

# Share Event vs. LHD to LHD Transfer

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# Agenda

- Sharing an Event
  - Why you may need to Share an Event
  - Process for Sharing
  - Unsharing an Event
- LHD to LHD Transfer
  - When to use LHD to LHD Transfer
  - How to do LHD Transfer
  - Where to find LHD Transfers
- Difference between Sharing and LHD Transfer

# Sharing an Event

- Why you may need to Share an Event
- Process for Sharing
- Unsharring an Event

# Why you may need to Share an Event

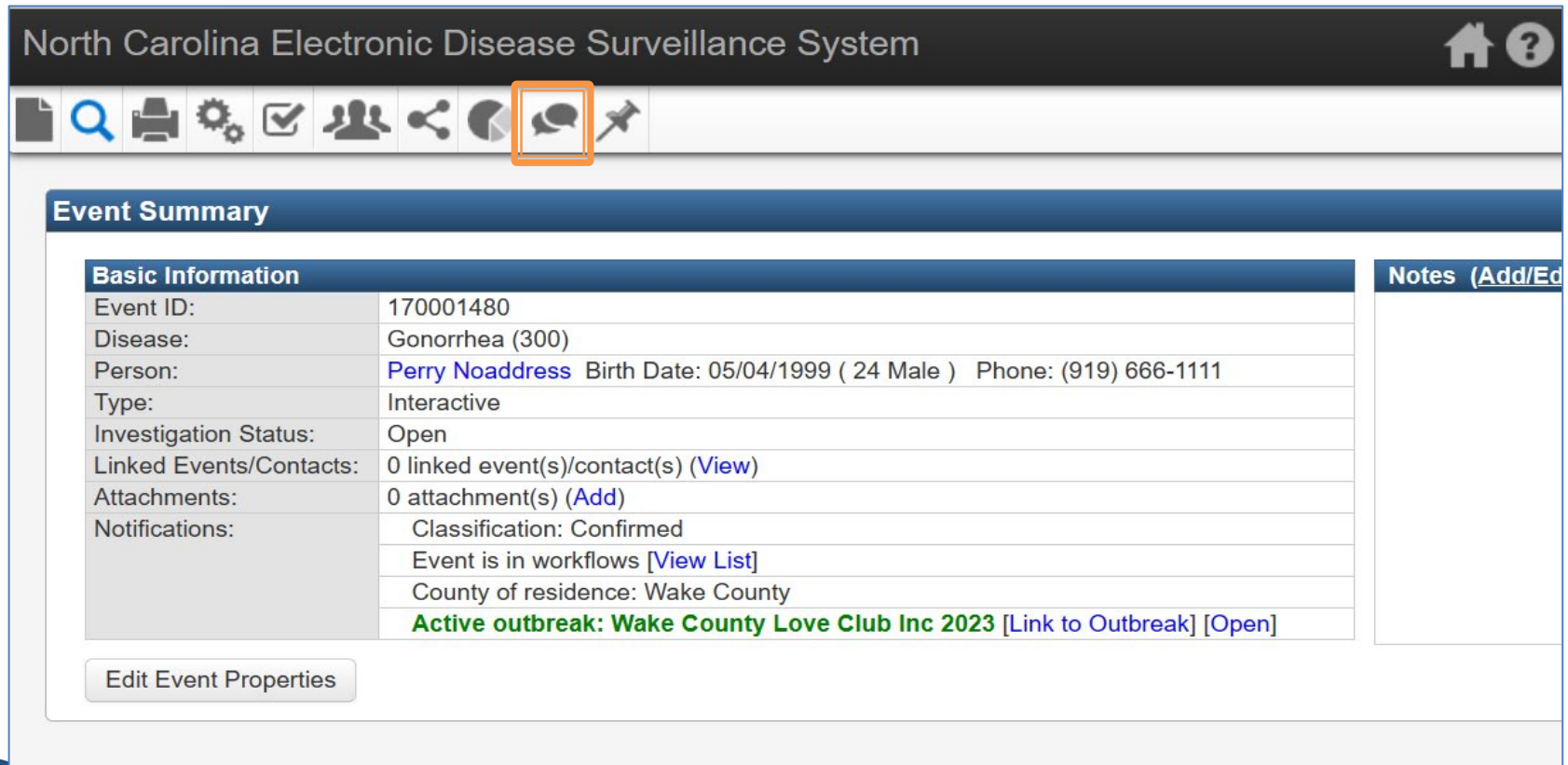
- In certain circumstances, a user in one Local Health Department (LHD) may need to see or edit an event that is not assigned to their County group.
- Example reasons for sharing:
  - Persons/patients from more than one county are involved
  - Conducting a provider call in a county other than the person's county of residence
  - Linking a Contact Event

