

# TIMS

Tuberculosis Information Management System

## User's Guide

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**U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES**

Public Health Service

Centers for Disease Control and Prevention

National Center for HIV/STD/TB Prevention

Division of Tuberculosis Elimination

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## User's Guide

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## **Introduction**

### **Introducing TIMS**

Welcome to the Tuberculosis Information Management System, or TIMS. This User's Guide will provide the information you need to operate the TIMS application successfully.

TIMS is designed for the Microsoft® Windows® operating environment and will work with all versions of Windows 95®, Windows 98® or Windows NT® 4.0.

TIMS has two key objectives:

1. To provide tools that will aid healthcare facilities in their effort to treat, control, and eliminate tuberculosis in the United States and its outlying territories.
2. To gather tuberculosis surveillance information so that it can be transmitted to the Centers for Disease Control and Prevention (CDC) for statistical and research purposes.

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## ***TIMS Features***

Here are some of the key features of TIMS:

- Combines the functions of SURVS-TB (for surveillance data) and TBDS (for patient management functions) into one application
- Fulfills tuberculosis reporting obligations
- Windows-based Graphical User Interface
- Standalone or LAN-based multi-user operation
- Easy to use
- Enables you to export data to other applications
- Can share data between modules to minimize data re-entry

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## ***System Requirements***

TIMS requires the following minimum system configuration:

- Personal computer 486/66 or higher processor (Pentium recommended)
- 16 megabytes (MB) of RAM (32 MB or more recommended)
- 50 MB of free hard disk space (disk space requirements will be considerable higher if you plan to convert a large SURVS-TB database)
- Microsoft Windows 95, Windows 98 or Windows NT 4.0
- Windows-compatible mouse
- 9600 baud modem (28800 baud recommended)
- Dedicated dual-standard phone line

TIMS can be installed for multi-user operation on a local area network (LAN) on the following network operating systems:

- Novell® NetWare® version 3.1 and later
- Microsoft Windows NT Server 4.0 and later

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## **TIMS Modules**

TIMS functions are divided into modules to promote flexibility and ease-of-use. While all modules are available to all users, the functions available within those modules depend on the user privileges assigned by your TIMS system administrator. Some functions are disabled completely or have restricted capabilities for some users. See the System Module chapter in this manual for additional security-related information.

The modules are:

- Client
- Surveillance
- Patient Management
- Daily Program Operation
- Program Evaluation
- System

### **Client Module**

Use the Client module to create, retrieve, and maintain client specific identification and demographic information. This is a client-centered module.

### **Surveillance Module**

Use the Surveillance module to record and report client tuberculosis information to the proper health authorities. The Surveillance module contains electronic duplicates of three related documents:

- Report of Verified Case of Tuberculosis (RVCT)
- Initial Drug Susceptibility Report (Follow Up-1)
- Case Completion Report (Follow Up-2)

Completing and transmitting data from the Surveillance module fulfills your tuberculosis-reporting obligation.

This is a client-centered module.

### **Patient Management Module**

Use the Patient Management module to track clients' medical treatment, contacts, and tests.

Information entered in the Patient Management module can be imported into documents in the Surveillance module. See the Surveillance Module chapter in this manual for additional information about generating data.

This is a client-centered module.

## **Daily Program Operation Module**

Use the Daily Program Operation module to record information about your facility. Daily Program Operation records information about your staff (appointments, languages spoken, etc.), and other operations-related features.

## **Program Evaluation Module**

Use the Program Evaluation module to create, maintain and transfer Aggregate Reports for Program Evaluation (ARPE).

## **System Module**

Use the System module to maintain the TIMS software installation and manage your data. The System module allows you to:

- Add and remove TIMS users
- Change your password
- Transmit surveillance data to the proper health authorities
- Change the way some information on the on-screen forms appears

The System module also provides a number of other options that allow you to ensure that TIMS runs smoothly and records data accurately. Most of the functions in the System module are restricted to High or System Administrator access privileges.

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## ***Using TIMS Documentation***

### **TIMS User's Guide**

The TIMS User's Guide is contains a series of chapters and appendices that provide a complete reference to the TIMS application.

**Chapter 1** - The *TIMS Workplace*. Describes and illustrates the TIMS user interface.

**Chapter 2** - The *Client Module*. Provides information about adding, editing, and maintaining basic information (such as name, address, and social security number) about the people who visit your facility to receive tuberculosis-related services.

**Chapter 3** - The *Patient Management Module*. Provides information about adding, editing, and maintaining tuberculosis-related information about specific clients. Includes information on storing diagnoses, medication, test results, and other TB-related data.

**Chapter 4** - The *Surveillance Module*. Provides information about adding, editing, and maintaining surveillance data that will eventually be transmitted to the CDC.

**Chapter 5** - The *Program Evaluation Module*. Provides information about creating, maintaining and transferring Aggregate Reports for Program Evaluation (ARPE).

**Chapter 6** - The *Daily Program Operation Module*. Provides information about adding, editing, and maintaining information about your site, including workers providing services to clients.

**Chapter 7** - The *System Module*. Provides information about performing system-related functions in TIMS: maintaining databases, transmitting data, adding and deleting TIMS users, etc.

## User's Guide Conventions

Understanding the conventions employed in the User's Guide can help you use it more effectively.

Whenever possible, the TIMS procedures are divided into numbered steps. Follow the steps in order to complete the task.

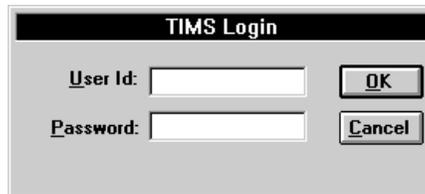
### *Example*

Type your User ID in the **User ID** field.

User IDs are assigned by a TIMS System Administrator. The user ID must be entered exactly as it was given to you.

Type your password in the **Password** field.

Passwords are not case-sensitive: PASSWORD = password = PassWord



Click the **OK** button.

**Bold** type is used to identify program controls such as buttons, menu items, text boxes, etc.

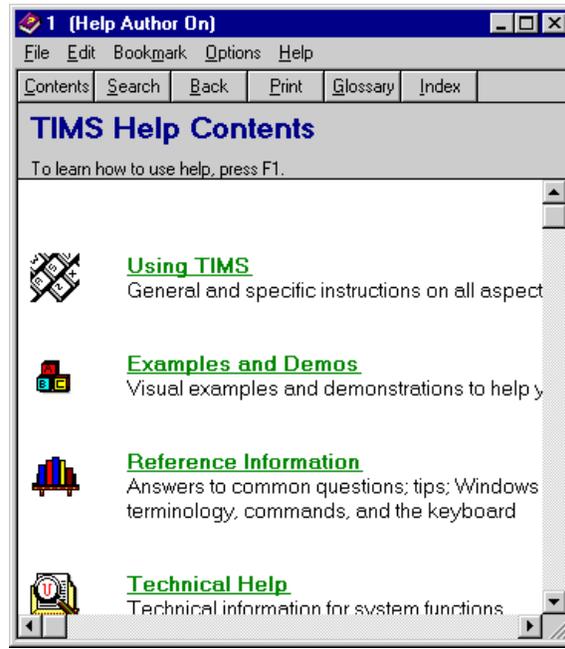
### *Example*

1. Click the **OK** button.



## Online Help

TIMS includes integrated, context-sensitive online help. Use the online help system to get information while operating the TIMS application, or you can view the help independently by opening the TIMS.HLP file (located in the TIMS program directory on your local hard drive or Local Area Network (LAN) server).



See Chapter 1 - The TIMS Workplace for additional information about TIMS online help.

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## Service and Support

### Phone Support

If you experience problems with TIMS that you cannot resolve, please contact the TIMS Help Desk at (404) 639-8155. The TIMS Support Team is available Monday through Friday, 8:30 a.m. to 4:30 p.m., Eastern time.

### E-Mail Support

In addition to phone support, you can e-mail questions and comments to the TIMS Support Team. The e-mail address is [timshelp@cdc.gov](mailto:timshelp@cdc.gov).

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## ***Confidentiality, Data Security, Data Integrity, and Dissemination of Data***

The Division of TB Elimination in the National Center for HIV, STD and TB Prevention has obtained from the Director of the Centers for Disease Control and Prevention (CDC) an Assurance of Confidentiality to protect the CDC expanded TB surveillance system. State and local TB control programs should ensure that their policies and procedures protect the confidentiality of their TB surveillance systems. Policies or procedures should be in place to protect all TB reports, records, and files containing patient names and other identifying information. Local policies regarding the confidentiality of such information, especially HIV test results, should adhere to all applicable state and local laws. These protections should include the use of TIMS software and databases.

## Protecting the Confidentiality of Data Collection Forms, Reports, and other Patient Information in the TB Surveillance Program

1. All Report of Verified Case of Tuberculosis (RVCT) forms, communicable disease report cards, or other records which contain patient names and other identifying information should be kept in closed, locked files except when being processed by TB surveillance staff. Offices should be locked during non-business hours. No papers should be exposed when the employee is away from the work area, even for brief periods. Hard copies of RVCT forms, communicable disease report cards, and other records should be retained as required by state or local communicable disease laws and other applicable laws or regulations.
2. Access to all RVCT forms, communicable disease report cards, and the files containing them should be restricted to designated TB surveillance staff who are directly involved with surveillance and other case work, and who have a need to know.
3. **RVCT forms should never be mailed to CDC.** All TB surveillance records are reported to CDC via modem (in an encrypted format) using CDC's Tuberculosis Information Management System (TIMS) software. Although TIMS allows for the collection and storage of personal identifiers such as names and street addresses for local and state TB surveillance purposes, **these identifiers are not transmitted to CDC.** In general, any surveillance information sent through the mail should be stamped "confidential," should be addressed to a specific person (or sent to that person's attention), and should be sent by secure mail. These precautions will help to limit the possibility of unauthorized access to surveillance information.
4. The Advisory Council for the Elimination of TB (ACET), recommended at its January 1993 meeting that surveillance information which is necessary to conduct both TB and HIV/AIDS surveillance activities, and is necessary to allow for adequate investigation of TB and HIV/AIDS cases, should be shared between TB and HIV/AIDS surveillance programs within the same health department. ACET also recommended that TB surveillance programs and staff adhere to the same confidentiality standards as HIV/AIDS surveillance programs. TB program staff should work with local HIV/AIDS programs to establish equivalent data confidentiality systems.
5. ACET further recommended that sharing information on HIV serostatus with persons outside the HIV/AIDS and TB surveillance programs of the same health department should only be done with the informed consent of the patient, except in clear emergency situations. For clinical care purposes, HIV-related information should be shared between TB care providers and other health care providers in accordance with state and local laws.

Warning: Unauthorized use of this system is prohibited by Title 18 of the United States Code. Reverse engineering, deciphering, or any other attempt to produce non-executable forms of this program is not authorized and may be prohibited by federal and state laws. In addition, this software may process data protected by other federal and state laws. Information regarding unauthorized use of this software or access to protected data will be referred to the Federal Bureau of Investigation and the United States Department of Justice for prosecution.

## **Protecting the Confidentiality of Records and Reports in TIMS**

1. Access to all electronic surveillance data (e.g., TIMS, TB registers, and other surveillance databases, etc.) should be restricted to designated TB surveillance staff who are directly involved with surveillance and other case work, and who have a need to know.
2. Access to TIMS is protected by a user ID and password combination. User IDs must be issued by the TIMS Administrator and should be issued only to designated members of the surveillance staff who require access to TIMS to perform their official duties. Passwords should be changed on a monthly basis, and should not be easy to deduce (e.g., staff members' names, birthdates, or other unique information that might be "guessed" by an unauthorized person trying to access confidential files). User IDs and passwords should never be shared between individuals. User IDs belonging to individuals who are no longer authorized to access TIMS must be immediately deleted by the Administrator.
3. All computers or workstations accessing TIMS, performing analyses on data or files exported from TIMS, or other surveillance databases must be kept in a restricted or locked area. If this is not feasible, the hard disk must be physically or electronically locked when the computer is not in use. Refer to the User's Guide supplied with the computer for information on the security options available.
4. All hardcopy output (e.g., file listings, reports, etc.) generated by TIMS or other surveillance databases must be kept in a restricted or locked area. All hardcopy output that is no longer needed must be destroyed.

