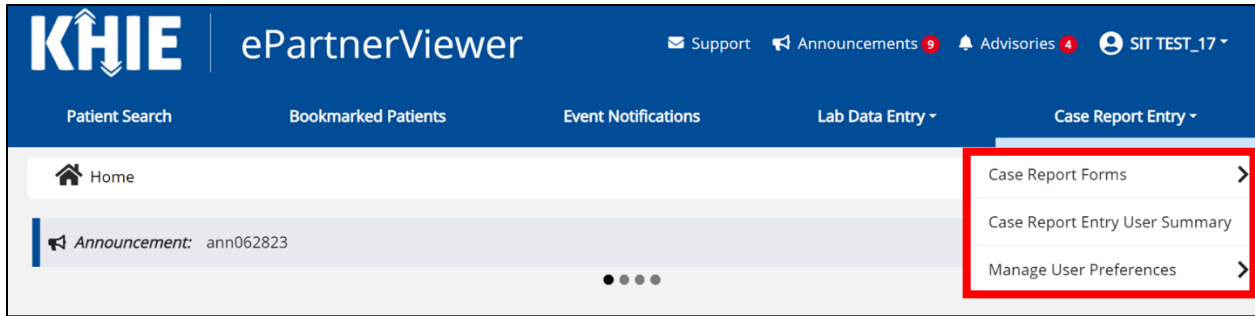


Please Note: If you click **Cancel**, a pop-up notification displays that indicates that you are *about to be logged out. Use of the ePartnerViewer portal is subject to the acceptance of KHIE's Terms of Use.* To proceed to the ePartnerViewer, click either **Logout Now** or **Cancel**.

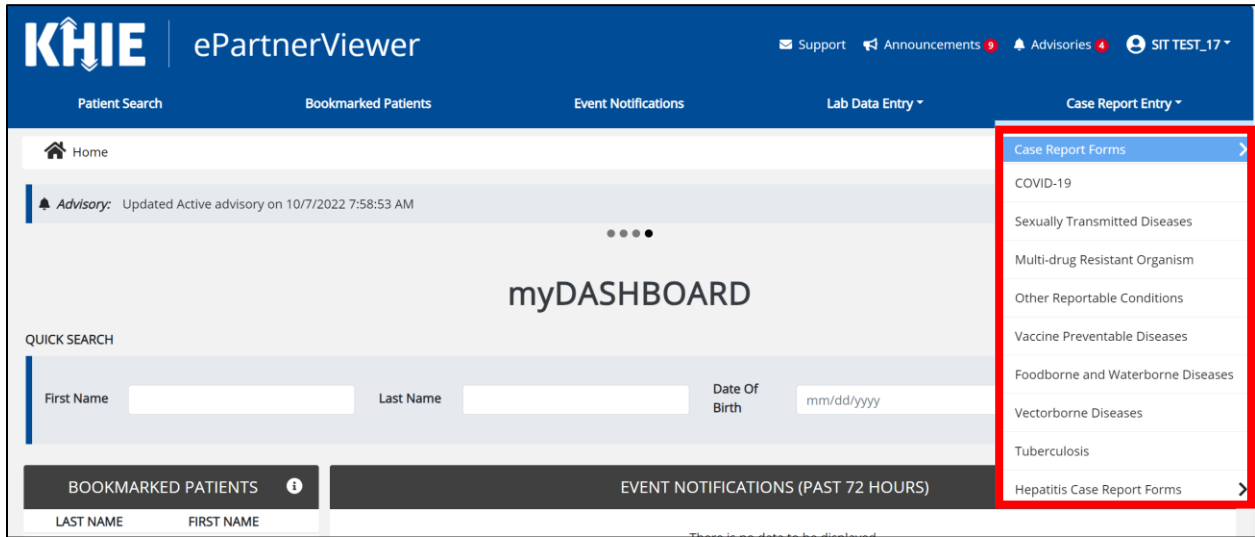
3 Understanding the Case Report Entry Dropdown Menu

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.

Please Note: For specific information about Vaccine Preventable Diseases case reporting, please review the [Direct Data Entry for Case Reports: Vaccine Preventable Diseases User Guide](#).

- **Foodborne and Waterborne Diseases Case Report:**

- Designed for Users to enter Foodborne and Waterborne Diseases case reports.

- **Vectorborne Case Report:**

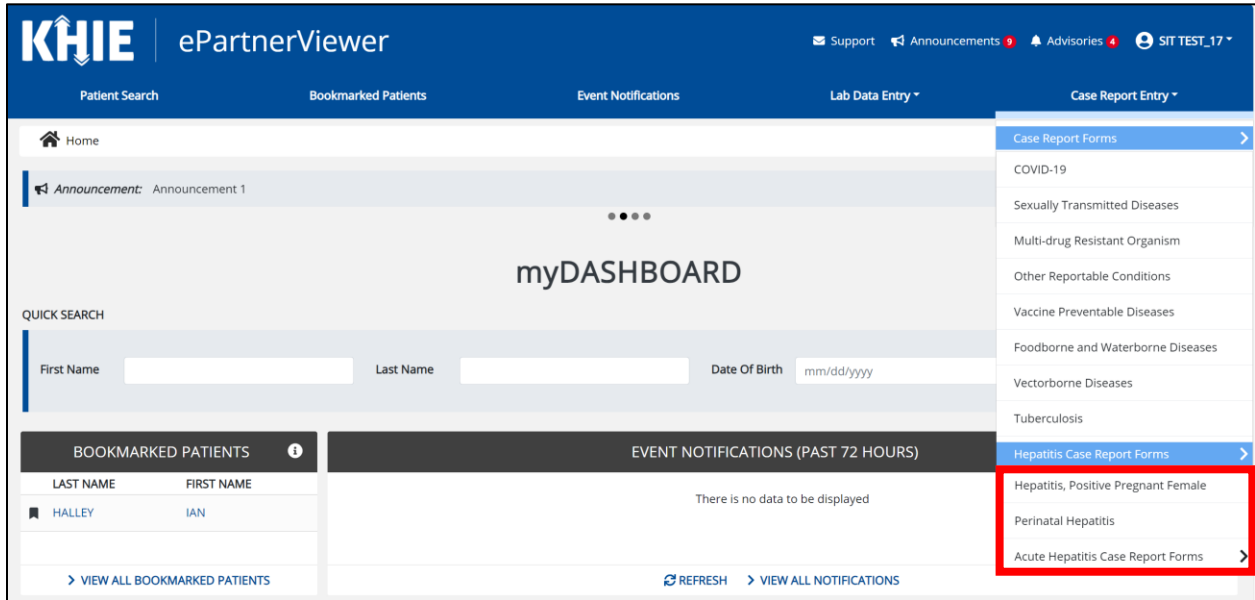
- Designed for Users to enter Vectorborne Diseases case reports.

- **Tuberculosis Case Report:**

- Designed for Users to enter Tuberculosis case reports.

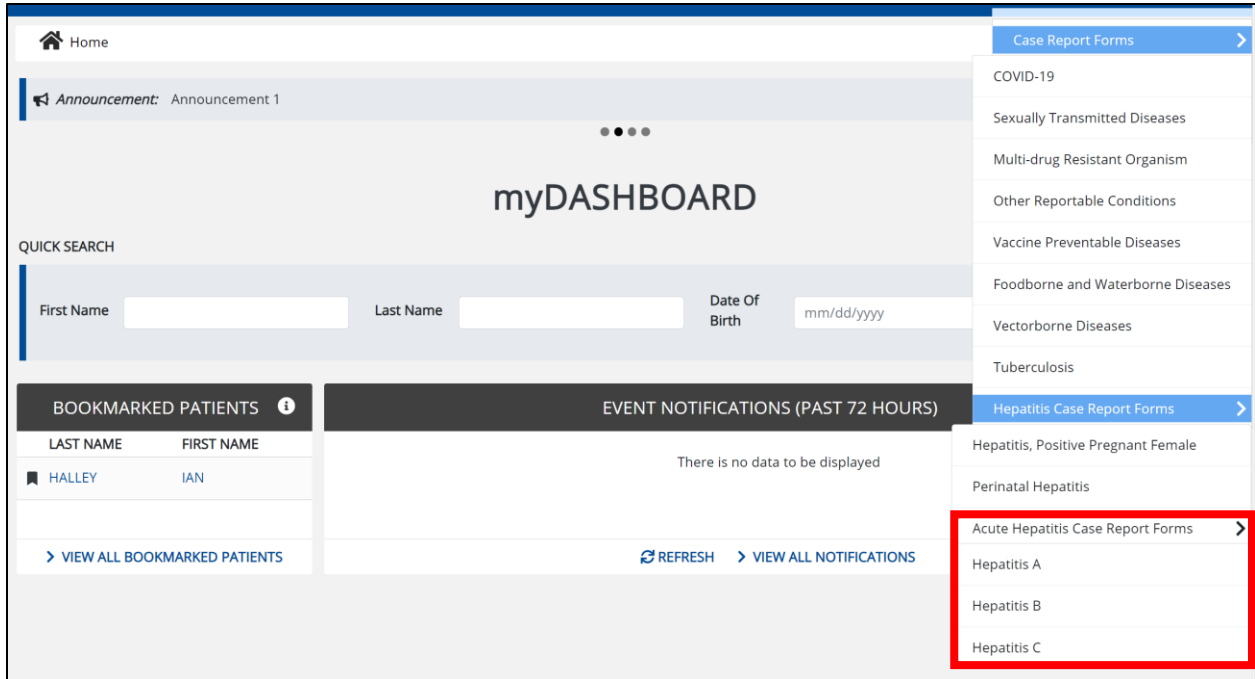
Please Note: For specific information about Tuberculosis case reporting, please review the [Direct Data Entry for Case Reports: Tuberculosis User Guide](#).

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 enter details for any one of 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](#).

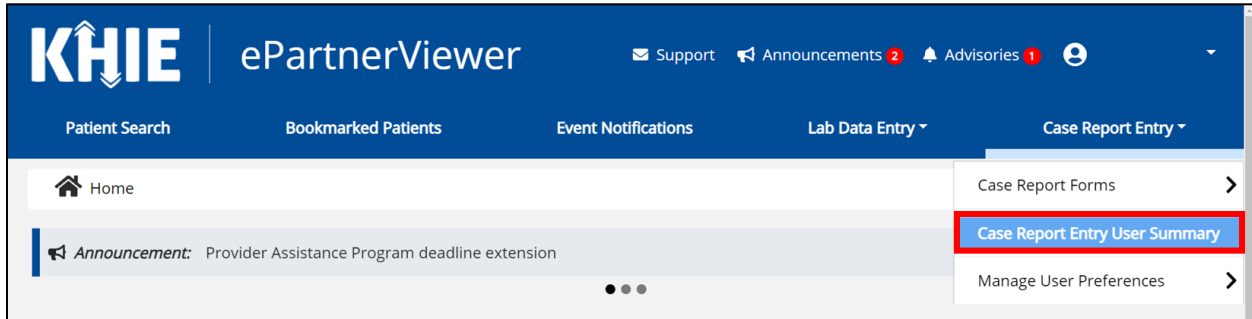
- **Acute Hepatitis C Case Report:**

- 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](#).

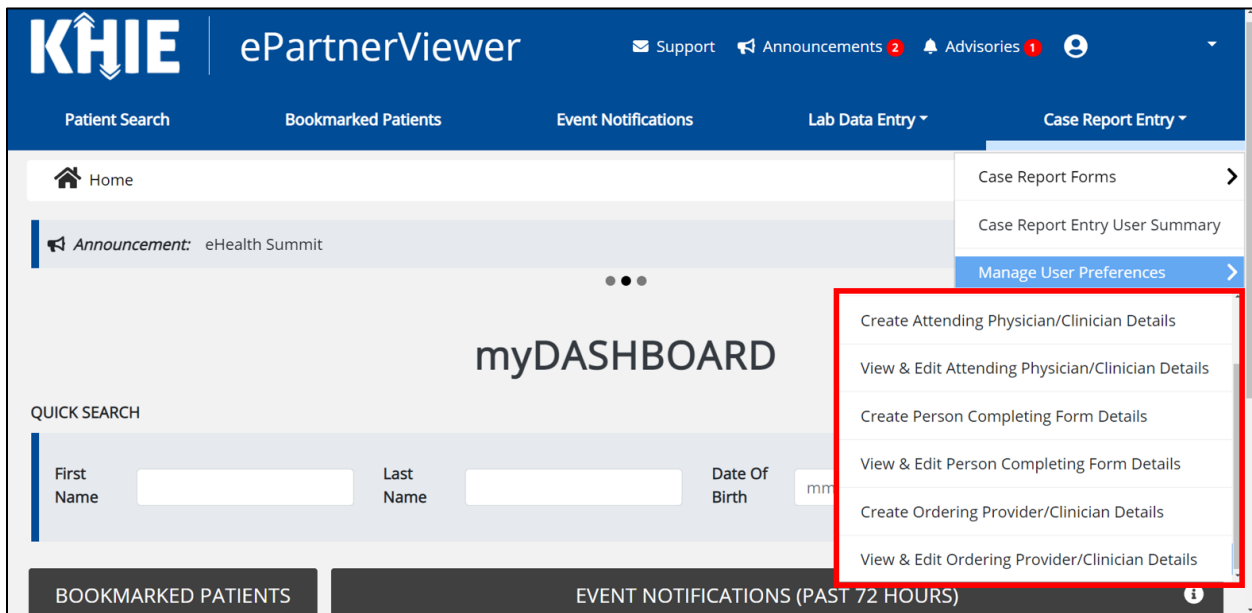
4. **Case Report Entry User Summary:**

- 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.

