Creating a Field Record from a manually entered lab:

First, create the event.

Refer to Chapter 3: Working with Events in THISIS in the Core User Manual for more information on this topic

Always search for an existing event before creating a new event. The skill sheet entitled, 'Searching in THISIS' provides instructions on how to search for an event in the system. If no existing event is found, follow these procedures to create a new event.
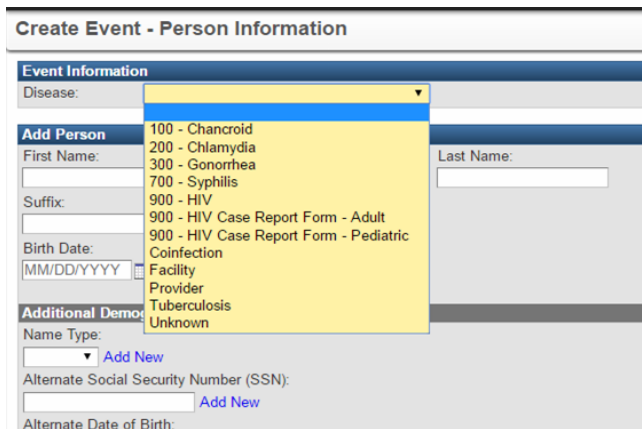
Select the **Create Event** button on toolbar to display the **Create Event** screen.

When the Create Event screen opens, select a disease. The create event screen will not allow any function to performed without selecting a disease.

Tip! **To navigate the disease list quickly, type the first letter of the disease name to scroll to the first disease that begins with that letter and you will get an alphabetical list of diseases that begin with that letter.**

Select the Select Person button.

Enter search criteria for the person associated with this specific event in the Search Party screen. Then select the Search button.

Select the result for the correct person (highlighted in yellow).

Use the Select button to insert person information into Create Event Screen.

If person is not found, select the Cancel button to return to Create Event Screen.

Enter the person information into Add Person, Advanced Demographics and Contact Information sections of Create Event Screen.

Save   Cancel   Help

To create new event, select the `Save` button.

If the Potential Matches Screen Appears, research the existing records:

❶ Evaluate existing events listed at the bottom of the page. If an event is the same person, the same disease, and the same time frame, the 'Use this event' link will take you to that event. This is the safe choice that does not create a new person or event.

❷ Evaluate existing persons. Use the Choose Person button if an existing person matches the person information and you have a high degree of confidence that it is the same person. This will create a new event with the existing person information.

❸ If the person information does not match, use the Create new case and person button. This will create a new person with a new event. This should only be done after evaluating existing persons and events

The diagram on the next page shows the different parts of the Potential Matches Screen to investigate.

Entered Information:

Name:	Jimmy John
Birth Date:	05/05/1955
Social Security Number:	
Name Type	
Alternate Social Security Number (SSN)	
Estimated Age	
Alternate Date of Birth	
eHARS Case ID	
TDCJ Number (SID)	
Ethnicity	
Race	
Sex at Birth	
Current Gender Identity	
Born in the US	
Country of Birth	
Date of Arrival in the US	
English Speaking	
Preferred Language	
Email Type	
Electronic Contact Type	
Phone Number Type	
Address:	TX
County:	
Country:	USA
Phone:	

❸

Create new case and person

☐ Mark as pending deduplication

Matches

Matched Record 1

Name:	Jimmy John [Details]
External ID:	PBEXWNOKSBG
Birth Date:	05/05/1955
Social Security Number:	
Name Type	
Alternate Social Security Number (SSN)	
Estimated Age	
Alternate Date of Birth	
eHARS Case ID	
TDCJ Number (SID)	
Ethnicity	
Race	
Sex at Birth	
Current Gender Identity	
Born in the US	
Country of Birth	
Date of Arrival in the US	
English Speaking	
Preferred Language	
Email Type	
Electronic Contact Type	
Phone Number Type	
Address:	TX
County:	
Country:	USA
Phone:	

❷

Choose Person (creates new event)

☐ Use entered information

Events

Event ID	Status	Disease	Create Date	Action
200001671	Open	200 - Chlamydia	02/21/2018	Use this event

❶

If you selected "create an event" from the Potential Matches screen, or there were no potential matches, a new event will open on the screen in the Event Summary screen. Your event is now ready to enter information. You should record the new Event ID on the source document.

In the event, select the disease:

Enter in the demographic information available from the lab result.

Select Save when complete.

When in the event click on "Lab Results" tab.
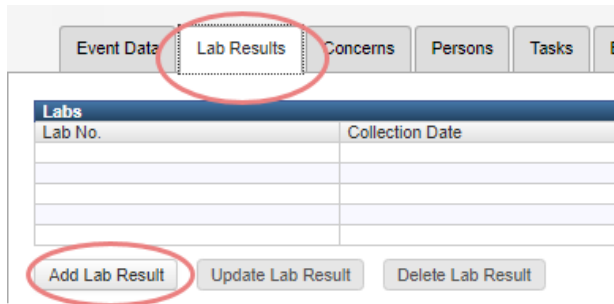
Select "Add Lab Result" – this will take you to the lab screen.

