Table of Contents

1. Welcome to PA-NEDSS ........................................................................................................5
   1.1. Introduction ........................................................................................................... 5
   1.2. Purpose ............................................................................................................... 5
   1.3. Organization of the Disease Reporter Guide ...................................................... 5

2. Getting Started in PA-NEDSS .................................................................................. 6
   2.1. Registering in PA-NEDSS ................................................................................ 6
   2.2. Logging On to PA-NEDSS ................................................................................ 12
   2.3. Managing Your PA-NEDSS Session ................................................................ 13
       2.3.1 Logging Off of PA-NEDSS ...................................................................... 14
       2.3.2 Contact Us Link ....................................................................................... 14
       2.3.3 Edit User Link ........................................................................................... 17
       2.3.4 Renew Session Link .................................................................................. 17
   2.4. About the Disease Reporting Location Screen ................................................. 19
       2.4.1 Identifying a Reporting Location .............................................................. 19

3. Using Administrative Functions .............................................................................. 22
   3.1. Changing Your Password .................................................................................. 22
   3.2. Updating Your User Profile ............................................................................... 23
   3.3. Adding Designees ............................................................................................ 25
   3.4. Viewing Designees ........................................................................................... 27
   3.5. Notifying the Department of Health of Staff Changes ...................................... 28

4. Entering a Report ...................................................................................................... 30
   4.1. Performing a Patient/Contact Search Before Entering a Report ..................... 30
   4.2. Entering a New Patient Report ......................................................................... 33
      4.2.1 Entering Demographic Information ............................................................ 35
      4.2.2 Entering Location (Primary Residence) and Other Information .............. 36
      4.2.3 Entering Clinical Information ................................................................... 37
      4.2.4 Entering Test Information ......................................................................... 38
      4.2.5 Entering Ordering Physician/Facility Information .................................... 41
      4.2.6 Completing the Disease Reporting Short Form ....................................... 44
      4.2.7 Entering Report Details (for Clinicians, Hospitals, and Physicians) ........ 47
   4.3. Entering a Report for an Existing Patient .......................................................... 51
   4.4. About the Navigation Bar .................................................................................. 55
      4.4.1 Navigating from Screen to Screen ............................................................. 55
      4.4.2 Viewing a List of Recently Viewed Patients............................................... 57
4.5. Adding Test Information for Uncommon Tests ......................................................... 58
4.6. Viewing a Report Summary ......................................................................................... 59
4.7. Viewing Patient Demographic Information ................................................................. 61
4.8. Viewing a Patient's Previous Reports ........................................................................... 61
4.9. Editing a Report ............................................................................................................. 63
   4.9.1 Updating a Patient Address ......................................................................................... 65
4.10. Adding Additional Treatment Details for an Existing Patient ....................................... 66
5. Using Inboxes ...................................................................................................................... 70
   5.1. Opening the Inbox Menu ............................................................................................ 70
   5.2. Submitting an In Progress Report ................................................................................ 71
6. Conducting a Search .......................................................................................................... 74
   6.1. About Advanced Search Types .................................................................................... 74
   6.2. Conducting a Patient Search ...................................................................................... 75
       6.2.1 Advanced Patient Search ....................................................................................... 77
   6.3. Conducting a Report Search ....................................................................................... 79
   6.4. Conducting an Accession Search ................................................................................. 80
7. Key Terminology ................................................................................................................. 82
8. Using Hot Keys .................................................................................................................... 84
9. Contact Information ............................................................................................................ 86
10. Appendix A: Disease Reporting Process Flow in PA-NEDSS ........................................... 87
# Version History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>04/09/2003</td>
<td>Staff</td>
<td>Final</td>
<td>Authored by Implementation Team based on current PA-NEDSS functionality, including functionality in Release 4.0. The document will be updated as changes to the application are made.</td>
</tr>
<tr>
<td>1.1</td>
<td>09/30/2003</td>
<td>Staff</td>
<td>Final</td>
<td>Additional Release 4.3 updates.</td>
</tr>
<tr>
<td>2.0</td>
<td>01/12/2004</td>
<td>Staff</td>
<td>Final</td>
<td>Updated based upon Release 5.0 functionality.</td>
</tr>
<tr>
<td>3.0</td>
<td>07/15/2004</td>
<td>Staff</td>
<td>Final</td>
<td>Updated based upon Release 6.0 functionality.</td>
</tr>
<tr>
<td>4.0</td>
<td>09/12/2005</td>
<td>Staff</td>
<td>Final</td>
<td>Updated based upon Release 7.5 functionality.</td>
</tr>
<tr>
<td>5.0</td>
<td>12/16/2005</td>
<td>Staff</td>
<td>Final</td>
<td>Updated based upon Release 8.0 functionality.</td>
</tr>
<tr>
<td>9.0</td>
<td>03/27/2006</td>
<td>Staff</td>
<td>Final</td>
<td>Updated based upon Release 9.0 functionality</td>
</tr>
<tr>
<td>10.0</td>
<td>11/17/2006</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated to reflect Release 10.0 enhancements.</td>
</tr>
<tr>
<td>11.0</td>
<td>09/07/2007</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated to reflect Release 11.0 enhancements.</td>
</tr>
<tr>
<td>12.0</td>
<td>03/07/2008</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated to reflect Release 12.0 enhancements.</td>
</tr>
<tr>
<td>13.0</td>
<td>09/04/2008</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated to reflect Release 13.0 enhancements.</td>
</tr>
<tr>
<td>14.0</td>
<td>10/02/2009</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated for structure, clarity and additional training best practices as part of Release 14.0 documentation.</td>
</tr>
<tr>
<td>14.1</td>
<td>10/26/2010</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated to reflect new password requirements.</td>
</tr>
<tr>
<td>15.0</td>
<td>11/01/2012</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated to reflect Release 15.0 enhancements.</td>
</tr>
<tr>
<td>15.1</td>
<td>01/07/2013</td>
<td>Implementation Team</td>
<td>Final</td>
<td>Updated contact information.</td>
</tr>
<tr>
<td>17.1</td>
<td>08/10/2017</td>
<td>PMO</td>
<td>Final</td>
<td>Updated Figure 4.6-1.</td>
</tr>
<tr>
<td>17.2</td>
<td>06/19/2018</td>
<td>Staff</td>
<td>Final</td>
<td>Update password requirements</td>
</tr>
</tbody>
</table>

**Document Updates for Version 17.2**

<table>
<thead>
<tr>
<th>Section</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>Update password requirements</td>
</tr>
</tbody>
</table>
1. Welcome to PA-NEDSS

1.1. Introduction

Welcome to PA-NEDSS, Pennsylvania’s version of the National Electronic Disease Surveillance System. PA-NEDSS is a web-based application developed for the Pennsylvania Department of Health (PA DOH) to facilitate public health disease reporting, surveillance and tracking. PA-NEDSS electronically transmits disease reports from hospitals, laboratories, and physicians across the Commonwealth to the district, county and municipal health departments and DOH Central Office staff. As disease reports are submitted by you or members of your organization, public health staff can access the submitted reports and begin investigations from them based on the information you enter.

1.2. Purpose

The Disease Reporter Guide is designed to help disease reporters learn how to use PA-NEDSS. This guide provides detailed instructions on all functionality currently available to disease reporters in PA-NEDSS.

1.3. Organization of the Disease Reporter Guide

The Disease Reporter Guide is organized into six sections.

- Getting Started in PA-NEDSS
- Using Administrative Functions
- Entering a Report
- Submitting a Report to the PA DOH
- Using Inboxes
- Conducting a Search
2. **Getting Started in PA-NEDSS**

This section will help you get started using PA-NEDSS. You will learn how to:

- Registering in PA-NEDSS
- Logging On to PA-NEDSS
- Managing your PA-NEDSS session
  - Logging Off of PA-NEDSS
  - Contact Us
  - Edit User
  - Renew Session
- About the Disease Reporting Location Screen
  - Identifying a Reporting Location

### 2.1. Registering in PA-NEDSS

This section reviews how to register with PA-NEDSS and log on for the first time. You must register with PA-NEDSS before you can log on to the system. Once your registration request is completed, you will receive a unique registration number and pass code via email from either the Prime Contact of your Organization or the PA DOH Security Officer. Your registration number and pass code is unique to your user account.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open Internet Explorer, type <a href="https://www.nedss.state.pa.us">https://www.nedss.state.pa.us</a> in the Address bar (Figure 2.1-1), and press Enter on your keyboard to display the PA-NEDSS Log On screen (Figure 2.1-2).</td>
</tr>
</tbody>
</table>

*Figure 2.1-1: Internet Explorer Address Bar.*
2. At the Welcome to PA-NEDSS Home Page (Figure 2.1-2), click the Activate your account here link to display the PA-NEDSS System Registration screen.

![Figure 2.1-2: Activate Your Account Here Link on PA-NEDSS Log On Screen.](image)

3. On the PA-NEDSS System Registration screen (Figure 2.1-3), confirm you have the information you need to complete the process, such as contact information and registration details, and click the Next button to display the PA-NEDSS System Registration Authorization screen.

![Figure 2.1-3: PA-NEDSS System Registration Screen.](image)
4. On the PA-NEDSS System Registration Authorization screen (Figure 2.1-4), type in the Registration Number and Pass Code provided then click the **Next** button to display the Commonwealth Privacy Policy screen.

**Note:** Be sure to type the information exactly as it appears since these fields are case sensitive.

![Figure 2.1-4: PA-NEDSS System Registration Authorization Screen.](image)

5. The Privacy Policy is a legally binding agreement. If you agree to the terms and conditions of the Commonwealth Privacy Policy, type "Agree" in the field provided (Figure 2.1-5), and click the **Next** button to display the PA-NEDSS System Registration screen.

**Note:** You will not be able to continue if you disagree with the policy.
6. On the PA-NEDSS System Registration screen (Figure 2.1-6), complete the Account Information and the Basic Personal Information sections. Fields marked with a red asterisk (*) are mandatory. You will not be able to advance to the next screen until all mandatory fields have been completed.

In the Account Information section, create a User Name and Password that you will use to access PA-NEDSS.

User names can be any combination of letters or numbers and are not case sensitive. Please do not use spaces, hyphens, underscores or any other special characters (-, _, ?, &, etc.). Note instructions on right side of screen.

Passwords must be at least 12 characters long with at least one capital letter (A – Z), one lower case letter (a – z), and one number (0 – 9). Passwords are case sensitive. The password you select must be different from your user name and your first or last name. Note instructions on right side of screen (Figure 2.1-6).