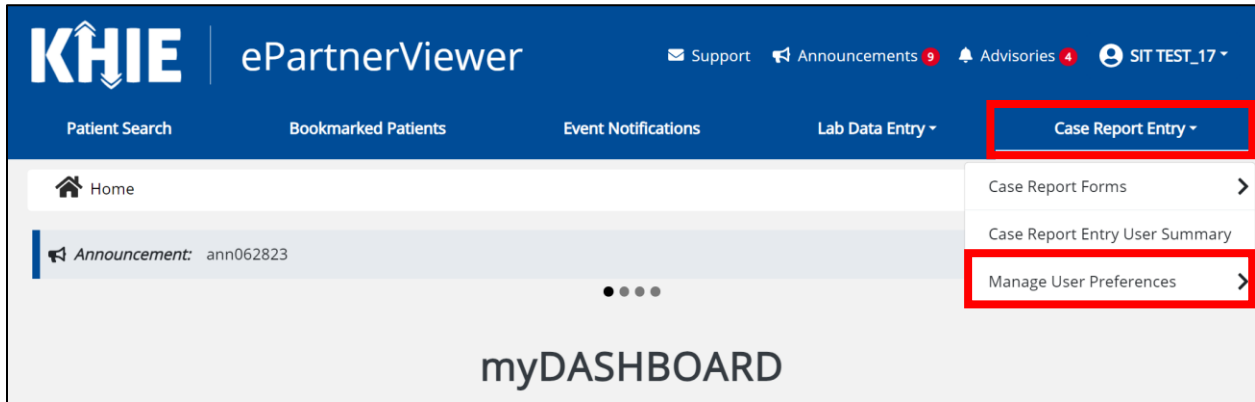


4 Manage User Preferences

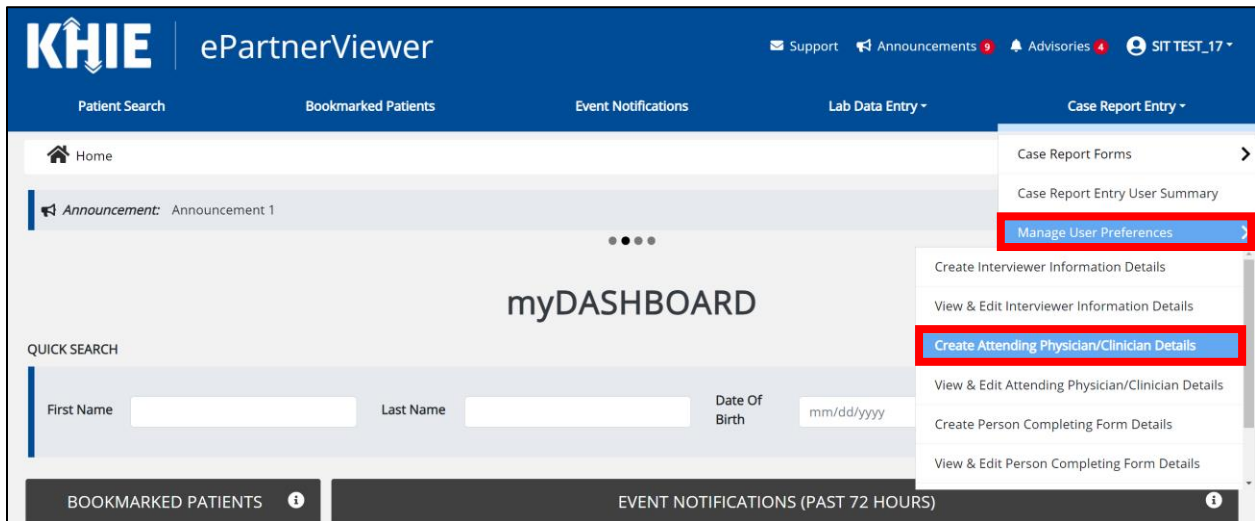
These are your User Preferences. Prior to entering your case report information, you are required to enter information about the Attending Physician/Clinician and the Person Completing Form on the **Manage User Preferences** screen. By entering these details here in your user preferences, you will be 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 Vectorborne 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.

Home > Create Attending Physician/Clinician Details

Please complete the form below to create an Attending Physician/Clinician. All fields marked with an asterisk(*) are required.

ATTENDING PHYSICIAN/CLINICIAN

Prefix
Select...

First Name* [] Last Name* []

Suffix
Select...
II
III
IV
Jr
Sr

Address 2
Unit, Suite, Building, etc. []

State* [Select...] Zip Code* []

Email
name@domain.com []

(XXX) XXX-XXXX []

Clear Save

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

Please complete the form below to create an Attending Physician/Clinician. All fields marked with an asterisk(*) are required.

ATTENDING PHYSICIAN/CLINICIAN

Prefix
Dr. [x | v]

First Name* [] Last Name* []

Suffix
Sr [x | v]

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

Address 1*	Address 2	
<input type="text"/>	<input type="text" value="Unit, Suite, Building, etc."/>	
City*	State*	Zip Code*
<input type="text"/>	<input type="text" value="Select..."/>	<input type="text"/>

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

Phone*	Email
<input type="text" value="(XXX) XXX-XXXX"/>	<input type="text" value="name@domain.com"/>

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.

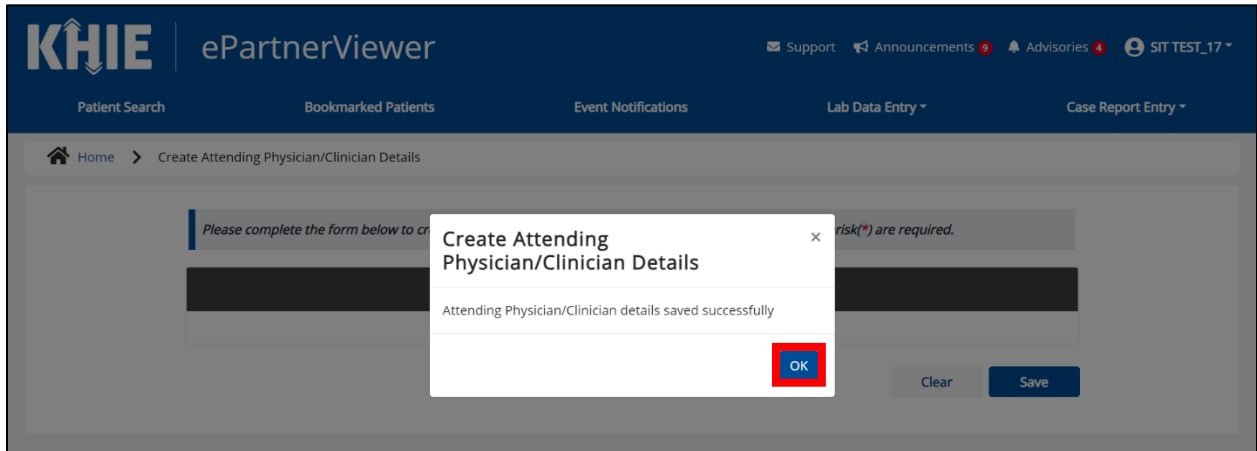
9. After completing the mandatory fields, click **Save.**

Please complete the form below to create an Attending Physician/Clinician. All fields marked with an asterisk(*) are required.

ATTENDING PHYSICIAN/CLINICIAN

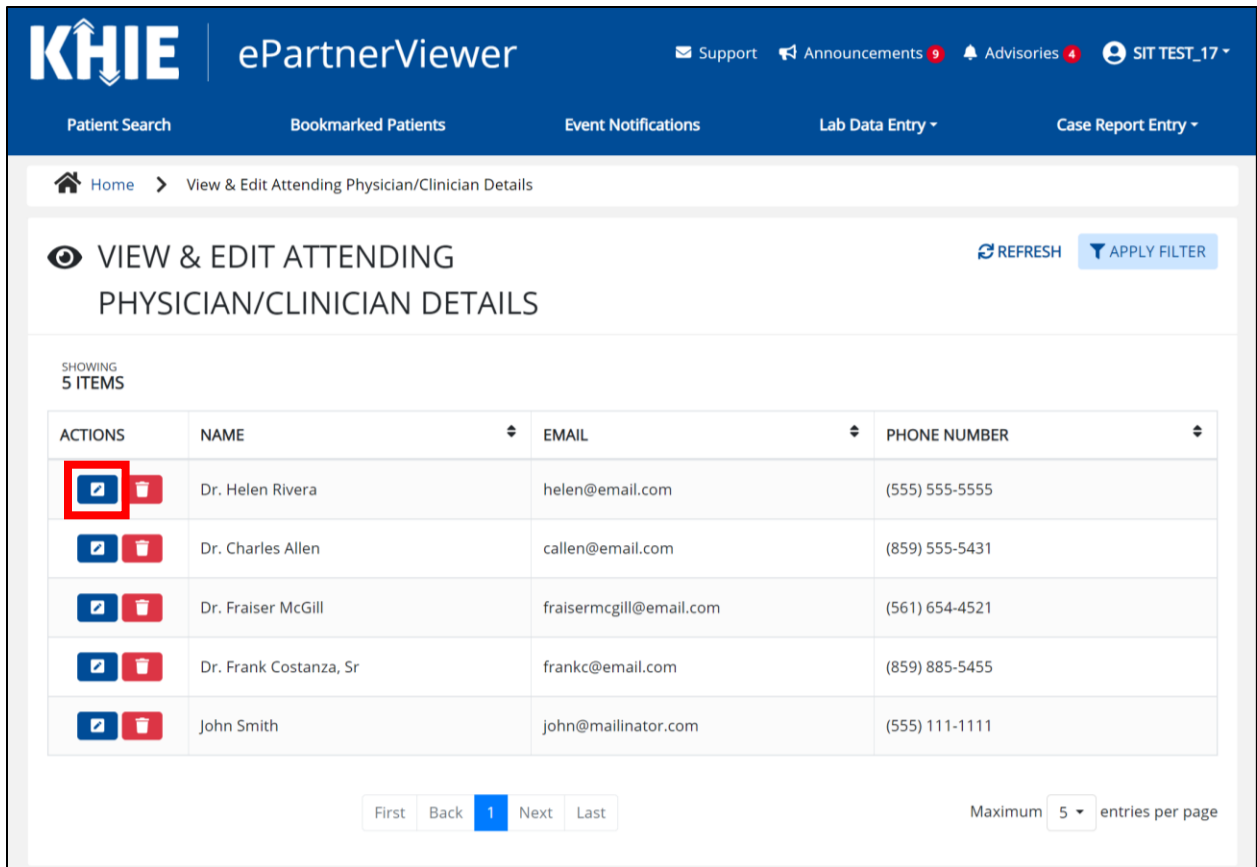
Prefix	<input type="text" value="Dr."/>	
First Name*	<input type="text" value="Frank"/>	
Last Name*	<input type="text" value="Costanza"/>	
Suffix	<input type="text" value="Sr."/>	
Address 1*	<input type="text" value="1 First Street"/>	
Address 2	<input type="text" value="1A"/>	
City*	State*	Zip Code*
<input type="text" value="Frankfort"/>	<input type="text" value="KY"/>	<input type="text" value="40123"/>
Phone*	Email	
<input type="text" value="(555) 555-5555"/>	<input type="text" value="frank@email.com"/>	

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.



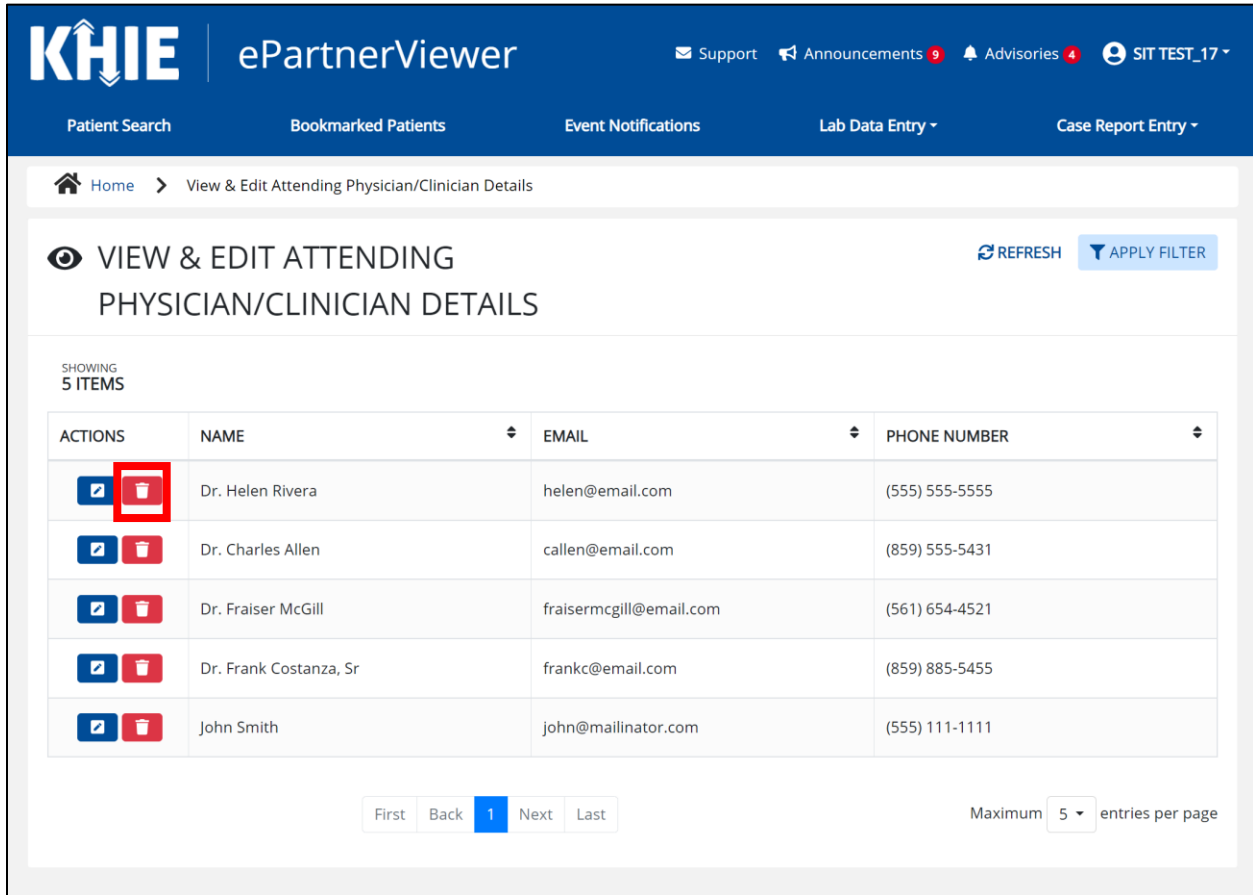
12. The *Update Attending Physician/Clinician Details* pop-up displays. You can make any necessary edits and click **Save** to save the updates and close out of the pop-up.

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

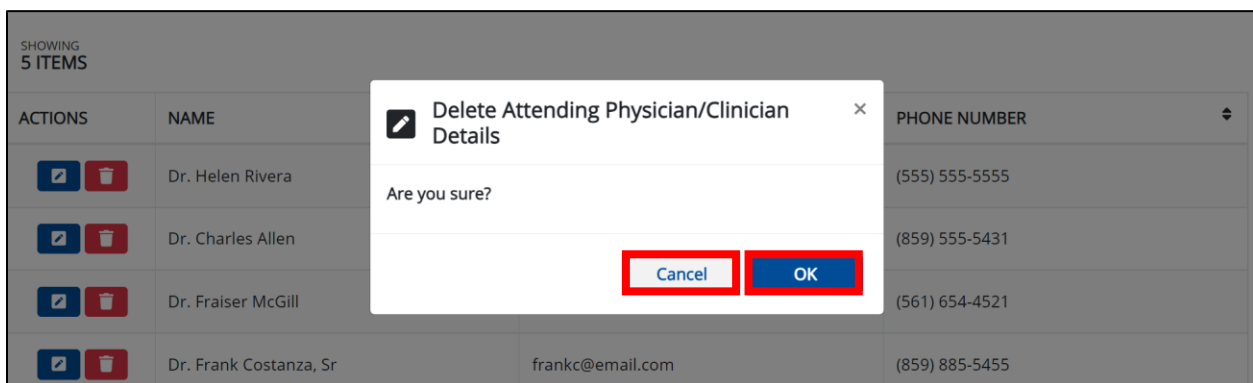
ACTIONS	NAME	PHONE NUMBER
	Dr. Helen Rivera	(555) 555-5555
	Dr. Charles Allen	(859) 555-5431
	Dr. Fraiser McGill traisermcgill@email.com	(561) 654-4521
	Dr. Frank Costanza, Sr frankc@email.com	(859) 885-5455

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.