# Why you may need to Share an Event

- Sharing a NC EDSS or a NC COVID event with another County group gives users in that county the ability to view, edit, and share the event that is outside of their usual county group.
- To request an event, you can:
  - Contact the LHD in which the event resides, or
  - You can contact the NC EDSS Help Desk via email ([ncedsshelpdesk@dhhs.nc.gov](mailto:ncedsshelpdesk@dhhs.nc.gov)) and request an event share using the Event ID number

# Process for Sharing

To share a specific event with another LHD access the Event Summary Screen. On the Event Summary screen, click on the 'Share Event' icon and the 'Share Event' screen will populate.



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Event Summary

Basic Information		Notes (Add/Ed
Event ID:	170001480	
Disease:	Gonorrhea (300)	
Person:	<a href="#">Perry Noaddress</a> Birth Date: 05/04/1999 ( 24 Male ) Phone: (919) 666-1111	
Type:	Interactive	
Investigation Status:	Open	
Linked Events/Contacts:	0 linked event(s)/contact(s) ( <a href="#">View</a> )	
Attachments:	0 attachment(s) ( <a href="#">Add</a> )	
Notifications:	Classification: Confirmed	
	Event is in workflows ( <a href="#">View List</a> )	
	County of residence: Wake County	
	<b>Active outbreak: Wake County Love Club Inc 2023</b> ( <a href="#">Link to Outbreak</a> ) ( <a href="#">Open</a> )	

Edit Event Properties

# Process for Sharing

- If the event has already been shared, the share information will be displayed under the 'Currently Shared' table.
- The Add Event Share section is where you add info to submit share request in NC EDSS

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Share Event - Tinker Bell - Gonorrhea (300)

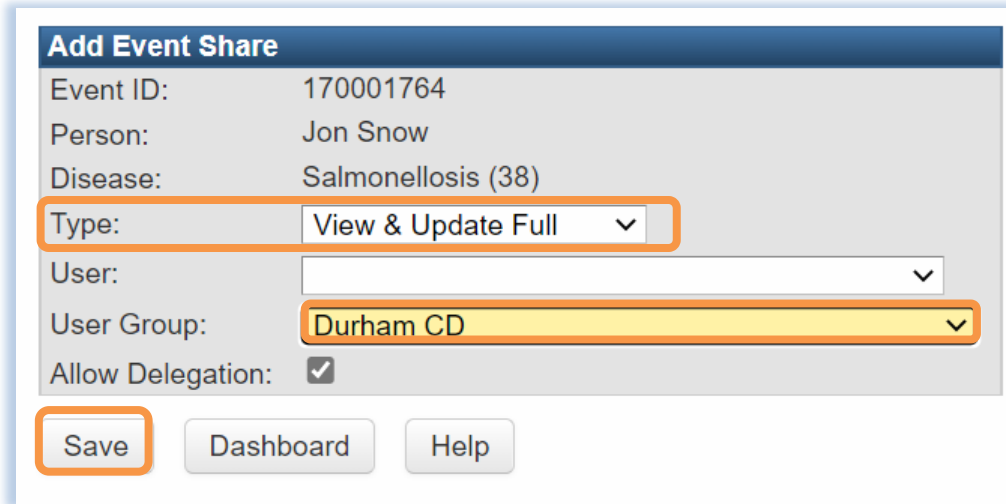
Currently Shared					
Event	Person	Status	Disease	Type	Shared Date

**Add Event Share**

Event ID: 170002580  
Person: Tinker Bell  
Disease: Gonorrhea (300)  
Type: View Only Limited  
User: View Only Limited  
User Group: View Only Full  
Allow Delegation: View & Update Full

Save Dashboard Help

# Process for Sharing



The screenshot shows a web form titled "Add Event Share". The form contains the following fields and values:

- Event ID: 170001764
- Person: Jon Snow
- Disease: Salmonellosis (38)
- Type: View & Update Full (dropdown menu)
- User: (empty dropdown menu)
- User Group: Durham CD (dropdown menu)
- Allow Delegation:

At the bottom of the form, there are three buttons: "Save", "Dashboard", and "Help". The "Save" button is highlighted with an orange border.