Reenter your password in the field provided to confirm the password.

Select a Security Question from the Security Question drop-down menu.

Enter your Security Answer to the security question in the field provided. Note instructions on right side of screen.

**Note:** Be sure to select a security question and provide an answer. This security feature will assist the Help Desk in positively identifying you when you call requesting a password reset or any patient or user account-specific information.

In the Basic Personal Information section enter your First Name, Last Name, Email Address, Confirm Email Address, and Telephone Number (Office) in the fields provided.

**Note:** For Confirm Email Address and Telephone Number, see instructions on right side of screen.

For additional help completing the Account Information and the Basic Personal Information sections of the PA-NEDSS System Registration screen, click the Help button on the upper-right side of each section.

**Note:** If you are a physician, select your specialization from the drop-down menu.
In addition, provide a Tax ID and/or the National Provider Index (NPI) number when registering. Currently, the Centers for Medicare and Medicaid Services is in the process of establishing the NPI with the goal of providing one master list of all providers assigned to a unique identification number. The NPI number is not generated by or furnished by PA-NEDSS.

7. Click the **Next** button to process the registration (Figure 2.1-6).
8. When the registration has been successfully processed, the screen will refresh notifying you to click the Home link to log in (Figure 2.1-7). Click the Home link to display the PA-NEDSS Log On Page (Figure 2.1-8).

![Figure 2.1-7: Successful Registration Completion Screen.]

![Figure 2.1-8: PA-NEDSS Log On Page.]

2.2. **Logging On to PA-NEDSS**

After registering, you may log on and start entering and working with disease reports.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open Internet Explorer , type <a href="https://www.nedss.state.pa.us">https://www.nedss.state.pa.us</a> in the Address bar, and press Enter on your keyboard to display the Welcome to PA-NEDSS Log On page (Figure 2.2-1).</td>
</tr>
<tr>
<td>2.</td>
<td>Type your PA-NEDSS user name and password in the fields provided and click the <strong>Log On</strong> button (Figure 2.2-1)</td>
</tr>
</tbody>
</table>

![Figure 2.2-1: PA-NEDSS Log On Screen.](image)

2. Type your PA-NEDSS user name and password in the fields provided, and click the **Log On** button (Figure 2.2-1) to display the Welcome to PA-NEDSS screen (Figure 2.2-3).

**Note**: Before the Home Page is displayed, you may be presented with a pop-up window asking if you would like to close the window (Figure 2.2-2), click **Yes**.

![Figure 2.2-2: PA-NEDSS Log On Pop-Up Window.](image)
2.3. Managing Your PA-NEDSS Session

After logging in to PA-NEDSS, it is important to understand how to manage your session. Important functions for managing your session are located in the upper right corner of the Welcome to PA-NEDSS Home Page (Figure 2.3-1).

The **User** feature displays your user name. The **Session expires** feature is a security feature which provides a count-down in minutes, starting from 30 minutes to the time you will be logged off of PA-NEDSS, if you have not performed a save feature, renewed your session, or navigated to a new page. There is a session expiration pop-up warning two minutes before the automatic log off occurs.

**Note**: PA-NEDSS does not have an automatic save feature. If you log off of PA-NEDSS or are logged out of PA-NEDSS due to session inactivity, any unsaved changes will be lost.
2.3.1 Logging Off of PA-NEDSS

Due to the sensitive nature of information in PA-NEDSS and to protect patient privacy, you should log off of PA-NEDSS when you are not actively working in the system. To do so, click the Log Off link (Figure 2.3.1-1). After logging off, the Session Termination screen is displayed (Figure 2.3.1-2).

![Figure 2.3.1-1: Log Off Link.](image)

At the Session Termination screen (Figure 2.3.1-2), you have been successfully logged out of PA-NEDSS. The browser will redirect itself to the log on page in 10 seconds. If the browser does not redirect, you can click the here link. If you want to close the window, click Close.

![Figure 2.3.1-2: Session Termination Screen.](image)

2.3.2 Contact Us Link

You can make suggestions or communicate technical problems regarding PA-NEDSS to the DOH Help Desk using the Contact Us link (Figure 2.3.2-1).

![Figure 2.3.2-1: Contact Us Link.](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>After clicking the Contact Us link, the Contact Us screen is displayed (Figure 2.3.2-2).</td>
</tr>
<tr>
<td>2.</td>
<td>If you want to contact DOH by e-mail, click the Use the Web Form link (Figure 2.3.2-2) to display the Contact Us Online screen (Figure 2.3.2-3). <strong>Note:</strong> If you prefer to contact the PA DOH by phone, refer to the contact information provided. Once you have the information you need, you can click the Home link to return to the Welcome to PA-NEDSS screen (Figure 2.3.2-1). Click the Back link to go back to the previous screen.</td>
</tr>
<tr>
<td>4.</td>
<td>On the Contact Us Online screen (Figure 2.3.2-3), enter your Full Name and Email Address in the fields provided, select a “The Note is Related To” option, and add some remarks in the “Tell Us About It” box. <strong>Note:</strong> If you do not have your own email address, please be sure to provide a phone number at which you can be reached in the body of your email when providing a shared email account. Fields marked with a red asterisk (*) are mandatory. You will not be able to send your e-mail until all mandatory fields have been completed. Click the Send button to send your e-mail or click the Cancel button to cancel the e-mail.</td>
</tr>
</tbody>
</table>
5. After clicking Send, the e-mail is sent, and the Submission Accepted screen is displayed (Figure 2.3.2-4).
   
   Click the **Home** button to return to the Welcome to PA-NEDSS screen.
   
   Click the **Home** link to log out and return to the Log On to PA-NEDSS screen.

---

**Figure 2.3.2-3: Contact Us Online.**

**Figure 2.3.2-4: Submission Accepted Screen.**
2.3.3 Edit User Link

If any of your personal information changes, especially your e-mail address, please update your user profile in PA-NEDSS immediately by clicking the Edit User link or clicking the Administration button and then the Update User Profile link (Figure 2.3.3-1).

**Note:** For information on how to update your personal information, refer to Section 3, Using Administrative Functions, Section 3.2, Updating your User Profile.

![Figure 2.3.3-1: Update User Profile Link and Administration Screen.](image)

2.3.4 Renew Session Link

As mentioned above, your account and session information is located in the upper-right corner of the screen. You will notice the session expiration clock to the right of your user name. This clock counts down from 30 minutes. If after 30 minutes you have not performed any save actions, have not navigated to a new screen or renewed your PA-NEDSS session, you will be logged off of PA-NEDSS. It is important to note that PA-NEDSS does not have an automatic save feature. If you are logged off due to session inactivity, any unsaved changes will be lost.

Your session is renewed each time you navigate through different screens or save data. You can also renew your session at any time by clicking the Renew Session link to reset your **Session expires** time to 30 minutes (Figure 2.3.4-1).

![Figure 2.3.4-1: Renew Session.](image)

After your time is renewed, a window is displayed confirming the time period renewal. Click the **Close** button to close window and continue with your work (Figure 2.3.4-2).
If you do not renew your session, a window is displayed warning you that your session will expire in two minutes (Figure 2.3.4-3).

Click the **Renew** button to renew your session time to 30 minutes. After your time is renewed, a window is displayed confirming the time period renewal (Figure 2.3.4-2). Click the **Close** button to close window and continue with your work.

**Note:** If you do not renew your session, your session will terminate and you will be returned to the Log On to PA-NEDSS screen.

![Session Renewal Confirmation Pop-Up Window](image)

**Figure 2.3.4-2: Session Renewal Confirmation Pop-Up Window.**

![Session Expiration Warning](image)

**Figure 2.3.4-3: Session Expiration Warning.**
2.4. About the Disease Reporting Location Screen

Prior to entering disease reports, users must select a disease reporting location or add a new location, if necessary. This is required of organizations with multiple locations in different reporting jurisdictions.

2.4.1 Identifying a Reporting Location

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Upon logging in to PA-NEDSS, you may be taken to the Reporting Location screen (Figure 2.4.1-1). Before you can report, you need to select a reporting location. If your reporting location is listed, select the location ☑️, and click the Next button. If no reporting locations are listed, the application will state &quot;No reporting locations exist&quot; and you can click the Add New Location link (Figure 2.4.1-1) to add your reporting location. If reporting locations are listed, but your location is not listed, you can click the Add New Location link (Figure 2.4.1-1) to add your reporting location. After clicking the Add New Location link (Figure 2.4.1-1), the Add New Reporting Location pop-up window is displayed. <strong>Note:</strong> You must select a reporting location if multiple locations exist for your organization. If you do not select a reporting location and you click the Close Window button, this will close the PA-NEDSS window and end your session (Figure 2.4.1-1).</td>
</tr>
</tbody>
</table>

![Locations Displayed on Reporting Location Screen](image_url)
2. On the Add New Reporting Location pop-up window (Figure 2.4.1-2), enter your location information, and click the Add button to add the location. Fields marked with a red asterisk (*) are mandatory. You will not be able to advance to the next screen until all mandatory fields have been completed.

3. PA-NEDSS will attempt to match the location you enter to an address in the United States Postal Service address database (Figure 2.4.1-3) using a tool called Blue Fusion. Whenever possible, select the [VERIFIED] address link rather than the [AS PROVIDED] address link. When the address you entered exactly matches the address returned by Blue Fusion, the address will be automatically verified. You will not be presented with an address verification window. 

Note: If the address you enter does not closely match an address in the database, you will be presented with a window to use the unverified address or re-enter the address on the form (Figure 2.4.1-4).
Figure 2.4.1-3: Verifying a Location.

Figure 2.4.1-4: Verified Location Screen.
3. Using Administrative Functions

This section of the guide describes the functionality available to you via the Administration button. In many instances, the links available are based on your user privileges; however, there are some administrative functions which are available to all users.

The Administration screen offers access to administrative functions such as:

- Changing your password
- Updating your user profile
- Adding Designees (You will only see this link if you are the prime contact)
- Viewing Designees (You will only see this link if you are the prime contact)
- Notifying the Department of Health of Staff Changes

3.1. Changing Your Password

In this section, you will learn how to change your PA-NEDSS password. As an additional security measure, PA-NEDSS passwords expire every 60 days. A message displays on the Welcome to PA-NEDSS Home Page at each log on notifying you of an impending password expiration beginning 25 days prior to the expiration date.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click the <strong>Administration</strong> button (Figure 3.1-1) to display the Administration screen.</td>
</tr>
<tr>
<td>2.</td>
<td>On the Administration screen (Figure 3.1-2), click the <strong>Change Password</strong> link to display the Change Password screen (Figure 3.1-3).</td>
</tr>
</tbody>
</table>
3. Complete the Change Password screen (Figure 3.1.3) by entering your current password, the new password you would like to use, the confirmation of the new password, and a password hint. Click the **Change** button to save the updated password and password hint.