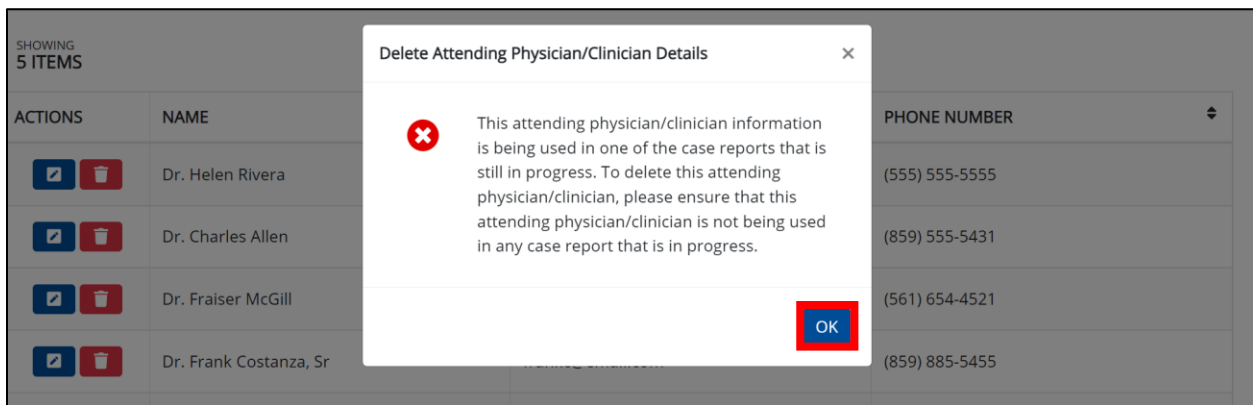
Please Note: You can delete an Attending Physician/Clinician on the **View & Edit Attending Physician/Clinician** screen as long as the Attending Physician/Clinician has not been selected for use in another case report that is still in progress.

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**.

The screenshot shows the ePartnerViewer interface. At the top, there is a navigation bar with the KHIE logo, 'ePartnerViewer', and several notification icons. Below this is a secondary navigation bar with options like 'Patient Search', 'Bookmarked Patients', 'Event Notifications', 'Lab Data Entry', and 'Case Report Entry'. The main content area is titled 'VIEW & EDIT ATTENDING PHYSICIAN/CLINICIAN DETAILS'. It includes a 'REFRESH' button and an 'APPLY FILTER' button, which is highlighted with a red box. Below the title, it says 'SHOWING 5 ITEMS' and displays a table with columns for ACTIONS, NAME, EMAIL, and PHONE NUMBER. The table contains five rows of physician data.

ACTIONS	NAME	EMAIL	PHONE NUMBER
	Dr. Helen Rivera	helen@email.com	(555) 555-5555
	Dr. Charles Allen	callen@email.com	(859) 555-5431
	Dr. Fraiser McGill	fraisermcgill@email.com	(561) 654-4521
	Dr. Frank Costanza, Sr	frankc@email.com	(859) 885-5455
	John Smith	john@mailinator.com	(555) 111-1111

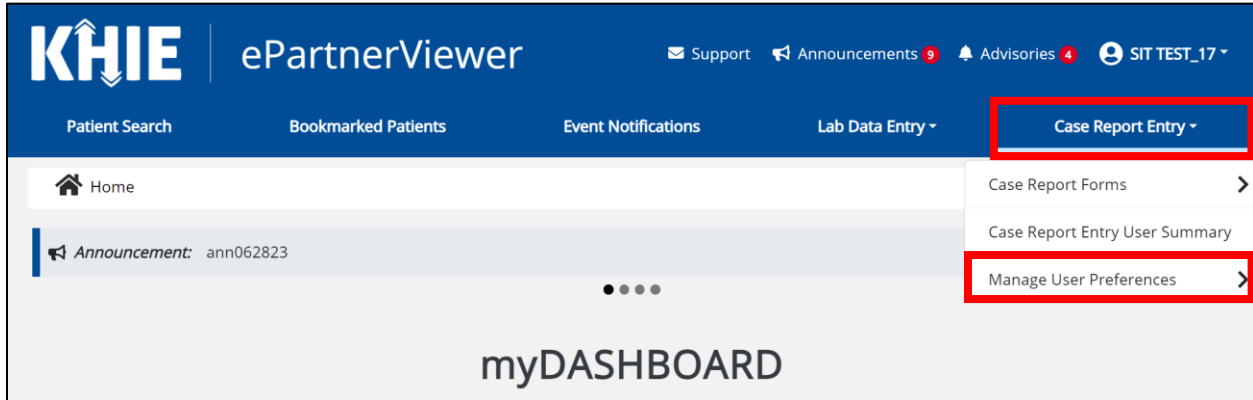
17. The Filter fields display. You can search by entering the **Attending Physician/Clinician's Name**, **Email Address**, and/or **Phone Number** in the corresponding Filter fields.

This screenshot is similar to the previous one, but the filter fields are now active. The 'APPLY FILTER' button has been replaced by a 'HIDE FILTER' button, also highlighted with a red box. The table headers 'NAME', 'EMAIL', and 'PHONE NUMBER' now have corresponding input fields with placeholder text: 'Enter NAME...', 'Enter EMAIL...', and 'Enter PHONE NUMBER...'. These input fields are also highlighted with red boxes.

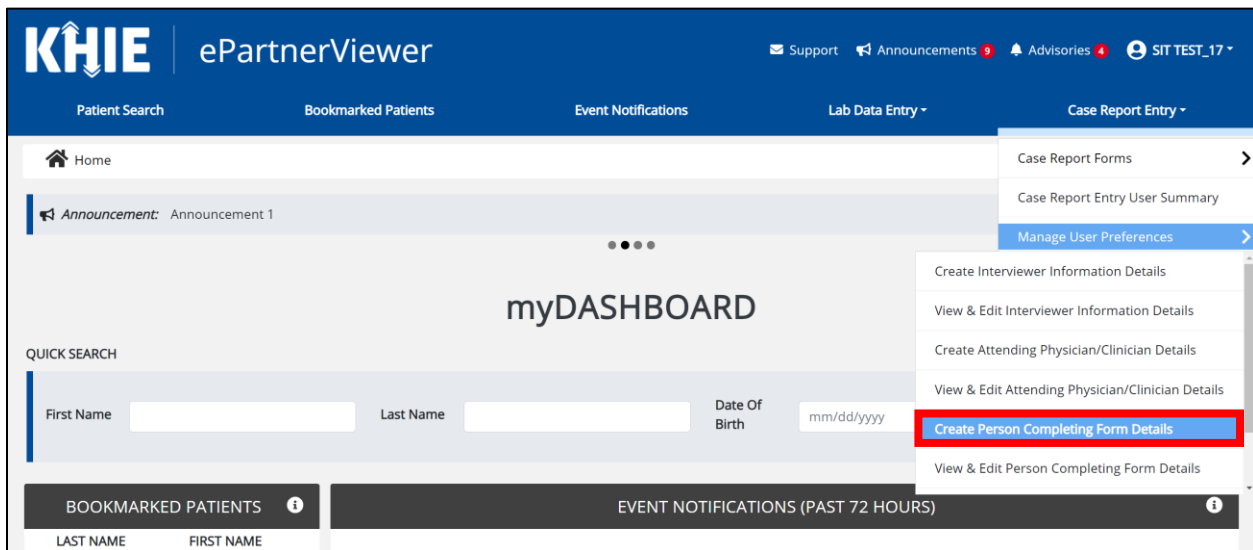
ACTIONS	NAME <input data-bbox="418 1570 591 1612" type="text" value="Enter NAME..."/>	EMAIL <input data-bbox="764 1570 937 1612" type="text" value="Enter EMAIL..."/>	PHONE NUMBER <input data-bbox="1175 1570 1347 1612" type="text" value="Enter PHONE NUMBER..."/>
	Dr. Helen Rivera	helen@email.com	(555) 555-5555
	Dr. Charles Allen	callen@email.com	(859) 555-5431
	Dr. Fraiser McGill	fraisermcgill@email.com	(561) 654-4521
	Dr. Frank Costanza, Sr	frankc@email.com	(859) 885-5455

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.

Please complete the form below to create a Person Completing Form. All fields marked with an asterisk(*) are required.

PERSON COMPLETING FORM

Prefix
Select...

First Name* **Last Name***

Suffix
Select...
II
III
IV
Jr
Sr

Address 2
Unit, Suite, Building, etc.

State* Select... **Zip Code***

Email*
(XXX) XXX-XXXX name@domain.com

Clear Save

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

First Name* **Last Name***

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

Address 1* **Address 2**
Unit, Suite, Building, etc.

City* **State*** Select... **Zip Code***

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

Phone* (XXX) XXX-XXXX	Email name@domain.com
---------------------------------	---------------------------------

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 complete the form below to create a Person Completing Form. All fields marked with an asterisk(*) are required.

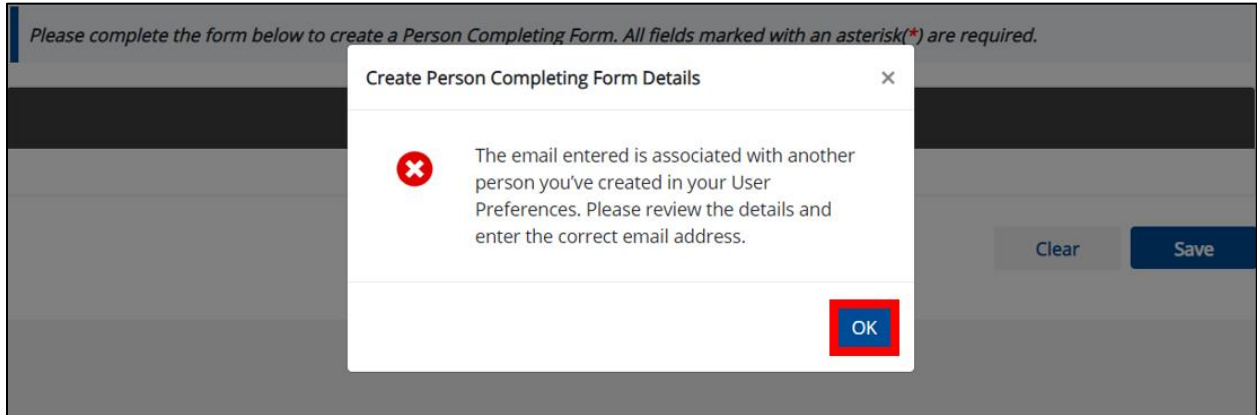
PERSON COMPLETING FORM

Prefix Mr.		
First Name* Arthur	Last Name* Vandelay	
Suffix II		
Address 1* 22 Second Avenue	Address 2 Unit, Suite, Building, etc.	
City* Bowling Green	State* KY	Zip Code* 42101
Phone* (222) 222-2222	Email* arhur@email.com	

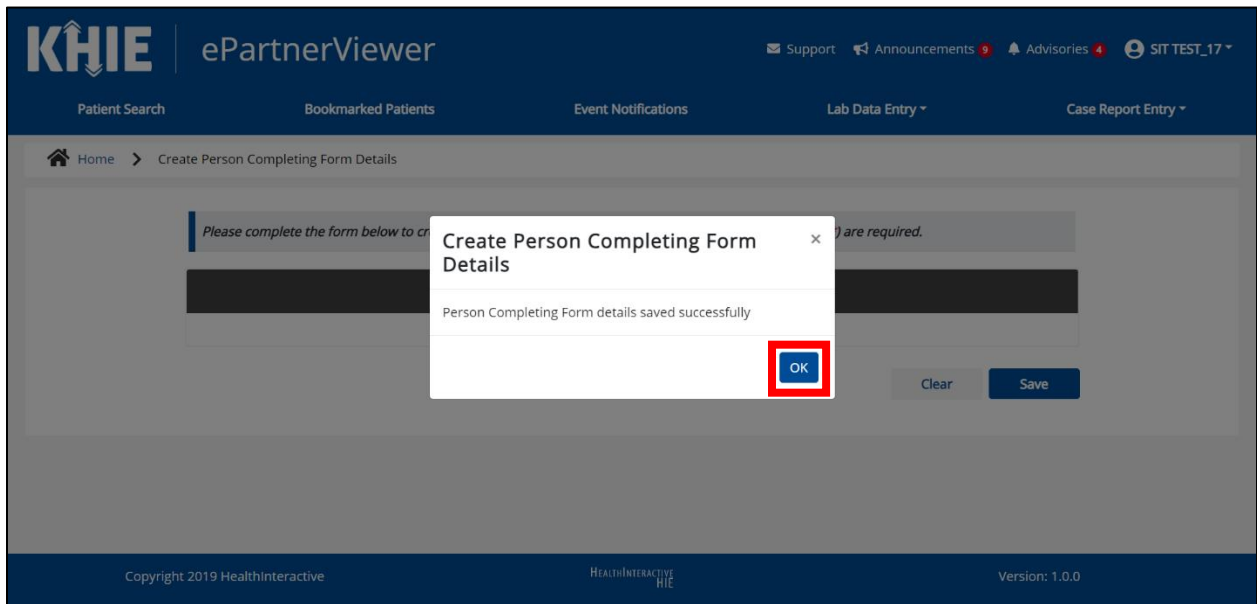
Clear Save

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.

ACTIONS	NAME	EMAIL	PHONE NUMBER
 	Mr. Arthur Vandelay, II	arthur@email.com	(222) 222-2222
 	Mr. Marty Craine, Sr	marty@email.com	(555) 123-3210
 	Miss Jane Doe	jane@mailinator.com	(555) 123-1234

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.

Update Person Completing Form Details

Prefix: Mr.

First Name*: Arthur Last Name*: Vandelay

Suffix: II

Address 1*: 22 Second Avenue Address 2: Unit, Suite, Building, etc.

City*: Bowling Green State*: KY Zip Code*: 42101

Phone*: (222) 222-2222 Email*: arthur@email.com

Cancel Save

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

NAME	EMAIL	PHONE NUMBER
Mr. Arthur Vandelay, II		(222) 222-2222
Mr. Marty Craine, Sr		(555) 123-3210
Miss Jane Doe		(555) 123-1234

Update Person Completing Form Details [X]

Person Completing Form details updated successfully

OK

First Back 1 Next Last Maximum

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.

