This guide is non-exhaustive. Please direct questions on topics not covered in this guide to your disease-specific point of contact.
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Questions?
Contact the Washington State Department of Health
Office of Communicable Disease Epidemiology
Email: CommDisEpi@doh.wa.gov | Phone: (206) 418-5500
Contact information by disease area can be found in the New LHI CD Epi Investigator Manual

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

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

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

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

For persons with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-525-0127 (TDD/TTY call 711).
How to Assign the Accountable County on an Event

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

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

Step 1: Input the Person’s Address

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

If you do not know the person’s address, simply input your county in the county drop down field.
Adding an address when creating the event

Adding an address via the Persons tab

Step 2: Select the Reporting Address in the Wizard

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

Hepatitis

Select reporting address
Accountable county

Select the reporting address to assign the county of diagnosis.

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

Choose Associated Address

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

Attaching a File

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

1. Open the event to which an attachment will be added.

2. From the Event Summary screen select ‘Add’ next to Attachments.

3. The following screen will appear.
4. Browse for the file to attach, enter a Description, and select ‘Save.’ Note: The file size limit for individual case attachments in WDRS is 7.63 MB. If this limit is exceeded, then you will see an error message that reads, “Attachment is too large”.

5. You will be brought to the Manage Attachments screen, where you can view, edit or delete an existing attachment or add a new attachment.

### Attachment Information Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Date</td>
<td>The date the attachment was added in WDRS.</td>
</tr>
<tr>
<td>Person</td>
<td>The person whose event the attachment is on.</td>
</tr>
<tr>
<td>File</td>
<td>The name and path of the file to be attached.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the file being attached. (Required)</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the attachment, and whether it requires review, is approved, or is rejected.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Type</td>
<td>The type of file being attached. Select the most appropriate option, most choices may not be applicable. Lab Results may be required in the lab result itself, refer to program area guidance.</td>
</tr>
<tr>
<td>Security Level</td>
<td>Determines the security level needed for a user to be able to see the attachment. Choices are: None, Very low, low, medium, high, very high should not be used.</td>
</tr>
<tr>
<td>Notes</td>
<td>Notes about the attachment.</td>
</tr>
</tbody>
</table>

## Checking Workflows

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

To check your workflows:

1. Select the gears icon in the toolbar or select ‘More...’ in the lower corner of the Workflows pane on the WDRS Home Page.

2. Depending on your role/group you may see different workflows than what is portrayed in the example (right). There may be workflows assigned to you through the Task function in WDRS.

Note: to simplify your workflow screen, hide workflows with no events in them by selecting the link “(Hide empty workflows)” next to the Workflow Queues title. Once hidden you may make these workflows visible again by selecting, “(Show empty workflows)” at any time.
Workflow Queue Fields

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

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

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

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

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

![Warning]

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

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

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

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

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

Resolving a Concern

To resolve a system-generated concern, simply correct the data entry issue provided in the “Description” field.
To resolve a user-generated concern:

1. Highlight the concern on the Concerns tab, select ‘Update Concern.’
2. Change the ‘Status’ from “Active” to “Resolved”.
3. The ‘Notes’ field is available to note how the concern was resolved.
   
   Please note: User-generated concerns remain in the concerns table even after they have been resolved.

Configuring the Home Page

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

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

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

1. Click the ‘Edit’ link at the top right of the WDRS Home Page.
   
   Notice that "move handle" controls appear in the title bar of each pane.
2. Click and drag a handle to relocate the corresponding pane on the page. Notice how the elements rearrange themselves and dotted rectangles become visible at appropriate moments as you move the pane around, providing you with subtle visual assistance in moving the pane to the desired location.

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

How to Remove Panes from the Home Page

1. Click the ‘Edit’ link at the top right of the page.
Notice that "delete" controls (X icons) appear in the title bar of each pane. To remove a pane entirely from the page, click its "delete" control (the X).