- Type: is defaulted to “View Only Limited”. From the dropdown, always select “View and Update Full”
- User Group: when possible, instead of a single User
- Check the “Allow Delegation” box so the event can be shared by the user group the event was shared with
- Click the Save button



# Process for Sharing

**Share Event - Jon Snow - Salmonellosis (38)**

Currently Shared										
Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action
170001764	Jon Snow	Open	Salmonellosis (38)	View & Update Full	11/10/2022	Alicia Shedd [asheddcovid]		Durham CD	Yes	<a href="#">Unshare</a>

**Add Event Share**

Event ID: 170001764  
Person: Jon Snow  
Disease: Salmonellosis (38)  
Type: View Only Limited ▾  
User:   
User Group:   
Allow Delegation:

- You will see under ‘Currently Shared’; you should now see the event that is shared and who that event is shared with
- Select Dashboard to return to the Event Summary dashboard

# Process for Sharing

The screenshot displays a software interface with a top toolbar containing icons for search, print, settings, checkmark, user, share, and refresh. Below the toolbar is a window titled "Event Summary" with a close button (X). The window is divided into two main sections: "Basic Information" and "Notes (Add/Edit | Show My Notes)".

**Basic Information**

Event ID:	170001764
Disease:	Salmonellosis (38)
Person:	<a href="#">Jon Snow</a> Birth Date: 08/05/1980 ( 42 Male )
Type:	Interactive
Investigation Status:	Open
Linked Events/Contacts:	1 linked event(s)/contact(s) ( <a href="#">View</a> )
Attachments:	0 attachment(s) ( <a href="#">Add</a> )
Notifications:	Classification: Confirmed
	Event is in workflows ( <a href="#">View List</a> )
	County of residence: Wake County
	<a href="#">Linked outbreak: Durham County Frankies Chick'n Shack March 2022</a> ( <a href="#">Open</a> )

**Add/Edit Notes**

**Add Note**

Text:

2452 characters left

Category:

Type:

- Add/Edit Notes window
  - Example: Shared event with Durham County/Linked Outbreaks
- Click on the Save button

# Unsharring an Event

Currently Shared										
Event	Person	Status	Disease	Type	Shared Date	Shared By	User	User Group	Allow Delegation	Action
<a href="#">170002580</a>	Sade Mae Brown	Open	Gonorrhea (300)	View & Update Full	08/01/2023	Wake Student19 [WakeLHC19]		Johnston STD	Yes	<a href="#">Unshare</a>

If an event no longer needs to be shared with a specific user group, click on the [Unshare](#) blue hyperlink in the Currently Shared section of the Share Event screen.

# Sharing an Event Demonstration



# LHD to LHD Transfer

- When to use LHD to LHD Transfer
- How to do LHD Transfer
- Where to find LHD Transfers

## When to use LHD to LHD Transfer

If an LHD receives a Part 1 form, paper lab or ELR for a person and they determine that the person resides in a different county, an LHD-to-LHD transfer must be completed.

# How to do a LHD Transfer

Change the NC County of Residence to the county where the event is being transferred.

