


## Creating a Field Record from a manually entered lab:

First, create the event. 

Refer to Chapter 3: Working with Events in THISIS in the Core User Manual for more information on this topic

*\*\*\*Always search for an existing event before creating a new event. The skill sheet entitled, 'Searching in THISIS' provides instructions on how to search for an event in the system. If no existing event is found, follow these procedures to create a new event.\*\*\**

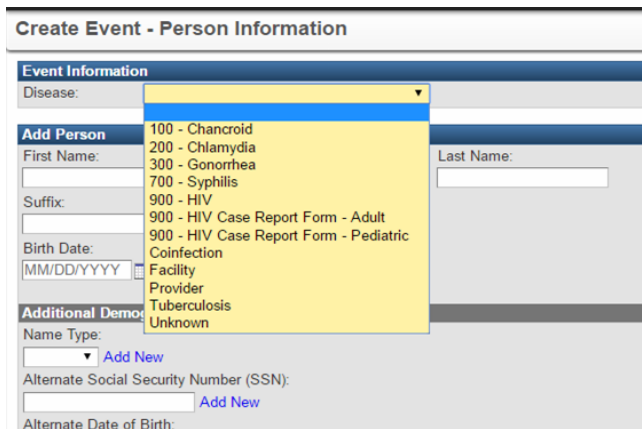
Select the **Create Event** button  on toolbar to display the **Create Event** screen.



The screenshot shows the Maven Disease Surveillance Suite interface. The toolbar at the top contains several icons, with the 'Create Event' icon (a document with a plus sign) circled in red. Below the toolbar are three sections: 'Workflows', 'Tasks', and 'Recent Cases'. The 'Recent Cases' section contains a table with the following data:

Event ID	Name	Disease
200001446	Smith, John R	200 - Chlamydia
200001644	Smith, John	200 - Chlamydia
200001643	Smith, John	200 - Chlamydia
200001642	Smith, John	200 - Chlamydia
200001641	Smith, John	200 - Chlamydia

When the Create Event screen opens, **select a disease**. The create event screen will not allow any function to be performed without selecting a disease.



The screenshot shows the 'Create Event - Person Information' form. The 'Disease' dropdown menu is open, displaying a list of diseases. The form fields include:

- Event Information**: Disease (dropdown menu)
- Add Person**: First Name, Last Name, Suffix, Birth Date (MM/DD/YYYY), Facility, Provider, Tuberculosis, Unknown
- Additional Demographics**: Name Type (dropdown menu), Alternate Social Security Number (SSN), Alternate Date of Birth



To navigate the disease list quickly, type the first letter of the disease name to scroll to the first disease that begins with that letter and you will get an alphabetical list of diseases that begin with that letter.

Select the **Select Person** button.

Phone Number Type:  Add New

**Contact Information**

Address Type:  Home Street:

City:  State:  TX Zip Code:

County:  Country:  USA

Home Phone:

Residence Type:

**Select Person...** Clear

Save Cancel Help

Enter search criteria for the person associated with this specific event in the Search Party screen. Then **select the Search button**.

**Search Party**

Search Criteria

Party ID:

Last Name:  Jon\*

First Name:

Birth Date:  05/22/1989  (Inexact)

Social Security Number:

City:

State:

Zip Code:

Phone:

Street:

Alternate First Name:

Alternate Middle Name:

Alternate Last Name:

Alternate Suffix:

Estimated Age:

eHARS Case ID:

Sex at Birth:

Sort Options

Sort By:  Name

Sort Order:  Ascending

Search Options

Search History:

Search Soundex:

**Search** Clear Create New

Select the result for the correct person (highlighted in yellow).

Use the **Select** button to insert person information into Create Event Screen.

The screenshot shows a 'Search Results' table with the following data:

Name	Birth Date	Street Address	City	State	Zip Code	External ID
JOnes, Avery				TX		PBEWUTTCKDW
Jones, Abbey				TX		PBEWRDOUFCK
▶ Jones, Abel	05/22/1989	123 This Street	Houston	TX	78345	PFMEVUCWWLY
Jones, Amy	07/30/1977			TX		PFMEVTAQEUBD
Jones, Analise				TX		PBEWUNUPRBU
Jones, Angel				TX		PBEWTBKKGFM
Jones, Angela	05/17/1985			TX		PBEWHSCQYV
Jones, Ari	05/15/1987			TX		PBEXBISABDD
Jones, Arty				TX		PFMEVTFALICC
Jones, Ava	09/28/2015			TX		PBEWSHICKBJ

Below the table are navigation buttons: First, Previous, 1, 2, Next, Last. At the bottom, there are three buttons: **Select**, Cancel, and Help. Red arrows point from the text above to the 'Select' button and the row for 'Jones, Abel'.

