




Searching and Linking Contacts to Events

Scenario:

You interview a Patient Plum  and the patient names Partner Blue  and Partner Green 

You need to link the partners to your patient's event. You need to find out:

1. Does the partner already have an existing event for the same instance of disease? You need to determine if this is a new contact event or a link to an existing case of hepatitis if it is the same instance of disease.
2. If the person does not already have an existing event for the same instance of disease, does the person exist in NCEDSS? (A person must have a disease event to exist – they may have a disease you cannot see, such as syphilis).

Action Steps:

- A. Open the patient's event in NCEDSS to the event Dashboard. Click the "View" hyperlink in the "Linked Events/Contacts" row.

Basic Information	
Event ID:	170001869
Disease:	Syphilis - 01. Primary Syphilis (710)
Person:	Patient Plum Birth Date: 01/01/1980 (38 Male) Phone: (222) 222-2222
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Linked Exposure Sites:	0 linked exposure site(s) (View)
Attachments:	0 attachment(s) (Add)

- B. Look at the Link Events box. There are three "operations" you can select:

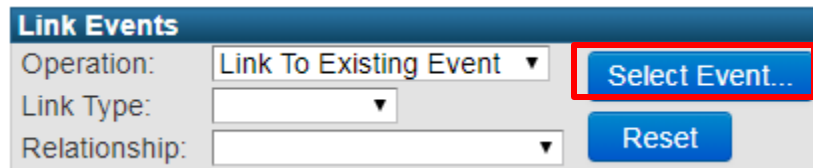
1. Create Linked Event – allows the user to create a NEW disease EVENT as well as a NEW PERSON if needed.
2. Link to Existing Event – allows the user to link the patient event to a partner's EXISTING disease EVENT and EXISTING PERSON.

Link Events	
Operation:	Create Linked Event ▾
Disease:	Create Linked Event hili
Link Type:	Link To Existing Event
Relationship:	Link To Multiple Events

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3. Link to Multiple Events – Not currently being used by LHD staff for hepatitis.

- C. Always select “Link to Existing Event” **first** for each partner you link. This option allows you to search for an existing disease event for the partner, so you can avoid creating a duplicate event/person if the partner already has an active disease event.




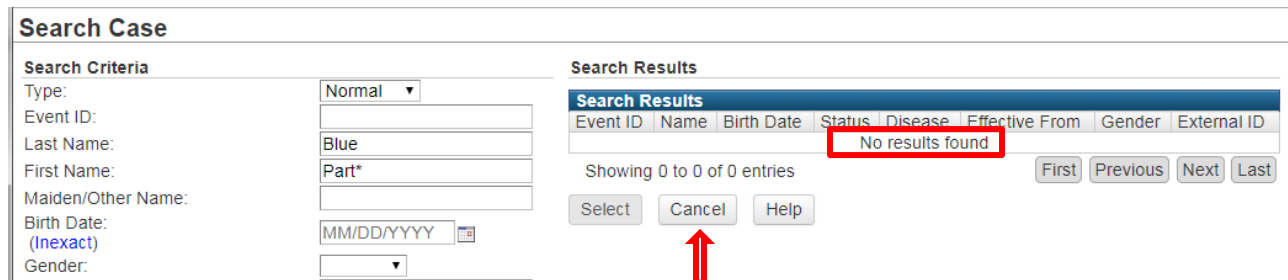
Link Events

Operation: **Select Event...**

Link Type:

Relationship: **Reset**

- D. Conduct a search for your partner , using the same best practices for searching as provided in the Business Policies. Utilize all information available to search and determine if the partner has an existing disease event.



