

### **Purpose:**

- How to conduct **searches for parties/facilities**.
- How to properly conduct a **search for a case/event** in the CTEDSS.

**Background:** Some instances require searching prior to the data entry to avoid duplicates in system. First example 'Quick instructions' is searching for **people and facilities** using the 'Manage People and Facilities' button. Second example is if searching for a **case/event**, where you can use the 'search event' button on the Menu bar or if generated Event ID' number exist, the 'CTEDSS search window'.

Remember, the most recent address entered for that person in CTEDSS is what shows up in the Event dashboard if you have chosen the person from CTEDSS when you enter the case.

### **Quick Instructions: People and Facilities (Pages 2+3 below)**

1. Select 'Manage People and Facilities' on the splash screen menu. A pop-up window called Search Person Party appears; this window may be changed to search for an organization using dropdown.
2. Fill in all the information on person or organization you are searching for and select search. CTEDSS will give all results with letter sequence entered. Be aware, CTEDSS has a limit of 100 returned. May have to narrow search.
3. Once CTEDSS produces the results you are looking for, make sure by double checking all the information. Highlight event chosen and hit select.
4. The 'Person Summary' or 'Organization Summary' page (depends if seeking person or facility) will consist of demographic and contact information. Will also consist of affiliated events listed.

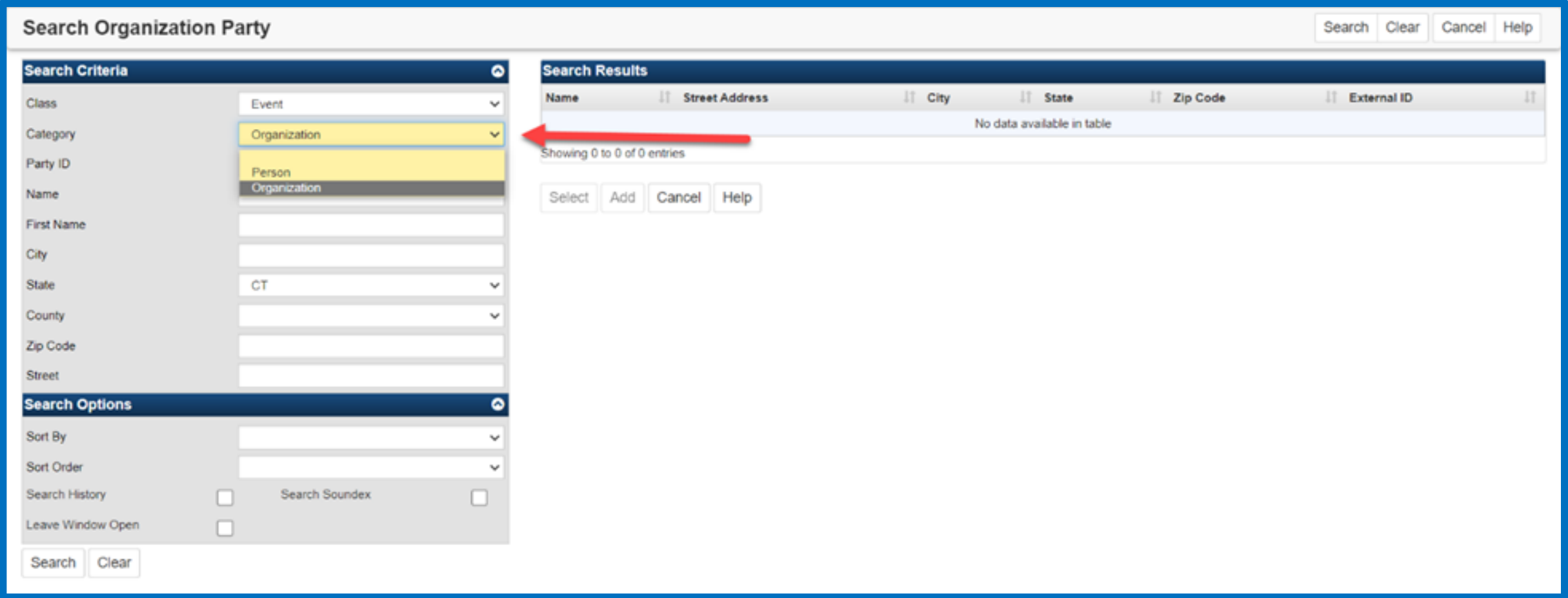
### **Quick Instructions: Case/Event search (Pages 4+5 below)**

- 1.** You may begin to search for an event in two ways. Either by selecting 'Search event' on the menu bar or if CTEDSS ID number exists, you may use the search box on the top right hand of page.
- 2.** If 'Search Event' is selected a 'Pop-up' page called 'Search Case' will open. Select the disease of the event sought along with name and DOB to allow for an accurate search in the CTEDSS.
- 3.** Select 'Search', CTEDSS will list for you all events that correspond with the letter sequence entered. The Wildcard\*- it's an asterisk you can place along with 2 characters or more to search broadly.
- 4.** Select the event from CTEDSS generated list and hit select button. CTEDSS will take you to the event to begin data entering.

