



**TEXAS**  
Health and Human  
Services

**Texas Department of State  
Health Services**

# **NEDSS Training Module 2: Search & Create**

**DSHS Contractor Training  
2023**

# Module 2

After completing this module, you should be able to:

**1. Search** for a patient.

- Identify if the patient file exists in NEDSS.

**2. Create** a patient file.

- The patient file is not specific to TB.

# Part 1: Search for a Patient

# What To Know about Searching and Creating



**Always conduct a search**, even if you believe the patient or their investigation does *not* exist. The patient may be in NEDSS due to another condition.



**Search broadly.** Enter only the first 3 letters of the first and last name and click search.



**Review the search results carefully.** Consider if the search should be refined before adding a new patient file (to avoid duplicates).



# NEDSS Homepage Dashboard

Home | Data Entry | Merge Patients | Open Investigations | Reports | System Management

Release 6.0.9-GA Dashboard

Patient Search

## Search Demographics

*(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)*

Last Name:

First Name:

DOB:

## Search Identifiers

Event ID Type:

Patient ID(s):

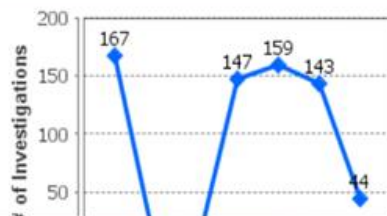
*(Separate IDs by commas, semicolons, or spaces)*

My Queues

Open Investigations (957)

Approval Queue for Initial Notifications (629)

Cases created - Last 7 Days



Search Demographics is where users will search for the patient.

Search broadly by selecting just the **first 3 letters** in the first name and **first 3 letters** in the last name.

My Reports

There are no private reports available.

## Patient Search

### Search Demographics

(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:

First Name:

DOB:  

Current Sex:  

### Search Identifiers

Event ID Type:  

Patient ID(s):

(Separate IDs by commas, semicolons, or spaces)

[Advanced Search](#)

## Data Entry:

Use the name provided to enter in the **Search demographics** field.

*Using just a few letters in the name will broaden your search.*

# Two Situations Can Occur in Search



## Situation 1

The broad search yields multiple patients with the same letters in their first/last name.



## Situation 2

The broad search yields no patients with those letters in their first/last name.



Situation 1: The search yields multiple patients.



# Example 1

- **Last name:** Mermaid
- **First name:** Ariel



Patient Search

Search Demographics

*(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)*

Last Name:

First Name:

DOB:

Current Sex:

Search Identifiers

Event ID Type:

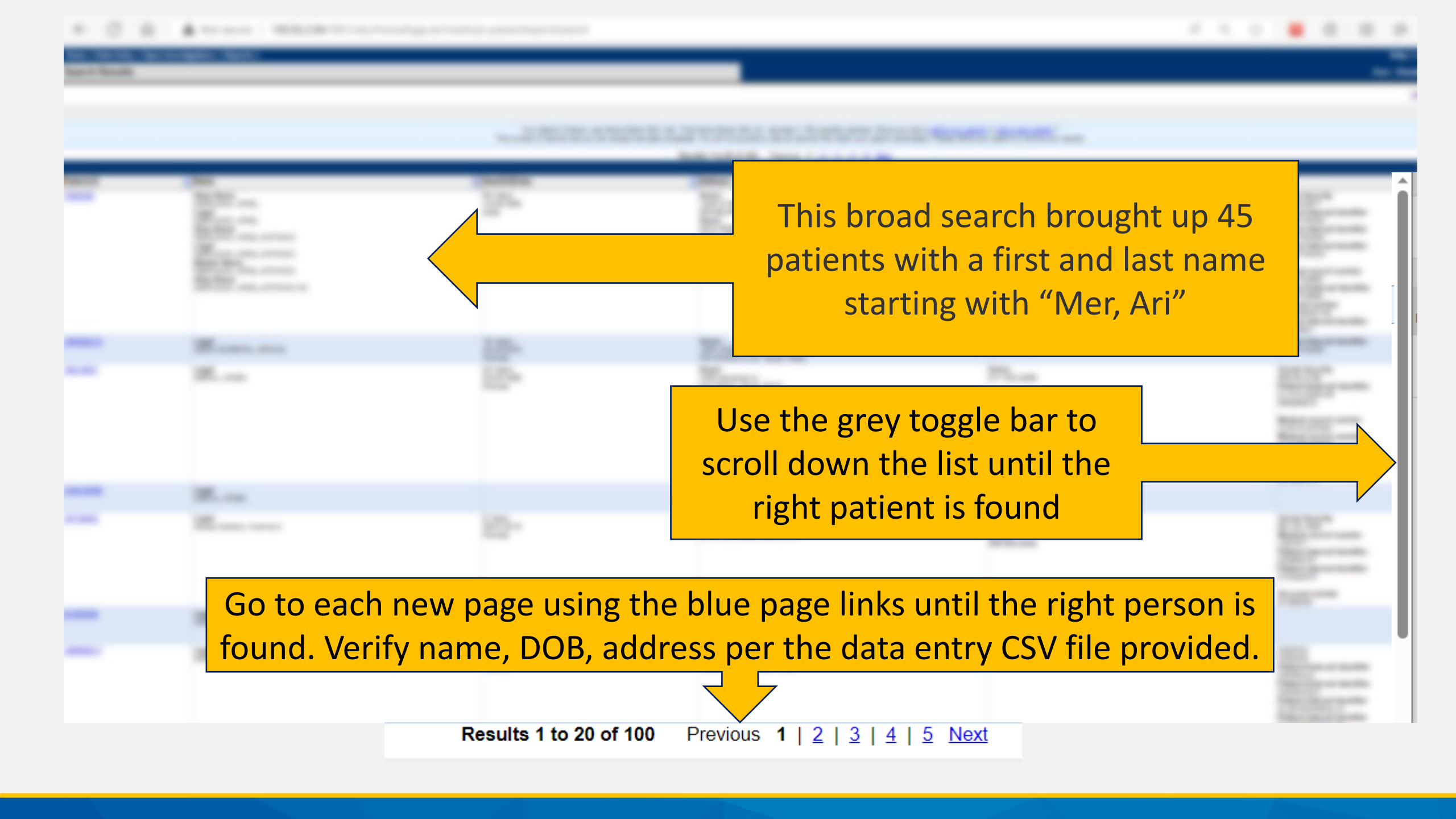
Patient ID(s):