Search Case

Search Criteria


Type:

Event ID:

Last Name:

First Name:

Maiden/Other Name:


Birth Date: 

Gender:

Search Results


Event ID	Name	Birth Date	Status	Disease	Effective From	Gender	External ID
No results found							

Showing 0 to 0 of 0 entries

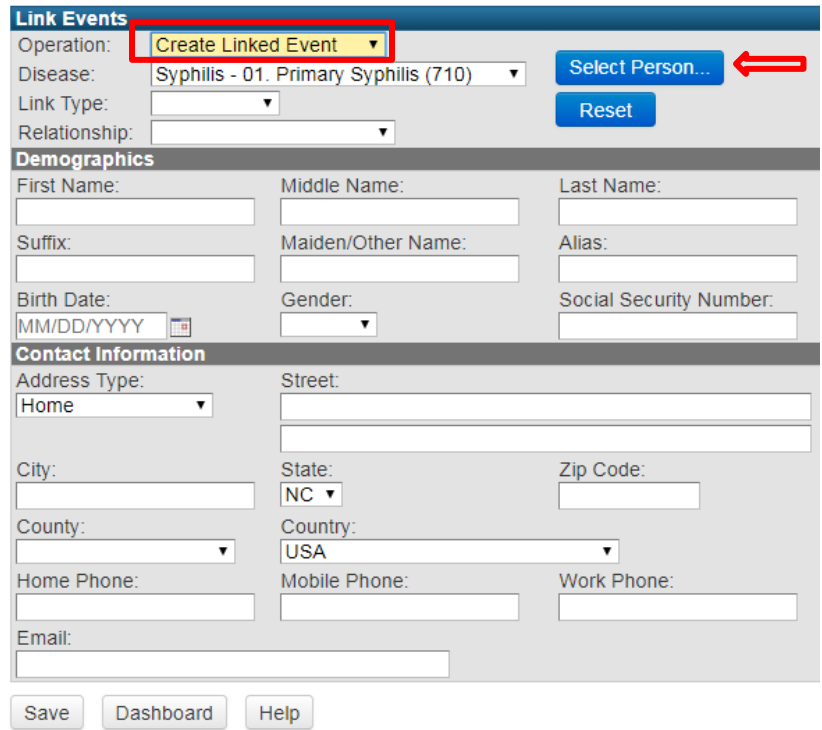
In our scenario above, Partner Blue  does not appear to have an existing case of disease as “No Results” were found. Click the Cancel button to return to the Link Events box.

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- E. Change the operation selection to “Create Linked Event”. We will now

search for Partner Blue  to determine if the partner exists as a person in NCEDSS, but with a disease event the user does not have permission to see.

*You do not need to enter anything in the person fields at this time. You only need to click on the Select Person button.



Link Events

Operation: **Create Linked Event** (highlighted)

Disease: Syphilis - 01. Primary Syphilis (710)

Link Type: []

Relationship: []

Select Person... (highlighted with red arrow)

Reset

Demographics

First Name: [] Middle Name: [] Last Name: []

Suffix: [] Maiden/Other Name: [] Alias: []

Birth Date: MM/DD/YYYY [] Gender: [] Social Security Number: []

Contact Information

Address Type: Home Street: []


City: [] State: NC Zip Code: []

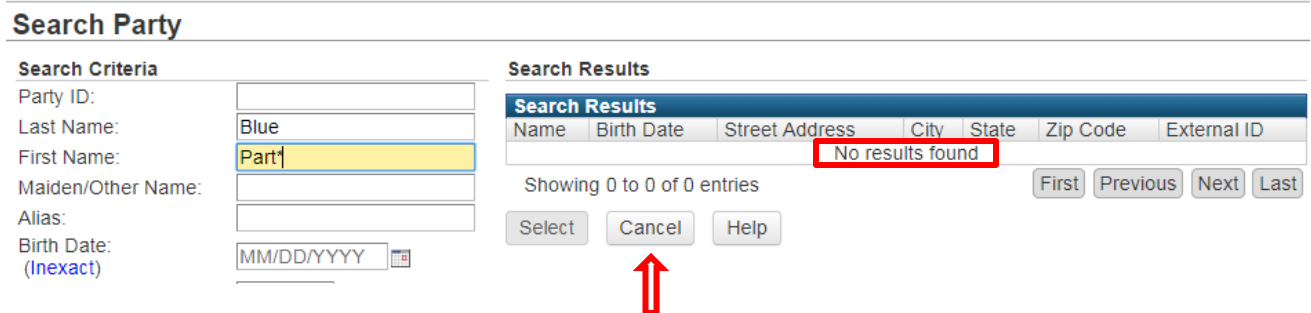
County: [] Country: USA

Home Phone: [] Mobile Phone: [] Work Phone: []

Email: []

Save Dashboard Help

- F. Conduct a search for your partner , using the same best practices for searching as provided in the Business Policies. Utilize all information available to determine if the partner has an existing person.