## Protecting the Security of Records and Reports in TIMS

1. All computers and workstations accessing TIMS should be protected from electronic viral contamination. Shareware or other programs or files of unknown origin should never be installed on the computer. Diskettes of unknown or questionable history should be formatted prior to use. Damaged diskettes should be destroyed. CDC recommends that each site purchases anti-viral software and use it to scan each diskette received from another site. The hard disk should also be scanned periodically for viruses.

**Note:** All diskettes received by CDC are scanned for viruses.

2. To enhance security, information in the TIMS database is not accessible to any other application at any time.  
Additional security measures (e.g., restricted access to the PC, locating the PC in a secured area, etc.) will further protect patient confidentiality and data security. All TIMS administrators should review their security system as soon as possible to determine whether it is adequate. The TIMS administrator should conduct periodic reviews or audits to ensure compliance with all data security procedures.
3. Client-related information is encrypted before it is transmitted to other TIMS sites and is not decrypted until it is processed in the TIMS InBox at the receiving site. Transmission acknowledgements do not contain confidential information and are not encrypted.
4. The National Electronic Telecommunication System for Surveillance (NETSS) files, which are also created by a TIMS Data Transfer process, do not contain confidential patient identifiers and are not encrypted. The NETSS files are created in the Surveillance module and the destination of the output is configured in the System module. See the appropriate chapters in the TIMS User's Guide for details.
5. Files exported from TIMS are not covered by CDC's Assurance of Confidentiality (page xv). Such exported files may contain confidential patient information, and must be protected as such.

## Protecting the Integrity of Databases in TIMS

1. Key entry of data is the only authorized method to enter data into TIMS. Data from other sources (e.g., mainframes or other surveillance databases) must not be imported, downloaded, or uploaded into the TIMS databases. Such unauthorized attempts to load data into TIMS jeopardizes the integrity of local, state, and national TB surveillance data.
2. To create database copies for external analysis, the user must use the Database Export or Flat File Export features found on the **Data Mgt** menu in the System module. Copies of the TIMS databases or data exported from TIMS cannot be imported back into TIMS.
3. To protect the integrity of the database, the restore function available in TIMS can only be executed with a password provided by the CDC. All sites must coordinate with CDC should it be necessary to restore the database from a TIMS backup copy or a LAN backup. Call the TIMS Help Desk at (404) 639-8155 prior to restoring a database to receive a password and to ensure that appropriate procedures have been implemented to assure data integrity.

## Dissemination of Surveillance Data

The following recommendations are based on the U.S. Department of Health and Human Services, CDC Staff Manual on Confidentiality (February 1984). Only designated staff members should be authorized to release information to the public. In addition, TB surveillance programs should adhere to all state and local confidentiality laws.

### *Procedures for Responding to Queries from Persons Outside the Local TB Surveillance Program*

1. TB surveillance staff should use discretion and should not discuss sensitive program or patient issues, or records with anyone other than those directly involved in surveillance activities.
2. TB surveillance staff should never reveal the name of a patient or other individual to anyone other than those directly involved in surveillance activities and who have a need to know.
3. TB surveillance staff should never confirm or deny that a particular individual has been reported as having a specific disease or condition to anyone other than those directly involved in surveillance activities and who have a need to know.

### *Procedures for Releasing TB Surveillance Information*

1. All statistical data released by TB surveillance staff should be carefully scrutinized so that individuals cannot be identified. Statistics released to the public should not include any information that would make it possible for a particular individual to be identified. Only designated staff members should be authorized to release information to the public.
2. Line-by-line records from the active TB surveillance databases should not be released for research, or for any other purpose to individuals outside the health department. A separate research database, which groups data as described below, should be created for such release. Alternatively, tables of interest should be produced by surveillance program personnel and only released to outside investigators if the tables meet the following guidelines:
  - A. In no table should all cases of any line or column be found in a single cell.
  - B. In no instance should the total figure for a line or column of a cross-tabulation be less than three.
  - C. In no instance should a quantity figure be based upon fewer than three cases.
  - D. In no instance should a quantity figure be released if one case contributes more than 60 percent of the amount.
  - E. In no instance should data on an identifiable case, nor any of the kinds of data listed in preceding items A-D, be derivable through subtraction or other calculation from the combination of tables released.
  - F. Data released by the surveillance program should never permit disclosure when used in combination with other known data.

***Assurance of Confidentiality for  
Reports of Verified Cases of Tuberculosis (RVCT),  
Centers for Disease Control and Prevention (CDC)  
Control Number M3-91-027***

Reports of Verified Cases of TB (RVCT) are submitted to CDC from TB control programs in all states, most large cities, and U.S. Territories and Commonwealths. The surveillance information requested by CDC consists of detailed reports of persons with TB, including information on the individual's HIV serostatus, demographics (e.g., homelessness, correctional institution, or long-term care facility), alcohol and drug use, drug therapy, and drug susceptibility results. The data are used by U.S. Public Health Service scientists and cooperating state and local health officials to help understand and control the spread of TB.

Information that would permit identification of any individual on whom a record is maintained by CDC is collected with a guarantee to the agency, institution, physician, or individual providing the information that it will be held in strict confidence, will be used only for purposes stated in this assurance, and will not otherwise be disclosed or released without the consent of the individual in accordance with Sections 306 and 308(d) of the Public Health Service Act (42 U.S.C. 242k and 242m(d)). Data or information retained by the state or local health officials or by authorized collaborating researchers will be protected in accordance with state law.

Information reported to CDC will be used without identifiers for statistical and analytic summaries in which no individual on whom a record is maintained can be identified and for special studies of the transmission, natural history, and epidemiology of TB associated with HIV infection. When necessary for confirming information, or in the interest of public health and disease prevention, CDC may confirm information contained in case reports or may notify other medical personnel or health officials of such information. In each instance, only the minimum information necessary will be disclosed.

Collaborative research efforts with an important public health purpose will require approval by the Director of CDC pursuant to strict conditions. If disclosure of identifying information to the collaborating researchers is essential to conduct the research, a written certificate will be required that identifying information obtained from CDC will be managed as confidential and will not be released or re-disclosed. No information that could be used to identify any individual on whom a record is maintained, whether directly or indirectly, will be made available to anyone for non-public health purposes. In particular, such information will not be disclosed to the public, parties involved in civil, criminal, or administrative litigation, or non-health agencies of the federal, state, or local government.

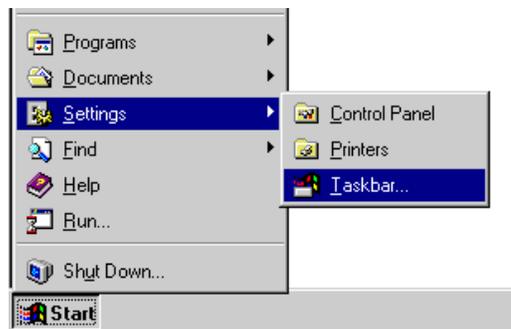
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## Chapter 1      The TIMS Workplace

TIMS enables you to add, edit, retrieve, and report information about people associated with tuberculosis quickly and easily. These people may include tuberculosis patients, healthcare workers providing tuberculosis-related services, persons who have been in contact with tuberculosis, etc. The user interface, called the TIMS Workplace, consists of a series of windows, dialog boxes, and program controls that enable you to enter data efficiently, retrieve it easily, and store it safely and securely.

**Note:** When running TIMS under Windows 95, Windows 98 or Windows NT 4.0, the lower portion of the TIMS Workplace may be hidden by the Windows Taskbar. To prevent this, click the **Start** button on the taskbar, and then select **Settings** and **Taskbar**.



When the Properties dialog box appears, be sure that **Auto hide** is selected.



## Starting TIMS

### Windows 95, Windows 98, or Windows NT

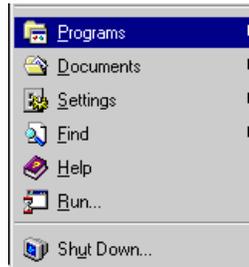
Follow these steps to start TIMS on Windows 95, Windows 98, and Windows NT Workstation 4.0.

To start TIMS...

1. Click the **Start** button on the Windows taskbar.



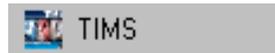
2. Click the **Programs** folder to open it.



3. Click the **TIMS** program folder to open it.



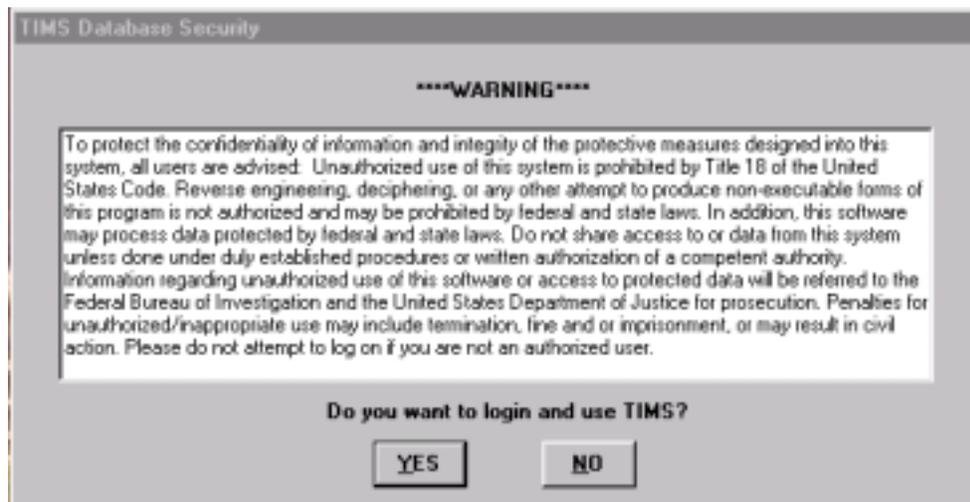
4. Click the **TIMS** icon.



Or

### Double-click the TIMS icon on the desktop

*The TIMS Database Security screen will appear.*



5. Review the TIMS Database Security warning statement.
6. Click the **YES** button to proceed to the login screen.

## **TIMS Login**

TIMS requires that you identify yourself to the system before it will allow you access to its functions. This procedure, called login, uses your User Identification (User Id) and password to determine what features you have access to, and will provide the System Administrator a record of all your TIMS activity.

### **User Id**

A TIMS System Administrator assigns your User Id and initial password (see *Chapter 7 - System Module* for information on changing your password). User Ids must have between six and ten characters and can be any combination of letters, numbers, and special characters. Passwords may also have any combination of letters, numbers, and special characters, and must contain between six and fifteen characters.

### **User Levels**

There are four security levels for TIMS users:

<b>Name</b>	<b>Privileges</b>
<b>Low</b>	Can view most client information, but cannot add or change any client information. Is eligible to view HIV information. Can change their own password, but cannot perform any other administrative function.
<b>Medium</b>	Can enter most client information and is eligible to view client HIV status. Cannot modify client disposition. Can modify their own password, set preferences, perform Ad-Hoc queries, and perform other administrative tasks.
<b>High</b>	Can add, edit, and delete all tuberculosis and related information but cannot perform system administration duties, such as adding and deleting TIMS user accounts.
<b>System Administrator</b>	User with System Administrator privileges can perform all TIMS functions, including adding and deleting users, assigning user privileges, deleting surveillance records, client records and manipulating other sensitive information.