**Note:** Your password may not be changed again for 24 hours. If you require assistance with your password, contact the Help Desk.

**Note:** Your password is case sensitive and must be at least 8 characters long containing at least one number and at least one uppercase and one lowercase letter (A-Z, a-z), but NO spaces. Your password may not contain your user name, first name, or last name.

![Figure 3.1-3: Changing Your Password.](image)

### 3.2. Updating Your User Profile

If any of your personal information changes, especially your e-mail address, please update your user profile in PA-NEDSS immediately.

In addition, you may also update or change your security question and answer at any time via the **Update User Profile** link. The security question and answer will be used to assist the
Help Desk in positively identifying you when you are calling requesting a password reset or other patient or user account specific information.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click the <strong>Administration</strong> button (Figure 3.2-1) to display the Administration screen.</td>
</tr>
</tbody>
</table>

![Figure 3.2-1: Administration Button.](image1)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>On the Administration screen (Figure 3.2-2), click the <strong>Update User Profile</strong> link to display the Update Profile screen (Figure 3.2-3).</td>
</tr>
</tbody>
</table>

![Figure 3.2-2: Update User Profile Link.](image2)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | Update the information that has changed and then click the **Save** button to automatically update your PA-NEDSS user profile (Figure 3.2-3).  
**Note:** Content on the Update Profile screen will depend on your user type classification. |
3. On the Update Profile screen (Figure 3.2.3), update your Personal Information as required.

**Note:** Be sure to select a security question and provide an answer. This security feature will assist the Help Desk in positively identifying you when you call requesting a password reset or any patient or user account-specific information.

For additional help updating your User Profile, click the **Help** button on the upper-right corner of the screen.

To cancel or exit the Update User Profile screen without saving your updates, click the **Home** button or the **PA-NEDSS** link to return to the Welcome to PA-NEDSS screen.

4. After updating the information, click the **Save** button (Figure 3.2.3) to update your PA-NEDSS user profile.

5. The Update Profile screen refreshes and displays a note verifying the update was saved successfully (Figure 3.2-4).

### Figure 3.2-4: Update Profile Verification.

<table>
<thead>
<tr>
<th>3.3. Adding Designees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only the prime contact of each organization or the lead physician for the physician group will have access to add designees. Add designee who will use PA-NEDSS to report information on behalf of your organization.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
1. | Log on to PA-NEDSS and click the Administration button (Figure 3.3-1) to display the Administration screen.

![Figure 3.3-1: Administration Button.](image)

2. | Click the Add Designees link to display the Add Designee screen (Figure 3.3-3).

![Figure 3.3-2: Add Designees Link.](image)

3. | On the Add Designee screen (Figure 3.3-3), select or add the Designee Reports From location, if applicable, from which the designee is reporting. All designees must be assigned to at least one reporting location, if applicable.

   Complete the Designee Details and click the Add button when finished.

![Figure 3.3-3: Add Designee Screen.](image)
4. A pop-up confirmation window (Figure 3.3-4) is displayed with the following message: "Are you sure you want to designate (Designees name)?". Click the OK button to continue to the New Account Information screen (Figure 3.3-5) or Cancel to return to the Add Designee screen (Figure 3.3-3).

![Figure 3.3-4: Designee Confirmation Window.](image)

5. Check the Print box to print the account information, and/or check the E-mail box to forward the registration number and pass code information to the new designee (Figure 3.3-5). Click the OK button to continue.

**Note:** It is better to choose BOTH just in case the e-mail ends up in a spam folder and is deleted accidentally or in case there are system issues.

![Figure 3.3-5: New Account Information.](image)

### 3.4. Viewing Designees

A designee must be registered with PA-NEDSS before his/her name will appear on the designee screen. This section reviews how you, as a prime contact, can display a list of designees who are registered with PA-NEDSS and reporting on behalf of your organization.
Step | Action
--- | ---
1. | Log on to PA-NEDSS and click the Administration button (Figure 3.4-1) to display the Administration screen.

**Figure 3.4-1: Administration Button.**

2. | On the Administration screen (Figure 3.4-2), click the Show Designees link to display the Current Designees screen (Figure 3.4-3).

**Figure 3.4-2: Show Designees Link.**

**Figure 3.4-3: Current Designees Screen.**

### 3.5. Notifying the Department of Health of Staff Changes

You can use PA-NEDSS to notify the DOH Security Officer of staff changes. Do this if an employee leaves the organization or no longer requires access to PA-NEDSS. Due to the nature of information in PA-NEDSS, it is important that the accounts of users who no longer require access to the information are disabled.

Step | Action
--- | ---
1. | Log on to PA-NEDSS and click the Administration button (Figure 3.5-1) to display the Administration screen.
2. On the Administration screen (Figure 3.5-1), click the Notify DOH of Staffing Changes link to open a new e-mail message window directed to the Department of Health Security Officer. Type the staff change information in message window and click the Send button.

Figure 3.5-2: Notify DOH of Staffing Changes Link.
4. Enter a Report

This section provides instructions on the following:

- Performing a Patient/Contact Search Before Entering a Patient Report
- Entering a New Patient Report
- Entering a New Report for an Existing Patient
- Viewing Patient Data
- Editing a Report
- Entering Additional Treatment Details for an Existing Patient

4.1. Performing a Patient/Contact Search Before Entering a Report

PA-NEDSS is a patient-centric solution. It is critical that reports are associated with an existing patient, when applicable, to ensure the DOH Public Health Staff can see the bigger picture of what is going on with the patient. Attempting to locate a patient before creating a new patient is important to prevent multiple entries for the same patient.

A patient search will only yield results if the patient has been entered in PA-NEDSS by your organization in the past. You cannot search PA-NEDSS for patients and disease reports entered by other disease reporting entities. However, you can determine if you are adding information to a patient who was previously entered by another disease reporting entity.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click the <strong>Search/Report</strong> button (Figure 4.1-1) or type in the patient’s last name in the <strong>ID and Last Name Quick Search</strong> and click the arrow to execute to the search (Figure 4.1-1). <strong>Note:</strong> There are more comprehensive search options from the <strong>Search/Report</strong> button, which is reviewed in this scenario.</td>
</tr>
<tr>
<td>2.</td>
<td>Hover your mouse over the <strong>Search/Report</strong> button to display a list of search options and select <strong>Patient/Contact</strong> from the list (Figure 4.1-2).</td>
</tr>
<tr>
<td>3.</td>
<td>Enter the known patient information into the fields provided (Figure 4.1-2).</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Search</strong> button to perform the patient/contact search or press <strong>Alt + F</strong> on your keyboard to execute the search (Figure 4.1-2). For more information on keyboard shortcuts, refer to Section 8, Using Hot Keys.</td>
</tr>
</tbody>
</table>

*Figure 4.1-1: Administration Screen.*
5. If no patient matches are located, the displayed search results pop-up window will indicate No Matches (Figure 4.1-3). Click the Close Window button to return to the Advanced Search screen (Figure 4.1-2).

**Note:** If there are no matches, a report for the patient has not been previously entered by your organization.

The Patient/Contact search screen will remain open as a window. Either window can be brought to the foreground by clicking on the appropriate button on the Task Bar at the bottom of the screen.
6. If there is a possible patient match, the search results pop-up window will list the Name, Patient/Contact ID, Date of Birth, and Residence Address for each potential match (Figure 4.1-4).
7. If you do not locate a patient match, you will need to create the new patient and enter the report. Refer to Section 4.2, Entering a New Patient Report.

8. If you locate the desired patient, you should associate the disease report with the existing patient. Refer to Section 4.3, Entering a Report for an Existing Patient.

4.2. Entering a New Patient Report

When creating a new patient in PA-NEDSS, the following rules apply:

1. PA-NEDSS prevents the addition of non-alphabetic characters in the name fields, with the exception of spaces, hyphens, and apostrophes.
2. You receive an error message in red at the top of the screen when trying to enter a new patient into PA-NEDSS with invalid characters in the name fields (Figure 4.2-1).

![Figure 4.2-1: Patient Name Error Message.](image)

**Step** | **Action**
--- | ---
1. | Search for the patient from the Patient/Contact Search as described in the Performing a Patient/Contact Search before entering a patient report section of this guide. **These steps should only be completed if a matching patient cannot be located during your search.**

**Note:** It is important to remember that PA-NEDSS is a patient-centric solution. Disease reports should be associated with existing patients when applicable.
2. Enter the patient information into the fields provided, First Name, Last Name, Birth Date and Gender.

Birth dates may be entered by populating the date field manually in the MM/DD/YYYY format where MM = two-digit month, DD = two-digit day of month and YYYY = four-digit year, e.g. 08/27/2007, or by using the Calendar icon to select the date of birth.

3. Click the **New Patient** button (Figure 4.2-4) or press Alt + P on your keyboard to display the Advance Screen – New Patient screen (Figure 4.2-5).

   **Note:** Refer to Section 8, Using Hot Keys for additional keyboard shortcuts.

4. The screen now displays a condition drop-down menu. Select a condition from the Condition drop-down menu (Figure 4.2-5).

   **Note:** Each patient report is condition specific. The information you will be prompted to enter will differ based on the condition you choose.

5. Click the **Start New Report** button (Figure 4.2-5) or press Alt + R on your keyboard to display the Disease Reporting Short Form (Figure 4.2-6).
4.2.1 Entering Demographic Information

The patient demographic information you entered when creating the patient will be transferred to the Disease Reporting Short Form for you.

If the patient demographic details are grayed out on the Short Form, this is your indication that disease reports have been previously entered for this patient by someone outside your
organization. Because the patient has information from other organizations, you will not be able to change the information which appears in gray.

### Step 1

Enter the remaining demographic information which was not provided when creating the patient.

**Note:** You must enter or select information in each field marked with a red asterisk (*). You will not be able to submit the disease report if you leave any of the required fields blank or if you enter an incorrect date or a date in the future.

Race is not a required field for laboratory users.