Select "STD Lab Result"
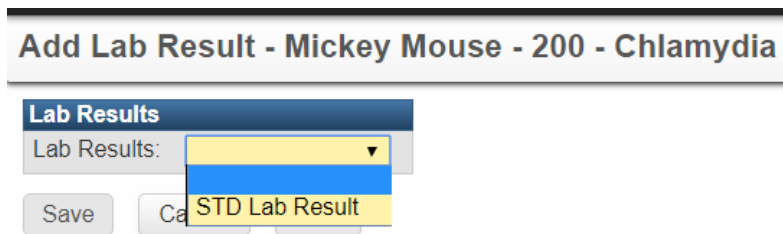
Note: The Lab Result option will match the disease already entered. For example, for HIV it will say "HIV Lab Result" and "TB Lab Result" for TB.

Fill out all of the information available on the lab. Notice only the information on the test (lab, dates, type of test, result) are only required.

Patient information is not required for STD lab results, but is for positive HIV results.

Note: Patient information in the HIV lab result is required. This is not the case in an STD lab.

Add the lab.

Save lab information.

Now, the lab is entered into the system. To create the field record Select Event Data tab. Then select the Case Assignment/Field Record question package.

Initial Status/Initial assignment outcome will only be created on ELR imports. Surveillance staff will have to make a determination on manually entered labs on whether or not follow-up is needed.

Initial jurisdiction	PHFU Austin
* Initial date	05/01/2018
* Initial assignment outcome	Administrative Closure
Lock initial assignment block	BFP - No Follow-up
	Field Follow-up
	Insufficient Information
* Assignment type	Record Search Closure
	Not Program Priority
* Indicates required field	Surveillance Follow-up
	Congenital Investigation Needed
Save Cancel Help	Other

If field follow-up is needed, surveillance staff will need to select field follow-up and then open a new assignment type under the Case Assignment/Field Record Information.

Staff will select:

Case Assignment / Field Record Information	
* Assignment type	▼
* Indicates required field	Congenital Investigation
	Field Record / Interview
Save Cancel Help	OOS
	Re-interview
	Surveillance Assignment

Then select:

Case Assignment / Field Record Information		
* Assignment type ⊟	Field Record / Interview ▼	Add New
Assignment type lock	Yes ▼	
* Created by	Mary VanWisse	
Create date - syphilis	06/11/2018	
* Is this a field record or interview only?	▼	
Assignment		
Jurisdiction assigned to	Field Record	
	Interview Only ▼	
* Person assigned to		
* Assignment reason	▼	
Coinfection Information		
Iteration ID of existing block	1002321	
Source case of the current block	200002402 - 700 - Syphilis - Mickey Mouse	
* Prevents this answer block from being joined if the current case is joined	▼	

* Indicates required field

Save   Cancel   Help

Staff should be able to fill out the rest:

Case Assignment / Field Record - Mickey Mouse - 700 - Syphilis

		Current Status
Outcome		

		Initial Status
Initial jurisdiction	PHFU Austin	
* Initial date	06/07/2018	
* Initial assignment outcome	▼	
Lock initial assignment block	Yes ▼	

		Case Assignment / Field Record Informa
* Assignment type ⊟	Field Record / Interview ▼ Add New	
Assignment type lock	Yes ▼	
* Created by	Mary VanWisse	
Create date - syphilis	06/11/2018	
* Is this a field record or interview only?	Field Record ▼	
* Field Record ID	1002321	
Assignment		
Jurisdiction assigned to	PHFU Austin ▼	
* Person assigned to	Karen Surita	🔍 🗑
* Assignment reason	New Syphilis ▼	
Field Record		
* Referral basis (Syphilis)	P1 - Sex partner ▼	
* Date initiated (Syphilis)	06/11/2018 📅	
* Initiating agency	PHFU Austin	🔍 🗑
* Investigating agency	PHFU Austin	🔍 🗑
Notifications and Follow-ups		
* Is this patient notifiable?	Yes ▼	
Is this patient notifiable by internet ONLY?	Yes ▼	
Initiate for Internet follow-up?	Yes ▼	
Internet notification completed	☐ Yes	
* Notification plan for field follow-up	Third Party ▼	
Field Record Address		
Select Address at the Time of this Event		
Address type	▼	
Residence type	▼	
Street address		
Street address 2		
Phone - work		
Locating Information/Other		
Electronic contact type	▼	
Locating information/Other		

Physical Attributes		
* Gender	▼	
Height		
Visible identifiers	☐ Tattoos ☐ Scars ☐ Glasses ☐ Piercings ☐ Facial hair ☐ Other	
Hair color	▼	
Eye color	▼	
Marital Status/Exposure		
Spousal notification required?	▼	
Current marital status	▼	
Exposure date (first)	MM/DD/YYYY 📅	
Frequency of exposure - general	▼	
Expected in Clinic		
Is the patient expected in to the clinic	▼	
Field Investigation Outcome		
Syphilis disposition	▼	
Date this patient was notified of exposure to syphilis	MM/DD/YYYY 📅	
Coinfection Information		
Iteration ID of existing block	1002321	
Source case of the current block	200002402 - 700 - Syphilis - Mickey Mouse 🔍 🗑	
* Prevents this answer block from being joined if the current case is joined	▼	
Print Field Record		

* Indicates required field

[Save] [Cancel] [Help]

Fields marked with a * are required. Once the field record is created, it can be printed and saved.