See *Appendix Sys I Security Table* for a complete list of security privileges.

## Login

The TIMS Login screen is the second window that you will see upon starting the TIMS application. You must login to use TIMS.

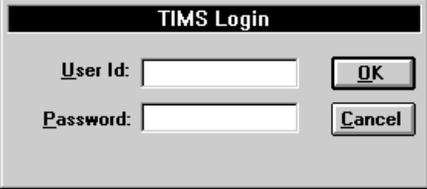
To login to TIMS...

1. Type your User Id in the **U**ser Id field.

*A TIMS System Administrator assigns User Ids. The User Id must be entered exactly as it was given to you.*

2. Type your password in the **P**assword field.

*Passwords are not case-sensitive: PASSWORD = password = PassWord*



3. Click the **OK** button.

## Logout

There is no logout command for TIMS. If you must logout of TIMS, close the application.

See *Closing TIMS* later in this chapter.

## Gathering TIMS Data

TIMS accepts and processes many different types of information. To assist in the data gathering process, TIMS includes a series of paper-based forms. The TIMS forms are located in *Appendix V* of this User's Guide. Please feel free to make copies of these forms to assist in your data collection efforts.

The available paper forms are:

- Appointment Form
- Blood Test Form
- Client Form
- Diagnosis Form
- History Form
- Hospitalization Form
- Medication Form
- Referral Form
- Bacteriology Form
- Chest X-Ray Form
- Contact Form
- Drug Pickups Form
- HIV Test Form
- Physical Exam Tests Form
- Skin Test Form
- Susceptibility Form

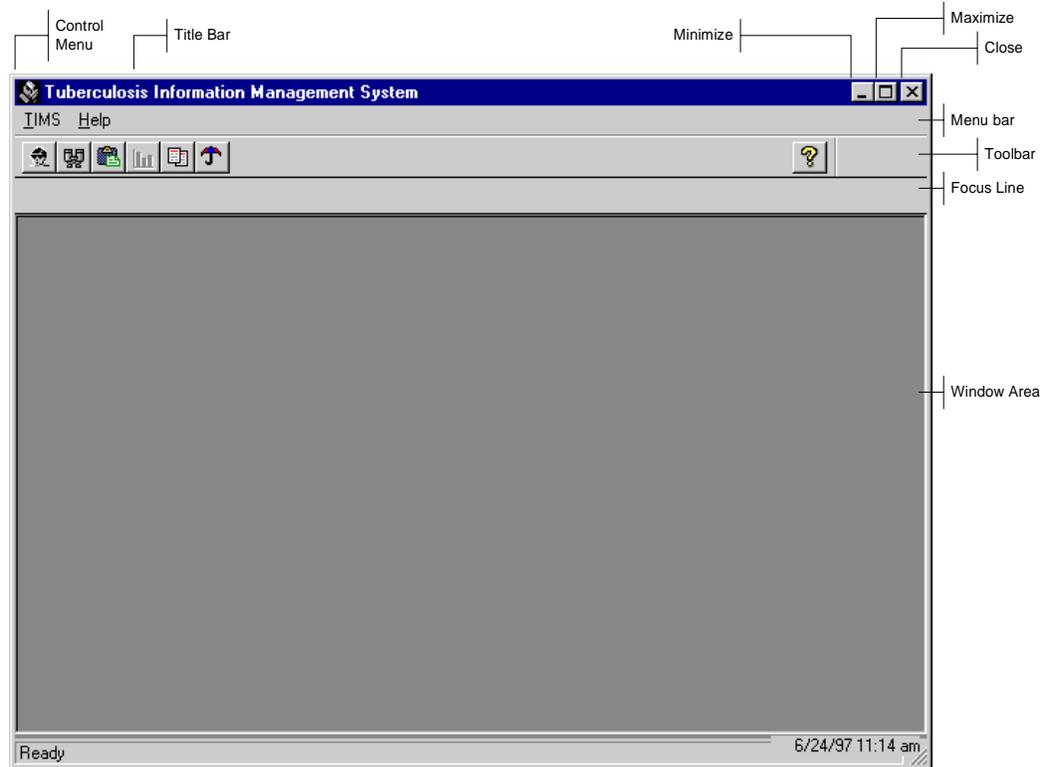
Additionally, TIMS is designed to use data from standard tuberculosis data gathering and reporting forms.

They are:

- Report of Verified Case of Tuberculosis (RVCT)
- Initial Drug Susceptibility Report (Follow Up Report – 1)
- Case Completion Report (Follow Up Report – 2)
- Aggregate Reports for Program Evaluation (ARPE)

## Common Workplace Elements

The visible part of a computer application, the windows, menus, buttons, and other on-screen items are called the user interface. You use the user interface to interact with the application. Refer to the following diagram and definitions for details.



**Title Bar** - Displays the module name and the active TIMS window.

**Control Menu** - Open the *Control Menu* by clicking the icon in the upper left corner of the window. The Control Menu provides access to window-related functions such as size, move, and close.



**Restore** – Select the *Restore* command to change a window to its previous size. The Restore button only appears after a window has been maximized.

**Minimize Button** - Select the *Minimize* command to reduce the application window to an icon. The TIMS icon will appear on the taskbar (the bar usually found at the bottom of the screen that contains the Start button). To reverse the minimize operation; click the icon on the task bar.

**Maximize Button** – Select the *Maximize* command to expand the window to its maximum size in the current context. If you click the maximize button of a main window, it will expand to fill the entire window.

**Close Button** - Select *Close* to exit the TIMS application.

**Menu Bar** - The *Menu Bar* displays the TIMS command menus. Each module has its own set of menus and menu options.

**Toolbar** - The *Toolbar* displays a series of module-specific buttons that provide single-click access to frequently used program functions. Each module has its own toolbar.

**Focus Line** - The *Focus Line* displays the currently active client, worker, or site, depending on which module you are in.

**Clients** are displayed in the Client, Surveillance, and Patient Management modules. Users can select or change the active client by clicking the **Change Focus** button on the toolbar.



**Workers** are displayed in the Daily Program Operation module. Users can select or change the active worker by clicking the **Change Focus** button on the toolbar.

**Sites** are displayed in the System module. Site information is assigned when TIMS is installed and cannot be changed by the user.

**Window Area** - The *Window Area* contains the documents, forms, and dialog boxes you need to work with TIMS.

## Using the Menu Bar

The menu bar is used throughout TIMS and most other Windows applications. It contains a series of menu names that display a list of related commands and options. The menu bar displays different options to match the function of the current module.

### *Menu Operation: Mouse*

To operate the menus using the mouse...

1. Click the menu name on the menu bar to open it.



- Click an option on the menu to select it.



### *Menu Operation: Keyboard*

There are several ways you can use the keyboard to select commands from the menu bar. For example, you can press the **Alt** key to activate the menu bar, and then use the arrow keys to select the appropriate menu and command. However, a more efficient method is to use the **Alt** key in combination with the underlined letter in the menu and command names.

To operate the menus using the keyboard...

- Press the **Alt** key.
- While holding the **Alt** key, press the underlined letter in the menu you want to open and release the **Alt** key.
- Press the underlined letter in the name of the option you want to select.

### **Using the Shortcut Menu**

Many TIMS windows, fields, and other on-screen objects have shortcut menus which provide an additional way to access commands. Some commands can only be accessed through the shortcut menu.

The shortcut menu is displayed by clicking the right mouse button.



To use the shortcut menu...

- Right-click an object in the TIMS window area.
- Select a command or option from the shortcut menu.



## Using Toolbars

Toolbar buttons provide one-click access to some commonly used TIMS functions. The buttons that appear will provide module-specific options.

You can find a brief description of the function of specific toolbar buttons by displaying its ToolTip. ToolTips appear when the mouse pointer is placed over a toolbar button for a few moments.



To use a toolbar button, click it one time.

## Common Menus

Two menus, **Window** and **Help**, appear in all TIMS modules.

### Window Menu

The *Window* menu enables you to change the way the windows within the main TIMS window are displayed.



#### *Tile*

Select the *Tile* command to arrange all open windows so that they don't overlap.

#### *Layer*

Select the *Layer* command to arrange all open windows so that each window completely covers the one below it.

#### *Cascade*

Select the *Cascade* command to arrange all open windows so that each window's title bar is visible.

#### *Screen Saver*

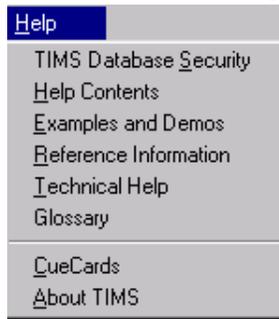
TIMS will automatically suspend operation if there has been no activity for a pre-determined amount of time (set by a TIMS administrator in the System module).

If you know you'll be away from the computer, but do not want to exit the application, you can select Screen Saver to temporarily suspend TIMS operation. You will be required to re-enter your password before you can resume TIMS operation.



## Help Menu

The *Help* menu provides access to additional information about operating the TIMS application.



### *TIMS Database Security*

Select ***TIMS Database Security*** to view the security clause.

### *Help Contents*

Select ***Help Contents*** to see the TIMS Help Contents.

### *Examples and Demos*

Select ***Examples and Demos*** to display sample TIMS windows.

### *Reference Information*

Select ***Reference Information*** to access information and tips about the TIMS Workplace, general data entry suggestions, keyboard guide information, and tips on how to use the TIMS Help System.

### *Technical Help*

Select ***Technical Help*** to get information on whom to contact for help.

### *Glossary*

Select ***Glossary*** to display an alphabetized list of terms associated with TIMS program operation, tuberculosis, and other TIMS-related topics.

### *CueCards*

Select ***CueCards*** to set preferences for TIMS CueCards, which are small help screens designed to prompt you to perform certain commonly used actions within the TIMS application.

### *About TIMS*

Select ***About TIMS*** to display TIMS version and TIMS Help Desk information.

## Selecting a Client or Worker (Change Focus)

Most TIMS activity will apply either to a client or a worker. The Focus Line enables you to immediately identify whether you are working in the client section or in the worker section, and whose record the current action is affecting. Client records can be accessed in the Client, Surveillance or Patient Management modules. Worker records can be accessed in the Daily Program Operations module.

### Change Focus (Client)

To change client focus...

1. Do one of the following:
  - Click the **Change Focus** button on the toolbar.



Or

- Click the **Open** button on the toolbar.



Or

- Open the **C**lient menu and select **O**pen.
  -
2. Select a filter ('All' is the default filter) from the drop-down list.
  3. Click **E**xecute to create the selected filter client list.
  4. Select a client from the list.

Last Name	First Name	DOB	State Case #	City/County Case #
ACLIENT	NOSHOW	07/01/1950		0A0930293
AFFLICTED	BEN	01/10/1974	00CA12345	CA2100210
ANNOYING	DEFECT	08/31/1950		341234234
ANOTHER	NEW	00/00/0000		L2-22222
ARDMARK	ANDY	01/23/1947	260092095	071750017
ARDINSON	AARON	01/01/1960	099151325	980150827
AXNEW	CLIENT	12/12/1989		1521235CA
AXNEW	CLIENTONE	12/12/1967	CA1967130	L21967130
BOB	CLIENT	03/31/1989	0NONUMBER	A39489333
BOY	BIG	08/07/1961	KwL000001	000097869

5. Click **O**K or double-click on the client to open.

After a client is selected, the client's name will appear in the Focus Line. Navigational buttons are available to move from the Current Client to the Previous or Next Client.



## Change Focus (Worker)

To change worker focus...