Home > View & Edit Person Completing Form Details

VIEW & EDIT PERSON COMPLETING FORM DETAILS

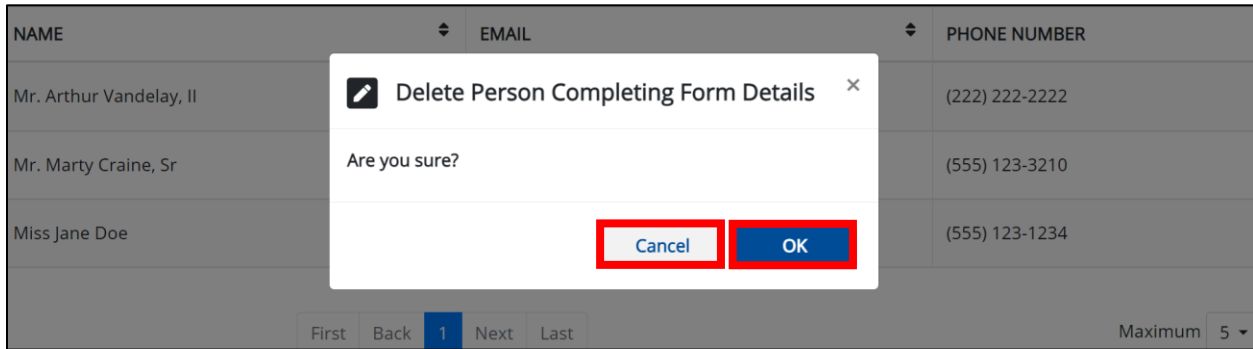
REFRESH APPLY FILTER

SHOWING 3 ITEMS

ACTIONS	NAME	EMAIL	PHONE NUMBER
	Mr. Arthur Vandelay, II	arthur@email.com	(222) 222-2222
	Mr. Marty Craine, Sr	marty@email.com	(555) 123-3210
	Miss Jane Doe	jane@mailinator.com	(555) 123-1234

First Back 1 Next Last Maximum 5 entries per page

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.

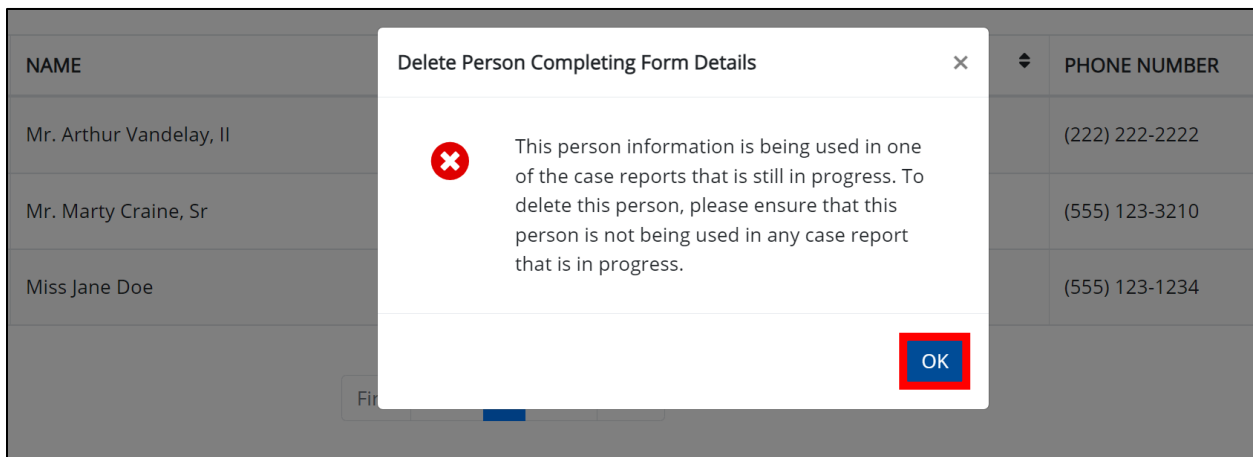


Please Note: You can delete a person on the **View & Edit Person Completing Form Details** screen as long as that person has not been selected for use in a case report that is still in progress. If you attempt to delete a person who has been selected for use in a case report that has not been completed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

This person information is being used in one of the case reports that is still in progress. To delete this person, please ensure that this person is not being used in any case report that is in 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**.

Home > View & Edit Person Completing Form Details

VIEW & EDIT PERSON COMPLETING FORM DETAILS REFRESH **APPLY FILTER**

SHOWING 3 ITEMS

ACTIONS	NAME	EMAIL	PHONE NUMBER
	Mr. Arthur Vandelay, II	arthur@email.com	(222) 222-2222
	Mr. Marty Craine, Sr	marty@email.com	(555) 123-3210
	Miss Jane Doe	jane@mailinator.com	(555) 123-1234

First Back 1 Next Last Maximum 5 entries per page

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

VIEW & EDIT PERSON COMPLETING FORM DETAILS REFRESH **HIDE FILTER**

SHOWING 3 ITEMS

ACTIONS	NAME <input data-bbox="402 1039 574 1079" type="text" value="Enter Name..."/>	EMAIL <input data-bbox="760 1039 932 1079" type="text" value="Enter Email..."/>	PHONE NUMBER <input data-bbox="1175 1039 1347 1079" type="text" value="Enter Phone Number..."/>
	Mr. Arthur Vandelay, II	arthur@email.com	(222) 222-2222
	Mr. Marty Craine, Sr	marty@email.com	(555) 123-3210
	Miss Jane Doe	jane@mailinator.com	(555) 123-1234

First Back 1 Next Last Maximum 5 entries per page

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.

VACCINATION HISTORY

Patient Information ✓
Laboratory Information ✓
Applicable Symptoms ✓
Additional Information ✓
Hospitalization, ICU & Death Information ✓
Vaccination History
Additional Comments
Review & Submit

Is the patient vaccinated for the condition being reported?*

Yes No Unknown

Vaccine Details

If yes, please provide vaccine name: ?
Select... | v

If other, please specify: ?
[Text Input]

If yes, please enter the number of doses: ?
Select... | v

Date Administered (1st dose) [mm/dd/yyyy] [Calendar Icon] Unknown
Date Administered (2nd dose) [mm/dd/yyyy] [Calendar Icon] Unknown
Date Administered (3rd dose) [mm/dd/yyyy] [Calendar Icon] Unknown

+ Add Vaccine

Save Previous Next

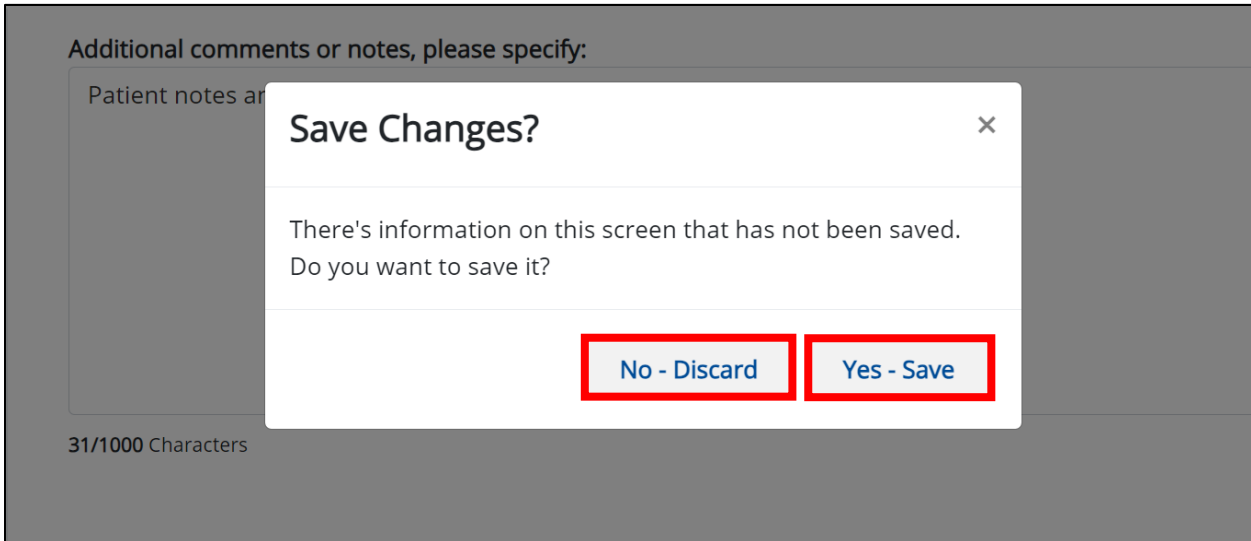
Save Feature

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
	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 Vectorborne 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 Vectorborne Diseases Case Report, the subsequent fields will be grayed out and disabled.

LABORATORY INFORMATION

<div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Patient Information ✔</div> <div style="background-color: #0056b3; color: white; padding: 5px; margin-bottom: 5px;">Laboratory Information ⊙</div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Applicable Symptoms</div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Additional Information 🔒</div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Hospitalization, ICU & Death Information 🔒</div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Vaccination History 🔒</div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Additional Comments 🔒</div> <div style="background-color: #f0f0f0; padding: 5px; margin-bottom: 5px;">Review & Submit 🔒</div>	<p>Does the patient have a lab test?*</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> <input type="button" value="Unknown"/> </div> <hr/> <p>Laboratory Information</p> <p>Laboratory Name</p> <input style="width: 100%; background-color: #f0f0f0;" type="text"/> <p>Test Name</p> <input style="width: 100%; background-color: #f0f0f0;" type="text" value="Select..."/> <p>If other, please specify: ?</p> <input style="width: 100%; background-color: #f0f0f0;" type="text"/> <p>Filler Order/Accession Number ?</p> <input style="width: 100%; background-color: #f0f0f0;" type="text"/>
---	--

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

LABORATORY INFORMATION

Patient Information

Laboratory Information

Applicable Symptoms

Additional Information

Hospitalization, ICU & Death Information

Vaccination History

Additional Comments

Review & Submit

Does the patient have a lab test?*

Laboratory Information

Laboratory Name*

Test Name*

Select...

If other, please specify: ?

Filler Order/Accession Number ?

Specimen Source*

Select...

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**.

APPLICABLE SYMPTOMS

Patient Information

Laboratory Information

Applicable Symptoms

Additional Information

Hospitalization, ICU & Death Information

Vaccination History

Additional Comments

Review & Submit

Were symptoms present during the course of illness?*

Onset Date ?

mm/dd/yyyy Unknown

If symptomatic, which of the following did the patient experience during their illness?

Fever

If yes, please enter the highest temperature: ?

Diarrhea (>3 loose stools/24hr period)

If yes, please enter # of days of diarrhea: ?

Chills

- 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**.

The screenshot shows the 'APPLICABLE SYMPTOMS' screen. On the left is a navigation menu with 'Applicable Symptoms' selected. The main content area has the question 'Were symptoms present during the course of illness?*' with three buttons: 'Yes', 'No', and 'Unknown'. The 'Unknown' button is highlighted with a red box. Below this, the 'Onset Date' field is disabled and labeled 'Unknown'. The section 'If symptomatic, which of the following did the patient experience during their illness?' contains several symptom questions, all of which are disabled and labeled 'Unknown': 'Fever', 'Diarrhea (>3 loose stools/24hr period)', and 'Chills'. Each symptom question has 'Yes', 'No', and 'Unknown' buttons, with 'Unknown' highlighted in blue.

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

The screenshot shows the 'APPLICABLE SYMPTOMS' screen with the 'Yes' button highlighted in red for the question 'Were symptoms present during the course of illness?*. The subsequent fields are enabled and highlighted with a red border: 'Onset Date*' (with a date picker and 'Unknown' option), 'Fever*' (with 'Yes', 'No', and 'Unknown' buttons), 'Diarrhea (>3 loose stools/24hr period)*' (with 'Yes', 'No', and 'Unknown' buttons), 'Chills*' (with 'Yes', 'No', and 'Unknown' buttons), and 'Cough*' (with 'Yes', 'No', and 'Unknown' buttons').

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.

The screenshot shows a form section titled "Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form and Attending Physician/Clinician?*" with two radio buttons: "Yes" and "No". Below this are three rows of fields. Each row has a field for the entity name (Patient ID (MRN), Person Completing Form, or Attending Physician/Clinician) and a dropdown menu for "Affiliation/Organization". The "Patient ID (MRN)" field is a text input, while the others are dropdowns. To the right of each "Affiliation/Organization" dropdown is a text input field labeled "If other, please specify:". The "Yes" radio button is selected in the screenshot.

- 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) from the dropdown menu.

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

Yes No

Patient ID (MRN)* Affiliation/Organization*

Person Completing Form* Affiliation/Organization If other, please specify:

Attending Physician/Clinician* Affiliation/Organization If other, please specify:

- 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.

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

Yes No

Patient ID (MRN)* Affiliation/Organization*

Person Completing Form* Affiliation/Organization If other, please specify:

Attending Physician/Clinician* Affiliation/Organization If other, please specify:

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.

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

Yes **No**

Patient ID (MRN)* Affiliation/Organization*

Person Completing Form* Affiliation/Organization* If other, please specify:

Attending Physician/Clinician* Affiliation/Organization* If other, please specify:

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

Patient ID (MRN)* Affiliation/Organization*

Person Completing Form* If other, please specify:

Attending Physician/Clinician* If other, please specify:

Prefix

Affiliation/Organization* dropdown menu items:
Afzal, Mohammad MD, Internal Medicine, LLC
eICR Onboarding Regression
Hilton Hospital
King's Daughters Medical Center
Murray-Calloway County Hospital
Test Medical Center
University Of Kentucky Chandler Medical Center

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

Person Completing Form* Affiliation/Organization* If other, please specify:

Attending Physician/Clinician* If other, please specify:

Prefix

First Name* Last Name*

Suffix Date of Birth*

Affiliation/Organization* dropdown menu items:
eICR Onboarding Regression
Hilton Hospital
King's Daughters Medical Center
Murray-Calloway County Hospital
Test Medical Center
University Of Kentucky Chandler Medical Center
Other

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**.

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

Patient ID (MRN)*

Affiliation/Organization*

[Person Completing Form](#)*

Affiliation/Organization*

If other, please specify:*

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

Patient ID (MRN)*

Affiliation/Organization*

[Person Completing Form](#)*

Affiliation/Organization*

If other, please specify:*

[Attending Physician/Clinician](#)*

Affiliation/Organization*

- Eugene Hospital
- Evergreen General Hospital
- Green Hosp
- Heartland Clinic
- Hilton Hospital
- Howell Hospital
- Justin Hospital
- Knight Hospital

Prefix

First Name*

Suffix

Patient Sex*

Ethnicity*

Race*

Last Name*

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**.

[Attending Physician/Clinician](#)*

Affiliation/Organization*

If other, please specify:*

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?**

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

Yes **No**

Patient ID (MRN)*
SK05051960

Affiliation/Organization*
Test Medical Center

Person Completing Form*
Mr. Arthur Vandelay, II (arthur@email.com)

Affiliation/Organization*
Other

If other, please specify:*
Test Hospital

Attending Physician/Clinician*
Dr. Frank Costanza, Sr (frank@email.com)

Affiliation/Organization*
Test Medical Center

If other, please specify:

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

Yes **No**

Patient ID (MRN)*
SK05051960

Affiliation/Organization*
Test Medical Center

Person Completing Form*
Mr. Arthur Vandelay, II (arthur@email.com)

Affiliation/Organization*
Test Medical Center

If other, please specify:

Attending Physician/Clinician*
Dr. Frank Costanza, Sr (frank@email.com)

Affiliation/Organization*
Test Medical Center

If other, please specify:

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

Yes **No**

Patient ID (MRN)*
SK05051960

Person Completing Form*
Mr. Arthur Vandelay,

Attending Physician/Clinician*
Dr. Frank Costanza, Sr (frank@email.com)

Affiliation/Organization*
Test Medical Center

Patient Information

All selections for the "Affiliation/Organization" will be reset. Are you sure you want to change your selection?