![Patient Race Options](image)

**Figure 4.2.1-1: Patient Race Options**

### Step 2

Next, complete the patient’s primary residence and other information. Refer to Section 4.2.2, Entering Location (Primary Residence) and Other Information.

#### 4.2.2 Entering Location (Primary Residence) and Other Information

In the Location section of the Disease Reporting Short Form, enter the patient’s current address if known. In order to submit a disease report, the State and Zip Code must be present. A Non-USA address may be added by placing a check mark in the box to the left of “Provide a new Non-US Location for the patient”. A patient’s primary address must still be a US address.

Users will also have the ability to enter other information such as Social Security Number, Medical Assistance Number and various employers’ information. While these fields are not required in order to submit a report, please enter this information if it is available to you as
it will greatly benefit the public health staff member who receives this report (Figure 4.2.2-1).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Scroll to the Location (Primary Residence) section of the Disease Reporting Short Form (Figure 4.2.2-1); enter the patient’s current address if known. In order to submit a disease report, the State and Zip Code must be present. A Non-US address may be added by placing a check mark in the box to the left of “Provide a new Non-US Location for the patient”.  
**Note:** A patient’s primary address must still be a US address for important tracking purposes. For patients who are visiting from outside the US and fall ill, the primary address should be the hotel or the friend’s house at which the patient was staying. |
| 2.   | You will also have the ability to enter other information such as Social Security Number, Medical Assistance Number and employer information. While these fields are not required, please enter this information if it is available to you as it will greatly benefit the public health staff member who receives this report (Figure 4.2.2-1). |
| 3.   | Next, complete the patient’s clinical information. Refer to Section 4.2.3, Entering Clinical Information. |

![Figure 4.2.2-1: Entering Location and Other Information.](image)

### 4.2.3 Entering Clinical Information

On the Disease Reporting Short Form, you should enter detailed Clinical Information - Core Data and Special Circumstances. Enter as much information as possible. The Condition will be grayed out since you selected the condition when creating the report. All of the questions which appear are specific to the condition you selected.

A selection must be made for each question with a **Yes, No** or **Unknown** answer. If no answer has been selected an error message will be shown when saving the screen. Should the wrong answer be selected, click on the selected answer to deselect that answer or click on another **Yes, No** or **Unknown** answer.
Step | Action
--- | ---
1. | Scroll to the Clinical Information section of the Disease Reporting Short Form (Figure 4.2.3-1); enter detailed Clinical Information - Core Data and Special Circumstances. Enter as much information as possible. Remember, the Condition is grayed since the condition was selected when creating the report. If the patient is female, whether or not she is pregnant is required. If you select Yes, answering affirmative to the pregnancy, it will request that the patient’s estimated due date be filled in.

2. | Next, complete the patient’s test information. Refer to Section 4.2.4, Entering Test Information.

**Figure 4.2.3-1: Entering Clinical Information and Special Circumstances.**

### 4.2.4 Entering Test Information

The Tests section of the Disease Reporting Short Form is specimen-centric meaning that you will enter information about a specimen then enter test details for the tests performed on that specimen. Multiple specimens can be entered on the Disease Reporting Short Form; however, it is recommended that the number of specimens added on the Disease Reporting Short Form be limited to three or four.

The tests that appear for each specimen are based on the condition selected and the specimen source indicated. If the specimen source field is left blank, all of the tests available for the condition are displayed. If a specimen source is selected, some tests are hidden as they do not pertain to that specimen. There is also a section to add any additional information or notes.

Step | Action
--- | ---
1. | Enter the accession number using one of the following options:

   Leave the accession number field empty and click the **Lookup** button. The search results screen will appear and include all accession numbers which have been entered for the patient by your organization. You may then select the accession number from the list and the five specimen level fields will automatically be populated with the information
available for that accession number (Figure 4.2.4-1) or

Enter a partial or an exact accession number and click the **Lookup** button. All accession numbers entered for the patient by your organization which contain the numbers entered will be returned. You may then select the accession number from the list and the five specimen level fields will be automatically populated with the information available for that accession number.

or

Enter the accession number and any other specimen information you have directly into the fields available. The ability to look up accession numbers is a convenience feature, not a required part of the work flow.

**Note:** Once an accession number is saved or submitted on a disease report it will be found during an accession search.

---

**Figure 4.2.4-1: Entering Accession Number.**

**2.** After the specimen fields are populated, the data in these fields are editable (Figure 4.2.4-2). If you edit any of the data and saves the report, a new accession number entry will be created. The existing accession number information will not be changed.

**Figure 4.2.4-2: Edible Specimen Fields.**

**3.** Select **Yes** next to each test that was performed on the specimen, additional questions will appear. Provide as much test information as you have available in these additional fields (Figure 4.2.4-3).

**Note:** The tests that appear depend upon the specimen source provided for the specimen.
4. Specimen instances can be added and deleted from the Disease Report Short Form by clicking either the Add New or Delete Specimen buttons (Figure 4.2.4-4).

**Note:** If you delete a specimen, all of the associated tests will also be deleted on the Disease Reporting Short Form.

5. Sometimes tests do not have specimens, for example X-rays. When you have information about a test performed which does not have a specimen, look for the test in the Other Tests section (Figure 4.2.4-5).

These tests are associated with the specified condition and are dynamic. If you check Yes answering affirmative to the test, additional fields will appear to gather more information about the test performed.
4.2.5  Entering Ordering Physician/Facility Information

The following are three different options to enter the Ordering Physician or Facility Information: manually entering all the information, auto complete, and history link. These options are available for both the Ordering Physician and the Ordering Facility. If the incorrect physician/facility was entered, the information can be cleared out of the text boxes and the procedure can be started again.

4.2.5.1  Manually Entering Physician/Facility Information

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Manually type the appropriate data into each field for the ordering physician/facility. When entering the Physician's name make sure to enter the Physician Name, in the following order Last name, comma, space and then the First name (Figure 4.2.5.1-1).</td>
</tr>
</tbody>
</table>

![Figure 4.2.5.1-1: Manually Entering Physician/Facility Information.](image)

4.2.5.2  Physician/Facility History Links

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | The Physician/Facility History links presents a list of ordering physicians/facilities to select from. Click either the Physician or Facility History link (Figure 4.2.5.2-1).  

**Note:** The My Provider's List will remain open as a pop-up window. Either window can be brought to the foreground by clicking on the appropriate window on the Task Bar at the bottom of the screen. |
2. The My Provider’s List shows up to the last 30 physicians/facility submitted by you or other users at your organization and within the same condition group. For example, if a gonorrhea report is being submitted, you will only see physician or facility names in the history lists which have been previously submitted on reports by you or someone at your organization for conditions in the STD program area.

Records in the Physician History screen default alphabetically by the Physician Last Name. Additionally, the information can be sorted by Name, Phone Number and Date Last Used by clicking on the appropriate column headings. Click the Select button to the left of the physician/facility’s name (Figure 4.2.5.2-2).
3. The appropriate physician/facility fields will be populated as read-only from the existing physician/facility record in the database (Figure 4.2.5.2-3).

![Clinician Disease Reporting Short Form](image)

**Figure 4.2.5.2-3: Physician/Facility Data Entered.**

### 4.2.5.3 Auto Complete

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Auto Complete allows you to obtain the physician/facility information by starting to enter the physician/facility name. In the physician field start typing the physician’s last name, comma, space and first name or in the facility field start typing the facility name. After typing a few letters, a drop-down menu will appear with all physician/facility names previously entered by the current user that match the characters entered (Figure 4.2.5.3-1).</td>
</tr>
</tbody>
</table>

![Auto Complete Physician/ Facility Data](image)

**Figure 4.2.5.3-1: Auto Complete Physician/ Facility Data.**

| 2.   | The appropriate physician/facility fields will be populated as read-only from the existing physician/facility record in the database (Figure 4.2.5.3-2). |
4.2.5.4 **Clear Physician/Facility Data**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>If the incorrect physician/facility was entered, the information can be cleared out of the text boxes and the procedure can be started again. Click the <strong>Clear Physician Data</strong> or <strong>Clear Facility Data</strong> button (Figure 4.2.5.4-1) to clear data in the fields. The procedure of selecting a physician/facility can be repeated with any of the steps above.</td>
</tr>
</tbody>
</table>

4.2.6 **Completing the Disease Reporting Short Form**

Once you have finished entering all of the information available to you on the Disease Report Short form you need to perform one of the following actions (Figure 4.2.6-1, Table 1).
Figure 4.2.6-1: Saving Clinician Disease Reporting Short Form.

**Warning:** Click the **Save** button once. If you click more than once, duplicate disease reports will be created.

### Table 1: Action Buttons

<table>
<thead>
<tr>
<th>Action Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save and Submit to DOH</strong></td>
<td>Click to save the short form and submit to the DOH. You can edit the report as long as public health staff has not yet viewed it. The report is available in the Reports &gt; Submitted Inbox.</td>
</tr>
<tr>
<td>OR <strong>Alt + S</strong></td>
<td>Click to save the short form and return to the Patient/Contact Search/Entry screen. You can edit the report or access the Questionnaire to add additional details such as clinical features and risk factors. The report will not be accessible by public health staff, until submitted. The report is available in the Reports &gt; In Progress Inbox.</td>
</tr>
<tr>
<td><strong>Save Work in Progress</strong></td>
<td><strong>Note:</strong> Only on the Clinician Disease Reporting Short Form. Click to save the short form and proceed to the Questionnaire screens to add additional details such as clinical features and risk factors. The report will not be accessible to public health staff until submitted. The report is available in the Reports &gt; In Progress Inbox.</td>
</tr>
<tr>
<td>OR <strong>Alt + W</strong></td>
<td><strong>Note:</strong> Only on the Clinician Disease Reporting Short Form. Click to save the short form and proceed to the Questionnaire screens to add additional details such as clinical features and risk factors. The report will not be accessible to public health staff until submitted. The report is available in the Reports &gt; In Progress Inbox.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Click to Cancel the report. No information will be saved.</td>
</tr>
<tr>
<td>OR <strong>Alt + C</strong></td>
<td>Click to Cancel the report. No information will be saved.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
1. | After selecting one of the save options, a pop-up window will be displayed with the following message: “You are about to create a report for [Condition]. Are you sure you want to proceed? If you click OK, please proceed to Questionnaire to provide more detailed information about this incident.” (Figure 4.2.6-2). Click the **OK** button to proceed to the Questionnaire screen or click **Cancel** to return to the Disease Report Short Form.