2. Click ‘Save’ to save your changes.

How to Add/Restore Panes to the Home Page

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

1. Click the ‘Add’ link at the top right of the page.

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

How to Change the Attributes of a Pane

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

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

1. Click the gear icon in a title bar.
2. Select ‘Edit’ from the popup menu that appears.
3. Change the available attributes as desired by clicking the desired color, checking the appropriate boxes, etc.

4. Click ‘Save’.

Copying an Event

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

As an example, this functionality can be used if an event is started as a Salmonellosis event and later becomes identified as Typhoid. Once selected, event data are copied to a new event. If you need to delete the original event, assign a task to the appropriate DOH staff member.
Clicking the **Copy Event** button takes the user to the **Copy Event** screen. The upper half of the **Copy Event** screen has the **Source Event** section which lists information about the event being copied.

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

Clicking the ‘Save’ button copies the specified data to the new case.

**Copy Event Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Mode</td>
<td>Allows the user to copy either as a new event or to an existing event.</td>
</tr>
<tr>
<td>Disease</td>
<td>Select a new disease for the event if necessary.</td>
</tr>
<tr>
<td>Status</td>
<td>Defaults to the current event's status, but allows the user to change the</td>
</tr>
<tr>
<td></td>
<td>current investigation status of the event.</td>
</tr>
<tr>
<td>Notes</td>
<td>Allows the user to enter event-related notes.</td>
</tr>
<tr>
<td>Copy Question Packages</td>
<td>Allows the user to selectively choose which question packages should be</td>
</tr>
<tr>
<td></td>
<td>copied over to the new event. Only shows question packages where</td>
</tr>
</tbody>
</table>
questions have been answered. **Important: only questions shared between the two conditions will be copied.**

| **Copy Fields** | Allows the user to selectively choose which other field information should be copied over to the new event. |
| **Link to Source As** | Allows the user the option to create a link between the new event and the copied event, according to a configurable list of predetermined link types. |

## Deleting an Event

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

## Filtering a Session by Group

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

To do so:

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

![Switch Groups](image)
2. Select one or more groups you would like enabled for that session. The checkbox next to the ‘Group’ title can be used to check or uncheck all of the line items in the list.

3. Click the Save button.

4. Once you’ve selected a subset of available groups, your name on the dashboard will display ‘(Filtered)’.

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

Help Button

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

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

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

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

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

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

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

**Event Notes**

<table>
<thead>
<tr>
<th>Washington Disease Reporting System WDRS 10/24/17 Training- Build 5.4.2.4-PROJECT-19</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Event Summary</strong></td>
</tr>
<tr>
<td><strong>Basic Information</strong></td>
</tr>
<tr>
<td>Event ID:</td>
</tr>
<tr>
<td>Disease:</td>
</tr>
<tr>
<td>Person:</td>
</tr>
<tr>
<td>Dates:</td>
</tr>
<tr>
<td>Type:</td>
</tr>
<tr>
<td>Investigation Status:</td>
</tr>
<tr>
<td>Linked Events/Contacts:</td>
</tr>
<tr>
<td>Attachments:</td>
</tr>
<tr>
<td>Notes:</td>
</tr>
</tbody>
</table>

**Editing/Deleting Event Notes**

Users can edit or delete their own notes but no one else's. Additionally, users can only edit or delete their most recent note, and only if it was the last note added to the event. This allows references to older notes to be maintained in WDRS for auditing or in the event of a records request. *Example: User 1 opens the event and enters a note and saves it. Later, User 2 opens the same event and also adds a note. Now User 1 will no longer be able to edit or delete their original note because User 2's note was the last one added to the event.*
To edit the most recent note, select ‘Add/Edit’ in the Notes pane. In the new screen that opens, you will have a ‘Delete’ option if your note is the most recent.