Searching for both **“People and Facilities”** require the same steps in the CTEDSS:

1. Select the ‘Manage People and Facilities’ button on Menu bar of Splash screen.

A ‘Pop-Up window called ‘Search Person Party’ will appear. Choose what/who you are searching for, a Person or an Organization. Example (below) shows if you select ‘Organization’ from drop down; whole page changes from ‘Search Person Party’ to ‘Search Organization Party’



2. Fill in all information on the Party (Person or Organization) you are searching for and select search. CTEDSS will produce all the results from the letter sequence entered and list them for you to choose. You may need to narrow your search if too many results are listed (below). 100 is the limit.

### Search Person Party

Search Clear Cancel Help

#### Search Criteria

Class: Event  
Category: Person  
Party ID:   
Last Name: Smith  
First Name:   
Maiden/Other Name:   
Alias:   
Birth Date (Range): mm/dd/yyyy   
Gender:   
Social Security Number:   
City:   
State: CT  
County:   
Zip Code:   
Street:   
EMPI ID:

#### Search Options

Sort By:   
Sort Order:   
Search History:  Search Soundex:   
Leave Window Open:

Search Clear

Please correct the indicated errors before proceeding:

- Your search has returned more than 100 results, so sorting has been disabled. To sort, please filter your search further.

#### Search Results

Name	Birth Date	Street Address	City	State	Zip Code	External ID
Q Smith,	11/16/2004		Stamford	CT	06902	
Q Smith,	04/12/1955		Milford	CT	06480	
Q Smith,	05/06/1997		Groton	CT	06340	
Q Smith,	02/16/1996		Groton	CT	06340	
Q Smith,	07/09/1982		Norwalk	CT	06854	
Q Smith,	11/07/1962		New Britain	CT	06053	
Q Smith,	01/30/1983		Barkhamsted	CT	06063	
Q Smith,	09/16/2016		Enfield	CT	06082	
Q Smith,	03/08/1991		Windham	CT	06226	
Q Smith,	11/13/2012		Bridgeport	CT	06604	

Showing 1 to 10 of 100 entries

Previous 1 2 3 4 5 ... 10 Next

Select Add Cancel Help

3. Once CTEDSS produces the results you are looking for, make sure by double checking all the information. Must highlight the chosen party and hit the 'Select' button to select them from list.

**Search Person Party** Search Clear Cancel Help

**Search Criteria**

Class: Event  
Category: Person  
Party ID:   
Last Name: Person  
First Name: Fak\*  
Maiden/Other Name:   
Alias:   
Birth Date (Range): mm/dd/yyyy   
Gender:   
Social Security Number:   
City:   
State: CT  
County:   
Zip Code:   
Street:   
EMPI ID:

**Search Results**

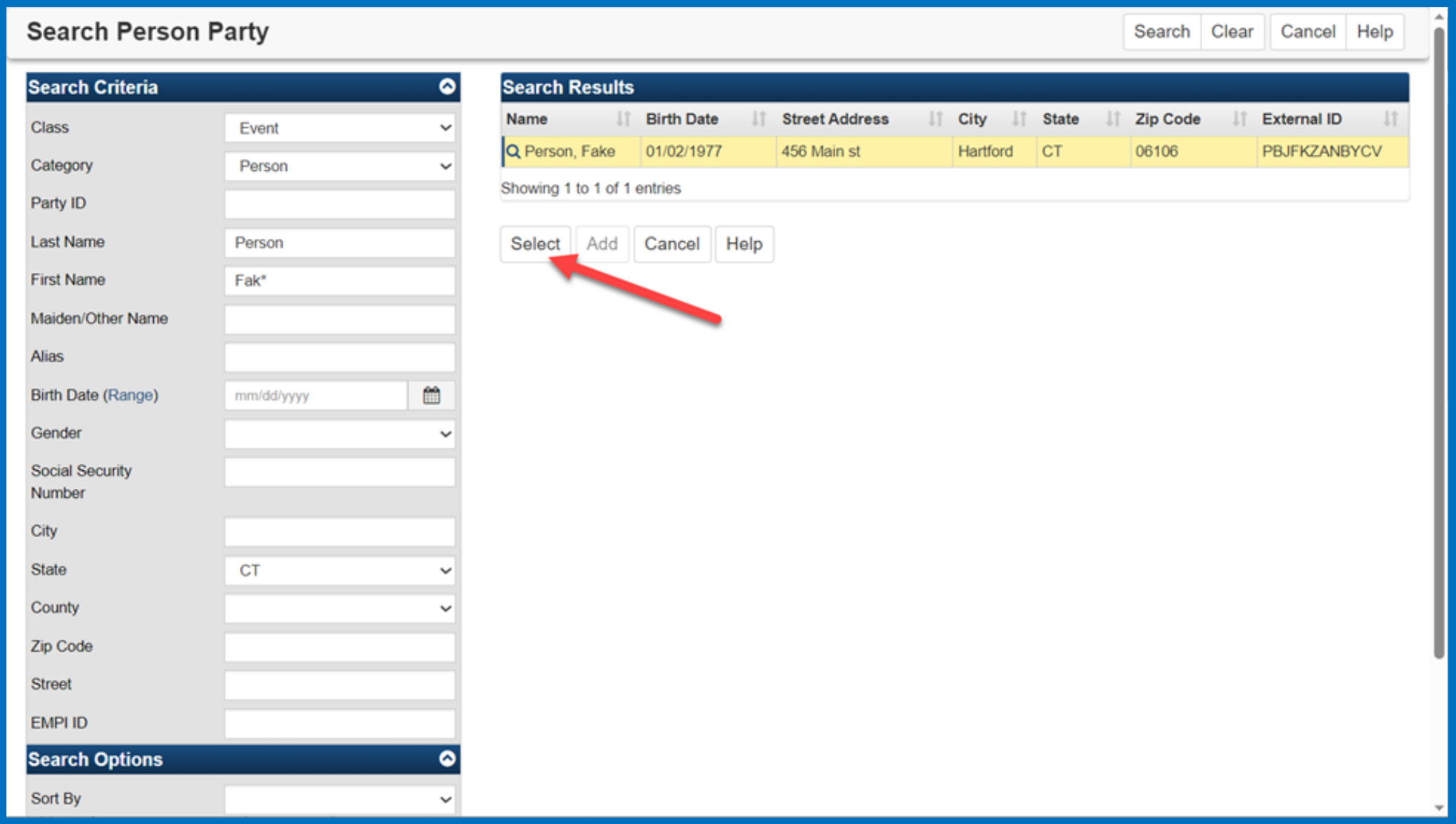
Name	Birth Date	Street Address	City	State	Zip Code	External ID
Person, Fake	01/02/1977	456 Main st	Hartford	CT	06106	PBJFKZANBYCV

Showing 1 to 1 of 1 entries

**Select** **Add** **Cancel** **Help**

**Search Options**

Sort By:



4. CTEDSS will bring you to the 'Person Summary' or 'Organization Summary' page (depends if seeking person or facility). The Summary page will consist of demographic and contact information. It will also have a breakdown of all affiliated events for the party. Events will be listed individually by disease and event date as shown below.

The screenshot shows the 'Person Summary' page in the CTEDSS interface. The page is titled 'Connecticut Electronic Disease Surveillance System' and includes a search bar for 'Enter Case ID'. The left sidebar contains navigation options such as 'Home', 'Open Help', 'History', 'Case Management', 'Create Event', 'Search Event', 'Workflow', 'Tasks', 'Import Roster', 'Update Roster', 'Manage People and Facilities', 'Create Outbreak/Exposure Event', 'Recent Events', 'Import Event(s)', 'Export Event(s)', and 'Delete Party'.

The main content area is divided into three sections:

- Demographic Information:** A table with the following data:

First Name:	Fake
Last Name:	Person
Party ID:	PBJFKZANBYCV
Birth Date:	01/02/1977
Gender:	Male
Deduplication Status:	Done
Gender current:	Male
- Notes:** A section with the text 'No data available for this section'.
- Contact Information:** A table with columns for Type, Address, County, and Phone. The data row shows: Type: Home \* Primary, Address: 456 Main st, Hartford, CT 06106, County: (empty), Phone: (empty). Below the table are buttons for 'Add Address Type', 'Edit Address', and 'Make Primary'.

The **Event Information** section is highlighted with a red arrow and contains a table of events:

Event ID	External ID	Person	Status	Create Date	Disease OR Condition	Event Date
109151212	109151212	Person, Fake	Open	02/28/2023	Gonorrhea	02/28/2023
109150151	109150151	Person, Fake	Open	01/27/2023	Brucellosis	01/15/2023

# Searching for 'Cases or Events' require using slightly different search areas.

1. You begin on splash screen by either selecting the 'Search Event' in the menu bar or if you have a generated CTEDSS Event ID, you can place it in the search box. Following example shows locations below.