If person is not found, select the **Cancel** button to return to Create Event Screen.

Enter the person information into Add Person, Advanced Demographics and Contact Information sections of Create Event Screen.

The screenshot shows the 'Create Event - Person Information' form. It is divided into three main sections, each with a red arrow pointing to a callout box:

- Add Person:** Fields for First Name (Jimmy), Middle Name, Last Name (John), Suffix, Birth Date, and Social Security Number.
- Additional Demographics:** Fields for Name Type, Alternate Social Security Number (SSN), Estimated Age, Alternate Date of Birth, eHARS Case ID, TDCJ Number (SID), Ethnicity, Race, Sex at Birth, Current Gender Identity, Born in the US, Country of Birth, Date of Arrival in the US, English Speaking, Preferred Language, Email Type, Electronic Contact Type, and Phone Number Type.
- Contact Information:** Fields for Address Type (Home), Street, City, State (TX), Zip Code, County, Country (USA), Home Phone, and Residence Type.

At the bottom of the form are buttons for 'Select Person...' and 'Clear'.



To create new event, select the **Save** button.

If the Potential Matches Screen Appears, research the existing records:

1

Evaluate existing events listed at the bottom of the page. If an event is the same person, the same disease, and the same time frame, the 'Use this event' link will take you to that event. This is the safe choice that does not create a new person or event.

2

Evaluate existing persons. Use the Choose Person button if an existing person matches the person information and you have a high degree of confidence that it is the same person. This will create a new event with the existing person information.

3

If the person information does not match, use the Create new case and person button. This will create a new person with a new event. This should only be done after evaluating existing persons and events

The diagram on the next page shows the different parts of the Potential Matches Screen to investigate.

Entered Information:	
Name:	Jimmy John
Birth Date:	05/05/1955
Social Security Number:	
Name Type	
Alternate Social Security Number (SSN)	
Estimated Age	
Alternate Date of Birth	
eHARS Case ID	
TDCJ Number (SID)	
Ethnicity	
Race	
Sex at Birth	
Current Gender Identity	
Born in the US	
Country of Birth	
Date of Arrival in the US	
English Speaking	
Preferred Language	
Email Type	
Electronic Contact Type	
Phone Number Type	
Address:	TX
County:	
Country:	USA
Phone:	

**3**

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Create new case and person

Mark as pending deduplication

**Matches**

Matched Record 1	
Name:	Jimmy John <a href="#">[Details]</a>
External ID:	PBEXWNOKSBG
Birth Date:	05/05/1955
Social Security Number:	
Name Type	
Alternate Social Security Number (SSN)	
Estimated Age	
Alternate Date of Birth	
eHARS Case ID	
TDCJ Number (SID)	
Ethnicity	
Race	
Sex at Birth	
Current Gender Identity	
Born in the US	
Country of Birth	
Date of Arrival in the US	
English Speaking	
Preferred Language	
Email Type	
Electronic Contact Type	
Phone Number Type	
Address:	TX
County:	
Country:	USA
Phone:	

**2**

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Choose Person (creates new event)

Use entered information

Events				
Event ID	Status	Disease	Create Date	Action
200001671	Open	200 - Chlamydia	02/21/2018	<a href="#">Use this event</a>

**1**

If you selected "create an event" from the Potential Matches screen, or there were no potential matches, a new event will open on the screen in the Event Summary screen. Your event is now ready to enter information. You should record the new Event ID on the source document.

In the event, select the disease:

Create Event - Person Information	
<b>Event Information</b>	
Disease:	<input type="text"/>
<b>Add Person</b>	100 - Chancroid
First Name:	200 - Chlamydia
<input type="text"/>	300 - Gonorrhea
Suffix:	700 - Syphilis
<input type="text"/>	900 - HIV
Birth Date:	900 - HIV Case Report Form - Adult
<input type="text" value="MM/DD/YYYY"/>	900 - HIV Case Report Form - Pediatric
<b>Additional Demog</b>	Coinfection
Name Type:	Facility
<input type="text"/>	Provider
<input type="text"/>	Tuberculosis
<input type="text"/>	Unknown
<input type="text"/>	Unknown MIS Legacy

Enter in the demographic information available from the lab result.