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

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

**Picker Search**

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

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

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

To Print a Document

1. Open the event for which a document needs to be printed.
2. Click the Print Event  icon in the toolbar
3. A screen will appear listing all documents available for printing for the specific event. This screen is different depending on the disease specified in the event.
4. Locate the necessary document from the list displayed.
5. Open the document by either clicking on the name of the print template or click on the ‘Open’ link in the Action column.
6. You can also attach the document to the event by selecting ‘Attach’ in the Action column. You can view the attached document from the Basic Information pane on the Event Summary screen.
Recent Events

Viewing Recent Events

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

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

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

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

**Reports**

**Running Reports**

To run a report:

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

- **Report period**: The report may ask for a ‘Report Date From’/’Report Date To’ or ‘Report Period’ for data to be reported. Note that these dates are **exclusive**. If you need to see data for the current day, set the end date to the following day’s date.

- **Output Type**: You may select between displaying the report in a non-editable format within the browser window (HTML) or exporting it to an external application such as Excel. Exporting the data allows for the data to be manipulated, formatted, or graphed.
  
  - When ‘Output Type’ displays, select from the dropdown list.
  
  - Alternatively, you may have to select ‘Run Report’ (which opens the results as HTML in a new browser tab) or ‘Export Results’ (which offers appropriate export options including HTML, CSV, PDF, and Excel).

  - The ‘Excel w/Parameters’ option is available for line list and tabular reports to facilitate the exporting of the report parameters and name.

  - **Note**: If you plan to import the data into statistical software program, such as SAS or R, we recommend exporting the data as a CSV.

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

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

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

Sharing an Event

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

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

2. From **Event Dashboard**, click the **Share Event** icon in the toolbar.

3. The “Currently Shared” screen displays all the information about the users and/or user groups the event is currently shared with. If the event is not being shared with other users/user groups, the screen will display a blank table at the top of the window, as shown.

4. Select the **Type of permissions** being allocated to the new user or user group (‘View only Limited’, ‘View only Full’, ‘View and Update Limited’, ‘View and Update Full’). Note: ‘Limited’ settings are not currently configured and there is no difference between Limited and Full Types.

   - **View only Limited**: User(s)/group(s) may view a limited amount of question data in the shared event, but may not make any updates to that event.
   - **View only Full**: User(s) may view all question data in the shared event, but may not make any updates to it.
   - **View and Update Limited**: User(s) sees a limited amount of question data in the shared event, and may make updates to those questions.
   - **View and Update Full**: User(s) may view and edit all questions in the shared event.

5. Using the dropdown, choose the **User** or **User Group** with whom the event will be shared. Note that when creating a share, it is possible to select either a user or a group,
but not both at once. To share with an additional party (user or user group) follow the steps to create another share.

6. Check the ‘Allow Delegation’ box button to allow the user or user group with whom the event is being shared to also be able to share the event with other users or user groups (if desired). Note: Please ensure that events are only shared with necessary users and groups.

7. Click ‘Save’. The Shared Events table is now populated with the information from this share.

Share Event Fields

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

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

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

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

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

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

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

### Unshare an Event

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

1. Open the event to be “unshared” in the WDRS Dashboard.
2. Click the Share Event icon

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

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

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

This functionality does not exist for chronic hepatitis cases. Please see above for instructions on assigning chronic hepatitis cases.

Tasks

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

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

<table>
<thead>
<tr>
<th>Where task is created</th>
<th>How to create task</th>
<th>Visual</th>
</tr>
</thead>
<tbody>
<tr>
<td>From within an event using the Tasks tab on the Event Summary screen</td>
<td>Select the ‘Add Task’ button on the Tasks tab to create an event-specific task.</td>
<td>![Visual Diagram]</td>
</tr>
</tbody>
</table>
### From the Workflow Queues page under the Task Specific Monitors category

Select the ‘Add Task’ link from the Workflow page (under Task Specific Monitors), to create a general (non-event-specific) task.

### From the Tasks icon on the WDRS Dashboard toolbar

If you click the Tasks icon on the toolbar, you can create both event-specific and general (non-event-specific) tasks.

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

---

### Creating and Assigning a New Task

#### Event-Specific Tasks

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

5. Select the **Type** of task from the dropdown list.

6. If necessary, select the appropriate task **Status** from the list (Pending, In Progress, or Completed), **Priority** of the task, **Assigned Date** and **Due Date**.