NC County of Residence for the Event		
If a different county is investigating this event, the county of residence must share this event. If patient is not a NC resident, enter the NC investigating county here.		
NC County of Residence for the Event	Wake County	▼
Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
Date Assigned-Reassigned	01/20/2012	<input type="button" value="Add New"/>
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake CD	Local patient identifier
* Select the reason for the assignment/reassignment	Original/Initial Assignment	▼
Authorized Reporter		Phone number

Click Add New in order to get a new box in the Investigation Trail

- In order for the new LHD to see the event, the transferring LHD MUST do 2 things...
  1. Change the County of Residence
  2. Click Add New under the Investigation Trail

# How to do a LHD Transfer

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
<b>Date Assigned-Reassigned</b> <input type="text" value="01/20/2012"/>	<input type="button" value="Add New"/>	
<b>Group:</b> (You cannot change your group selection unless you clear this entry by erasing the Date Assigned) * Select the reason for the assignment/reassignment	Wake CD	<b>Local patient identifier</b> <input type="text"/>
<b>Authorized Reporter</b>	Original/Initial Assignment <input type="button" value="v"/>	<b>Phone number</b> (919) 555-5555
Classification status	AShedd	
Notes	Confirmed <input type="button" value="v"/>	

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation		
<b>Date Assigned-Reassigned</b> <input type="text" value="01/20/2012"/>		
<b>Group:</b> (You cannot change your group selection unless you clear this entry by erasing the Date Assigned) * Select the reason for the assignment/reassignment	Wake CD	<b>Local patient identifier</b> <input type="text"/>
<b>Authorized Reporter</b>	Original/Initial Assignment <input type="button" value="v"/>	<b>Phone number</b> (919) 555-5555
Classification status	AShedd	
Notes	Confirmed <input type="button" value="v"/>	
<b>Date Assigned-Reassigned</b>	<input type="text" value="01/25/2012"/>	

- A new block will populate with a new box with Date Assigned/Reassigned
- Enter the correct date and press the tab button on your keyboard



# How to do a LHD Transfer

The screenshot shows a web form for managing LHD assignments. At the top, a dropdown menu is set to "Durham County". Below this, there are two main sections for assignment entries. The first entry has a date of 01/20/2012, group "Wake CD", and classification status "Confirmed". The second entry has a date of 01/25/2012, group "Durham CD", and classification status "Confirmed". An orange callout box points to the "LHD to LHD transfer" reason for the second entry, with the text "Include notes supporting reason for transfer to help new LHD." The form also includes fields for "Authorized Reporter", "Classification status", and "Notes".

NC County of Residence for the Event		Durham County		Expand Details	
<b>Investigation Trail: Add a new entry for each group to which the event transfers during the investigation</b>					
Date Assigned-Reassigned	01/20/2012	Wake CD	Original/Initial Assignment	Local patient identifier	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)				Phone number	(919) 999-1111
* Select the reason for the assignment/reassignment					
Authorized Reporter	AS				
Classification status	Confirmed				
Notes	Is a student at Duke.				
<hr/>					
Date Assigned-Reassigned	01/25/2012	Durham CD	LHD to LHD transfer	Local patient identifier	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)				Phone number	
* Select the reason for the assignment/reassignment					
Authorized Reporter					
Classification status	Confirmed				
Notes					

- Make sure the Group assigned matches the County of residence:
  - Example above (Durham county residence & Group Durham (STD))
- Reason for Assignment/Reassignment: LHD to LHD transfer
- Classification status: should be kept the same as previous box

# LHD to LHD Transfer Demonstration



# Where to find LHD Transfers

North Carolina Electronic Disease Surveillance System



## C.2 CD Review and Approval Workflows

[CD Events Submitted for Review and Approval \(Bacterial Diseases\): 2. LHD to LHD Transfer](#)

Workflow Queue	Category	Description
<a href="#">CD Events Submitted for Review and Approval (Bacterial Diseases): 2. LHD to LHD Transfer</a>	C.2 CD Review and Approval Workflows	This workflow contains events assigned to your group by another LHD group. To clear, reassign once investigation is completed and ready to submit to state or other LHD group.

- You will be able to locate any LHD-to-LHD transfers in the Workflows

# Where to find LHD Transfers

## C.2 CD Review and Approval Workflows

CD Events Submitted for Review and Approval (Bacterial Diseases): 1. Original Assignment
CD Events Submitted for Review and Approval (Bacterial Diseases): 2. LHD to LHD Transfer
CD Events Submitted for Review and Approval (Bacterial Diseases): 3. Reassign to LHD from State
CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 1. Original Assignment
CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 2. LHD to LHD Transfer
CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 3. Reassign to LHD from State
CD Events Submitted for Review and Approval (HEPC): 1. Original Assignment
CD Events Submitted for Review and Approval (HEPC): 2. LHD to LHD Transfer
CD Events Submitted for Review and Approval (HEPC): 3. Reassign to LHD from State
CD Events Submitted for Review and Approval (High Profile Communicable Diseases) Cases: 1. Original Assignment
CD Events Submitted for Review and Approval (High Profile Communicable Diseases) Cases: 2. LHD to LHD Transfer
CD Events Submitted for Review and Approval (High Profile Communicable Diseases) Cases: 3. Reassign to LHD from State