Maven Disease Surveillance Suite

### Create Event - Person Information

**Event Information**  
Disease: 200 - Chlamydia

**Add Person**  
First Name: Mickey Middle Name: Last Name: Mouse  
Suffix:  
Birth Date: 11/16/1964 Social Security Number:

**Additional Demographics**  
Name Type: Add New  
Alternate Social Security Number (SSN): Add New  
Estimated Age: Add New  
Alternate Date of Birth: MM/DD/YYYY Add New  
eHARS Case ID: TDCJ Number (SID):  
Ethnicity: Hispanic  
Race: Black or African American Add New  
Sex at Birth: Male Current Gender Identity: Male  
Born in the US: Yes Country of Birth: USA  
Date of Arrival in the US: MM/DD/YYYY  
English Speaking: Preferred Language:  
Email Type: Add New  
Electronic Contact Type: Add New  
Phone Number Type: Add New

**Contact Information**  
Address Type: Home Street: 7433 Cayenne Lane  
City: austin State: TX Zip Code: 78741 ✓ Address validated [View] [Apply]  
County: Country: USA  
Home Phone:  
Residence Type:

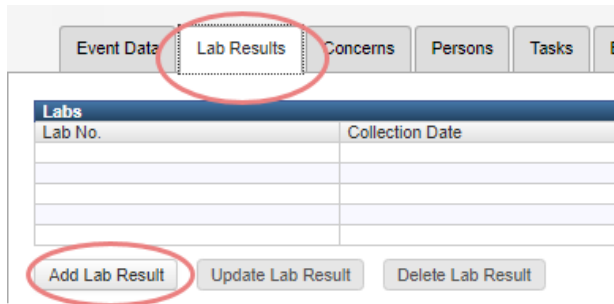
Select Person... Clear

Notice the address is validated in real time as it is entered.

Save Cancel Help

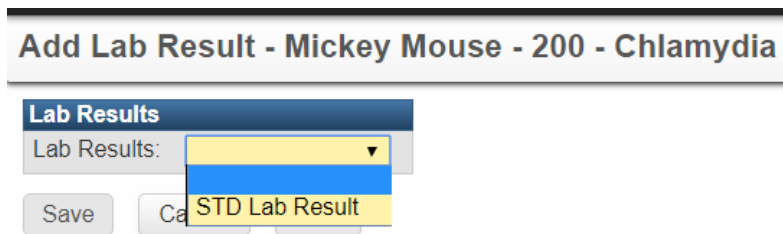
Select Save when complete.

When in the event click on "Lab Results" tab.



Select "Add Lab Result" – this will take you to the lab screen.

Select "STD Lab Result"



*Note: The Lab Result option will match the disease already entered. For example, for HIV it will say "HIV Lab Result" and "TB Lab Result" for TB.*

Fill out all of the information available on the lab. Notice only the information on the test (lab, dates, type of test, result) are only required.

Patient information is not required for STD lab results, but is for positive HIV results.



The screenshot shows a form titled "Lab Results" with a dropdown menu set to "HIV Lab Result". Below this are sections for "Report Source", "Patient Information", "Specimen Info", "Ordered Test", and "Resulted Test". Red circles highlight the following fields: "HIV Lab Result" dropdown, "Report Source" dropdown, "First Name\*", "Last Name\*", "Date of Birth\*" (with a calendar icon), "Sex\*" dropdown, "Race" dropdown, "Address 1\*", "Address 2", "City", "State\*", "Zip\*", and "Country".

Note: Patient information in the HIV lab result is required. This is not the case in an STD lab.

Add the lab.

The screenshot shows the "Resulted Test" section. A dropdown menu for "Test\*" is open, listing several options: CHLAM - Culture, CHLAM - DFA, CHLAM - DNA Probe, CHLAM - EIA, CHLAM - IgA, CHLAM - IgG, CHLAM - IgM, and CHLAM - NAAT(SDA, TMA, PCR). To the right of the dropdown are fields for "Result\*", "Result Value\*", "Test Local Desc", "Result Local Description", "Test Description", and "Rapid". A blue "Add" button is at the bottom left, with a red arrow pointing to it.

Save lab information.

The screenshot shows a dialog box with three buttons: "Save", "Cancel", and "Help". The "Save" button is circled in red.

Now, the lab is entered into the system. To create the field record Select Event Data tab. Then select the Case Assignment/Field Record question package.