7. Enter a brief description of the task to be done and add notes to clarify if necessary.

8. Add an attachment if necessary.
9. Select the correct user and/or group from the search field.

10. Click the ‘Save’ button.

11. Alternatively, you may create an Event-Specific task by visiting the Tasks Tab within an event and selecting the ‘Add Task’ button and then follow the steps above.

Accessing Tasks

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

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

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

<table>
<thead>
<tr>
<th>Task Specific Monitors</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Groups’ Open Tasks</td>
<td>All tasks for your group that have not been completed.</td>
</tr>
<tr>
<td>My Open Tasks</td>
<td>All tasks assigned to you that have not been completed.</td>
</tr>
<tr>
<td>My Overdue Tasks</td>
<td>All tasks that are assigned to you and are overdue.</td>
</tr>
<tr>
<td>Open Tasks Created by Me</td>
<td>Pending tasks that you have created.</td>
</tr>
<tr>
<td>Overdue Tasks Created by Me</td>
<td>Overdue tasks that you have created.</td>
</tr>
</tbody>
</table>

Performing Tasks

To perform or update tasks using the workflows:

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

1. Click the Tasks icon on the Dashboard toolbar.
2. If the task has not yet been started, there will be a ‘Start Task’ link under the ‘Assigned To’ person’s name. Clicking this link acknowledges that the task has been started by marking the task as ‘In Progress’, and fills the start date with the current date.
3. Select the ‘Edit’ link to edit the remaining fields as needed.