*(Separate IDs by commas, semicolons)*

Enter:  
**Last Name: Mer**  
**First Name: Ari**

Hit the "Search" button

1	
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A screenshot of a web application showing a search results table. The table has columns for patient information. A yellow callout box with an arrow points to the search criteria. Another yellow callout box with an arrow points to the vertical scrollbar on the right. A third yellow callout box with an arrow points to the pagination links at the bottom. The background is slightly blurred to emphasize the callouts.

This broad search brought up 45 patients with a first and last name starting with “Mer, Ari”

Use the grey toggle bar to scroll down the list until the right patient is found

Go to each new page using the blue page links until the right person is found. Verify name, DOB, address per the data entry CSV file provided.

Results 1 to 20 of 100 Previous [1](#) | [2](#) | [3](#) | [4](#) | [5](#) [Next](#)

[24360630](#)

**Legal**

Mermaid, Ariel

Alias Name

Little Mermaid, Ariel

38 years

When the right patient is found, select their blue patient ID on the left side of their name.

Security  
000

license number

Home | Data Entry | Merge Patients | Open Investigations | Reports | System Management Help | Logout

**Patient File** User : Elizabeth Foy **TEST-1**

Delete Print

**Ariel Mermaid | Female | 01/01/1985 (38 Years)** Patient ID: 24384002

Summary **Events** Demographics [Expand All](#) | [Collapse All](#)

**Patient Summary**

Go to: [Patient Summary](#) | [Open Investigations](#) | [Documents Requiring Review](#)

**Patient Summary** Back To Top

<b>Address (Home)</b> 123 Fish Street Austin, Texas 78752 Travis County	No Phone Info Available	No ID Info Available
		<b>Race</b> Unknown
		<b>Ethnicity</b> No Ethnicity Info Available

**Open Investigations (0)** Back To Top

**Documents Requiring Review (0)** Back To Top

Summary **Events** Demographics Delete Print



Users are now in the correct patient's file. It is possible the patient exists in NEDSS because of having another disease condition (i.e., COVID 19). Users will need to open a TB investigation before entering TB specific data. That is covered in Module 3.

Example 2: The search does not yield any patient record.



Patient Search

Search Demographics

*(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)*

Last Name:

First Name:

DOB:

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):

*(Separate IDs by commas, semicolons)*

Enter:  
**Last Name: Mer**  
**First Name: Ari**

Hit the "Search" button

1	
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Your Search Criteria: Last Name Starts With 'Mermaid', resulted in 0 possible matches. Would you like to [refine your search](#) or [add a new patient](#) ?

Nothing found to display

Age/DOB/Sex

Address

Phone/Email

ID

Nothing is found, so the person does not currently exist in the database. Users will need to **Create** this person's patient file before entering their TB specific data.

# Why Search Broadly?

- If the patient is in NEDSS from a previous notifiable disease condition, their name may have been entered differently from the data provided in their TB record.

Search broadly to avoid creating a duplicate patient file, in the event the patient already exists in NEDSS with a variation of their name.