![Figure 4.2.6-2: Confirmation to Create a Disease Report.](image)

2. | PA-NEDSS will attempt to match the patient’s address to an address in the United States Postal Service address database (Figure 4.2.6-3) using a tool called Blue Fusion. Whenever possible, select the [**VERIFIED**] address link rather than the [**AS PROVIDED**] address link. When the address you entered exactly matches the address returned by Blue Fusion, the address will be automatically verified. You will not be presented with an address verification window.

While it is preferred that addresses are verified by Blue Fusion when possible in order to locate the patient, PA-NEDSS allows you to provide an unverified address to accommodate rural areas and new housing developments which may not exist in the database. Please attempt to verify an address first. If there are no close matches in Blue Fusion, the Verify Location screen is displayed with the option to enter an unverified address (Figure 4.2.6-4).

![Figure 4.2.6-3: Verifying a Location.](image)
4.2.7 Entering Report Details (for Clinicians, Hospitals, and Physicians)

Once the Clinician Disease Reporting Short Form is saved, additional screens are accessible to record additional clinical information regarding the onset of a patient’s condition. Select “Save Work in Progress and Continue” to move through the pages of the questionnaire. The questionnaire pages consist of:

- Clinical Features
- Risks
- Treatments
- Immunizations
- Interventions

Laboratory reporters and Clinician reporters who selected “Save Work in Progress” can access the Questionnaire screens by selecting the Questionnaire options in the Patient ID menu located on the Navigation Bar.

**Note:** The contents of the Questionnaire screens will vary for each condition as well as the reporter type - clinician or laboratory. Laboratories and Clinicians see different questions and layouts within PA-NEDSS.
Step | Action
--- | ---
1. | Click the **Save Work in Progress & Continue** button, or press **Alt + I** on your keyboard, at the bottom of the Clinician Disease Reporting Short Form screen. The Questionnaire - Clinical Features screen will be displayed (Figure 4.2.7-1).

   **or**

   Click the **Save Work in Progress** button, or press **Alt + W** on your keyboard, at the bottom of the Laboratory Disease Reporting Short Form screen. Select **In Progress** from the **Inbox** button drop-down menu. Locate the patient that you would like to provide additional information for and click the **Edit** link. Use the selections from the Report ID menu located on the Navigation Bar to navigate to the screens of the Questionnaire on which you may provide more information. The example below shows the Clinical Features screen of the Questionnaire (Figure 4.2.7-1).

![Figure 4.2.7-1: Questionnaire - Clinical Features.](image)

2. | Provide as much information as possible, and then click the **Save & Continue** button (Figure 4.2.7-1) to record the information entered and proceed to the Questionnaire - Risks screen (Figure 4.2.7-2).

   **Note:** Many questionnaire items within PA-NEDSS are dynamic. This means that if you check Yes, answering affirmative to the question, there are secondary questions related to the observation.
3. Provide as much information as possible, and then click the **Save & Continue** button (Figure 4.2.7-2) to record the information entered and proceed to the Questionnaire - Treatments screen (Figure 4.2.7-3).

4. Provide as much information as possible, and then click the **Save & Continue** button (Figure 4.2.7-3) to record the information entered and proceed to the Questionnaire - Immunizations screen (Figure 4.2.7-4).
5. Provide as much information as possible, and then click the **Save & Continue** button (Figure 4.2.7-4) to record the information entered and proceed to the Questionnaire - Interventions screen (Figure 4.2.7-5).

6. Provide as much information as possible, and then click the **Save & Go to Report Summary** button (Figure 4.2.7-5) to record the information entered and open the Report Summary screen (Figure 4.2.7-6, Table 2).
Figure 4.2.7-6: Report Summary Screen.

Table 2: Report Summary Screen Options

<table>
<thead>
<tr>
<th>Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Report</td>
<td>Click to delete the entire report without submitting the disease detail to the PA DOH.</td>
</tr>
<tr>
<td>Submit</td>
<td>Click to submit the report to the PA DOH. The report becomes available in the Reports &gt; Submitted Inbox.</td>
</tr>
<tr>
<td>Save</td>
<td>Click to save the report. The report is not accessible by public health staff until it is submitted. The report is available in the Reports &gt; In Progress Inbox.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click Cancel to return to the top of the Report Summary screen without saving any changes made.</td>
</tr>
</tbody>
</table>

4.3. Entering a Report for an Existing Patient

Once you have entered a patient in PA-NEDSS, you can quickly enter a new report for the patient, without re-entering the demographic details.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Search for the patient from the Patient/Contact Search, as described in Performing a Patient/Contact Search, in Section 4.1 of this guide. <strong>These steps should only be completed if a matching patient is located during your search.</strong> Once you have located the desired patient in the Patient/Contact search results, click in the row on which the patient resides to highlight the row in yellow, and click the View Patient Report History button.</td>
</tr>
</tbody>
</table>
**Note:** It’s important that you highlight the patient record to begin working with the appropriate patient.

![Patient/Contact Search Screen](image)

Figure 4.3-2: Patient/Contact Search Screen.

2. Reports previously submitted by your organization for the patient are displayed. From the Patient Reports screen, select the appropriate condition from the drop-down menu and click the **New Report** button (Figures 4.3-4).
3. The Disease Reporting Short Form opens with the patient demographic information already populated and read-only fields in gray. (Figure 4.3-5).

Figure 4.3-4: Patient Reports.

Figure 4.3-5: Disease Report for an Existing Patient with Demographic Information in Gray.
Some demographics may be edited if the existing patient’s information does not exist in the system or is incomplete (Figure 4.3-6). Rules for these updates are provided in Table 3.

### Table 3: Short Form - Business Rules for Updating Patient Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Business Rules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Suffix</td>
<td>A name suffix can be added, but only if a name suffix doesn’t exist for the patient in the system. If a name suffix already exists in the system for the patient, the disease reporter cannot edit the name suffix.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>A middle name can be added, but only if a middle name doesn’t already exist for the patient in the system. If a middle name already exists for the patient in the system, the disease reporter cannot edit the middle name. However, if the middle initial is currently in the system, a middle name may be added but only if the middle name being added begins with the initial that is currently in the system. In the example below, because the middle initial of K was already in the system the middle name can be edited and the name Karen can be added because it starts with the letter K.</td>
</tr>
<tr>
<td>Gender</td>
<td>The gender can only be edited if patient’s gender is currently in the system as Unknown.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>When the exact date of birth (not estimated) has been entered into the system for the patient, it cannot be edited. But when an estimated date of birth is entered into the system and is not equal to 1/1/1900, then it can be edited up to three years (before or after) of the current estimated date of birth in the system. In the example below, the estimated date of birth is 1/24/1980. The estimated date of birth can be changed anywhere from 1/24/1978 to 1/24/1983. Also, if the date of birth is less than or equal to 1/1/1900, it can be edited to any other date of birth.</td>
</tr>
<tr>
<td>Race</td>
<td>When the existing patient has a race value of Unknown, the user has the ability to edit the race to another value (i.e. – White, Black or African-American, etc.). If the existing patient has a race value of any value other than Unknown, the race value cannot be changed. In the example below, since the race value is checked as Unknown, the race value can be changed to another race value such as Asian.</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>If ethnicity is currently not selected, the disease reporter can select a value. But if the ethnicity is currently selected, the disease report cannot change the value. In the example below, the ethnicity was not selected, so an ethnicity option can now be selected.</td>
</tr>
<tr>
<td>Phone Number field in patient primary residence address</td>
<td>A phone number for the patient’s home phone can only be added if no phone number currently exists for the patient’s home phone (this is not the alternate phone number). In the example below, a home phone number is already in the system, so the home phone number cannot be edited. An Alternative Phone Number can be added if not previously provided. Once in the system, the alternative phone number can not be edited.</td>
</tr>
<tr>
<td>Address</td>
<td>If an address currently exists for the patient, it cannot be edited. However, an additional location can be provided by checking &quot;Provide another location&quot;.</td>
</tr>
<tr>
<td>Pregnancy Status</td>
<td>Disease reporters can add pregnancy status information and edit any existing pregnancy status information.</td>
</tr>
<tr>
<td>Social Security</td>
<td>When a SSN currently exists in the system for the patient, the SSN cannot be edited. However, an additional SSN can be added by clicking</td>
</tr>
<tr>
<td>Field</td>
<td>Business Rules</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Number (SSN)</td>
<td>on the Add Another link to the right of the SSN. The screen refreshes with a field to add another SSN. The appropriate validations for the additional SSN still apply.</td>
</tr>
<tr>
<td>Medical Assistance (MA) Number</td>
<td>When a MA Number already exists, it cannot be edited. However, another instance of an MA Number can be added by clicking on the Add Another link. The appropriate validations for the additional MA Number still apply.</td>
</tr>
<tr>
<td>Employer Name</td>
<td>When employer information (name and occupation) currently exists in the system for the patient, the employer information cannot be edited. However, another instance of either employer name or occupation can be added if already provided by clicking on the Add Another link to the right of the Employer.</td>
</tr>
<tr>
<td>Any Additional Information and Notes</td>
<td>Additional information can be added in the Any Additional Information and Notes text box even if there is currently information in the text box.</td>
</tr>
</tbody>
</table>

Once the disease report is started for the existing patient, the steps are the same as entering a report for a new patient.

4. Complete the Disease Reporting Short Form, entering as much information as possible. For additional help in filling out the Disease Reporting Short Form, refer to Section 4.2, Entering a New Patient Report.

4.4. About the Navigation Bar

The Navigation Bar on the left side of the screen allows you to do the following:

- Navigate from screen to screen
- View list of recently viewed patients

4.4.1 Navigating from Screen to Screen

The Navigation Bar, which allows you to navigate from screen to screen, appears once a report has been opened to view or edit.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and open a report by conducting a search and selecting a patient or report to work with or by selecting a report from one of the inboxes.</td>
</tr>
<tr>
<td>2.</td>
<td>Once a report is opened the Patient ID menu and the Report ID menu is displayed on the Navigation Bar (Figure 4.4.1-1). To expand or close the menus, click the arrow to the left of Patient ID or Report ID.</td>
</tr>
</tbody>
</table>
3. If you would like to navigate to a screen at the Report level, click Report ID from the Navigation Bar to expand the Report ID menu (Figure 4.4.1-2). Click the name of the questionnaire page you would like to navigate to (in this case Tests) and the corresponding screen, Questionnaire – Tests, is displayed in the active window.