**Viewing Completed Tasks**

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

**WDRS Glossary**

Below are several terms specific to WDRS
<table>
<thead>
<tr>
<th><strong>Auto-Case Classification</strong></th>
<th>WDRS will auto-classify eight conditions based on a combination of laboratory and/or clinical information, depending on the condition.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Concern</strong></td>
<td>Messages that appear on the <strong>Basic Information</strong> section of the <strong>Event Summary</strong> screen. These messages appear in red and are meant to notify you of an issue or concern regarding the event.</td>
</tr>
</tbody>
</table>
| **Dashboard**               | **Main Dashboard**: Allows you to create a new disease event or outbreak, search for existing diseases or outbreaks, view and work with workflows, add and edit tasks, view recent activity and run reports.  
**Event Summary Dashboard**: Allows you to view case summary, link events, add, view and edit cases details and, view and edit lab tests. |
<p>| <strong>Data Conversion</strong>         | The process of taking our current data systems and aligning them with the fields in WDRS. This often involves taking variables from PHIMS and matching them up with fields in WDRS |
| <strong>Deduplication</strong>           | The process of merging events, people or organizations that appear more than once in WDRS. |
| <strong>Denormalized tables</strong>     | Databases store information in many tables, all tied together with an ID number. Denormalized just means &quot;flattened&quot; as in making a single record (i.e. line in Excel) out of many different files tied together on that ID. Also called a &quot;flat file.&quot; Several reports in WDRS use denormalized tables. |
| <strong>DRIVE</strong>                   | Project name for Rhapsody transformation of lab data to make it align with WDRS. Lab data is scattered and inconsistent when it comes in. This transforms it to make high-level decisions such as which product code it belongs to and general standardized lab results. |
| <strong>ELR</strong>                     | Electronic Laboratory Reporting |
| <strong>Event</strong>                   | An instance of a disease occurrence. A person can have multiple events. |
| <strong>Expressions</strong>             | Formula that causes an action on a question in WDRS (e.g. calculating the earliest treatment start date from multiple dates input). |
| <strong>External ID</strong>             | Person ID. Viewable on the edit person page. |
| <strong>GCD</strong>                     | General Communicable Diseases |
| <strong>HL7</strong> | Lab language. It's the format for lab data reported to us electronically. Mostly. |
| <strong>Lab Tab</strong> | Also known as the <strong>Investigation Template</strong>. This is the tab where lab results exist, both populated from WELRS and manually entered. |
| <strong>Linked event</strong> | Two events linked together somehow. May be across product codes or across people. |
| <strong>Maven</strong> | The off-the-shelf product that we are building into WDRS. |
| <strong>Model</strong> | Models are often referred to by their condition or their grouping. This term identifies who manages them. They include: Hepatitis, TB, General Communicable Diseases (GCD), and Lead. |
| <strong>Notification</strong> | Messages that appear on the <strong>Basic Information</strong> screen. These messages will appear in a variety of colors. The messages may inform you that a case is closed, that confirmation is needed or other information you need to review. |
| <strong>Parent/Child Questions</strong> | A parent question may contain child questions. Child questions appear as a result of an answer selection made on a parent questions. It is not related to people relations at all. |
| <strong>Person-Centric</strong> | The idea that there is a single person who has multiple disease events associated with them. |
| <strong>Person-Party</strong> | Stores basic information on a person (Name, Date of birth, aliases, SSN, address). It is technically considered its own model. |
| <strong>PHRED</strong> | Public Health Reporting of Electronic Data |
| <strong>Party</strong> | A party can be a person (case or contact) or organization (an organization where the outbreak occurred). |
| <strong>Print Templates</strong> | A template that populates from data within a question package. Allows for users to easily print items such as a letter that populates with a patient's name and date information to remind them to get a follow up test. |
| <strong>Product Code</strong> | Condition-specific code that determines what rules/question packages will exist. Lab results are mapped to product codes. Example: Hep product codes include Hep B/D (HBV), Hep C (HCV), and HCV Screening. |
| <strong>QID</strong> | Question ID. Variable name for questions inside question packages |</p>
<table>
<thead>
<tr>
<th><strong>Question Packages</strong></th>
<th>Sets of fields related to an event and related to a specific type of question where we collect our data (e.g. Administrative Question Package)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reference Code</strong></td>
<td>A list stored in WDRS that contains multiple choice options to be selected from with a search picker or used in a drop down question. Using a reference code allows for multiple conditions to have access to the same, easier to maintain list (ex: facilities). It also allows you to have the same answer choices for multiple questions within your model in a place that is easy to update (as compared to having to go to each question and changing the items within that list).</td>
</tr>
<tr>
<td><strong>Repeatable Block</strong></td>
<td>A set of questions that you'll need more than one instance of. Ex: In the Hep communications package you first select who you spoke to, which triggers child questions to appear. After you have completed all of this, you may speak to someone else and need a clean version of these questions available to complete and save. A repeatable block would make this new block of questions appear. Works on all question packages including the person and lab tab.</td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td>Allows user to pull their data out of WDRS. We can set up reports to define which fields should be pulled out.</td>
</tr>
<tr>
<td><strong>Rhapsody</strong></td>
<td>Owned by Orion Corp. A computer program that works with basic logic (IF-THEN) to transform data. (<a href="https://orionhealth.com/us/products/rhapsody/">https://orionhealth.com/us/products/rhapsody/</a>)</td>
</tr>
<tr>
<td><strong>Roles</strong></td>
<td>A role controls the user’s permissions – it assigns responsibility to what a user can do with data in WDRS.</td>
</tr>
<tr>
<td><strong>Rosters</strong></td>
<td>XML allowing import of data into WDRS in a way the user would not normally do (i.e. not using the interface).</td>
</tr>
<tr>
<td><strong>Rules</strong></td>
<td>Logic set up within Maven that triggers an action. Ex: There is a question that says, &quot;Born within 1945-1975?&quot; A rule can be set up to look at the date of birth on the person-party and automatically answer that question as &quot;Yes&quot; or &quot;No.&quot; Rules are also used to populate questions based on lab data, create workflows, and other functionality.</td>
</tr>
<tr>
<td><strong>WDRS</strong></td>
<td>Washington Disease Reporting System</td>
</tr>
<tr>
<td><strong>Wild Card</strong></td>
<td>A wild card is an asterisk that can be used during searches. The wild card (<em>) allows you to search using part of the text. For example Harbo</em> can be used to search for a Harborview hospital.</td>
</tr>
<tr>
<td><strong>Wizards</strong></td>
<td>Also called a &quot;virtual question package.&quot; Allows the user to subset questions from multiple question packages to fill out easily and quickly. Questions answered in a wizard populate the corresponding fields in the question packages.</td>
</tr>
<tr>
<td><strong>Workflow</strong></td>
<td>A list of activities that need to be performed on records. Workflows are based on queries that retrieve event information that needs attention and organizes them for processing. Often workflow and queue are used interchangeably. Examples are: All open events and Events missing suspected exposure type.</td>
</tr>
</tbody>
</table>
General Communicable Diseases (GCD)
Quick Reference Guides