# Part 2: Create a New Patient File

# Creating a Record for Mrs. Light Bulb

- **Last name:** Bulb
- **First name:** Light



Release 6.0.14.1-GA Dashboard

Patient Search


Search Demographics

*(By default, search uses 'Starts With'. To search for 'Contains' enter % at start of text or use Advanced Search)*

Last Name:

First Name:

DOB:  

Current Sex:  

Search Identifiers

Event ID Type:  

Patient ID(s):

*(Separate IDs by commas, semicolons)*

[Advanced Search](#)

My Queues

Default Queues

- Open Investigations
- Documents R

Enter:

Last Name: **Bul**

First Name: **Lig**

Hit the "Search"  
button

[New Search](#) | [Refine Search](#)

Add New

Your Search Criteria: Last Name Starts With 'bulb', First Name Starts With 'light', resulted in 0 possible matches. Would you like to [refine your search](#) or [add a new patient](#) ?

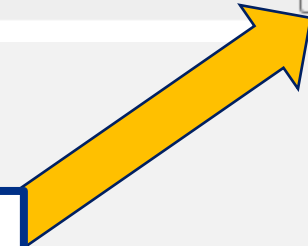
| [Remove All Filters/Sorts](#)

<u>Patient ID</u>	<u>Name</u>	<u>Age/DOB/Sex</u>	<u>Address</u>	<u>Phone/Email</u>	<u>ID</u>
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Nothing found to display.

Add New

Select "Add New"



After clicking ***add new***, users are directed to a page where demographic data entry will occur.

Enter the **name**, **date of birth**, and **other data fields** as available.  
NOTE: Fields are *case sensitive*- be sure to capitalize proper nouns such as name, address, etc.

The screenshot shows a web-based form for entering demographic information. The form is organized into several sections, each with a collapse icon (a square with a minus sign) to its left. The sections are: Basic Demographic Data, Name Information, Other Personal Details, Ethnicity and Race Information, and Identification. The 'Information As of Date' field is set to 09/23/2023. The 'Name Information' section includes fields for Last Name (filled with 'Culb'), First Name (filled with 'light'), Middle Name, and Suffix. The 'Other Personal Details' section includes fields for DOB, Current Age, Current Sex, Birth Sex, Is the patient deceased?, Date of Death, Marital Status, and State HIV Case ID. The address section includes fields for Street Address 1, Street Address 2, City, State (filled with 'Texas'), Zip, County, Census Tract, and Country (filled with 'United States'). The contact information section includes fields for Home Phone, Work Phone, Work Phone Ext, Cell Phone, and Email. The 'Ethnicity and Race Information' section includes an Ethnicity dropdown and a list of race options with checkboxes: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Other, Refused to answer, Not Asked, and Unknown. The 'Identification' section includes a table with columns for Type, Assigning Authority, and ID Value, and fields for Type, Assigning Authority, and ID Value. At the bottom of the form are buttons for 'Submit', 'Cancel', and 'Add Extended Data'. A yellow arrow points from the 'Information As of Date' field to the 'Submit' button. Another yellow arrow points from the 'Submit' button to the 'Information As of Date' field. A third yellow arrow points from the 'Submit' button to the 'Submit' button.

**Information As of Date** will auto-populate the date that data entry occurs.

Select **“Submit”** when all available data is entered.

Print

176788437

Light Bulb | Female | 01/01/2017 (6 Years)

Summary | Events | Demographics

Expand All | Collapse All

### Patient Summary

Go to: [Patient Summary](#) | [Open Investigations](#) | [Documents Requiring Review](#)

Patient Summary [Back To Top](#)

<b>Address (Home)</b> 123 Electric Avenue Austin, Texas 78752 Travis County	No Phone Info Available	No ID Info Available	<b>Race</b> No Race Info Available <b>Ethnicity</b> Hispanic or Latino
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Open Investigations (0) [Back To Top](#)

Documents Requiring Review [Back To Top](#)

[Previous](#) [Next](#)

Print

*Congratulations! You have successfully created a new patient file.*

There are no **Open Investigations** because this is a new Patient File. Next, users will create an open TB investigation.



# Demonstration



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<https://vimeo.com/manage/videos/877241304>

**Your Time to Try!**

# Navigating NEDSS



**Do not use the back button from your internet browser.** Records may become corrupted, and these errors are not easily resolved. If you accidentally use the back button, return to the home page and start again.



**Use Microsoft Edge.** It is the browser to use when accessing NEDSS.



**Avoid opening multiple tabs of NBS.** If you have more than one open in a browser to edit information, it can cause data corruption issues. If you must have multiple open, use different browsers.

# Exercise 2



Texas Department of State  
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**End of Module 2**