1. Do one of the following:
  - Click the **Change Focus** button on the toolbar.



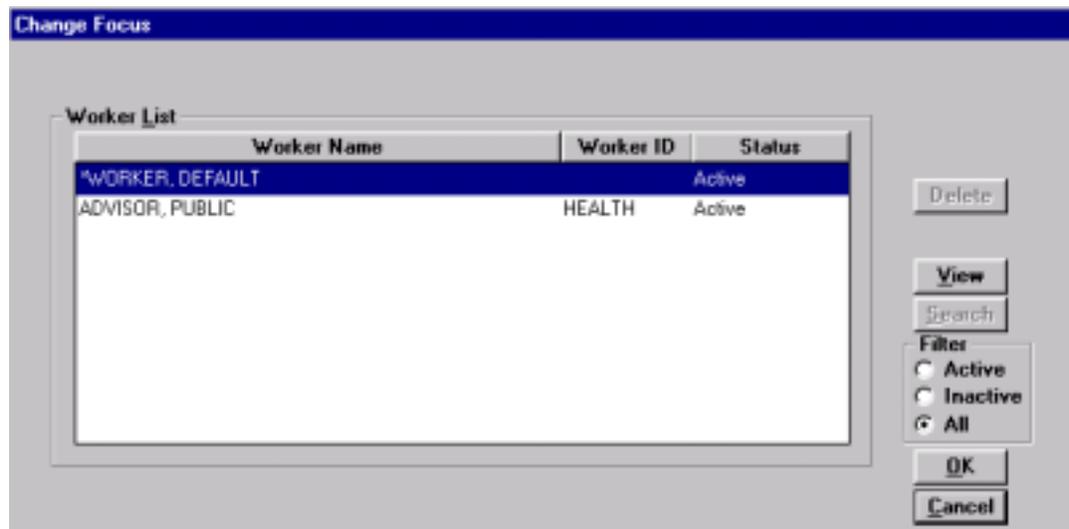
Or

- Click the **Open** button on the toolbar.



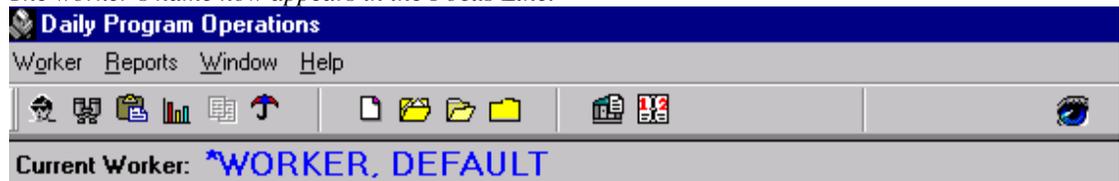
Or

- Open the **Worker** menu and select **Open**.
  -
2. Select the worker from the list.



3. Click **OK**.

*The worker's name now appears in the Focus Line.*

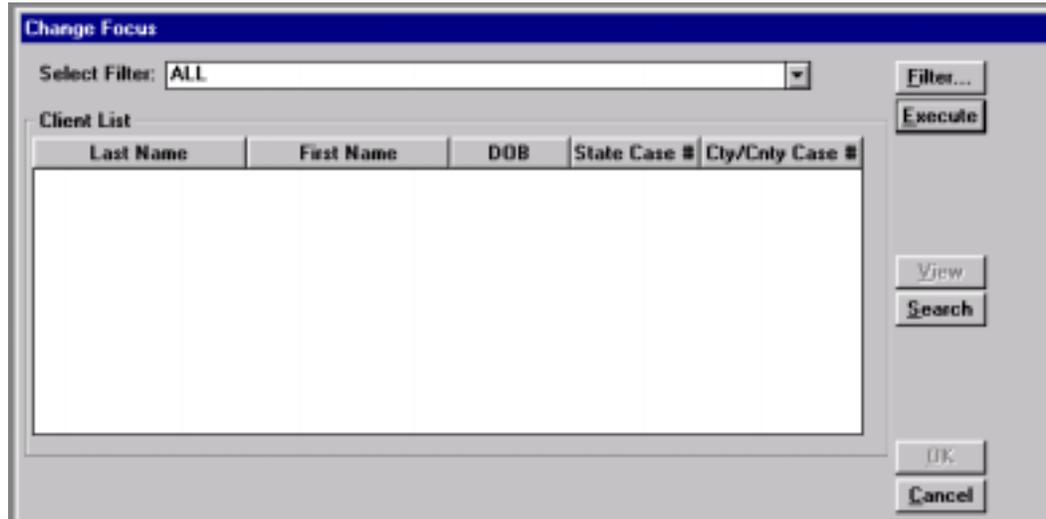


## Setting Up Filters

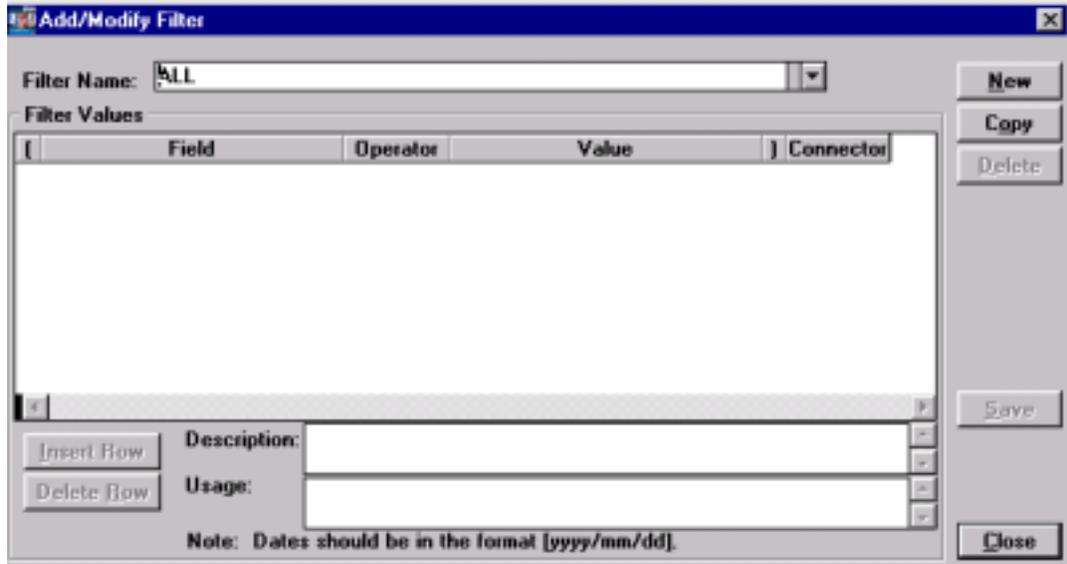
Filters limit the client list to those that fit your specified criteria. This option can only be used when working with the Change Focus (Client) operation; it is not available with the Change Focus (Worker) operation.

To set up a filter...

1. Open the Change Focus (Client) mode. In the Select Filter option, **ALL** is the default.



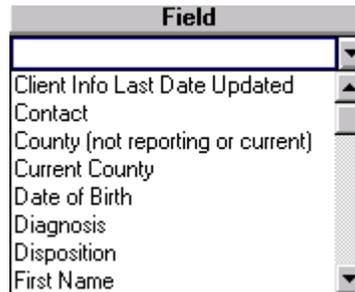
2. Click the **F**ilter button. The Add/Modify Filter window will appear.



3. Click the **N**ew button. An empty row will appear in the Filter Values box.
4. Assign a Name to the filter and enter into the Filter Name box.
5. Establish the parameters by which you want the filter to execute.

The following parameters are available to create a filter:

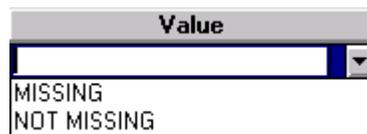
- **Field** provides the ability to filter by the predetermined drop-down options.



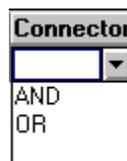
- The **Operator** field displays predetermined logical numeric operators.



- The **Value** field displays MISSING (provides data items that are blank) and NOT MISSING (provides data items that are not blank). You can also type in the value you want to filter on (e.g. date value).



- The **Connector** field provides the option of using AND or OR as the connector for your filter.



- The **Open and Close Parentheses** can be used to group filter criteria.



6. Insert another row to create another filter criteria by clicking the **I**nsert Row button. (A row may be deleted by clicking the **D**elate Row button).
7. Click the **S**ave button.
8. Click the **C**lose button and the system will return to the **C**hange Focus window.

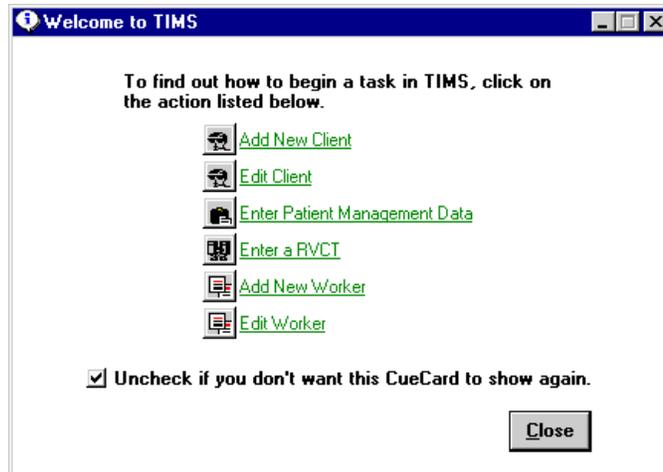
- Click the **Execute** button to display a list of clients that meet the parameters established in the newly created filter.

The screenshot shows a dialog box titled "Change Focus". At the top, there is a "Select Filter:" dropdown menu with "BINGO" selected. To the right of this dropdown are two buttons: "Filter..." and "Execute". Below the dropdown is a table titled "Client List". The table has five columns: "Last Name", "First Name", "DOB", "State Case #", and "Cty/Cnty Case #". The table contains ten rows of client data. To the right of the table are three buttons: "View", "Search", and "OK". At the bottom right of the dialog box is a "Cancel" button.

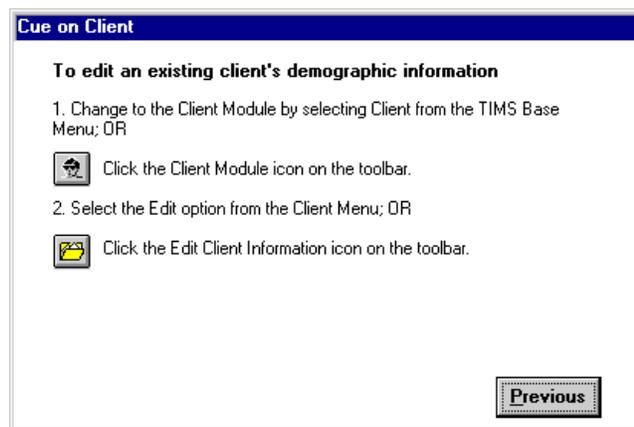
Last Name	First Name	DOB	State Case #	Cty/Cnty Case #
BRADY	PETER	04/20/1940		
CONTACT	JANE	02/01/1980		
CONTACT	JOANNE	04/19/1960		
CONTACT	JOE	02/01/1980		
CUNNINGHAM	RICHE	04/27/1955		
BRADY	MARSHA	01/01/1945		
NOT TB	DELETED LV ONE	02/29/1976		00000808
TEST	CLIENT	10/10/1978		000045345
FADS	FSD	11/21/1980		00005FDS
CLIENT	NOSHOW	07/01/1950		0A0930293

## Using CueCards

**CueCards** are very brief prompts that remind you how certain operations are performed. A module-specific CueCard displays each time you enter that module. The CueCard that appears after you login to TIMS displays tips from several different modules.



Click an icon or green underlined text to see additional information.



## Adding / Removing CueCards

Once you are accustomed to TIMS, the CueCards may become unnecessary. There are three ways to prevent CueCards from displaying.