The screenshot shows the software interface with three tabs: "Event Data", "Lab Results", and "Concerns". The "Event Data" tab is selected and highlighted with a red box. Below the tabs is a list of "Question Packages": Question Package, Demographic, Reporting / Morbidity, Case Assignment / Field Record, Follow-up Activity, Risk Factors, Partners / Clusters, Clinical, Venues, Create new Venue Location, and Coinfection Management. The "Case Assignment / Field Record" package is highlighted with a red box. At the bottom, there is a "View Question Package" button with a red arrow pointing to it.

Initial Status/Initial assignment outcome will only be created on ELR imports. Surveillance staff will have to make a determination on manually entered labs on whether or not follow-up is needed.

Initial jurisdiction	PHFU Austin
* Initial date	05/01/2018
* Initial assignment outcome	Administrative Closure BFP - No Follow-up Field Follow-up Insufficient Information Record Search Closure Not Program Priority Surveillance Follow-up Congenital Investigation Needed Other
Lock initial assignment block	
* Assignment type	
* Indicates required field	
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>	

If field follow-up is needed, surveillance staff will need to select field follow-up and then open a new assignment type under the Case Assignment/Field Record Information.

Staff will select:

Case Assignment / Field Record Information	
* Assignment type	▼
* Indicates required field	
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>	
	Congenital Investigation <b>Field Record / Interview</b> OOS Re-interview Surveillance Assignment

Then select:

Case Assignment / Field Record Information	
* Assignment type	Field Record / Interview <a href="#">Add New</a>
Assignment type lock	Yes ▼
* Created by	Mary VanWisse
Create date - syphilis	06/11/2018
* Is this a field record or interview only?	▼
<b>Assignment</b>	
Jurisdiction assigned to	Field Record Interview Only
* Person assigned to	
* Assignment reason	▼
<b>Coinfection Information</b>	
Iteration ID of existing block	1002321
Source case of the current block	200002402 - 700 - Syphilis - Mickey Mouse
* Prevents this answer block from being joined if the current case is joined	▼
* Indicates required field	
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>	

Staff should be able to fill out the rest:

Case Assignment / Field Record - Mickey Mouse - 700 - Syphilis

Current Status	
Outcome	

Initial Status	
Initial jurisdiction	PHFU Austin
* Initial date	06/07/2018
* Initial assignment outcome	
Lock initial assignment block	Yes

Case Assignment / Field Record Information	
* Assignment type	Field Record / Interview <a href="#">Add New</a>
Assignment type lock	Yes
* Created by	Mary VanWisse
Create date - syphilis	06/11/2018
* Is this a field record or interview only?	Field Record
* Field Record ID	1002321

Assignment	
Jurisdiction assigned to	PHFU Austin
* Person assigned to	Karen Surita
* Assignment reason	New Syphilis

Field Record	
* Referral basis (Syphilis)	P1 - Sex partner
* Date initiated (Syphilis)	06/11/2018
* Initiating agency	PHFU Austin
* Investigating agency	PHFU Austin

Notifications and Follow-ups	
* Is this patient notifiable?	Yes
Is this patient notifiable by internet ONLY?	Yes
Initiate for Internet follow-up?	Yes
Internet notification completed	<input type="checkbox"/> Yes
* Notification plan for field follow-up	Third Party

Field Record Address	
Select Address at the Time of this Event	
Address type	
Residence type	
Street address	
Street address ? Phone - work	

Locating Information/Other	
Electronic contact type	
Locating information/Other	

Physical Attributes	
* Gender	
Height	
Visible identifiers	<input type="checkbox"/> Tattoos <input type="checkbox"/> Scars <input type="checkbox"/> Glasses <input type="checkbox"/> Piercings <input type="checkbox"/> Facial hair <input type="checkbox"/> Other
Hair color	
Eye color	

Marital Status/Exposure	
Spousal notification required?	
Current marital status	
Exposure date (first)	MM/DD/YYYY
Frequency of exposure - general	

Expected in Clinic	
Is the patient expected in to the clinic	

Field Investigation Outcome	
Syphilis disposition	
Date this patient was notified of exposure to syphilis	MM/DD/YYYY

Coinfection Information	
Iteration ID of existing block	1002321
Source case of the current block	200002402 - 700 - Syphilis - Mickey Mouse
* Prevents this answer block from being joined if the current case is joined	
<a href="#">Print Field Record</a>	

\* Indicates required field

Save Cancel Help

Fields marked with a \* are required. Once the field record is created, it can be printed and saved.