Search Party

Search Criteria

Party ID: []

Last Name: Blue

First Name: Part (highlighted)

Maiden/Other Name: []

Alias: []

Birth Date: MM/DD/YYYY (Inexact) []

Search Results


Name	Birth Date	Street Address	City	State	Zip Code	External ID
No results found (highlighted)						

Showing 0 to 0 of 0 entries

Select Cancel Help

First Previous Next Last

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In our scenario above, Partner Blue  does not appear to have an existing person as No Results were found. Click the Cancel button to return to the Link Events box.

G. After searching to see if your partner has an existing event for this instance of disease AND searching to see if the partner has a person match in NCEDSS, you determine that you need to create a new disease event for this person.

1. Select the Link Type
2. Select the Relationship
3. Enter the partner demographics and address info that is available
4. Click the Save button

Link Events

Operation: Create Linked Event Select Person...

Disease: Syphilis - 01. Primary Syphilis (710) Reset

Link Type: Contact

Relationship: Other

Demographics

First Name: Partner Middle Name: Last Name: Blue

Suffix: Maiden/Other Name: Alias:

Birth Date: 02/01/1981 Gender: Male Social Security Number: 333-33-3333

Contact Information

Address Type: Home Street: 896 Apple St


City: Raleigh State: NC Zip Code: 27621 X Unknown address

County: Wake County Country: USA

Home Phone: Mobile Phone: Work Phone:

Email:

Save
Dashboard
Help

H. The partner  is now linked to your patient's event.

Linked Events - Patient Plum - Syphilis - 01. Primary Syphilis (710)

Filter Linked Events


Disease: Status:

Apply Filter Reset Filter

Linked Events

Event ID	Person	Status	Create Date	Disease	Link Type	Relationship	Action
170001871	Blue, Partner	Open	09/28/2018	Syphilis - 01. Primary Syphilis (710)	Contact	Other	Edit Delete Link

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- I. You also need to add Partner Green  using steps C, D, E, and F above. This time, you find an existing person for your partner.

Search Party

Search Criteria

Party ID:

Last Name:

First Name:

Maiden/Other Name:

Alias:

Birth Date: (Inexact)

Search Results

Name	Birth Date	Street Address	City	State	Zip Code	External ID
Green, Partner	06/01/1980	345 Oak Rd	Raleigh	NC	27613	PDCEZLXXAEY

Showing 1 to 1 of 1 entries

Navigation:


- J. The search results show a name, dob, and address. You aren't sure if this is the correct person and want to see if there is more info available about this person. You can copy the External ID for the person and click the Cancel button. Use the Home button to return to the event Dashboard, and then use the X button to close your patient's event.



- K. Click on the person search icon in the toolbar on the NCEDSS Homepage.




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- L. Paste the ID you copied into the Party ID field, or search again for your partner  . Doubleclick on the person name or single click and use the Select button to view the person.

Search Party

Search Criteria		Search Results						
Class:	Event	Search Results						
Category:	Person	Name	Birth Date	Street Address	City	State	Zip Code	External ID
Party ID:		Green, Partner	06/01/1980	345 Oak Rd	Raleigh	NC	27613	PDCEZLXXAEY
Last Name:	green	Showing 1 to 1 of 1 entries						
First Name:	part	First Previous 1 Next Last						
Maiden/Other Name:		Select Add Cancel Help						

- M. Although you don't see much, since you cannot see the disease event for this person, you can determine if other information matches your partner .