- They will be separated by disease categories and be in an Events Submitted for Review and Approval: 2. LHD to LHD Transfer workflow

# Where to find LHD Transfers

## Workflow Details - STD Events Submitted for Review and Approval: 2. LHD to LHD Transfer

STD Events Submitted for Review and Approval: 2. LHD to LHD Transfer (Last Update: 08/22/2023 10:49 AM)					
Event	Name	Status	Create Date	Disease	Last Update
<a href="#">170000753- 01. Administrative</a>	Grace Greene	Open	12/02/2010	Gonorrhea (300)	12/07/2012
<a href="#">170000752- 01. Administrative</a>	Gina Gray	Open	12/02/2010	Gonorrhea (300)	12/07/2012
<a href="#">170000751- 01. Administrative</a>	Elaine Eggplant	Open	12/02/2010	Gonorrhea (300)	12/07/2012
<a href="#">170000750- 01. Administrative</a>	Ellie Emerald	Open	12/02/2010	Gonorrhea (300)	06/16/2014
<a href="#">170000749- 01. Administrative</a>	Christine Crimson	Open	12/02/2010	Gonorrhea (300)	12/07/2012
<a href="#">170000748- 01. Administrative</a>	Billie Jean Burgundy	Open	12/02/2010	Gonorrhea (300)	12/07/2012
<a href="#">170000747- 01. Administrative</a>	Brenda Black	Open	12/02/2010	Gonorrhea (300)	12/07/2012

By clicking on the Administrative hyperlink, you can review the event Investigation Trail.

If patient is not a NC resident, enter the NC investigating county here.  
 NC County of Residence for the Event Wake County

Investigation Trail: Add a new entry for each group to which the event transfers during the investigation

Date Assigned/Reassigned	12/02/2010	
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Pitt STD	Local patient identifier
* Select the reason for the assignment/reassignment	Original/Initial Assignment	Phone number (252) 888-8888
Authorized Reporter	Betty Boop	
Classification status	Confirmed	
Notes	Patient is a NCSU student and resides most of the year in Wake County.	

Date Assigned/Reassigned	12/05/2010	Add New
Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake STD	Local patient identifier
* Select the reason for the assignment/reassignment	LHD(Region) to LHD(Region) transfer	Phone number
Authorized Reporter		
Classification status	Confirmed	
Notes		

# Where to find LHD Transfers

## G. STD Specific Workflows

Bacterial STDS Where Treatment is Incomplete	36 (0)
STD Events Submitted for Review and Approval: 1. Original Assignment	46 (0)
STD Events Submitted for Review and Approval: 2. LHD to LHD Transfer	24 (0)
STD Events Submitted for Review and Approval: 3. Reassign to LHD from State	2 (0)

Events remain in the **'Events Submitted for Review and Approval: 2.LHD to LHD Transfer'** Workflow until they are ready to be assigned to the State or another LHD group if the person's residence of diagnosis is determined to be another county.

# LHD Transfer Workflow Demonstration



# Difference between Sharing and LHD Transfer

- Sharing an Event:
  - Allows another county/user that does not have access to the current jurisdiction to view/edit/update the event.
  - The responsibility of completing the investigation and reporting to the State remains with the county of residence.
  - The event remains in the original county's workflows until assigned to the State or another LHD via LHD-to-LHD transfer.



# Difference between Sharing and LHD Transfer

- LHD to LHD transfer:
  - Reassigns the responsibility of investigation and reporting to the state to the new county.
  - Once the event is assigned via “LHD to LHD transfer”, it will no longer show up in the original assignee’s workflows.
  - The original county will no longer have access to view the event unless it is shared with them.



**Thank you for joining today!**

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