4. If you would like to navigate to a screen at the Patient level, click Patient ID from the Navigation Bar to expand the Patient ID menu (Figure 4.4.1-3). Click the name of the screen you would like to navigate to (in this case Patient Details) and the corresponding screen is displayed in the active window.
4.4.2 Viewing a List of Recently Viewed Patients

You can view a list of those patients which you have viewed or edited during the current PA-NEDSS session. Each time you log off and log back onto PA-NEDSS, this list will be refreshed.

**Step** | **Action**
--- | ---
1. | Log on to PA-NEDSS and open a report by conducting a search and selecting a patient or report to work with, or by selecting a report from one of the inboxes.
2. | A Recent Patients drop-down menu is displayed on the Navigation Bar. Click the icon to expand the drop-down menu. The list displays the first initial and last name of each patient which was viewed or edited in the current PA-NEDSS session. For example, Figure 4.4.2-1, shows two patient’s listed in the drop-down menu.

This means that you have viewed or edited two patients since you logged on to the current PA-NEDSS session.
3. The first patient listed in the drop-down menu is the patient with which you are currently working. To work with a different patient from the drop-down menu, select the patient’s name from the menu to display that patient’s Patient Details screen (Figure 4.4.2-1).

4.5. Adding Test Information for Uncommon Tests
Some conditions/diseases do not have specific tests mapped to them on the Disease Reporting Short Form. Enter these test results within PA-NEDSS by following the below procedures.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Locate the section of the Disease Reporting Short Form that asks, “Were the following tests ordered?” Select Yes for the Other test type. Additional dynamic questions are displayed (Figure 4.5-1).</td>
</tr>
</tbody>
</table>

![Figure 4.5-1: Dynamic Questions.](image)

2. Record details about this uncommon test. Continue entering additional disease information until the Disease Reporting Short Form is as complete as possible. Select Yes to display additional dynamic questions regarding each test ordered (Figure 4.5-1).
4.6. **Viewing a Report Summary**

Once you have created a report and either submitted or saved it as a work in progress, you can access a summary screen of the report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Display the Report Summary screen (Figure 4.6-1) by using one of the following methods:</td>
</tr>
<tr>
<td></td>
<td>Select the Report ID menu on the Navigation Bar, and select Report Summary. This is only applicable if you are currently dealing with this patient’s disease report.</td>
</tr>
<tr>
<td></td>
<td>Click the Inbox button and select one of the Inboxes. Select the patient by clicking anywhere in the row to highlight the row in yellow, and click the View Summary button to display the Report Summary screen.</td>
</tr>
<tr>
<td></td>
<td>Perform a Report search by clicking the Search/Report button and selecting Report. Enter Report ID and click the Search button. Locate and select the report by clicking anywhere in the row to highlight the row in yellow, and click the View or Edit Report Details button to display the Report Summary screen.</td>
</tr>
<tr>
<td></td>
<td>Perform an Accession search by clicking the Search/Report button and selecting Accession. Enter Accession Number and Patients Last Name, both required (*), and click the Search button. Locate and select the report by clicking anywhere in the row to highlight the row in yellow, and click the View Report Summary button to display the Report Summary screen.</td>
</tr>
</tbody>
</table>
Figure 4.6-1: Report Summary Screen.
4.7. Viewing Patient Demographic Information

The Patient ID menu located on the Navigation Bar contains patient demographic information. The Patient Details screen displays this basic demographic information. This information is read-only (Figure 4.7-1).

![Figure 4.7-1: Patient Details.]

4.8. Viewing a Patient’s Previous Reports

To view a listing of all the reports that have been submitted for a patient from your organization, select the Patient ID menu on the Navigation Bar and select Patient Reports. The Patient Reports screen lists all the reports, submitted and in progress, for the patient, from your organization.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Select the Patient ID menu on the Navigation Bar.</td>
</tr>
<tr>
<td>2.</td>
<td>Select Patient Reports (Figure 4.8-1). The Patient Report screen is displayed (Figure 4.8-2).</td>
</tr>
</tbody>
</table>
3. The Report Search Results screen remains displayed as a pop-up window. Either window can be brought to the foreground by clicking on the appropriate window on the Task Bar at the bottom of the screen.

4. Click anywhere in the row corresponding for the patient to highlight the patient in yellow. Click the **View Summary** or **Edit Summary** button (Figure 4.8-2) to view or edit the Report Summary (Figure 4.8-3).

![Figure 4.8-1: Patient Reports.](image1)

![Figure 4.8-2: Patient Report Pop-up Window.](image2)
4.9. Editing a Report

You can edit components of a disease report that you or anyone else from your organization has submitted if public health staff has not viewed the report. For example, laboratory reporters can only edit test details. All other disease reporters have the ability to edit the reported date, hospitalization information, and death information. You cannot, however, edit patient demographic or condition information. Once demographic details and condition information are entered, disease reporters cannot edit them without submitting another report. If you need to edit additional information on a submitted disease report, please contact your local public health staff and inform them of the change to the submitted report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Display the Report Summary screen (Figure 4.9-1) by using one of the following methods:  
Select the Report ID menu on the Navigation Bar, and select Report Summary. This is applicable if you are currently dealing with this patient’s disease report.  
Click the **Inbox** button and select one of the Inboxes. Select the patient by clicking anywhere in the row, the row will be highlighted in yellow, corresponding to the patient and click the **Edit Summary** button to display the Report Summary screen.  
Perform a **Report** search by clicking the **Search/Report** button and selecting **Report**. Enter **Report ID** and click the **Search** button. Locate and select the report by clicking anywhere in the row to highlight the row in yellow, and click the **View or Edit Report Details** button to display the Report Summary screen.  
Perform an **Accession** search by clicking the **Search/Report** button and selecting **Accession**. Enter **Accession Number** and **Patients Last Name**, both required (*), and click the **Search** button. Locate and select the report by clicking anywhere in the row to highlight the row in yellow, and click the **View** button. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Report Summary</strong> button to display the Report Summary screen.</td>
</tr>
</tbody>
</table>

**Figure 4.9-1: Report Summary Screen.**

2. Once the Report Summary screen is displayed, you can access the six Questionnaire screens from the Report ID menu on the Navigation Bar (Figure 4.9-2).

3. Select Tests to display the Questionnaire – Tests screen, select Yes, make any necessary changes or updates at the expanded screen, and click the **Save** button to record changes (Figure 4.9-2).
If public health staff has viewed the report, you cannot edit any information on the report. Once you open the Report Summary, there is text indicating that it is now view-only (Figure 4.9-3). If your information needs to be updated for the patient and condition, you must submit a new report for the patient - refer to Section 4.3, How to Enter a New Report for an Existing Patient. If the information that you wish to enter is additional treatments, refer to Section 4.10, Adding Additional Treatment Details.

4.9.1 Updating a Patient Address
You can provide updated address information on a new report for an existing patient. On the Disease Reporting Short Form, place a checkmark in the **Provide Another Location** check box. Additional text fields automatically appear (Figure 4.9.1-1).
4.10. Adding Additional Treatment Details for an Existing Patient

Disease reporters have the ability to enter follow-up treatment details for test results which have already been submitted to the PA DOH. Rather than having to create a new report and enter in much of the data that was already submitted for the patient, disease reporters can now submit these follow-up details in a less time consuming way.

In order to enter additional treatments for an already submitted test result, you MUST have the exact last name of the patient and accession number for which the test result was submitted.

This functionality is most beneficial for STD conditions; however, it may be used for the other reportable condition in PA-NEDSS.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click <strong>Search/Report &gt; Accession</strong> (Figure 4.10-1).</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the patient’s last name and accession number in the fields provided (Figure 4.10-2). Click the <strong>Search</strong> button or press Alt + F on your keyboard.</td>
</tr>
</tbody>
</table>

*Figure 4.9.1-1: Patient Location History.*

*Figure 4.10-1: Search by Accession.*
3. Once the Accession Search Results screen is displayed, click anywhere in the row of the report you wish to work on. This will highlight the row in yellow. Click the **Enter Treatments** button (Figure 4.10-3)

**Note:** The Accession Search Results will remain displayed as a pop-up window. Either window can be brought to the foreground by clicking on the appropriate button on the Task Bar at the bottom of the screen.

![Figure 4.10-2: Accession Search.](image)

![Figure 4.10-3: Enter Treatments Button.](image)

4. The Clinician Disease Reporting Short Form screen is displayed. Some demographics may be edited if the existing patient’s information does not exist in the system or is incomplete. Rules for these updates are provided in Table 3 of Section 4.3, Entering a Report for an Existing Patient. You will notice that where the tests for the condition are typically listed on this screen, the
treatments for the condition will appear (Figure 4.10-4).

Enter the additional treatment details for the test result which you have submitted.
5. Once the treatment details have been entered you may do one of two things.

First, you may click the **Save and Submit to DOH** button to submit all of your changes to the appropriate public health staff member, or press **Alt + S** on your keyboard.

OR

Click the **Save Work in Progress & Continue** button to move through the remaining screens of the questionnaire and enter any follow-up clinical features, etc. for the test result, or press **Alt + I** on your keyboard to move through the remaining screens.
5. **Using Inboxes**

The Reports Inboxes offer fast access to the 200 most recent reports your organization has submitted or saved as works in progress. The Reports Inbox button has three selections:

- All
- Submitted
- In Progress

### 5.1. Opening the Inbox Menu

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click the <strong>Inbox</strong> button to display the Inbox menu (Figure 5.1-1)</td>
</tr>
</tbody>
</table>

![Figure 5.1-1: Reports Inbox Menu.](image)

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All reports your organization has submitted, regardless of the report status.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Reports that have been submitted to the PA DOH by your organization. Public health staff can access and view these reports.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Reports that you have saved as works in progress. These reports are NOT accessible by public health staff.</td>
</tr>
</tbody>
</table>

**Note:** All report entries that you see on the screen originated at your selected location, if applicable. Only 200 of the most recent reports are listed on the Inbox screens. Older reports can be found by conducting a search for reports using the Search options.

The Inbox screens list the patient’s name, the condition, the reported date, the PA-NEDSS Report ID number, and an indication as to whether or not a report has been viewed by public health staff. For each report, you are given the option to select a condition to begin a new disease report for an existing patient, view the report summary or edit the report summary at the bottom of the screen (Figure 5.1-2).