The screenshot shows the CTEDSS interface with the following components:

- Menu:** Home, Open Help, History, Case Management (Create Event, Search Event, Workflow, Tasks, Import Roster, Manage People and Facilities, Create Outbreak/Exposure Event, Recent Events), Reports, Manage Exposure Sites, Profile Management (Edit Profile, Logout).
- Search Bar:** Located at the top right, containing the text '103451181' and a 'Search' button.
- Recent Records Table:**

Event ID	Name	Disease OR Condition
103451181	UAT, [redacted]	Viral Hemorrhagic Fevers
103451240	Illness, Unreal	Viral Hemorrhagic Fevers
103449797	Patient, Test	Coronavirus Infections
103450883	Tester, Test	Coronavirus Infections
- Workflows Table:**

Workflow Queue	Events	Assigned
Yale EPI COVID CRF Notification Custom	5000	0
Case Deduplication with Positive COVID-19	1090	0
- Tasks:** No tasks to display.
- Quick Links:** CTEDSS System Support And Contact Information, CTEDSS System News And Tips.

2. If 'Search Event' is selected a 'Pop-up' page called 'Search Case' will open. Select the disease of the event sought along with name and DOB to allow for an accurate search in the CTEDSS.

**Search Case** Search Clear Cancel Help

**Search Criteria**

Type Normal

Event ID

External ID

Last Name Person

First Name Fa\*

Maiden/Other Name

Birth Date (Range) mm/dd/yyyy

Gender

State CT

County

Disease OR Condition Gonorrhea

From Date mm/dd/yyyy

To Date mm/dd/yyyy

EMPI ID

**Search Options**

Sort By Create Date

Sort Order Descending

Search History  Search Soundex

Leave Window

**Search Results**

Event ID	Name	Birth Date	Status	Disease OR Condition	Create Date	Event Date	External ID
No data available in table							

Showing 0 to 0 of 0 entries

Select Create Record for Person Cancel Help

Enter all information on the case/event you are searching for.



3. Select 'Search', CTEDSS will list for you all events that correspond with the letter sequence entered. The Wildcard\*- it's an asterisk you can place along with 2 characters or more to search broadly. Highlight the event and hit 'select' to select event.

**Search Case**

Search Criteria

Type: Normal

Event ID:

External ID:

Last Name: Person

First Name: Fa\*

Maiden/Other Name:

Birth Date (Range): mm/dd/yyyy

Gender: Male

State: CT

County:

Disease OR Condition: Gonorrhea

From Date: mm/dd/yyyy

To Date: mm/dd/yyyy

EMPI ID:

Search Options

Sort By: Create Date

Sort Order: Descending

Search History:  Search Soundex:

Search Results

Event ID	Name	Birth Date	Status	Disease OR Condition	Create Date	Event Date	External ID
109151212	Fake Person	01/02/1977	Open	Gonorrhea	02/28/2023	02/28/2023	109151212

Showing 1 to 1 of 1 entries

Select Create Record for Person Cancel Help

**Wildcard\***

4. You will be taken to the selected events dashboard where you may begin entering data.

The screenshot shows the CTEDSS interface. On the left is a navigation sidebar with options like Home, Open Help, History, Case Management, Create Event, Search Event, Print Event, Workflow, Tasks, Import Roster, Update Roster, Manage People and Facilities, Create Outbreak/Exposure Event, Lock Event, Share Event, and Recent Events. The main content area is titled 'Event Summary' and contains several sections: 'Basic Information' (Event ID: 109151212, External ID: 109151212, Disease OR Condition: Gonorrhea, Full Name: Fake Person, Birth Date: 01/02/1977, Gender: Male, Address: 456 Main st, Hartford, CT 06103, Create Date: 02/28/2023, Event Date: 02/28/2023, Type: Interactive, Investigation Status: Open (Change to Closed), Linked: 0 (View), Events/Contacts: 0 (View), Linked Exposure Sites: 0 (View), Attachments: 0 (Add)), 'Notes' (Unreal Person [UnReal] - (Generic) 02/28/2023 12:04 PM, Not real case. Created for training (AL)), and 'Notifications' (Event/Age Notifier 1, Age (at time of event): 46 Years). At the bottom of the main area are buttons for 'Edit Event Properties' and 'Copy Event'. Below the main content is a horizontal menu with tabs for Event Data, Labs, Concerns, Participants, Tasks, Appointments, Event Properties, and Event History. A 'Question Packages' section is partially visible at the bottom.

# Event Dashboard

Questions or comments concerning this tutorial can be made at: [dph.ctedss@ct.gov](mailto:dph.ctedss@ct.gov)