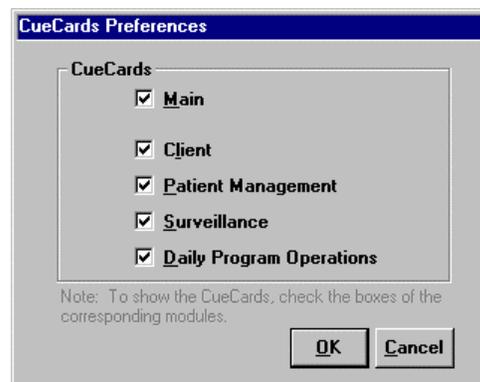
To display or remove CueCards...

- Clear the check box near the bottom of the **Welcome to TIMS** window to prevent that particular CueCard from displaying in the future. This procedure must be repeated for each CueCard.

Or

1. Open the **H**elp menu and select **C**ueCards.
2. Select the appropriate check box to display the associated CueCard when you open the appropriate module.

*Clear the check boxes to prevent that CueCard from displaying.*



3. Click **O**K.

Or

(**Note:** The user must have medium or higher user privileges to use this method.)

1. Open the **S**ystem module.
2. From the **S**ystem Mgt menu, select **P**references.
3. Click the **C**ueCards button.
4. Select the appropriate check box to display the associated CueCard when you open the appropriate module.
5. Click **O**K.

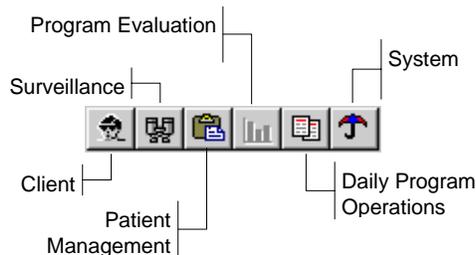
*Clear the check boxes to prevent the CueCards from displaying.*

## Changing Modules

You can select different TIMS modules by clicking the command menu on the left side of the window.

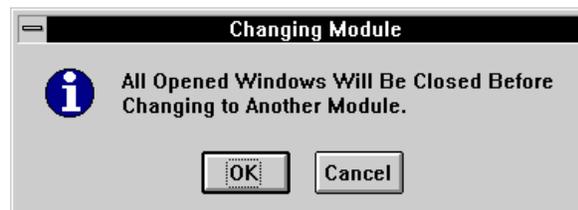
Command Menu	Module(s)
<b>TIMS</b>	Client, Surveillance, Patient Management, Daily Program Operations, System
<b>Client</b>	Client, Surveillance, Patient Management, Program Evaluation, Daily Program Operations, System
<b>Worker</b>	Client, Surveillance, Patient Management, Program Evaluation, System, Daily Program Operations
<b>System</b>	Client, Surveillance, Patient Management, Program Evaluation, Daily Program Operations

You can also change modules by clicking a button on the toolbar. The module buttons are always on the left side of the TIMS toolbar.



To change to a different module...

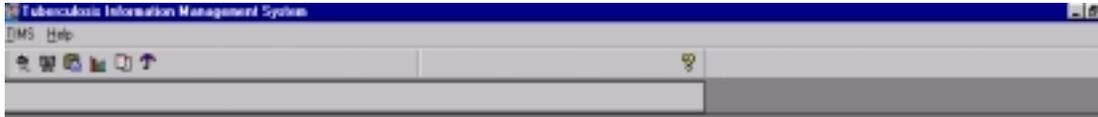
1. Save any currently open documents by clicking the **Save** button on the individual TIMS windows. If the **Save** button is disabled, the information on the window has not been modified since the last time it was saved.
2. Select the desired module from the command menu or click the appropriate button on the toolbar.
3. All opened windows will be closed when you change modules. If you are changing between module types, the current client, worker, or site will be closed. Click the **OK** button to close the windows.



## ***TIMS Module Selector***

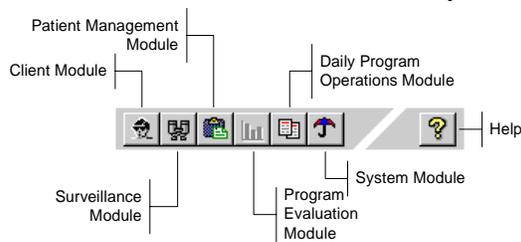
The TIMS Module Selector window appears immediately after you login to TIMS. The Module Selector window acts as a gateway to the other modules.

The Module Selector toolbar and menu options are available in all TIMS modules.



### **Toolbar**

The Module Selector toolbar allows you to change to a different module by clicking a button on the toolbar. The Module Selector toolbar buttons are available in every TIMS module.



## Module Overview

TIMS is divided into several modules that separate the functions of the TIMS software. The modules are **Client**, **Surveillance**, **Patient Management**, **Program Evaluation**, **Daily Program Operations**, and **System**.

### *Client*

Use the **Client** module to keep track of demographic and other information about persons receiving tuberculosis - related services from your facility. Unlike the other modules, the functions of the client module are available in all client-related modules. The client-related modules are Surveillance and Patient Management.

### *Surveillance*

Use the **Surveillance** module to complete electronic versions of standard tuberculosis tracking documents such as Report of Verified Case of Tuberculosis (RVCT), Initial Drug Susceptibility Report (Follow-Up Report - 1), and the Case Completion Report (Follow-Up Report - 2).

### *Patient Management*

Use the **Patient Management** module to record additional information about clients, such as their TB diagnosis, the tests they have received, and the medications they are receiving.

### *Program Evaluation*

Use the **Program Evaluation** module to enter data into the Aggregate Reports for Program Evaluation (ARPE), and transmit them to the reporting area (if applicable) and CDC.

### *Daily Program Operation*

Use the **Daily Program Operation** module to enter information about your facility and the people who work there.

### *System*

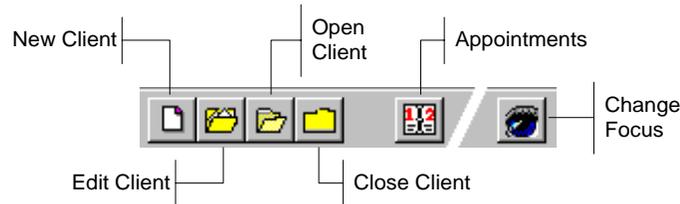
Use the **System** module to manage the TIMS system and data, customize TIMS operations, change your password, and transfer TIMS data to the CDC.

## Client Module

Use the Client module to track information about clients. The functions of the Client module are available in the other client-centered modules (Surveillance and Patient Management).

### Client Toolbar

The functions on the toolbar displayed in the Client module are available in the other client-centered modules. The Module Selector buttons are also available.



### Client Module Menus

The Client Module has three menus: Client, Window, and Help

#### Client Menu

The Client Menu enables you to create new client records, edit identification and demographic information, view client origins and final outcomes, and change between TIMS modules.

##### *New*

Select *New* to create a new client record.

##### *Edit*

Select *Edit* to modify an existing client record.

##### *Open*

Select *Open* to open a client record for viewing or modification. This command operates the same as Change Focus.

##### *Close*

Select *Close* to close the current client record. This removes focus from the current client. All open windows will be closed.

##### *Previous*

Select *Previous* to move to previously viewed client record.

##### *Next*

Select *Next* to move to the next client record.

##### *Origination*

Select *Origination* to view or modify the client's origins (former contact, transferring from another location, etc.).

##### *Disposition*

Select *Disposition* to record the final outcome for a client (completed therapy, died, moved, etc.).

##### *Appointments*

Select *Appointments* to add, edit, void, delete, confirm, reschedule, or check - in client appointments for tuberculosis-related services.

*Transfer*

Select ***Transfer*** to record a movement from your facility to another tuberculosis treatment center. This option is not available in the current version of TIMS.

*Print Setup*

Select ***Print Setup*** to select from the printers currently defined in your system and to make modifications to printer settings. Printer settings are printer and operating system specific.

*Other Menus*

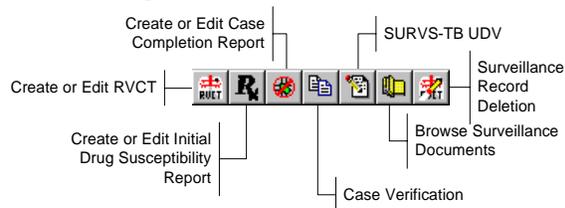
The *Window* and *Help* menus are common to all TIMS modules. See *Common Menus* earlier in this chapter for details.

## Surveillance Module

Use the Surveillance Module to complete electronic versions of the Report of Verified Case of Tuberculosis (RVCT), Initial Drug Susceptibility Report (Follow Up Report - 1), and Case Completion Report (Follow Up Report - 2). The information entered into the Surveillance module can be transmitted to the CDC.

### Surveillance Toolbar

The Surveillance module toolbar has seven unique functions. The toolbar also contains options for changing modules and adding and editing clients.



### Surveillance Menus

The Surveillance module has seven menus: Client, Surveillance, Data Generation, Data Transfer, Reports, Window, and Help.

#### Surveillance Menu

The Surveillance menu enables you to create and edit surveillance documents for the current client.

#### *Report of Verified Case of Tuberculosis (RVCT)*

Select **Report of Verified Case of Tuberculosis** to add or edit a client's RVCT.

#### *Initial Drug Susceptibility Report (Follow Up Report - 1)*

Select **Initial Drug Susceptibility Report** to add or edit a client's initial drug susceptibility report.

#### *Case Completion Report (Follow Up Report - 2)*

Select **Case Completion Report** to add or edit a client's case completion report.

#### *Case Verification*

Select **Case Verification** to add, edit, or view case count information.

#### *SURVS-TB UDV*

Select **SURVS-TB UDV** to view or edit the user-defined variables imported from the SURVS-TB system.

#### *Browse*

Select **Browse** to see a summary of all surveillance documents entered in TIMS.

#### *Surveillance Record Deletion*

Select **Surveillance Record Deletion** to mark for deletion and to purge surveillance records from your TIMS database.

### *Data Generation Menu*

Use the options on the Data Generation menu to import related information from the Patient Management module. This will prevent duplicate data entry.

#### *Generate*

Select ***Generate*** to import data for the active field.

#### *Generate All*

Select ***Generate All*** to import all relevant data from the Patient Management module.

#### *Clear Generated*

Select ***Clear Generated*** to remove the imported data from the active field.

#### *Clear All Generated*

Select ***Clear All Generated*** to remove the imported data from the entire document.

### *Data Transfer Menu*

The options on the Data Transfer menu are used to prepare surveillance data to be transmitted to the CDC through a hierarchy of reporting agencies. The two options on the Data Transfer menu are *NETSS* and *Surveillance*.

#### *NETSS*

The NETSS (National Electronic Telecommunication System for Surveillance) option is available at the Reporting Area only. It produces a sub-menu of three options for diskette-based data transfer:

##### *Weekly*

- Select ***Weekly*** to transmit data for the past week for inclusion in the MMWR.

##### *Year-to-Date*

- Select ***Year-to-Date*** to prepare to transmit all surveillance data collected from the beginning of the current MMWR year until the current date.

##### *Archived*

- Select ***Archived*** to re-send data that was damaged or lost for inclusion in the MMWR.

#### *Surveillance*

Select ***Surveillance*** to prepare surveillance data to be transmitted electronically to the next level reporting site. The actual transmission occurs in the System module.

### *Reports Menu*

The Reports menu displays a set of module-specific summary or detail reports:

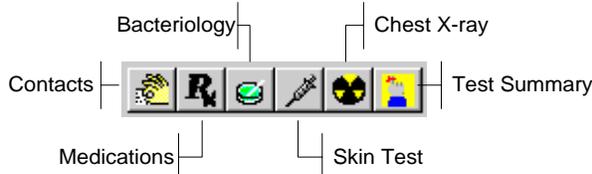
- Case Verification Report
- Counted Cases Report
- Not Counted Cases Report
- Demographics Report
- Clinical Data Report
- Case Follow-Up Report
- Completed RVCT Records
- Incomplete RVCT Records
- Facsimile Report
- Updated-In-Session Report
- Deleted Records Report

## ***Patient Management Module***

Use the Patient Management module to store and maintain tuberculosis-related information about clients who receive treatment or evaluation at your facility. The information in the Patient Management module is for your records and is not used as official surveillance data, nor is it transmittable. However, you can import relevant Patient Management information for use as surveillance data by using the **Generate** command in the Surveillance module.