The Reports Inbox will remain displayed as a pop-up window. Either window can be brought to the foreground by clicking on the appropriate window on the Task Bar at the bottom of the screen.
5.2. Submitting an In Progress Report

In order for the public health staff to have access to a disease report, you must submit them to the PA DOH. The message on the Advanced Search screen displays the number of reports currently in progress for your organization (Figure 5.2-1).

![Figure 5.2-1: Reports Currently in Progress.](image)

### Step Action

1. Click the **Inbox** button and select In Progress.

2. Locate the patient with the report you wish to submit and select the report by clicking on the row. The row will be highlighted in yellow. Click the **Edit Summary** button at the bottom of the screen (Figure 5.2-2).

**Note:** Submitted reports are editable as long as public health staff members have not yet viewed the report. Demographic information and condition are not editable at any time.
3. When the Report Summary screen is displayed (Figure 5.2-3), select Tests from the Report ID menu on the Navigation Bar (Figure 5.2-4).

At the Report ID menu, six questionnaire screens are displayed.

---

Figure 5.2-2: Reports Inbox – In Progress Screen.

Figure 5.2-3: Report Summary.
4. Update the report information on the questionnaire screens; refer to Section 4.2.7, Entering Report Details. After completing the last screen, the Report Summary screen is displayed (Figure 5.2-5).

5. Click the Submit button (Figure 5.2-5). The report is now accessible to public health staff members and can be located in the Reports > Submitted Inbox.

Figure 5.2-4: Questionnaire – Tests Screen.

Figure 5.2-5: Report Summary Screen.
6. Conducting a Search

In this section, you will learn how to access the various types of searches in PA-NEDSS. There are three different types of searches.

- Patient/Contact Search
- Report Search
- Accession Search

In addition to the three advanced search types, disease reporters may also perform a Last Name Quick Search from any screen within PA-NEDSS. If you would like to search for a patient by their last name, you may do so by entering the last name of the patient into the search field located on the left side of the screen (Figure 6-1). Click the button, or press Enter on your keyboard, to display the Patient/Contact Search screen (Figure 6-2) in a pop-up window listing the patients that you or someone at your organization has entered into PA-NEDSS matching the last name you entered.

If you do not know the patient’s last name or you wish to search by more advanced search options, click the Search/Report button to enter more detailed search criteria.

![Figure 6-1: Last Name Quick Search.](image1)

![Figure 6-2: Patient/Contact Search Screen.](image2)

6.1. About Advanced Search Types

The PA-NEDSS search types are accessible at any point via the Search/Report button on each screen of PA-NEDSS.

The Advanced Search screen remains displayed as a pop-up window. Either window can be brought to the foreground by clicking on the appropriate button on the Task Bar at the bottom of the screen.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Search/Report button to go to the Search screen (Figure 6.1-1).</td>
</tr>
</tbody>
</table>
2. Click the appropriate search option to access the desired search criteria (Figure 6.1-2).

Note: If you would like to change your search type, you can select the option button of the search type you would like to perform from the top of the Advanced Search screen.

6.2. Conducting a Patient Search

To locate disease reports using patient information as search criteria, click the Patient/Contact option. The Show Advanced Search Field link allows you to enter more search criteria to help locate the patient.

To effectively use the Patient Search, it is critical to understand the terminology that appears on the screen. A name or alias search has Exact, Soundex, Begins With, and Contains search types (Figure 6.1-1).

“Exact” searches are based on the exact data provided.

“Soundex” generates a Soundex code for each of the name values. The Soundex algorithm works by removing double consonants (so Michelle, becomes Michele), and then removing vowels (so Michele becomes mchl). Therefore, Michelle, Michael, and Michella would be displayed from the same Soundex search.

“Begins With” searches the initial letters of the information you provide. A search of First Name “Mi” and female might return “Michelle” and “Michaela”.

“Contains” returns name or alias data that contains the name or alias information you specify. For instance, a search of last name containing “Ith” will return “Ithaca” and “Smith”.

When searching Birth Date in the Advanced Search Fields, you can search using either “Exact” or “Plus/Minus”. If you select “Plus/Minus,” you must enter a value specifying years, months, weeks, or days.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Search/Report</strong> button to view the search type options.</td>
</tr>
<tr>
<td>2.</td>
<td>Select the Patient/Contact option.</td>
</tr>
<tr>
<td>3.</td>
<td>Type the search criteria. You can search on any one of the criteria by typing the information you seek or by choosing criteria from fields that contain drop-down menus. The more criteria you define, the shorter the results list will be and the more quickly you will be able to locate the report you seek. <strong>Note:</strong> The search results return a maximum of 50 entries.</td>
</tr>
<tr>
<td>4.</td>
<td>For more specific search criteria than the basic search screen offers, click the <strong>Show Advanced Search Fields</strong> link (Figure 6.2-1).</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button to display the Patient/Contact Search pop-up window (Figure 6.2-2) or press <strong>Alt + F</strong> on your keyboard to display the same results window. Refer to Section 8, Using Hot Keys.</td>
</tr>
</tbody>
</table>

*Figure 6.2-1: Search Types.*
Figure 6.2-2: Patient/Contact Search Results.

After the search, results based on the criteria entered appear or there is a message indicating there were no matches. The only patients returned in the search results are those that your organization entered into PA-NEDSS.

6.2.1 Advanced Patient Search

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click the <strong>Search/Report</strong> button to go to the Advanced Search screen.</td>
</tr>
</tbody>
</table>
| 2.   | Select the Patient/Contact search option from the Search Types heading to open the Patient/Contact Search form.  
You can search on any one of the criteria by typing the information you seek or by choosing criteria from fields that contain drop-down menus. The more criteria you define, the shorter the results list will be and the more quickly you will be able to locate the report you seek.  
**Note:** The search results return a maximum of 50 entries. |
| 3.   | Click the **Show Advanced Search Fields** link for additional search criteria fields (Figure 6.2.1-1). |
4. Use the additional fields and drop-down menus to further define search criteria, and then click the **Search** button to go to the results screen (Figure 6.2.2) or press **Alt + F** on your keyboard to go to the results screen.
6.3. Conducting a Report Search

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log on to PA-NEDSS and click the <strong>Search/Report</strong> button to display the Advanced Search screen.</td>
</tr>
<tr>
<td>2.</td>
<td>Select the Report option from Search Types to display the Report Search form (Figure 6.3-1). You can search on any one of the criteria by typing the information you seek or by choosing criteria from fields that contain drop-down menus. The more criteria you define, the shorter the results list will be and the more quickly you will be able to locate the report you seek. <strong>Note:</strong> Based on the criteria defined, the results list contains up to 50 listings.</td>
</tr>
</tbody>
</table>

![Figure 6.3-1: Report Search Form.](image-url)
3. Use the fields and drop-down menus to define search criteria, and then click on the **Search** button or **Alt + F** to go to the results screen (Figure 6.3-2).

![Figure 6.3-2: Reports Search Results.](image)

6.4. **Conducting an Accession Search**

The Accession Search lets you search for specific reports using the laboratory test accession number and the last name of the patient. If the accession number has been shared between the hospital, laboratory, and physician, the parties are able to locate the laboratory test results online via PA-NEDSS.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the top of the screen, click the <strong>Search/Report</strong> button to display the Advanced Search screen.</td>
</tr>
<tr>
<td>2.</td>
<td>Select the Accession option from Search Types to display the Accession Search form (Figure 6.4-1).</td>
</tr>
</tbody>
</table>

![Figure 6.4-1: Accession Search.](image)
3. Type the search criteria, and then click the **Search** button to display the Accession Search results screen (Figure 6.4-2) or press **Alt + F** on your keyboard to display the results screen.

4. Select the patient in the Accession Search results window by clicking anywhere in the row corresponding to the patient. The row will be highlighted in yellow. Click either the **Enter Treatment** button, the **View Patient Details** button, or the **View Report Summary** button (Figure 6.4-2).

![Figure 6.4-2: Accession Search Results.](image)
## 7. Key Terminology

### Table 5: Key terms and concepts in PA-NEDSS

<table>
<thead>
<tr>
<th>Term/Concept</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accession Number</td>
<td>A unique number generated by the laboratory to track a patient’s laboratory specimen. The laboratory should provide this number when entering disease reports. Using this number and the patient’s last name, PA-NEDSS users can conduct an accession search to locate test results for a patient.</td>
</tr>
<tr>
<td>Analysis &amp; Reporting</td>
<td>The PA-NEDSS Analysis &amp; Reporting (A&amp;R) environment contains tools for analyzing and visualizing the detailed data entered into the transactional side of PA-NEDSS by disease reporters and public health staff.</td>
</tr>
<tr>
<td>Contact</td>
<td>A person recently exposed to a contagious disease or a person suspected of being a possible source of the disease. Contact types include sex partners, needle-sharing partners, household contacts or any person that may have had close contact with the patient.</td>
</tr>
<tr>
<td>Designee</td>
<td>An individual who can submit disease reports on behalf of the Prime Contact of a disease reporting organization. Designees are identified by the Prime Contact and assigned unique PA-NEDSS user names and passwords.</td>
</tr>
<tr>
<td>Dynamic Questions</td>
<td>Allows disease reporters and public health staff to capture information about a condition by responding to condition and observation-specific questions. These detailed questions automatically appear based on responses to preceding questions. They are used frequently to capture additional details related to risks, symptoms, tests or treatments.</td>
</tr>
<tr>
<td>Electronic Laboratory Reporting (ELR)</td>
<td>Electronic Laboratory Reporting (ELR) is the process by which laboratories submit batch Laboratory Disease Reports to PA-NEDSS.</td>
</tr>
<tr>
<td>Investigation</td>
<td>Investigations are the case management records that public health staff use to conduct follow-up activities and collect information relevant to disease reports that may have been submitted electronically, via paper reports or obtained by other means. An investigation is initiated for each onset of a patient’s suspected condition (i.e. a patient may have two concurrent investigations: one for tuberculosis and one for botulism). Multiple disease reports from various sources (lab, hospital, and/or physician) and observations/test results may be linked to an investigation. An investigation may have reports from various sources, e.g. hospital, physician, and laboratory that refer to the same patient and suspected condition.</td>
</tr>
<tr>
<td>Organization</td>
<td>A collection of individuals that submit disease reports via the PA-NEDSS application. A hospital and its laboratory are considered two separate organizations since they are separately licensed in Pennsylvania. In most cases, members of an organization can only see data in PA-NEDSS that is reported by themselves or other members of the same organization.</td>
</tr>
<tr>
<td>Term/Concept</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------</td>
<td>------------</td>
</tr>
<tr>
<td>Prime Contact</td>
<td>An individual identified by an organization as being primarily responsible for that organization’s disease reporting to the DOH via PA-NEDSS. Also, a Prime Contact is responsible for identifying and pre-registering designees who will use PA-NEDSS to enter disease reports on behalf of the organization. In a hospital, there are typically two Prime Contacts: one for the laboratory organization and one for the clinical organization.</td>
</tr>
<tr>
<td>Report</td>
<td>Disease reports are submitted by hospitals, clinics, laboratories and physicians as well as investigators with the appropriate permissions. A disease report contains information about the patient and details to support the identification of the suspected reportable condition.</td>
</tr>
</tbody>
</table>
8. Using Hot Keys

Hot Keys, or keyboard shortcuts, allow you to type a combination of keys on the keyboard (Table 6) to perform an action associated with an on-screen button which can be used as an alternative to clicking an on-screen button with the mouse. This allows you to perform some of the most basic steps in PA-NEDSS without having to take a hand off of the keyboard. For example, when searching for a report, you can type the ‘Alt’ key and the ‘F’ key on the keyboard to initiate a search rather than clicking the Search button.