Person Summary

Demographic Information (View History)		Notes (Add/Edit)	
Name:	Green, Partner		
Maiden/Other Name:			
Alias:			
Gender:	Male		
Birth Date:	06/01/1980		
Death Date:			
Living Status:	Alive		
Age:	38		
Social Security Number:	888-88-8888		
Party ID:	PDCEZLXXAEY		
Create Date:	09/28/2018		

Contact Information						
Type	Address	County	Country	Phone	GIS Info	Action
Home * Primary	345 Oak Rd, Raleigh, NC 27613	Wake County	USA		Latitude: 35.86921, Longitude: -78.6984 [View Map]	Edit Delete


[Edit Person](#)

Event Information

Events				
Event ID	Person	Status	Create Date	Disease

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For the scenario above, you determine

that Partner Green  is the same person you need to link to Patient Plum. You close the person screen by clicking the X button and re-open your Patient Plum. Return to the Link Events box. Use the "Create Linked Event" selection and search again for your

partner .

Select the partner and you will see all the demographics auto-populate in the box. Click the Save button.

Link Events

Operation: [Select Person...](#)

Disease: [Reset](#)

Link Type:

Relationship:

Demographics

First Name: Middle Name: Last Name:

Suffix: Maiden/Other Name: Alias:

Birth Date: Gender: Social Security Number:

Contact Information

Address Type: Street:

City: State: Zip Code:

County: Country:

Home Phone: Mobile Phone: Work Phone:

Email:

Save
Dashboard
Help

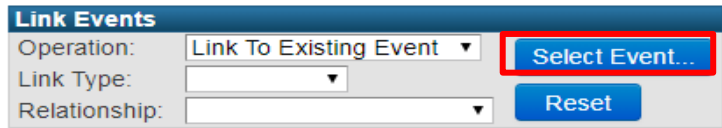
N. The second partner is now linked to your patient's event.

Linked Events - Patient Plum - Syphilis - 01. Primary Syphilis (710)								
Filter Linked Events								
Disease: <input type="text" value="Syphilis - 01. Primary Syphilis (710)"/>		Status: <input type="text" value="Open"/>						
Apply Filter		Reset Filter						
Linked Events								
Event ID	Person	Status	Create Date	Disease	Link Type	Relationship	Action	
170001871	Blue, Partner	Open	09/28/2018	Syphilis - 01. Primary Syphilis (710)	Contact	Other	Edit	Delete Link
170001872	Green, Partner	Open	09/28/2018	Syphilis - 01. Primary Syphilis (710)	Contact	Other	Edit	Delete Link

NOTES:

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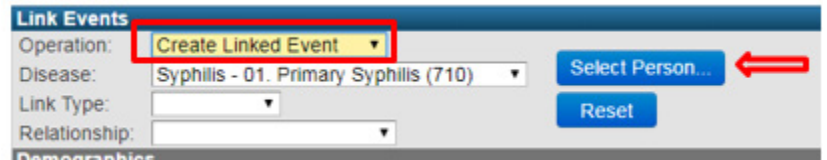
1. The Select Event button in the Link Events Box uses the exact same search as the magnifying glass icon on the toolbar.



The screenshot shows the 'Link Events' dialog box. The 'Operation' dropdown is set to 'Link To Existing Event'. The 'Select Event...' button is highlighted with a red box. Other fields include 'Link Type' and 'Relationship', both with empty dropdown menus, and a 'Reset' button.



2. The Select Person Button in the Link Events Box uses the exact same search as the 3 people icon on the toolbar.



The screenshot shows the 'Link Events' dialog box. The 'Operation' dropdown is set to 'Create Linked Event'. The 'Disease' field is set to 'Syphilis - 01. Primary Syphilis (710)'. The 'Select Person...' button is highlighted with a red box and a red arrow. Other fields include 'Link Type' and 'Relationship', both with empty dropdown menus, and a 'Reset' button.



3. You can always conduct a search first using the toolbar icons to determine if the person exists and /or has an existing event of the same instance of disease prior to linking so you know in advance if you will need to select the operation "Link to Existing Event" or "Create Linked Event".

*This document was created and shared with the Hepatitis Program from Christy Crowley"