Yes **No**

- 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).

The screenshot shows a form with the following fields: "Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form and Attending Physician/Clinician?" with "Yes" selected; "Patient ID (MRN)*" with value "SK05051960"; "Person Completing Form*" with value "Mr. Arthur Vandelay, II (arthur@email.com)"; "Attending Physician/Clinician*" with value "Dr. Frank Costanza, Sr (frank@email.com)"; and "Prefix" with value "Ms.". The "Affiliation/Organization*" dropdown menu is open, showing a list of options: "Afzal, Mohammad MD, Internal Medicine, LLC", "eICR Onboarding Regression", "Hilton Hospital", "King's Daughters Medical Center", "Murray-Calloway County Hospital", "Test Medical Center" (highlighted), and "University Of Kentucky Chandler Medical Center".

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.

The screenshot shows the same form as above, but now the "Affiliation/Organization*" dropdown menu is closed and displays "Test Medical Center". The "Person Completing Form*" and "Attending Physician/Clinician*" dropdown menus are also closed and display "Test Medical Center", which is highlighted with a red box. The "Yes" button remains selected.

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.

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

Patient ID (MRN)* Affiliation/Organization*

Person Completing Form* Affiliation/Organization If other, please specify:

Attending Physician/Clinician* Affiliation/Organization If other, please specify:

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

Patient Information

All selections for the "Affiliation/Organization" will be reset. Are you sure you want to change your selection?

2. You must individually complete **each** 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.
 - **All** three (3) of the *Affiliation/Organization* fields are enabled. This means a different Affiliation/Organization can be selected for each field.

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

Patient ID (MRN)* Affiliation/Organization*

Person Completing Form* Affiliation/Organization* If other, please specify:

Attending Physician/Clinician* Affiliation/Organization* If other, please specify:

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.

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

PATIENT INFORMATION

Patient Information | Laboratory Information

Disease/Organism* [Select...] | Date of Diagnosis* [mm/dd/yyyy] [Unknown]

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

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

PATIENT INFORMATION

Patient Information | Laboratory Information | Applicable Symptoms | Additional Information | Hospitalization, ICU & Death Information

Disease/Organism* [Select...] | Date of Diagnosis* [mm/dd/yyyy] [Unknown]

Is the patient... [Select...] | Patient ID (MRN)* [?] | Affiliation/Organization* [Select...]

Help Tooltip: An MRN or Medical Record Number is an Organization specific, unique identification number assigned to a patient by a healthcare organization. If your organization does not use an MRN, you MUST create a way to uniquely identify your patient

- 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.

City* [] | State* [KY] | Zip Code* []

County* [Select...]

Adair
Allen
Anderson
Ballard
Barren
Bath
Bell

Phone* [(XXX) XXX-XXXX] | Email [name@domain.com]

Encounter ID/Visit #* [] [Generate]

- 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.

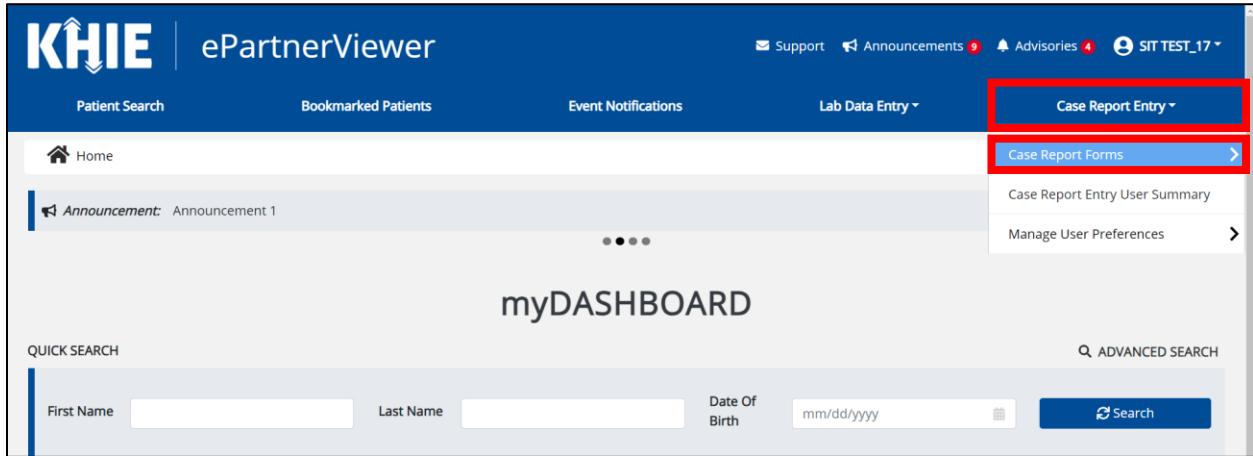
1. Enter dates by entering 2 digits for the month, 2 digits for the day, and 4 digits for the year.
- You can also click the *Date* field to bring up a calendar. You can click a **date on the calendar** or use the field dropdown menus to select the month and the year.

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

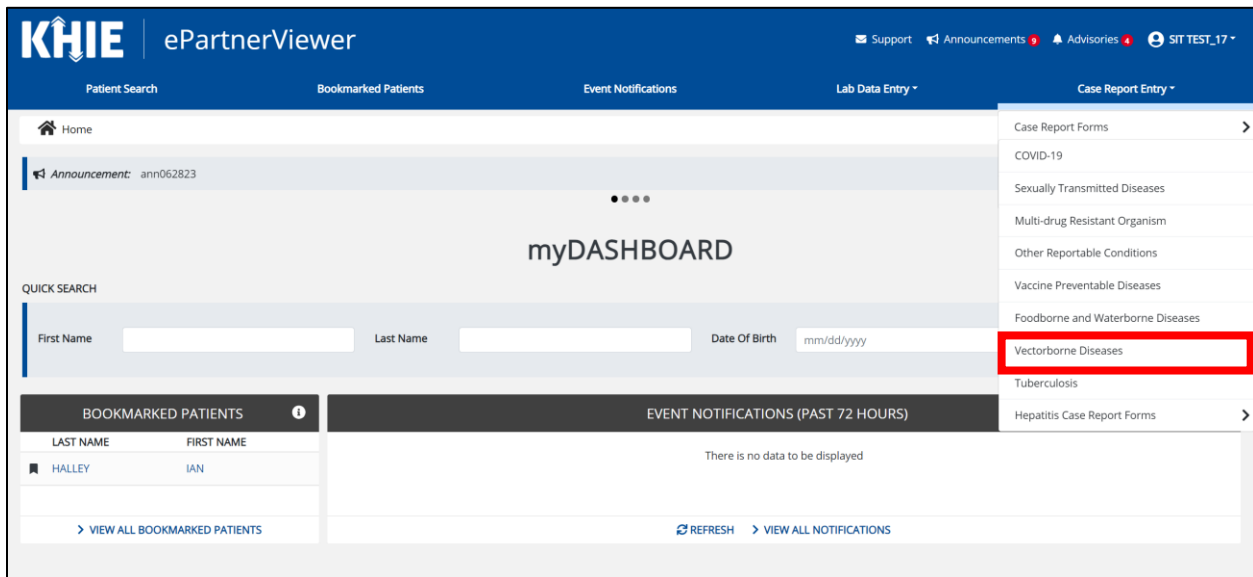
8 Vectorborne Diseases Case Report Form

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

1. To enter Vectorborne 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 **Vectorborne Diseases** from the dropdown menu.



9 Patient Information

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

VECTORBORNE DISEASES CASE REPORT FORM

Section 1 of 8

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

PATIENT INFORMATION

- Patient Information
- Laboratory Information
- Applicable Symptoms
- Additional Information
- Hospitalization, ICU & Death Information
- Vaccination History
- Additional Comments
- Review & Submit

Disease/Organism*
Select...

Date of Diagnosis*
mm/dd/yyyy

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

Yes No

Patient ID (MRN)*
Select...

Affiliation/Organization*
Select...

Person Completing Form
Select...

Affiliation/Organization*
Select...

Attending Physician/Clinician
Select...

Prefix
Select...

First Name*
Middle Name
Last Name*

Suffix
Select...

Date of Birth*
mm/dd/yyyy

Patient Sex*
Select...

Ethnicity*
Select...

Race*
Select...

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

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

The screenshot shows the 'PATIENT INFORMATION' form with a sidebar on the left containing menu items: Patient Information, Laboratory Information, Applicable Symptoms, Additional Information, Hospitalization, ICU & Death Information, Vaccination History, Additional Comments, and Review & Submit. The main form area contains the following fields and sections:

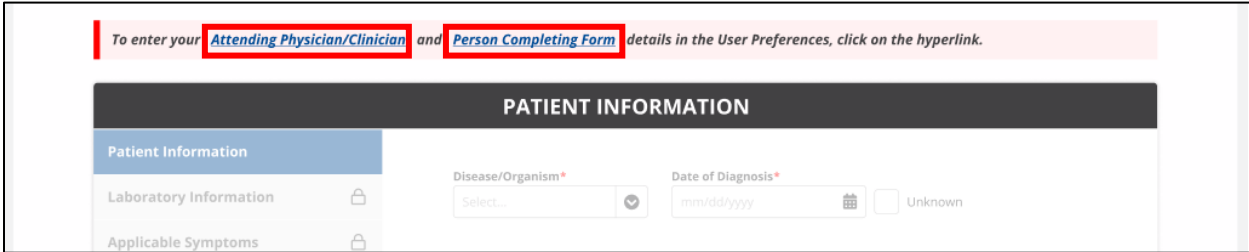
- Disease/Organism*** (dropdown) and **Date of Diagnosis*** (calendar) with an **Unknown** checkbox.
- Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician?*** (Yes/No buttons).
- Patient ID (MRN)** (text) and **Affiliation/Organization** (dropdown).
- Person Completing Form** (dropdown) and **Affiliation/Organization** (dropdown) with an **If other, please specify:** (text) field.
- Attending Physician/Clinician** (dropdown) and **Affiliation/Organization** (dropdown) with an **If other, please specify:** (text) field.
- Prefix** (dropdown).
- First Name*** (text), **Middle Name** (text), and **Last Name*** (text).
- Suffix** (dropdown) and **Date of Birth*** (calendar).
- Patient Sex*** (dropdown), **Ethnicity*** (dropdown), and **Race*** (dropdown).
- Address 1*** (text) and **Address 2** (text) with a note 'Unit, Suite, Building, etc.'
- City*** (text), **State*** (dropdown), and **Zip Code*** (text).
- County*** (dropdown), **Phone*** (text) with a mask 'XXX XXX-XXXX', and **Email** (text) with a placeholder 'name@domain.com'.
- Visit Type*** (dropdown) and **Encounter ID/Visit #*** (text) with a **Generate** checkbox.
- Is the patient currently pregnant?** (Yes/No/Unknown buttons).
- If yes, please enter the due date (EDC):** (calendar) with an **Unknown** checkbox.

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

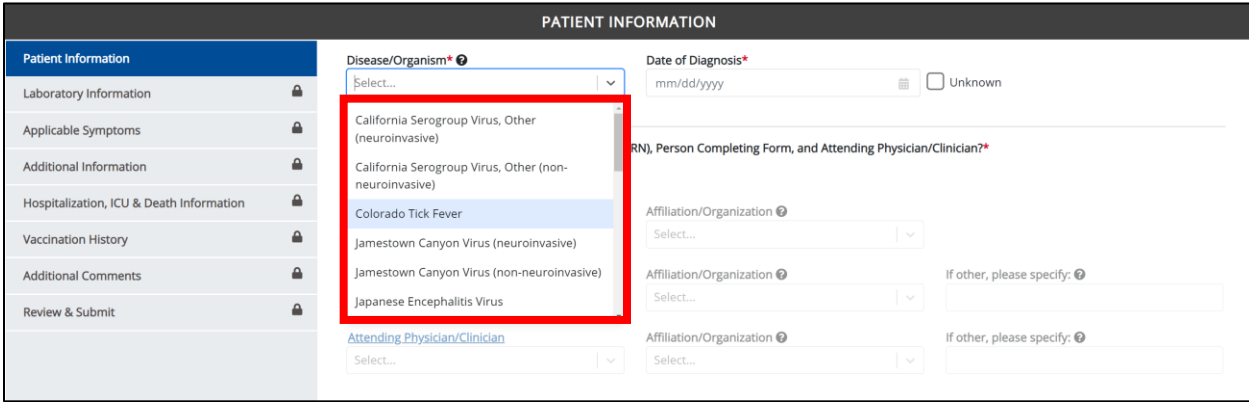
Please Note: You are required to enter the details associated with the *Person Completing Form* and the *Attending Physician/Clinician* prior to entering Vectorborne Diseases information.

If you access the Vectorborne 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 Vectorborne Diseases Case Report details.



2. To start the Vectorborne 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.

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

Patient ID (MRN)*

Affiliation/Organization*

Person Completing Form* Affiliation/Organization* If other, please specify:

Attending Physician/Clinician* Affiliation/Organization* If other, please specify:

- 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.

Patient ID (MRN)*

Affiliation/Organization*

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

Patient ID (MRN)*

Affiliation/Organization*

Person Completing Form*

Attending Physician/Clinician*

Prefix

If other, please specify:

If other, please specify:

Affiliation/Organization dropdown menu:

- Select...
- Eugene Hospital
- Evergreen General Hospital
- Green Hosp
- Heartland Clinic
- Hilton Hospital
- Howell Hospital
- Knight Hospital
- Knoll Hospital

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**.

The screenshot shows a form titled "Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician?*" with "Yes" and "No" buttons. Below are three rows of input fields. The first row has "Patient ID (MRN)*" with value "EB192465" and "Affiliation/Organization*" with value "Evergreen General Hospital". The second row has "Person Completing Form*" with a dropdown menu highlighted in red, showing options: "Select...", "Jane Doe (jane@mailinator.com)", and "Mr. Marty Craine, Sr (marty@email.com)". The third row has "Affiliation/Organization*" with value "Evergreen General Hospital".

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.

A screenshot of a web form. The first dropdown menu is labeled "Person Completing Form*" and contains the text "Select...". The second dropdown menu is labeled "Affiliation/Organization?" and also contains "Select...". Both dropdown menus are highlighted with a red rectangular border.

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.

A screenshot of a "Manage User Preferences" pop-up window. The window title is "PERSON COMPLETING FORM". A message at the top says: "Please complete the form below to create a Person Completing Form. All fields marked with an asterisk(*) are required." The form contains several fields: "Prefix" (dropdown, highlighted in red), "First Name*" (text input), "Last Name*" (text input), "Suffix" (dropdown, highlighted in red), "Address 1*" (text input), "Address 2" (text input with placeholder "Unit, Suite, Building, etc."), "City*" (text input), "State*" (dropdown), "Zip Code*" (text input), "Phone*" (text input with placeholder "(XXX) XXX-XXXX"), and "Email*" (text input with placeholder "name@domain.com"). There are "Cancel" and "Save" buttons at the bottom right.