Washington State Department of Health Office of Communicable Disease Epidemiology
Adding a Lab to an Event

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

For General Communicable Diseases, required fields include:

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

Additionally, please upload the lab report to the lab result using the ‘Upload Document’ link.
For additional details on specific fields in the lab template, refer to the WDRS Lab Results Instruction Manual.
Auto Case Classification

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

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

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

For Confirmed, Probable, and Suspect case classifications, you must update the information driving the auto classification in order to change the case classification. Not Reportable or Ruled Out events must be classified using the ‘Override classification’ checkbox. To have these events classified, notify the Office of Communicable Disease Epidemiology (OCDE) Subject Matter Expert (SME) to override the case classification. Note: SME’s will be automatically notified of auto class conditions without a case classification after 21 days from the LHJ notification date.
As an example, Camplybacteriosis case classification criteria include if the test performed is a bacterial culture and the result is positive (both in the lab template).

![Diagram showing test performed and result]

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

![Diagram showing case classification]

**Closing Events**

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

Events in the GCD model will remain open until annual data reconciliation occurs the following spring. After which, events from the previous year will be closed and all fields become read-only. Please contact the appropriate OCDE SME if an event must be reopened for any reason.
Note: Events will leave the ‘open events’ workflows without being closed. Check the workflow for specific criteria. Most often entering a **Case complete date** will cause the event to leave the workflow.

## Linking Events in WDRS

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

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

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

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

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

![Event Summary Screen]

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

![Link Events Screen]

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

![Search Case Screen]
4. The linking event’s information will be presented as greyed out. Scroll to the bottom and select ‘Save.’

5. This event will now appear as a linked event at the top of the screen.

What are General Communicable Diseases?

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

- Anthrax
- Arboviral disease, other
- Botulism, foodborne
- Botulism, infant
- Botulism, other
- Botulism, wound
- Brucellosis
- Burkholderia infection (melioidosis or glanders)
- Campylobacteriosis
- Cholera
- Coccidioidomycosis
- Coronavirus
- Cryptococcus gattii
- Cryptosporidiosis
- Cyclosporiasis
- Diphtheria
- Giardiasis
- Haemophilus influenzae
- Hantavirus pulmonary syndrome
- Hepatitis A, acute
- Hepatitis E, acute
- Highly antibiotic resistant organism (CRE, VRSA, other gram negative)
- Influenza, novel or unsubtypable strain
- Influenza, seasonal (required for deaths of lab-confirmed cases)
- Legionellosis
- Leptospirosis
- Listeriosis
- Lyme disease
- Malaria
- Measles
- Meningococcal disease
- Mumps
- Pertussis
- Plague
- Polio
Prion disease, human
Psittacosis
Q fever
Rabies, human
Rabies, suspected human exposure
Rare disease of public health significance
Relapsing fever
Rubella
Salmonellosis
Shellfish poisoning (paralytic, domoic acid, or diarrhetic)
Shiga toxin-producing Escherichia coli (STEC)
Shigellosis
Tetanus
Tickborne (excludes Lyme, Relapsing)
Trichinosis
Tularemia
Typhoid fever
Unexplained critical illness or death
Vaccinia transmission
Varicella (required for deaths)
Vibriosis
Viral hemorrhagic fever
West Nile virus disease
Yellow fever
Yersiniosis