### **Patient Management Toolbar**

The Patient Management module toolbar has six unique functions. The toolbar also contains options for changing modules and adding and editing clients.



### **Patient Management Menus**

#### *Profile Menu*

Use the options on the Profile menu to record personal information about the client such as their tuberculosis diagnosis, tuberculosis history, contacts, etc.

#### *Contacts*

Select **Contacts** to record information about persons who may have been exposed to tuberculosis through their association with the current client.

#### *Diagnosis*

Select **Diagnosis** to record one or more tuberculosis-related diagnoses for the current client. A valid diagnosis is required to enter certain other Patient Management information.

#### *History*

Select **History** to record relevant tuberculosis-related medical information about the current client.

#### *Hospital/Facility*

Select **Hospital/Facility** to record information about medical facilities where the current client has received any medical treatment in the recent past or during TB treatment.

#### *Referrals*

Select **Referrals** to record information about the person or organization that recommended that the current client visit your facility for tuberculosis evaluation or treatment.

### *Therapy Menu*

The options on the Therapy menu allow you to view, add, and modify information about the tuberculosis treatment regimen the current client is receiving.

#### *Medications*

Select **Medications** to add, edit, and view information about the current client's tuberculosis drug regimen.

#### *View Pick-Up/Delivery*

Select **View Pick-Up/Delivery** to display a drug pickup and delivery summary.

### *Tests Menu*

Use the options on the Tests menu to record, edit, and display information about tuberculosis-related tests that have been administered to the current client.

#### *Bacteriology*

Select **Bacteriology** to record, edit, or view bacteriological specimens and drug susceptibility test results.

#### *Blood*

Select **Blood** to record, edit, or view blood test results.

#### *Chest X-Ray*

Select **Chest X-Ray** to record, edit, or view chest radiograph results.

#### *HIV*

Select **HIV** to record, edit, or view HIV test results. This command will not be available if the user does not have HIV viewing privileges.

#### *Physical Exam*

Select **Physical Exam** to record, edit, or view the results of tuberculosis-related physical examinations.

#### *Skin*

Select **Skin** to record, edit, or view the results of tuberculosis-related skin tests.

#### *Test Summary*

Select **Test Summary** to view a summary of all tuberculosis-related test data that has been collected for the current client. This command will not be available if the user does not have HIV viewing privileges.

## *Reports Menu*

The *Reports* menu displays a set of module-specific summary or detail reports:

- Adherence: Appointments
- Adherence: Assigned Workers - This report is not available in the current version of TIMS.
- Adherence: Medication Metabolite
- Contact Report
- Medical Report: Summary
- Medical Report: Blood Tests
- Medical Report: HIV Tests
- Medical Report: Skin Tests
- Medical Report: X-Ray Tests
- Therapy: Medication
- Therapy: Medication Outcome

## ***Program Evaluation Module***

Use the Program Evaluation module to create, maintain and transfer Aggregate Reports for Program Evaluation (ARPE).

### **Program Evaluation Toolbar**

The Program Evaluation toolbar contains functions to create the following reports, ***Follow-up and Treatment for Contacts to Tuberculosis Cases*** and ***Targeted Testing and Treatment for Latent Tuberculosis Infection***.

### **Program Evaluation Menus**

The Program Evaluation module has four menus: TIMS, Reports, Window and Help.

#### *Reports Menu*

The Reports menu displays the specific reports available for Program Evaluation including:

- ***Follow-up and Treatment for Contacts to TB Cases*** and
- ***Targeted Testing and Treatment for Latent TB Infection***

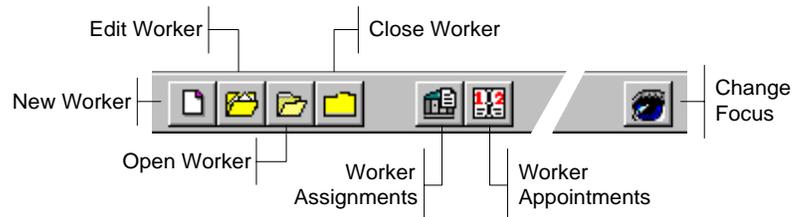


## Daily Program Operations Module

Use the Daily Program Operation module to store and maintain information about the staff at your facility.

### Daily Program Operations Toolbar

The Daily Program Operation toolbar has one unique feature, Worker Assignments. The rest of the tools are variations of the functions found in the client-centered modules, applied to workers instead of clients.



### Daily Program Operations Menus

The Daily Program Operations module has four menus: Worker, Reports, Window, and Help.

#### Worker Menu

The Worker menu duplicates the function of the Client menu in the Client, Surveillance, and Patient Management modules, with a worker focus.

##### *New*

Select *New* to create a new worker record.

##### *Edit*

Select *Edit* to modify an existing worker record.

##### *Open*

Select *Open* to open a worker record for viewing or modification. This command operates the same as Change Focus from the toolbar.

##### *Close*

Select *Close* to close the current worker record. This removes focus from the current worker.

##### *Assignments*

Select *Assignments* to assign workers to individual clients. These assigned workers will then provide tuberculosis-related service to those clients.

##### *Appointments*

Select *Appointments* to create, edit, or display appointments assigned to the current worker. All client related appointments are scheduled in the client-centered modules.

## *Reports Menu*

The Reports menu displays a set of module-specific summary or detail reports:

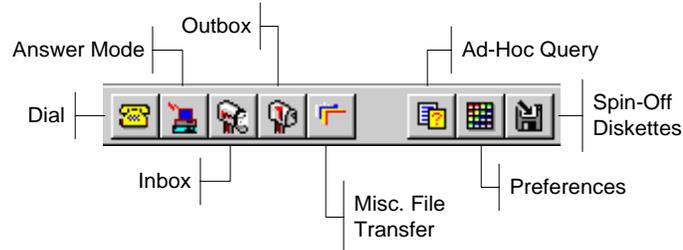
- **Appointment: By Client** - This report is not available in the current version of TIMS.
- **Appointment: By Worker** - This report is not available in the current version of TIMS.
- **Assignments: By Client** - This report is not available in the current version of TIMS.
- **Assignments: By Worker** - This report is not available in the current version of TIMS.
- **Assignments: Number and Types of Clients**
- **DOT Summary: By Worker**
- **DOT Summary: All Workers**
- **Exception Report: Clients who are smear positive (date range)**
- **Exception Report: Smears pending > X days**
- **Exception Report: Cultures pending > X days**
- **Exception Report: Clients with drug-resistant TB (date range)**
- **Exception Report: Cases/Suspects with no positive bacteriology (date range)**
- **Exception Report: Cases/Suspects without a worker assigned (date range)**
- **Exception Report: Cases/Suspects with no suspects identified (date range)**
- **Exception Report: Clients who have been a suspect for > X days**

## System Module

Use the System module to manage TIMS data and set TIMS program options.

### System Toolbar

The System module toolbar features eight unique functions.



### System Module Menus

The System module contains seven menus: System, Data Management (Data Mgt), System Management (System Mgt), Administration, Reports, Window, and Help.

#### System Menu

The System menu contains eight items; of the eight, only Transmission is unique to the System module. The others, Print Setup, Client, Surveillance, Patient Management, Daily Program Operations, Program Evaluation, and Exit are common to the first menu in all TIMS modules.

#### Transmission

The transmission menu provides access to six data transmission-related options:

##### *Dial*

Use the **Dial** command to connect with another TIMS system for an outgoing data transmission.

##### *Answer*

Use the **Answer** command to set the TIMS system to receive incoming data transmissions.

##### *Inbox*

Use the **Inbox** command to open the TIMS Inbox. The Inbox contains data files transmitted by lower-level sites.

##### *Outbox*

Use the **Outbox** command to open the TIMS Outbox. The Outbox contains any data files that are waiting to be transmitted to another site. Once transmitted the data are removed from the Outbox.

##### *Misc. File Transfer (Miscellaneous File Transfer)*

Use the **Misc. File Transfer** command to send non-surveillance data files to another site. Any kind of file, spreadsheets, graphic, word processing documents, etc. can be transmitted using the Misc. File Transfer command.

##### *COMM Port Settings*

Use the **COMM Port Setting** to adjust your modem setting to allow you to send and receive data successfully.

### *Data Management (Data Mgt) Menu*

The functions on the **Data Mgt** menu enable you to access TIMS information in ways that are not available in the rest of the application. Only users with High or System Administrator security privileges can access these functions.

#### *Ad-Hoc Queries*

Select *Ad-Hoc Queries* to create and save data queries not available as standard TIMS reports.

#### *Frequency Report*

Select *Frequency Report* to create and save frequency data queries.

#### *Data Dictionary*

Select *Data Dictionary* to display technical details about the tables and fields found in the TIMS database.

#### *Export*

Select *Export* to copy TIMS data to a different file in a choice of file formats.

#### *User-Defined Variables*

Select *User-Defined Variables* to add custom data entry fields to specific TIMS windows.

#### *Database Backup*

Select *Database Backup* to copy your TIMS data to diskette or other data storage device so that data are not lost if there are problems with the TIMS database.

#### *Database Recovery*

Select *Database Recovery* to restore your TIMS database from a copy made using the Database Backup command.

#### *Purge Records by Site*

Select *Purge Records by Site* to permanently remove records for lower site(s).

#### *Purge Client Records*

Select *Purge Client Records* to permanently remove clients without surveillance information.

### *System Management (System Mgt) Menu*

The functions on the System Mgt menu enables you to change your password, set system options, and correct problems with the TIMS system.

#### *Diagnostics*

This feature is not available in the current version of TIMS.

#### *Preferences*

Select **Preferences** to set system options such as file location, record search specifications, etc.

#### *Security*

Select **Security** to change your TIMS system password. System Administrators can use the Security option to add or delete users, or change their system privileges.

#### *Site Information*

This feature is not available in the current version of TIMS.

### *Administration Menu*

The functions on the *Administration* menu allow you to convert data from SURVS-TB (an older CDC tuberculosis data system), create reporting sites, and other administrative tasks.

#### *Data Conversion*

Select **Data Conversion** to convert data from SURVS-TB (no longer utilized since all SURVS-TB data have been converted).

#### *Spin-Off Diskettes*

Select **Spin-Off Diskettes** to register lower-level reporting sites within your jurisdiction. This option is only available to Reporting Area TIMS system administrators.

#### *Table Maintenance*

Select **Table Maintenance** to modify the options available from some drop-down lists within the TIMS application.

### *Reports*

The System module can produce several administration and data transmission related reports:

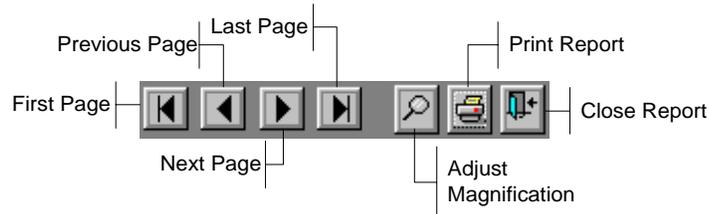
- Activity Log
- Transmission Log
- Users Rights / Access
- Unacknowledged Transfer File Report
- User-Defined Data Dictionary: Global
- User-Defined Data Dictionary: Local
- Unacknowledged Record Report

## Working With Reports

A report is an organized and effective way of presenting pre-selected data in a printed format. Reports organize the data to maximize readability.

Reports operate differently than other TIMS components. They are controlled entirely by a series of buttons near the bottom of the reports window.