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

A screenshot showing two text input fields. The first is labeled "First Name*" and the second is labeled "Last Name*". Both fields are highlighted with a red rectangular border.

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

A screenshot showing five input fields. The first is "Address 1*" (text input), the second is "Address 2" (text input with placeholder "Unit, Suite, Building, etc."), the third is "City*" (text input), the fourth is "State*" (dropdown menu), and the fifth is "Zip Code*" (text input). All five fields are highlighted with a red rectangular border.

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

Phone* (XXX) XXX-XXXX

Email* name@domain.com

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

PERSON COMPLETING FORM

Prefix: Mr.

First Name*: Marty

Last Name*: Craine

Suffix: Sr

Address 1*: 123 Cheers Street

Address 2: Unit, Suite, Building, etc.

City*: Lexington

State*: KY

Zip Code*: 40123-

Phone*: (555) 123-3210

Email*: marty@email.com

Buttons: Cancel, 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**.

Person Completing Form*

Select...

- Miss Jane Doe (jane@mailinator.com)
- Mr. Arthur Vandelay, II (arthur@email.com)
- Mr. Marty Craine, Sr (marty@email.com)

Affiliation/Organization ?

If other, please specify: ?

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**.

Phone* (XXX) XXX-XXXX
Email* name@domain.com

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

Manage User Preferences

Please complete the form below to create an Attending Physician/Clinician. All fields marked with an asterisk(*) are required.

ATTENDING PHYSICIAN/CLINICIAN

Prefix: Dr.

First Name*: Charles
Last Name*: Allen

Suffix: Select...

Address 1*: 112 Cottonwood Rd
Address 2: Unit, Suite, Building, etc.

City*: Lexington
State*: KY
Zip Code*: 40503-

Phone*: (859) 555-5431
Email: callen@email.com

Buttons: Cancel, 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.

Attending Physician/Clinician*
Select...
Dr. Charles Allen (callen@email.com)
Dr. Fraiser McGill (fraisermcgill@email.com)
Dr. Frank Costanza, Sr (frankc@email.com)
John Smith (john@mailinator.com)

Affiliation/Organization*
Select...

If other, please specify:

Middle Name
Last Name*

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**.

Form fields: First Name*, Middle Name, Suffix, Date of Birth*. The Date of Birth* field is highlighted with a red border and contains the text "mm/dd/yyyy" and a calendar icon.

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

Form fields: Patient Sex*, Ethnicity*, Race*, Address 2, State*, Zip Code*. The Patient Sex* dropdown menu is open, showing options: Female, Male, Other, Unknown. The dropdown menu is highlighted with a red border.

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

Form fields: Patient Sex*, Ethnicity*, Race*, Address 1*, Address 2, City*, State*, County*, Phone*, Zip Code*. The Ethnicity* dropdown menu is open, showing "Not Hispanic or Latino" and is highlighted with a red border. The Race* dropdown menu is open, showing options: American Indian or Alaska Native, Asian, Asked but Unknown, Black or African American, Native Hawaiian or Other Pacific Islander, Other, Unknown. The Race* dropdown menu is highlighted with a red border.

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

Form fields: Address 1*, Address 2, City*, State*, Zip Code*, County*, Phone*, Email. The Address 1*, City*, State*, Zip Code*, and County* fields are highlighted with red borders.

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

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

A screenshot of a patient information form. Fields include City* (Lexington), State* (KY), Zip Code* (40509), County* (Fayette), Phone* (masked as (XXX) XXX-XXXX), and Email (name@domain.com). The Phone* and Email fields are highlighted with red rectangles.

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

A screenshot of the Visit Type dropdown menu. The menu is open, showing options: Ambulatory, Emergency, Field, Home Health, Inpatient Acute, Inpatient Encounter, and Inpatient Non-Acute. The 'Ambulatory' option is selected. To the right is the Encounter ID/Visit #* field with a 'Generate' button.

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

A screenshot of the Visit Type dropdown menu with 'Ambulatory' selected. The Encounter ID/Visit #* field is highlighted with a red rectangle.

• 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.

A screenshot of the Visit Type dropdown menu with 'Select...' selected. The Encounter ID/Visit #* field is highlighted with a red rectangle.

The screenshot shows a 'Patient Case History' pop-up window. At the top, there are fields for Patient ID (MRN)* (EB06081970), First Name* (Elaine), and Last Name* (Benes). Below these is a table with 5 columns: CREATION DATE TIME, REPORT NAME, CONDITION NAME, VISIT TYPE, and ENCOUNTER ID. The table contains two rows of data. At the bottom of the pop-up, there is a 'Visit Type*' dropdown menu set to 'Inpatient Acute', an 'Encounter ID/Visit #' field, and a 'Generate' checkbox.

CREATION DATE TIME	REPORT NAME	CONDITION NAME	VISIT TYPE	ENCOUNTER ID
05/31/2023 9:08 AM	Other Conditions	Adult Botulism	Inpatient Encounter	10000000000000000073
05/30/2023 12:47 PM	COVID-19	COVID-19	Ambulatory	10000000000000000072

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 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.

This screenshot shows a close-up of the 'Generate' checkbox. The 'Visit Type*' dropdown is set to 'Emergency'. The 'Encounter ID/Visit #' field is empty. The 'Generate' checkbox is currently unchecked and is highlighted with a red box.

- Upon clicking the **Generate** checkbox, the *Encounter ID/Visit #* field will be grayed 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.

This screenshot shows the 'Generate' checkbox checked. The 'Encounter ID/Visit #' field is now grayed out and contains a system-generated value. The 'Generate' checkbox is highlighted with a red box.

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

Is the patient currently pregnant?*

If yes, please enter the due date (EDC): ?

Unknown

Please Note: The *Is the patient currently pregnant?* field is enabled and required 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.

Is the patient currently pregnant?*

If yes, please enter the due date (EDC):* ?

Unknown

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)*.

Is the patient currently pregnant?*

If yes, please enter the due date (EDC): ?

Unknown

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?*

VECTORBORNE DISEASES CASE REPORT FORM Section 2 of 8

Please provide laboratory information related to this case.

LABORATORY INFORMATION

Patient Information ✔

Laboratory Information

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.

LABORATORY INFORMATION

Patient Information ✔

Laboratory Information

Applicable Symptoms 🔒

Additional Information 🔒

Hospitalization, ICU & Death Information 🔒

Vaccination History 🔒

Additional Comments 🔒

Review & Submit 🔒

Does the patient have a lab test?*

Laboratory Information

Laboratory Name*

Test Name*

Select... | v

If other, please specify: ?

Filler Order/Accession Number ?

Specimen Source*

Select... | v

If other, please specify: ?

Test Result*

Select... | v

If other, please specify: ?

Test Result Date Unknown

Specimen Collection Date* Unknown

Additional Information ?

0/300 Characters

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.

Does the patient have a lab test?*

Laboratory Information

Laboratory Name*

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

Laboratory Information

Laboratory Name*

Test Name*

Select... | v

Colorado tick fever virus Ab [Presence] in Serum

Colorado tick fever virus IgG Ab [Titer] in Serum

Colorado tick fever virus IgG Ab [Units/volume] in Serum

Colorado tick fever virus IgM Ab [Titer] in Serum

Colorado tick fever virus IgM Ab [Units/volume] in Serum

Colorado tick fever virus RNA [Presence] in Specimen by NAA with probe detection

Other

- 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.*

Test Result*

Other | x | v

If other, please specify:* ?

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

The screenshot shows two input fields. The first is labeled "If other, please specify:*" with a help icon and contains the text "Other Test". The second is labeled "Filler Order/Accession Number" with a help icon and is currently empty. A red rectangular box highlights the "Filler Order/Accession Number" field.

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

The screenshot shows a dropdown menu titled "Specimen Source*" with the value "010101010101010" in the field above it. The dropdown list is open, showing options: "Select...", "Abscess", "Amniotic fluid", "Aspirate", "Bile fluid", "Blood - cord", "Blood arterial", and "Blood bag". A red rectangular box highlights the entire 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*.

The screenshot shows the "Specimen Source*" dropdown menu with "Other" selected. Below it, the "If other, please specify:*" field is now active and highlighted with a red rectangular box.

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

The screenshot shows a dropdown menu titled "Test Result*" with the value "Select..." in the field above it. The dropdown list is open, showing options: "Negative", "Pending", "Positive", "Undetermined/Inconclusive", and "Other". A red rectangular box highlights the entire 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.*

Test Result*

Other

If other, please specify:* ?

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

Test Result Date* mm/dd/yyyy Unknown

Specimen Collection Date* mm/dd/yyyy Unknown

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.

Test Result Date* 01/01/2024 Unknown
Invalid Test Result Date

Specimen Collection Date* 01/04/2024 Unknown
Invalid Specimen Collection Date

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

Test Result Date* 02/23/2024 Unknown

Specimen Collection Date* 01/15/2024 Unknown

Additional Information ?

0/300 Characters

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.

Laboratory Information

Laboratory Name*
Test

Test Name*
Other

If other, please specify:*
Other Test

Filler Order/Accession Number
010101010101010

Specimen Source*
Other

If other, please specify:*
Other Specimen Source

Test Result*
Other

If other, please specify:*
Abnormal Quantity detected greater than .009

Test Result Date*
01/01/2024 Unknown

Specimen Collection Date*
01/01/2024 Unknown

Additional Information
0/300 Characters

+ Add Test

Save Previous **Next**

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?*

VECTORBORNE DISEASES CASE REPORT FORM Section 3 of 8

Please select applicable symptoms that the patient experienced during illness.

APPLICABLE SYMPTOMS

Patient Information	✔	Were symptoms present during the course of illness?*
Laboratory Information	✔	<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown
Applicable Symptoms		
Additional Information	🔒	Onset Date ⓘ mm/dd/yyyy <input type="checkbox"/> Unknown

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

APPLICABLE SYMPTOMS

Patient Information	✔	Were symptoms present during the course of illness?*
Laboratory Information	✔	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown
Applicable Symptoms		
Additional Information	🔒	Onset Date ⓘ mm/dd/yyyy <input type="checkbox"/> Unknown
Hospitalization, ICU & Death Information	🔒	If symptomatic, which of the following did the patient experience during their illness?
Vaccination History	🔒	Fever* <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown
Additional Comments	🔒	If yes, please enter the highest temperature: ⓘ
Review & Submit	🔒	Diarrhea (>3 loose stools/24hr period)* <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown
		If yes, please enter the number of days with diarrhea: ⓘ
		Abdominal cramps* <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown

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 enter the highest temperature.*

- 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.*

Diarrhea (>3 loose stools/24hr period)*

If yes, please enter number of days with diarrhea:*

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

Abdominal pain*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Petechial rash*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Chills*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Pharyngitis*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Conjunctivitis*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Skin Rash*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Headache*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Sore throat*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Lethargy*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Tick Bite*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Maculopapular Rash lasting 3 or more days*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Tiredness*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Myalgia*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Vomiting*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>
Peripheral Lymphadenopathy*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>	Weakness*	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="Unknown"/>

Please Note: This user guide shows the generic workflow for the **Vectorborne 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 **Colorado Tick Fever**.

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

Did the patient have any other symptoms?*

If yes, please specify: ?

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

Did the patient have any other symptoms?*

If yes, please specify: * ?

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

Weakness*

Did the patient have any other symptoms?*

If yes, please specify: ?

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?*

VECTORBORNE DISEASES CASE REPORT FORM Section 4 of 8

Please select the information that the patient was exposed to prior to illness.

ADDITIONAL INFORMATION

Patient Information	✔	Does any of the following apply to the patient:*		
Laboratory Information	✔			
		Yes	No	Unknown

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

ADDITIONAL INFORMATION

Patient Information	✔	Does any of the following apply to the patient:*
Laboratory Information	✔	
Applicable Symptoms	✔	Yes No Unknown
Additional Information		
Hospitalization, ICU & Death Information	🔒	
Vaccination History	🔒	
Additional Comments	🔒	
Review & Submit	🔒	

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

Yes No Unknown

If yes, please specify state(s): ?

Select...

International Travel within the last 30 days*

Yes No Unknown

If yes, please specify country(s): ?

Select...

School/daycare attendee*

Yes No Unknown

If yes, please specify the name of school/daycare: ?

School/daycare employee*

Yes No Unknown

If yes, please specify the name of school/daycare: ?

Food handler*

Yes No Unknown

If yes, please specify the name of food handler service: ?

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) in which 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 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*

The screenshot shows a form with a red border highlighting five sections. Each section has a title, three radio buttons (Yes, No, Unknown), and a text input field with a help icon. The sections are: 'School/daycare attendee*', 'School/daycare employee*', 'Food handler*', 'Healthcare worker*', and 'Long-term care facility resident*'. The text input fields are currently empty.

Long-term care facility employee*

If yes, please specify the name of long-term care facility: ?

Correctional facility resident*

If yes, please specify the name of correctional facility: ?

Correctional facility employee*

If yes, please specify the name of correctional facility: ?

Homeless shelter resident*

If yes, please specify the name of homeless shelter: ?

Homeless shelter employee*

If yes, please specify the name of homeless shelter: ?

College/university student*

If yes, please specify the name of college/university: ?

College/university teacher*

If yes, please specify the name of college/university: ?

Military*

If yes, please specify the name of military base: ?

Other congregate setting resident*

If yes, please specify the name of other congregate setting: ?

Other congregate setting employee*

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.*

Healthcare worker*

If yes, please specify the name of 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?*

Did the patient inject drugs not prescribed by a doctor?*

Did the patient use street drugs, but not inject?*

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

Is this part of an outbreak?*

If yes, please specify the name of the outbreak: ?

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

Is this part of an outbreak?*

If yes, please specify the name of the outbreak:* ?

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

Is this part of an outbreak?*

If yes, please specify the name of the outbreak:* ?

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 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 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.

If yes, please specify the hospital name:* ⓘ
Test Hospital

Admission Date*
mm/dd/yyyy Unknown

Discharge Date*
mm/dd/yyyy Unknown
 Still hospitalized

- 5. Enter the patient’s hospitalization **Discharge Date**.
 - If the patient is still hospitalized, click the **Still Hospitalized** checkbox.

Admission Date*
10/01/2021 Unknown

Discharge Date*
mm/dd/yyyy Unknown
 Still hospitalized

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

If yes, please specify the hospital name:* ⓘ
Test Hospital

Admission Date*
10/01/2021 Unknown

Discharge Date*
mm/dd/yyyy Unknown
 Still hospitalized

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

Admission Date to ICU
mm/dd/yyyy Unknown

Discharge Date from ICU
mm/dd/yyyy Unknown

Did the patient die as a result of this illness?