If an on-screen button has a corresponding keyboard shortcut, the Hot Key combination is displayed as a tool tip when you roll the mouse over the button (Figure 8-1). A link to the list of Hot Key combinations is also available on the Welcome to PA-NEDSS screen (Figure 8-2).

When typing a Hot Key combination, hold down the Alt key; and at the same time press the desired letter key (P, for example), releasing both keys at the same time. The button associated with the Hot Key must appear on the screen you are currently on. For example, if you are on the short form and type the Hot Key combination for the Search button nothing will happen because the Search button does not appear on the short form. However, the Hot Key combination for the Search button would work the Advanced Search screen as the Search button is on the Advanced Search screen.

![Search button with hot key combination]

*Figure 8-1: Hot Keys Tool tip.*

![Welcome to PA-NEDSS screen with hot key link]

*Figure 8-2: PA-NEDSS Welcome Screen Hot Keys Link.*

The table below displays the button names, the Hot Keys combinations associated with the buttons, and the screen names where the buttons are located.

Table 6: List of Hot Keys

<table>
<thead>
<tr>
<th>Button Names</th>
<th>Hot Key Combination</th>
<th>Screen Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Patient</td>
<td>Alt + P</td>
<td>Advanced Search Screen</td>
</tr>
<tr>
<td>Button Names</td>
<td>Hot Key Combination</td>
<td>Screen Names</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Start New Report</td>
<td>Alt + R</td>
<td>Advanced Search Screen</td>
</tr>
<tr>
<td>Search</td>
<td>Alt + F</td>
<td>Advanced Search Screen</td>
</tr>
<tr>
<td>Cancel</td>
<td>Alt + C</td>
<td>Advanced Search Screen</td>
</tr>
<tr>
<td>Save and Submit to DOH</td>
<td>Alt + S</td>
<td>Laboratory and Clinician Disease Reporting Short Form</td>
</tr>
<tr>
<td>Save Work in Progress</td>
<td>Alt + W</td>
<td>Laboratory and Clinician Disease Reporting Short Form</td>
</tr>
<tr>
<td>Save Work in Progress &amp;</td>
<td>Alt + I</td>
<td>Laboratory and Clinician Disease Reporting Short Form</td>
</tr>
<tr>
<td>Continue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancel</td>
<td>Alt + C</td>
<td>Laboratory and Clinician Disease Reporting Short Form</td>
</tr>
</tbody>
</table>
9. **Contact Information**

Refer to Figure 9-1 for PA-NEDSS contact information. It contains web sites, e-mail addresses, mailing information, and a telephone number for the PA-NEDSS Help Desk.

---

**PA Electronic Disease Surveillance System (PA-NEDSS) Contact Information**

Technical Issues: ra-dhNEDSSTech@pa.gov  
All Other Inquiries: ra-dhNEDSS@pa.gov  

Help Desk: (717) 783-9171  

Mailing Address: Pennsylvania Department of Health  
Health & Welfare Building  
ATTN: Applicable Department  
625 Forster Street  
Harrisburg, PA 17120

*Figure 9-1: PA-NEDSS Contact Information.*
10. **Appendix A: Disease Reporting Process Flow in PA-NEDSS**

The following diagram depicts the typical disease reporting process flow in PA-NEDSS.

![Diagram of Disease Reporting Process Flow in PA-NEDSS](image)

- **Log On to PA-NEDSS**
- **Disease Reporting**
- **Select or Add Location (Physicians Only)**
- **Search for Patient**
  - Is Patient Found? Yes: **Create New Report for an Existing Patient**
  - No: **Add New Patient**
- **Reports Inbox: All**
- **Complete Disease Reporting Short Form (Clinician or Lab)**
- **Is Reporting Complete?**
  - Yes: **Save and Submit to DOH**
  - No: **Save Work in Progress / Save Work in Progress and Continue**
- **Report Summary**
- **Tests | Clinical Features | Risks | Treatments | Immunizations | Interventions**

Complete the Report Questionnaire
Appendix B: National Provider Index (NPI) Letter

Currently, the Centers for Medicare and Medicaid Services is in the process of establishing the National Provider Index (NPI). With the NPI, all providers will be compiled into one complete list with unique identification numbers assigned to each provider. Over time, incorporating these identifying numbers will facilitate a more accurate list of providers and decrease the amount of duplicate provider entries in PA-NEDSS. Please note that the NPI number is not generated by or furnished by PA-NEDSS.

The following link contains information regarding the NPI:

https://nppes.cms.hhs.gov/NPPES/StaticForward.do?forward=static.npistart

In addition, attached is a letter from the Centers for Medicaid and Medicare services that will explain the NPI and where providers can go to get more information.
National Provider Identifier Activities Begin in 2005

Dear Health Care Provider:

The Centers for Medicare & Medicaid Services (CMS) is pleased to announce the availability of a new identifier for use in the standard electronic health care transactions. The National Provider Identifier (NPI) will be the single provider identifier, replacing the different provider identifiers you currently use for each health plan with which you do business. This identifier, which implements a requirement of the Health Insurance Portability and Accountability Act of 1996 (HIPAA), must be used by most HIPAA covered entities, which are health plans, health care clearinghouses, and health care providers that conduct electronic transactions for which the Secretary has adopted a standard (i.e., standard transactions). This letter will help you to understand the background of this requirement and what steps you need to take to apply for and receive an NPI.

The NPI is one of the steps that CMS is taking to improve electronic transactions for health care. National standards for electronic health care transactions encourage electronic commerce in the health care industry and simplify the processes involved to reduce the administrative burdens on health care providers. With national standards and identifiers in place for electronic claims and other transactions, health care providers will be able to submit transactions to any health plan in the United States. Health plans will be able to send standard transactions such as remittance advices and referral authorizations to health care providers. These national standards will make electronic data interchange a viable and preferable alternative to paper processing for health care providers and health plans alike.

To date, we have adopted and implemented the following HIPAA standards: electronic health care transactions and code sets, privacy, security, and the national employer identifier.

We are now beginning to implement the NPI. On January 23, 2004, the Secretary published a Final Rule that adopted the NPI as this identifier. As of the compliance dates listed below, HIPAA covered entities must use NPIs to identify health care providers in standard transactions. These transactions include claims, eligibility inquiries and responses, claim status inquiries and responses, referrals, and remittance advices.
Page 2 – Health Care Provider

Health care providers include individuals, such as physicians, dentists, and pharmacists, and organizations, such as hospitals, nursing homes, pharmacies, and group practices. Health care providers who transmit health information electronically in connection with any of the standard transactions are required by the NPI Final Rule to obtain NPIs, even if they use business associates, such as billing agencies, to prepare the transactions.

The NPI will replace health care provider identifiers that are in use today in standard transactions. Implementation of the NPI will eliminate the need for health care providers to use different identification numbers to identify themselves when conducting standard transactions with multiple health plans. Many health plans, including Medicare, Medicaid, and private health insurance issuers, and all health care clearinghouses must accept and use NPIs in standard transactions by May 23, 2007. Small health plans have until May 23, 2008. After those compliance dates, health care providers may use only their NPIs to identify themselves in standard transactions, where the NPI is called for.

You will be able to apply for your NPI in one of three ways:

- You may apply through an easy web-based application process, beginning May 23, 2005. The web address is https://nppes.cms.hhs.gov.
- You may prepare a paper application and send it to the entity that will be assigning the NPI (the Enumerator) on behalf of the Secretary, beginning July 1, 2005. A copy of the application, including the Enumerator’s mailing address, will be available on https://nppes.cms.hhs.gov. You may also call the Enumerator for a copy. The phone number is 1-800-465-3203 or TTY 1-800-692-2326.
- With your permission, an organization may submit your application in an electronic file. This could mean that a professional association or perhaps a health care provider who is your employer could submit an electronic file containing your information and the information of other health care providers. This process will be available in the fall 2005.

Remember, you may apply for an NPI using only one of the ways described above. When gathering information for your application, be sure that all of your information, such as your social security number and Federal employer identification number, are correct. Once you receive your NPI, safeguard its use. The application form contains a Privacy Act Statement, which explains how we may disseminate the information collected in the application.
Page 3 – Health Care Provider

You may receive notices about the NPI from many of the health plans with which you do business. Remember that you need apply only once for an NPI. The same NPI is used for every health plan.

The transition from existing health care provider identifiers to NPIs in standard transactions will occur over the next couple of years. We urge health care providers to apply for an NPI beginning on May 23, 2005. While the NPI must be used on standard transactions with health plans, other than small health plans, no later than May 23, 2007, health care providers should not begin using the NPI in standard transactions on or before the compliance dates until health plans have issued specific instructions on accepting the NPI. Health plans will notify you when you can begin using NPIs in standard transactions. You should be aware that health plans might request that you begin using your NPI prior to the compliance dates. Applying for an NPI does not replace any enrollment or credentialing processes with any health plan, including Medicare.

You may obtain information about the NPI at www.cms.hhs.gov/hipaa/hipaa2. This site contains Frequently Asked Questions and other information related to the NPI and other HIPAA standards.

Beginning May 23, 2005, we will also provide up-to-date information about the NPI, such as when and how to apply on the NPPES web site at https://nppes.cms.hhs.gov, or you may call the Enumerator at 1-800-465-3203 or TTY 1-800-692-2326.

Sincerely,

/s/

Mark B. McClellan, M.D., Ph.D.