All reports have the same controls



Some reports allow you to cycle through multiple clients with the Previous and Next buttons.



### Navigate through a Report

Some TIMS reports will have more than one page. The navigation buttons at the bottom of the report screen allow you to change report pages quickly and easily.

To move forward one page...

- Click the **Next Page** button



To move backward one page...

- Click the **Previous Page** button.



To move to the last page in the report....

- Click the **Last Page** button.



To move to the first page in the report...

- Click the **First Page** button.



## Print a Report

To print a report...

1. Open the report.
2. Click the **Print Report** button



## Adjust Report Magnification

TIMS allows you to adjust the magnification of the viewing area.

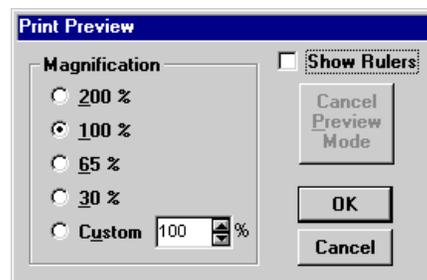
To adjust a report's magnification...

1. Open the report.
2. Click the **Adjust Magnification** button.



*This displays the Print Preview dialog box.*

3. Select Magnification settings from the preset options or enter your own in the Custom box.



4. Click the **OK** button.

## Adjust Report Margins

You can temporarily adjust the margins (the area between the printed material and the edge of the page) by dragging the margin indicators to a new location on the horizontal and vertical rulers. The margins will return to their default location the next time you run the report.

1. Open the report.
2. Click the **Adjust Magnification** button.

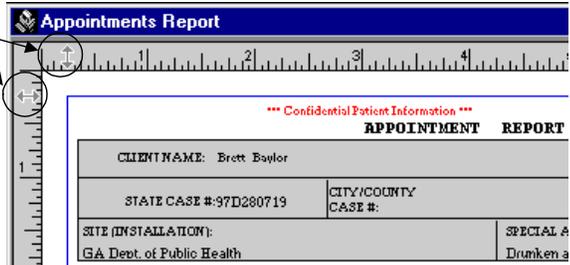


*This displays the Print Preview dialog box*

3. Select **Show Rulers**.
4. Click **OK**.

5. Drag the double-headed arrows to a new location to adjust the report margins.

Use the double-headed arrows to adjust the borders



6. Follow the normal procedure to print the report.  
*The printed report will print with the newly adjusted margins.*

## Close a Report

To close a report...

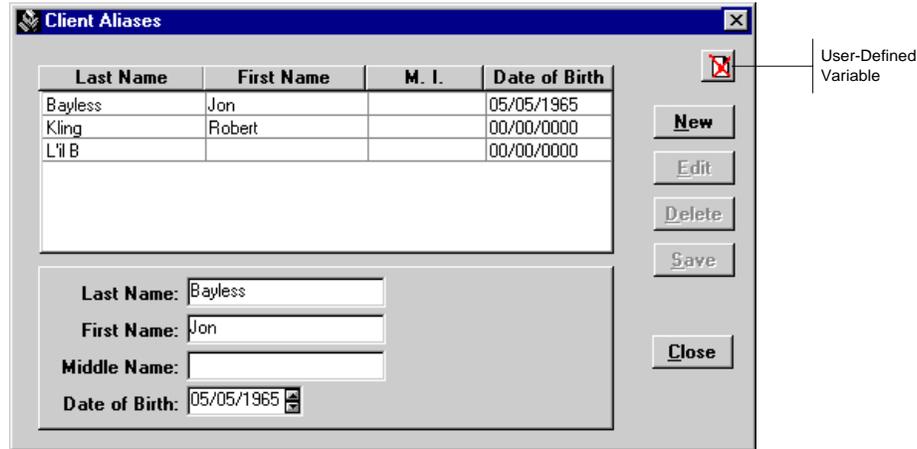
- Click the **Close Report** button.



## User-Defined Variables

If your facility gathers tuberculosis-related information that is not ordinarily part of TIMS, user-defined variables provide a place to store custom site-specific information. The TIMS System Administrator can define up to five user-defined variables for the 18 TIMS windows that will accept them. Not all TIMS windows can have user-defined variables.

Most TIMS windows have small user-defined variable buttons on them, usually on the right side of the window. All user-defined variable buttons depict a sheet of paper, with several variations.



There are three variations of user-defined variable buttons, each with a different meaning.



Buttons depicting a blank sheet with an X through it indicate that you must select a specific record to activate the user-defined variable for the current window.



Buttons with a blank sheet indicates that the user-defined variable associated with the currently selected record does not contain data.



Buttons with a striped sheet indicates that the user-defined variable associated with the currently selected record contains data. Clicking the user-defined variable button will allow you to view, edit, or delete the information it contains.

## Using User-Defined Variables

To enter information in a user-defined variable...

1. Click the **User-Defined Variable** button on the window.



*If the user-defined variable is required, the User Defined Fields for Client Information Table dialog box will appear automatically. You will not have to click the button.*

2. Complete the information that appears in the Global User Defined Fields dialog box.

*Each dialog box will have a unique appearance.*

Global User Defined Fields			
OHD SEVERITY CODE	Char	3	053
DATE SEVERITY CODE ASSIGNED	Date		02/12/1998

Local User Defined Fields			
TB REVIEW DATE	Date		05/31/1998
# OF HOUSEHOLD MEMBERS	Number		7.00000
TB REGIMEN CODE	Char	8	IRPS0808
IS THE CLIENT COOPERATIVE?	Yes/No/Unk		Y

There are four types of controls available on a user-defined variable window. The number and type of options that appear on your window depend on the TIMS System Administrator at your site, and the TIMS System Administrator at the Reporting Area level.

- **Char** - Enter any combination of numbers, letters, and special characters up to the maximum number specified to the left of the character field.
- **Date** - Enter a date in DD/MM/YYYY format.
- **Number** - Enter a number
- **Yes/No/Unk** - Enter Y for yes, N for No, and U for unknown.

3. Click the **Save** button.

## Flag Information Window

When a client is in focus, a flag button appears on the Focus Line.



Clicking the flag button produces a client information summary and displays any alerts (flags) about the current client. Persons who are able to perceive colors can get an at-a-glance assessment of the current client's alert status.

	Green Flag	The current client has no active alerts.
	Yellow Flag	The current client has a user-defined alert. This indicates that some factor about this client should be noted by workers reviewing his or her record in the future, but the client has no critical, red flag alerts such as drug resistant TB.
	Red Flag	Red Flag indicates that the current client meets one or more conditions to qualify for high alert status. Conditions which meet these criterion are: <b>Drug Resistant TB</b> <b>Non-adherent to treatment regimen</b> <b>Smear Positive (Bacteriology)</b>

### Open the Flag Window

To open the flag window...

- Click the **Flag** button on the Focus line.

## Client Information Window

The Client Information window provides a summary of useful client information.

The window includes:

Identification and Demographic Information	<ul style="list-style-type: none"> <li>▪ Social Security Number</li> <li>▪ State Case Number</li> <li>▪ City/County Case Number</li> <li>▪ Date of Birth</li> <li>▪ Sex</li> </ul>
Treatment Information	<ul style="list-style-type: none"> <li>▪ Workers assigned to client</li> <li>▪ Treatment enrollment date</li> <li>▪ Client disposition</li> </ul>
Alert Information	<ul style="list-style-type: none"> <li>▪ Rules-based alerts (based on medical tests and compliance with treatment)</li> <li>▪ User-defined alerts</li> </ul>

### Close the Client Information Window

To close the client information window...

- Click the **C**lose button.

## Using the TIMS Help System

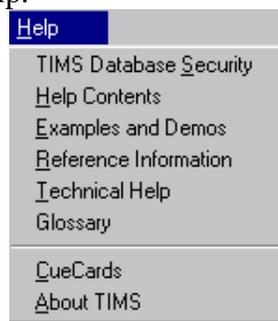
TIMS comes with extensive online help that can assist you in using the application effectively. There are three levels of TIMS help:

- **Subject Level** - an overview of a TIMS process.
- **Field Level** - description of a field or other object on a TIMS window.
- **Task Level** - “How To” instruction on how to complete a TIMS task.

There are several ways to access TIMS help.

### The Help Menu

The Help Menu provides access to additional information about operating the TIMS application. Open the Help menu to access the online help.



#### *TIMS Database Security*

Select ***TIMS Database Security*** to view the security clause.

#### *Help Contents*

Select ***Help Contents*** to see the online help Table of Contents.

#### *Examples and Demos*

Select ***Examples and Demos*** to display sample TIMS windows.

#### *Reference Information*

Select ***Reference Information*** to access information and tips about The TIMS Workplace, general data entry suggestions, keyboard guide information, and tips on how to use the TIMS Help System.

#### *Technical Help*

Select ***Technical Help*** to get information on database configuration, LAN setup, and other technical subjects. Also contains information about getting TIMS technical support.

#### *Glossary*

Select ***Glossary*** to display an alphabetized list of terms related to program operation, tuberculosis, and other TIMS-related topics.

### *CueCards*

Select *CueCards* to set preferences for TIMS CueCards, which are small help screens designed to prompt you to perform certain commonly used actions within the TIMS application.

### *About TIMS*

Select *About TIMS* to display TIMS version and system information.

### **Context-Sensitive Help**

You can get help on your current task by pressing the **F1** key. This displays help relevant to the task you are performing.

### **Help from the Toolbar**

Click the **Help** button on the TIMS toolbar to display context sensitive help. This is equivalent to pressing the **F1** key.



## TIMS Help Contents

The TIMS Help Contents screen allows you to access broad categories of TIMS help. Click one of the links to display additional help.



Select *Using TIMS* to display general and specific information about TIMS modules.



Select *Examples and Demos* to display sample TIMS windows which can be clicked to display detailed information about the window.



Select *Reference Information* to display answers to commonly asked questions, tips on using TIMS, and other useful TIMS-related information.



Select *Technical Help* to display information about phone and e-mail based support.

## TIMS Help Toolbar

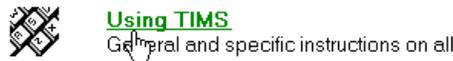
The TIMS help window displays a series of buttons you can use to access several help functions.

	Click <b>Contents</b> to display the TIMS Help Contents
	Click <b>Search</b> to display a list of TIMS topics, much like an index in a book.
	Click <b>Back</b> to return to the previous help topic.
	Click <b>Print</b> to print the current help topic.
	Click <b>Glossary</b> to display a list of TIMS and tuberculosis-related terms and their definitions.
	Click <b>Index</b> to display an alphabetical list of TIMS topics.

## Help on Help

TIMS uses the standard Microsoft Windows Help system that is compatible with Windows 95/98, and Windows NT. The individual help windows display informative text and graphics about the application the window was invoked from.

A window may contain one or more links to additional related information. These links may change the content of the current window, display a new window, or display a pop-up overlay on the current window. A solid green line, a dotted green line, or a graphic can identify links. The mouse pointer will always change to a pointing hand when over a link.



You can always get help on using the Windows Help system by pressing **F1** while in the Help system.

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## Closing TIMS

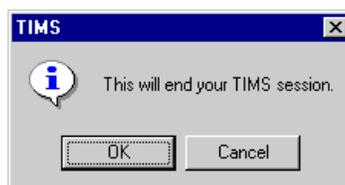
When you are finished using the TIMS application, shut it down.

There are three ways to exit the TIMS application...

### Menu

To close TIMS using the menu bar...

1. Open the primary menu.  
*Remember- This is the first menu on the left (TIMS, Client, Worker, or System).*
2. Select **Exit**.
3. Click **OK** to confirm that you want to end your TIMS session.



### Keyboard

To close TIMS using the keyboard...