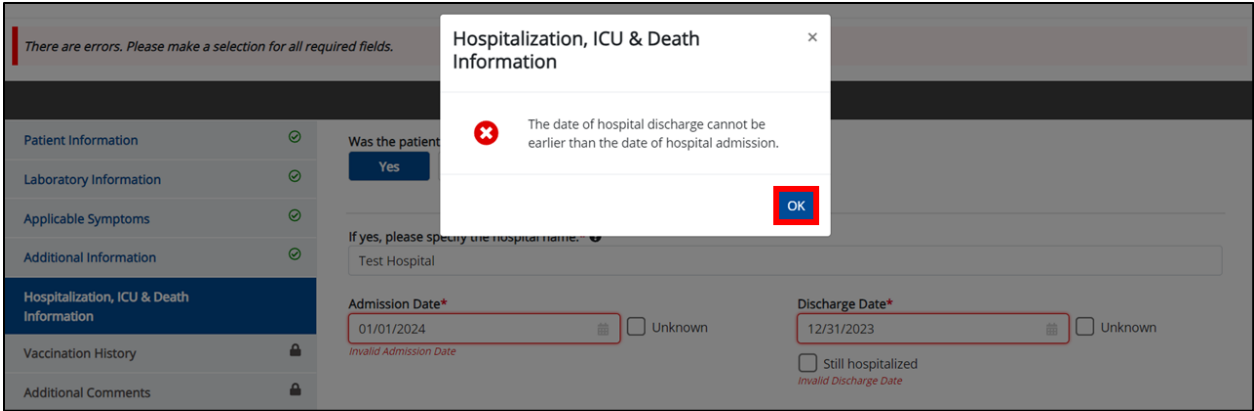
If yes, please provide the date of death:
Date of Death
mm/dd/yyyy Unknown

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.

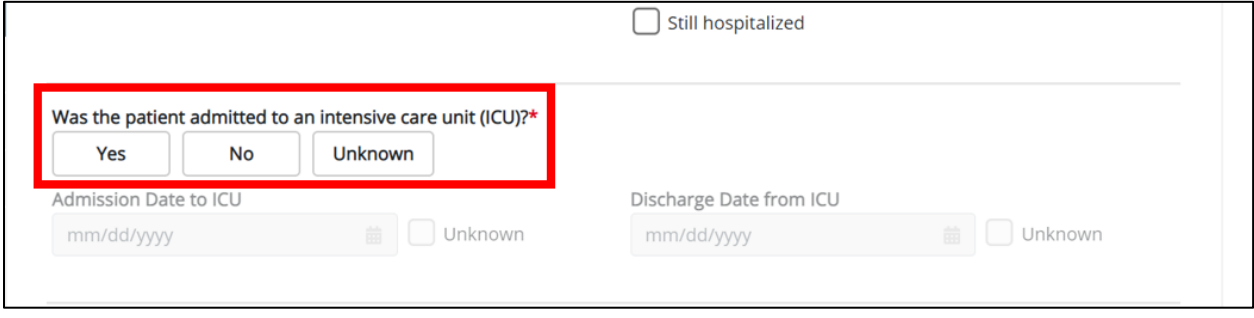
If you enter an Admission Date that occurs after the Discharge Date and click **Next**, both fields are marked as invalid, and the screen is grayed out and displays a pop-up message that states:

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**.

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

Admission Date to ICU* Unknown

Discharge Date from ICU* Unknown

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

Did the patient die as a result of this illness?*

If yes, please provide the date of death:

Date of Death Unknown

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

Did the patient die as a result of this illness?*

If yes, please provide the date of death:

Date of Death* Unknown

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

Hospitalization, ICU & Death Information

General Hospital

Admission Date* Unknown Discharge Date* Unknown

Still hospitalized

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

Admission Date to ICU Unknown Discharge Date from ICU Unknown

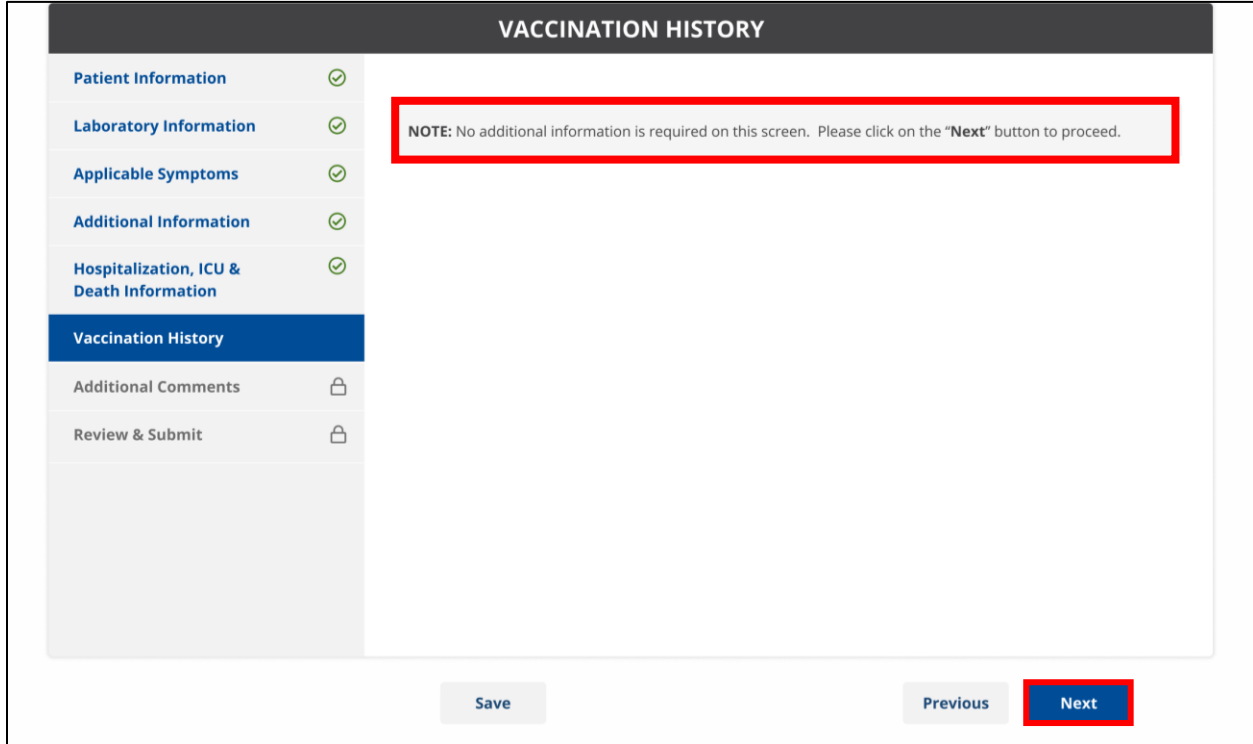
Did the patient die as a result of this illness?*

If yes, please provide the date of death:

Date of Death Unknown

14 Vaccination History

1. On the **Vaccination History** screen, the following message will display: **Note:** *No additional information is required on this screen. Please click on the "Next" button to proceed.*



2. 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.

VECTORBORNE DISEASES CASE REPORT FORM Section 8 of 8

Please review your information before submitting.

REVIEW & SUBMIT

Patient Information	✓
Laboratory Information	✓
Applicable Symptoms	✓
Additional Information	✓
Hospitalization, ICU & Death Information	✓
Vaccination History	✓
Additional Comments	✓
Review & Submit	

Print Download

Patient Information

Disease/Organism	Date of Diagnosis
Colorado Tick Fever	Unknown

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

Patient ID (MRN)	Affiliation/Organization
CF54315497	Baxter Hospital

Person Completing Form	Affiliation/Organization
Mr. Arthur Vandelay, II	Baxter Hospital

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

Print 3 sheets of paper

Destination SecurePrint

Pages All

Copies 1

Color Color

More settings

Print Cancel

Patient Information

Disease/Organism
Colorado Tick Fever

Date of Diagnosis
Unknown

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

Patient ID (MRN)
CF54315497

Affiliation/Organization
Baxter Hospital

Person Completing Form
Mr. Arthur Vandelay, II (arthur@email.com)

Affiliation/Organization
Baxter Hospital

Attending Physician/Clinician
Dr. Charles Allen (callen@email.com)

Affiliation/Organization
Baxter Hospital

First Name John	Last Name Doe
--------------------	------------------

Date of Birth
12/19/1996

Patient Sex
Male

Race
White

Address 1
123 Main Street

City
Lexington

State
KY

Zip Code
40511

County
Fayette

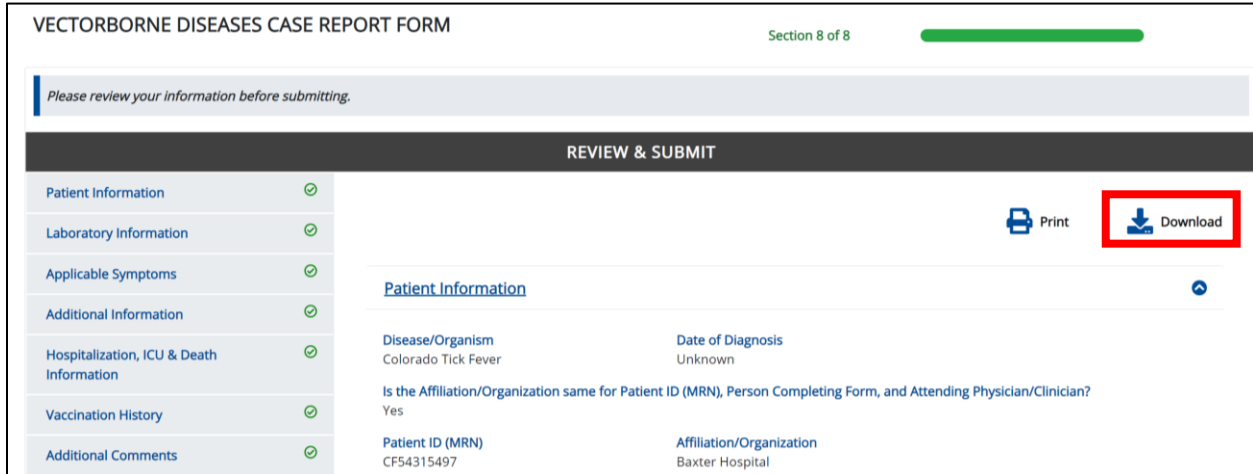
Phone
(222) 222-2222

Visit Type
Ambulatory

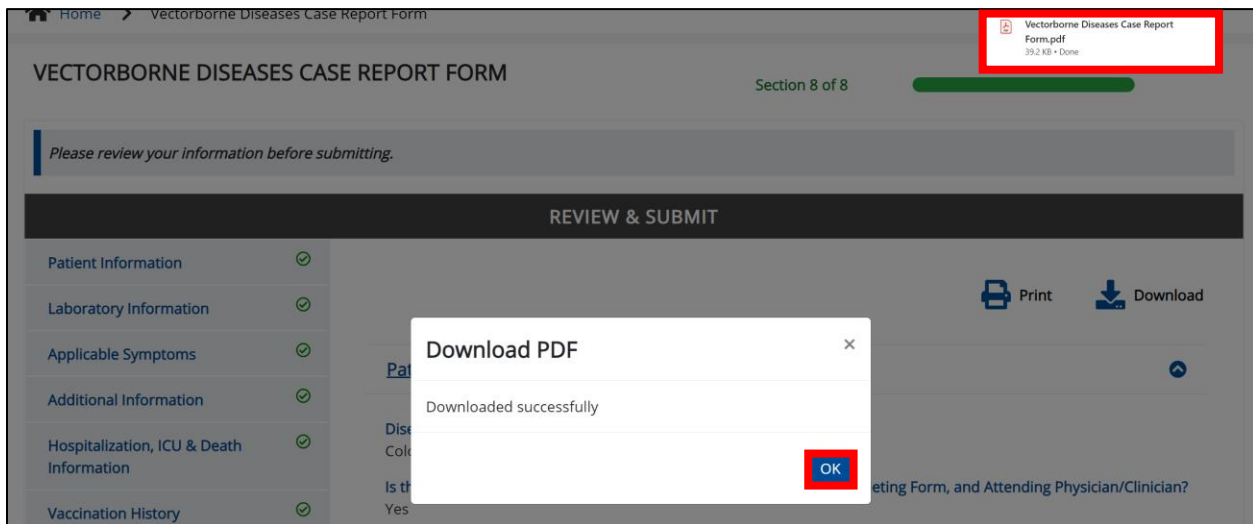
Encounter ID/Visit #
1000000000000000000815

Laboratory Information

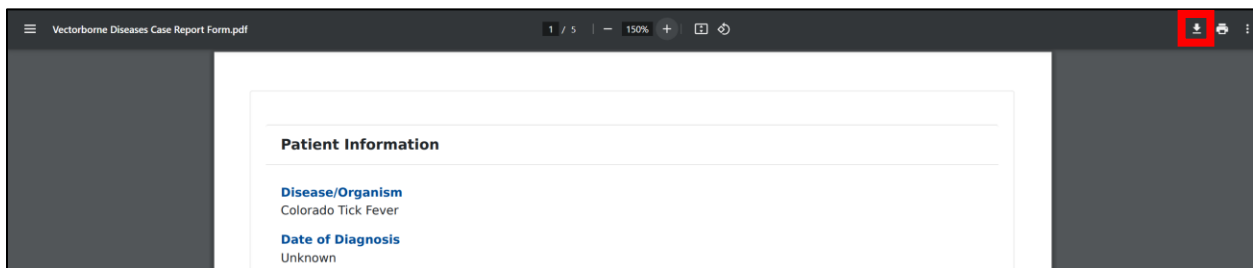
2. Click **Download** to download a PDF version of the case report.



- 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.


REVIEW & SUBMIT

Patient Information ✔	<div style="text-align: right; margin-bottom: 10px;"> Print Download </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Patient Information ⌵ </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Laboratory Information ⌶ </div> <div style="padding: 5px 0 5px 20px;"> Does the patient have a lab test? Yes </div> <div style="padding: 5px 0 5px 20px;"> Laboratory Information Laboratory Name Lab X </div>
Laboratory Information ✔	
Applicable Symptoms ✔	
Additional Information ✔	
Hospitalization, ICU & Death Information ✔	
Vaccination History ✔	
Additional Comments ✔	
Review & Submit	

3. Review the *Patient Information* section.

Disease/Organism Colorado Tick Fever	Date of Diagnosis Unknown
Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician? Yes	
Patient ID (MRN) CF54315497	Affiliation/Organization Baxter Hospital
Person Completing Form Mr. Arthur Vandelay, II (arthur@email.com)	Affiliation/Organization Baxter Hospital
Attending Physician/Clinician Dr. Charles Allen (callen@email.com)	Affiliation/Organization Baxter Hospital
First Name John	Last Name Doe
Date of Birth 1996/12/19	
Patient Sex Male	Ethnicity Not Hispanic or Latino
	Race White
Address 1 123 Main Street	
City Lexington	State KY
	Zip Code 40511
County Fayette	Phone (222) 222-2222
Visit Type Ambulatory	Encounter ID/Visit # 10000000000000000815

4. Review the *Laboratory Information* section.

[Laboratory Information](#) 

Does the patient have a lab test?
Yes

Laboratory Information

Laboratory Name
Test Lab

Test Name
Other

If other, please specify:
Test Name

Filler Order/Accession Number
0101010101

Specimen Source
Cyst

Test Result
Pending

Specimen Collection Date
2024/02/01

5. Review the *Applicable Symptoms* section.

Applicable Symptoms

Were symptoms present during the course of illness?
Yes

Onset Date
2024/01/31

If symptomatic, which of the following did the patient experience during their illness?

Fever
No

Diarrhea (>3 loose stools/24hr period)
No

Abdominal pain
No

Chills
Yes

Conjunctivitis
No

Headache
Yes

Lethargy
No

Maculopapular Rash lasting 3 or more days
No

Myalgia
Yes

Peripheral Lymphadenopathy
Unknown

Petechial rash
No

Pharyngitis
Yes

Skin Rash
No

Sore throat
No

Tick Bite
Yes

Tiredness
No

Vomiting
Yes

Weakness
Yes

Did the patient have any other symptoms?
No

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):
CO

International Travel within the last 30 days
No

School/daycare attendee
No

School/daycare employee
No

Food handler
No

Healthcare worker
No

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
Unknown

College/university teacher
No

Military
Unknown

Other congregate setting resident
Yes

If yes, please specify the name of other congregate setting:
Hiking Guide Co.

Other congregate setting employee
No

Did the patient inject drugs not prescribed by a doctor?
Yes

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

Is this part of an outbreak?
No

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

Hospitalization, ICU & Death Information

Was the patient hospitalized?
Yes

If yes, please specify the hospital name:
Baxter Hospital

Admission Date: 2024/01/28 Discharge Date: 2024/01/30

Was the patient admitted to an intensive care unit (ICU)?
No

Did the patient die as a result of this illness?
No

7. Review the *Additional Comments* section.

Additional Comments

Additional comments or notes, please specify:
Patient Notes

Click Hyperlinks to Edit

- 8. 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.

REVIEW & SUBMIT

Patient Information ✓ Print Download

Laboratory Information ✓

Applicable Symptoms ✓

Additional Information ✓

Hospitalization, ICU & Death Information ✓

Vaccination History ✓

Additional Comments ✓

Review & Submit

Patient Information

Disease/Organism: Colorado Tick Fever Date of Diagnosis: Unknown

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

Patient ID (MRN): CF54315497 Affiliation/Organization: Baxter Hospital

Person Completing Form: Mr. Arthur Vandelay, II (arthur@email.com) Affiliation/Organization: Baxter Hospital

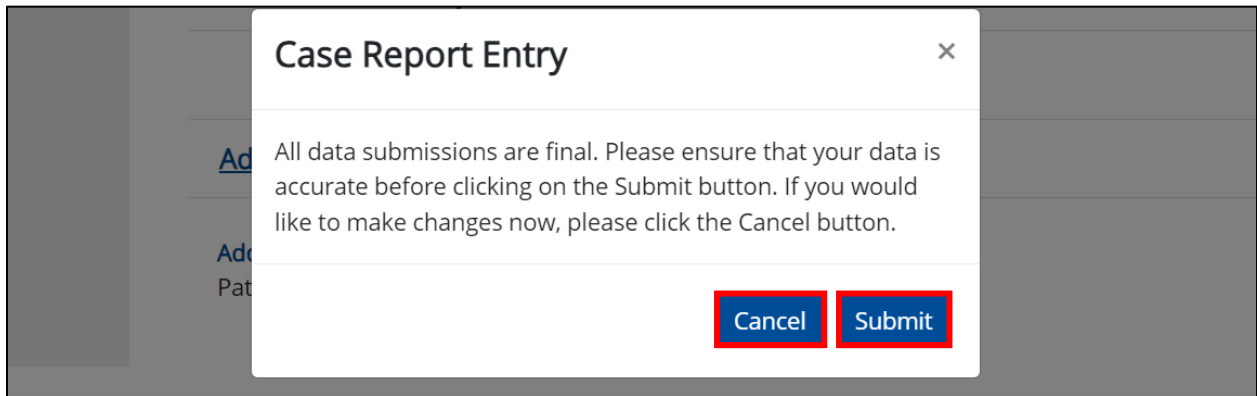
9. Once the appropriate edits have been made, click the **Review and Submit** tab on the side navigation bar to navigate back to the **Review and Submit** screen.

10. 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**.

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

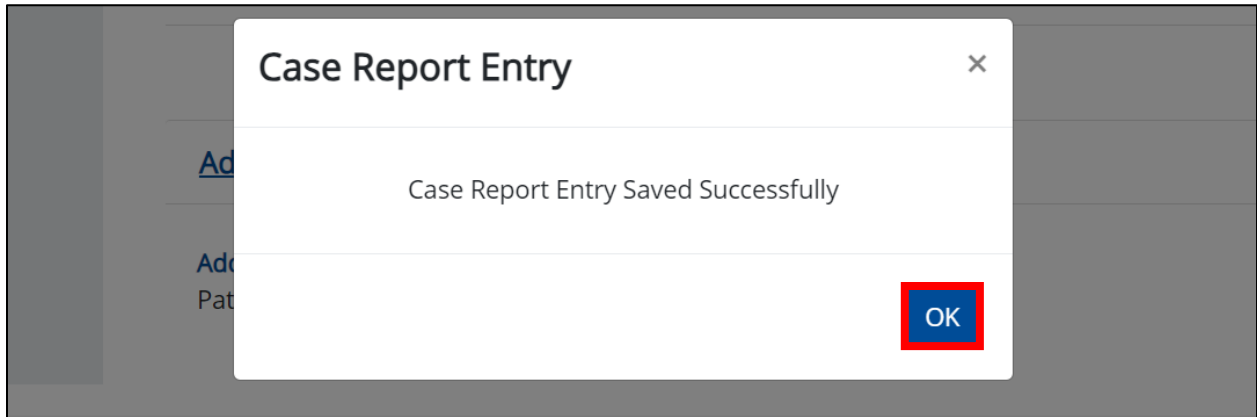
12. After verifying the information is accurate and/or the appropriate changes have been made, you must click **Submit** to submit the Vectorborne Diseases Case Report Entry.

- 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.

13. 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 Vectorborne 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.

ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	K5474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

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.

ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic			Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

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.

CASE REPORT ENTRY USER SUMMARY

LAST UPDATED DATE RANGE Start Date: 02/21/2020 End Date: 02/21/2024 Retrieve Data

Please select a Start Date that is within the last six months from today's date.

- 3. Click **Retrieve Data** to display the search results.
- 4. To search for a specific case report, click **Apply Filter**.

CASE REPORT ENTRY USER SUMMARY

LAST UPDATED DATE RANGE Start Date: 02/27/2024 End Date: 02/27/2024 Retrieve Data

SHOWING 3 ITEMS APPLY FILTER

ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	K547474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

First Back 1 Next Last Maximum 5 entries per page

- 5. The Filter fields display. 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.

SHOWING 3 ITEMS HIDE FILTER

ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
	Enter Report Type	Enter Disease/ Org.	Enter Affiliation/ Or	Enter Patient	Enter First Name.	Enter Last Name	Enter Date Of	All	Enter Sta	All	All
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	K547474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

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.

CASE REPORT ENTRY USER SUMMARY											
LAST UPDATED DATE RANGE											
Start Date: 02/27/2024				End Date: 02/27/2024				Retrieve Data			
SHOWING 3 ITEMS											
APPLY FILTER											
ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	KS47474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

First Back 1 Next Last Maximum 5 entries per page

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.

Case Report Details

[Print](#) [Download](#)

Patient Information

Disease/Organism	Date of Diagnosis
Colorado Tick Fever	2024/02/02

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

Patient ID (MRN)	Affiliation/Organization
KS47474747	Swanlake Clinic
Person Completing Form	Affiliation/Organization
Mr. Marty Craine, Sr (marty@email.com)	Swanlake Clinic
Attending Physician/Clinician	Affiliation/Organization
Dr. Fraiser McGill (fraisermcgill@email.com)	Swanlake Clinic
First Name	Last Name
Charles	Andover

[OK](#)

Copy Previously Submitted Case Reports

The **Copy** feature allows Users to copy the information from a completed case report, make edits, and then submit 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.

CASE REPORT ENTRY USER SUMMARY											
LAST UPDATED DATE RANGE											
Start Date		02/27/2024		End Date		02/27/2024		Retrieve Data			
SHOWING 3 ITEMS											
APPLY FILTER											
ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	KS47474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

First Back 1 Next Last Maximum 5 entries per page

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

By default, the **Patient Information** screen displays the information entered on the previously submitted Vectorborne Diseases case report. Users can change the information entered in any of the enabled fields and submit a new Vectorborne 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/Organization, 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.

The screenshot shows the 'PATIENT INFORMATION' form. Red boxes highlight the following fields: 'Date of Diagnosis' (02/02/2024), 'Person Completing Form' (Mr. Marty Craine, Sr), 'Attending Physician/Clinician' (Dr. Fraiser McGill), 'Ethnicity' (Unknown), and 'Race' (Native Hawaiian or Other Pacific Islander). The address fields (Address 1, City, State, Zip Code, County, Phone, Email) are also highlighted.

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.

Is the patient currently pregnant?

If yes, please enter the due date (EDC):

Unknown

- 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.

LABORATORY INFORMATION

Patient Information

Laboratory Information

Applicable Symptoms

Additional Information

Hospitalization, ICU & Death Information

Vaccination History

Additional Comments

Review & Submit

Does the patient have a lab test?*

Laboratory Information

Laboratory Name*

Test Name*
Salmonella sp [Presence] in Stool by Culture

If other, please specify:

Filler Order/Accession Number

Specimen Source*
Select...

If other, please specify:

Test Result*
Negative

If other, please specify:

Test Result Date*
 Unknown

Specimen Collection Date*
 Unknown

Additional Information

0/300 Characters

Add Test

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

The screenshot shows a 'Review & Submit' screen with a sidebar on the left containing navigation options: 'Applicable Symptoms', 'Additional Information', 'Hospitalization, ICU & Death Information', 'Vaccination History', 'Additional Comments', and 'Review & Submit' (which is highlighted). The main content area is titled 'Patient Information' and contains the following data:

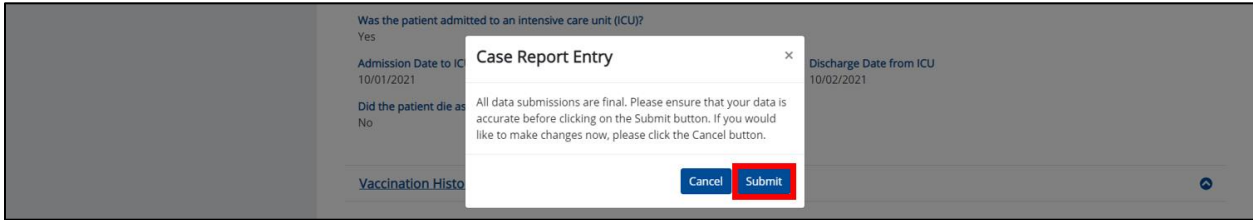
Disease/Organism	Colorado Tick Fever	Date of Diagnosis	2024/02/02
Is the Affiliation/Organization same for Patient ID (MRN), Person Completing Form, and Attending Physician/Clinician?			
Yes			
Patient ID (MRN)	Affiliation/Organization		
KS47474747	Swanlake Clinic		
Person Completing Form	Affiliation/Organization		
Mr. Marty Craine, Sr (marty@email.com)	Swanlake Clinic		
Attending Physician/Clinician	Affiliation/Organization		
Dr. Fraiser McGill (fraisermcgill@email.com)	Swanlake Clinic		
First Name	Last Name		
Charles	Andover		
Date of Birth	Ethnicity		Race
1978/01/18	Unknown		Native Hawaiian or Other Pacific Islander
Patient Sex	Address 1		
Male	14 Road Parkway		
City	State	Zip Code	
Frankfort	KY	40126	
County	Phone		
Franklin	(859) 899-7745		
Visit Type	Encounter ID/Visit #		
Virtual	100000000000000000817		

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

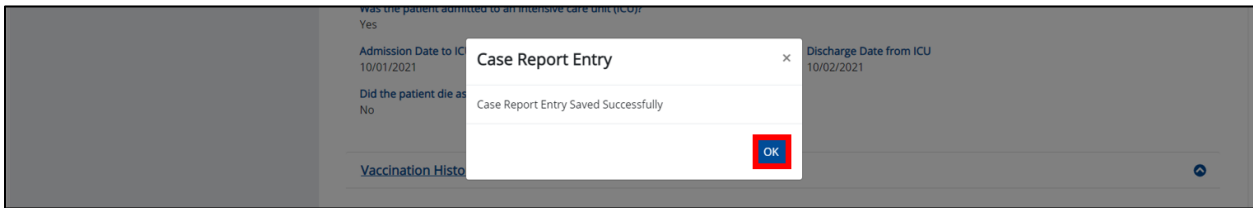
The screenshot shows the bottom section of the form. It includes a 'Vaccination History' section with a blue arrow icon, an 'Additional Comments' section with a blue arrow icon, and a text area for 'Additional comments or notes, please specify:' containing the text 'Additional Patient Notes'. At the bottom right, there are three buttons: 'Previous', 'Submit' (highlighted with a red border), and a blue arrow icon pointing up.

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.

CASE REPORT ENTRY USER SUMMARY											
LAST UPDATED DATE RANGE		Start Date	02/27/2024	End Date	02/27/2024	Retrieve Data					
SHOWING 4 ITEMS											
ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	K547474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 13:16	2024/02/27 13:16
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	K547474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

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.

ACTIONS	REPORT TYPE	DISEASE/ ORGANISM	AFFILIATION/ ORGANIZATION	PATIENT MRN	FIRST NAME	LAST NAME	DATE OF BIRTH	PATIENT SEX	STATUS	LAST UPDATED	SUBMISSION DATE
Continue Delete	Vectorborne Diseases	Colorado Tick Fever	St Francis Hospital	LK7872464	Martin	Taylor	1959/09/14	Male	In Progress	2024/02/27 12:53	
View Copy	Vectorborne Diseases	Colorado Tick Fever	Swanlake Clinic	KS47474747	Charles	Andover	1978/01/18	Male	Complete	2024/02/27 12:51	2024/02/27 12:51
View Copy	Vectorborne Diseases	Colorado Tick Fever	Howell Hospital	GU47514265	Mia	Bartwell	2000/04/07	Female	Complete	2024/02/27 12:49	2024/02/27 12:49
View Copy	Vectorborne Diseases	Colorado Tick Fever	Baxter Hospital	CF54315497	John	Doe	1996/12/19	Male	Complete	2024/02/27 12:46	2024/02/27 12:46

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

VECTORBORNE DISEASES CASE REPORT FORM

Section 7 of 8

Please add any additional comments related to this case.

ADDITIONAL COMMENTS

- Patient Information ✓
- Laboratory Information ✓
- Applicable Symptoms ✓
- Additional Information ✓
- Hospitalization, ICU & Death Information ✓
- Vaccination History ✓
- Additional Comments**
- Review & Submit

Additional comments or notes, please specify:

0/1000 Characters

Save Previous Next

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.