1. Press **Alt+F4**
2. The **OK** button is selected. Press **Enter** to confirm that you want to end your TIMS session.

### Control Menu / Close Button

To close TIMS using the mouse...

#### Control Menu

1. Double-click the TIMS icon on the Control menu.
2. Click **OK** to confirm that you want to end your TIMS session.

#### Close Button

1. Click the **Close** button.



2. Click **OK** to confirm that you want to end your TIMS session.

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### **Overview**

TIMS is a client-centered application. All information stored and processed in TIMS is in some way connected to people receiving tuberculosis-related services in your community. Most information is related directly to the client: name and address, the results of medical tests, records of the treatment they are receiving, and so forth. Other information is indirectly associated with clients: the names of the facilities that provide services, the names of the people providing those services, etc.

Use the Client module to add, edit, and maintain information about people receiving tuberculosis-related services at your facility. The application's client-centered approach provides easy access to specific client information. For this reason, the functions of the Client module can be accessed from each of the other client-centered modules (Surveillance and Patient Management).

The Client module enables you to:

- Add a new client to the TIMS database
- Modify existing client information
- Track multiple addresses for a client
- Track additional names (aliases) for a client
- Track client telephone numbers
- Maintain client appointments
- Record client dispositions
- Track a client's origins

## Quick Start

### Open the Client Module

1. To open the Client module, click the **Client** button on the toolbar, or select **C**lient from the current primary menu (the first menu on the left).



### Add a New Client

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **N**ew, or click the **New Client** button on the toolbar.



3. Complete as much information as possible in the New Client dialog box and click **OK**.
4. Follow the on-screen instructions to either add the new client or select their previously existing record from the list of possible matching records.

### Edit an Existing Client

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **O**pen, or click the **Open Client** button on the toolbar.

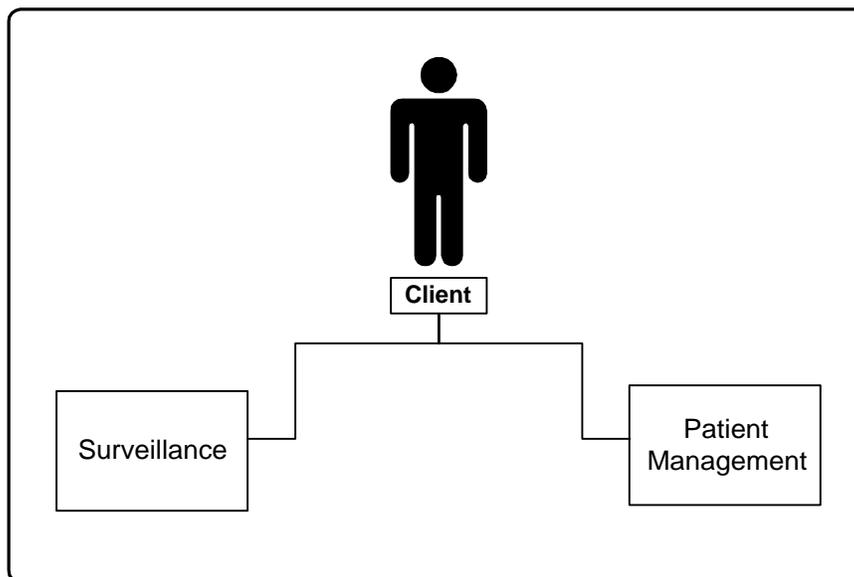


3. Select a client from the Change Focus dialog box and click **OK**.
4. Change information on the Client Information screen as necessary.

## ***Working with Client Information***

TIMS is client-centered like the facilities it is designed to support. Every feature of the application is related to the client in some way: clients are tested and treated, and workers are assigned to work with clients, etc.

These functions are also available in the other client-centered modules, **Surveillance** and **Patient Management**.



### **Open the Client Module**

To open the Client module...

- Click the **Client** button on the toolbar, or select **Client** from the current primary menu (the first menu on the left).



## Add a New Client

TIMS attempts to ensure that no duplicate clients are entered in the system by searching for existing clients as an integral part of the Add Client procedure.

First and last names are the minimum required information needed to add a client. However, since other modules require additional client information, it is best to complete as much information as possible.

**Note:** Users with low access privileges cannot add or edit client records.

To add a new client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **N**ew or click the **New Client** button on the toolbar.



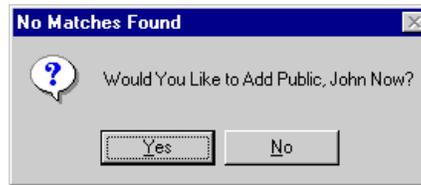
3. Complete as much information as possible in the New Client - Set Search Criteria dialog box. You must provide at least the client's first and last names.

4. Click **O**K. The Search Client dialog box will automatically appear. Click **C**ancel to abandon the Add New Client operation and return to the main menu.
5. Click **Y**es to search for matching clients in the TIMS database. Click **N**o to skip the client search and add the new client immediately. Click **C**ancel to return to the New Client - Set Search Criteria dialog box.

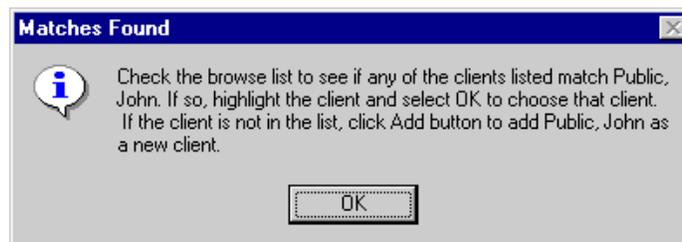
*If you did not see the Search Client dialog box, your TIMS system administrator has configured TIMS to always check for matches in System Preferences.*

## 6. Do one of the following:

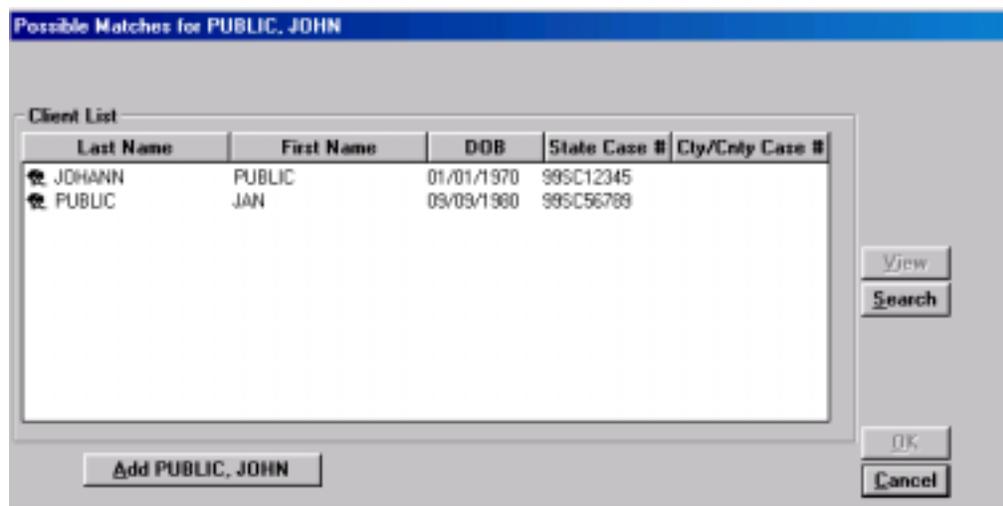
2. If no matches are found, click the **Yes** button to add the new client. Click the **No** button to abandon the Add New Client operation and return to the main menu.



- If TIMS finds possible matches, click the **OK** button to close the Matches Found dialog box.



- Evaluate the possible client matches. If one of the displayed entries is the client you are trying to add, click on the record to select it and click the **OK** button (enabled when you selected a client). If you need additional information, select the record and click the **View** button (enabled when you selected a client) to display additional information about that client. If none of the displayed records are a match, click the **Add** button. Click the **Cancel** button to abandon the Add New Client operation and return to the main menu.



*The Search function is disabled at this point because you are currently performing a search. The search function is available during the Change Focus operation, which uses this same window.*

## 7. The Client Information window is displayed.

## Open the Client Information Window

Additional client information can be entered any time after a client record has been added to the TIMS database. The Client Information window appears immediately after a new client has been entered.

To open the Client Information screen at other times...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **E**dit or click the **Edit Client** button on the toolbar.



## Add Identification and Demographic Information

The Client Information window enables you to add and edit identification information as well as demographic information such as date of birth, race, and ethnicity.

**Note:** Although you can save client information without a State Case Number, the Report of Verified Case of Tuberculosis (RVCT) in the Surveillance module requires it.

The screenshot shows the 'Client - [Client Information]' window. The current client is 'PUBLIC, JOHN'. The form contains the following fields and options:

- Name:** Last: PUBLIC, First: JOHN, Middle: Q
- Client Identifiers:** State Case Number: 50D170958, Social Security #: 000-11-2323, City/County Case Number: (empty)
- Date of Birth:** 03/02/1965, **Age:** 33
- Sex:**  Male,  Female,  Unknown
- Race:**  White,  Black,  American Indian or Alaskan Native,  Unknown,  Asian or Pacific Islander
- Ethnic Origin:**  Hispanic,  Not Hispanic,  Unknown
- Country of Origin:**  US,  Not US,  Unknown. Date Entered U.S.: 00/0000
- Language:** Primary Language: ENGLISH

Buttons on the right side include Address, Alert, Alias, Name, Phone, Save, and Close. The status bar at the bottom indicates 'Ethnic Origin of Client' and the date/time '4/17/98 10:09 am'.

To add or complete client identification and demographic information...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.

3. Add or complete all available information in the Client Identifiers section.

Client Identifiers	
State Case Number: 97GA00001	Social Security #: 123-45-6789
City/County Case Number: <input type="text"/>	Date of Birth: 01/01/1960 Age: 37

- If you don't know the client's date of birth, right-click the Date of Birth field and select **Unknown** from the menu that appears.
- A question mark icon will appear once you leave the Date of Birth field.



4. Add or complete the client demographic section of the Client Information window.

See Appendix SUR I (RVCT Form Completion Instructions) for additional information.

Sex	Race	Ethnic Origin
<input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unknown	<input type="radio"/> White <input checked="" type="radio"/> Black <input type="radio"/> American Indian or Alaskan Native <input type="radio"/> Unknown <input type="radio"/> Asian or Pacific Islander	<input type="radio"/> Hispanic <input checked="" type="radio"/> Not Hispanic <input type="radio"/> Unknown

5. Enter the client's Country of Origin.

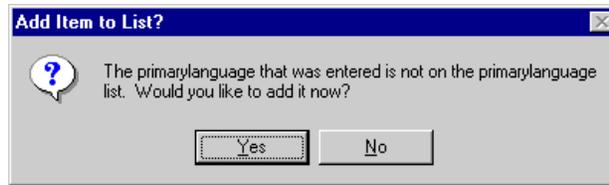
Country of Origin	
<input type="radio"/> US <input checked="" type="radio"/> Not US <input type="radio"/> Unknown	Date Entered U.S.: 03/1998 <input type="text" value="GHANA"/>

- If you select Not US, select the client's country of origin from the drop-down list and enter the date they arrived. Right-click **Date Entered US** to record the date as unknown or partially unknown. For partially unknown dates, enter the year the client arrived before you select **Unknown** from the shortcut menu. A question mark icon will appear once you leave the Date Entered US field.
6. Select the client's primary language from the Language list.

The Understand English and Speak English check boxes appear only if the Primary Language is not English. Select **Understand English** if the client can understand the English language. Select **Speak English** if the client can speak the English language.

Language	
Primary Language:	SPANISH
<input checked="" type="checkbox"/> Understand English	<input type="checkbox"/> Speak English

- If the appropriate language is not in the list, you can type it in to add it.



7. Click the **S**ave button.
8. Click the **C**lose button.

### Edit a Client Name

Only users with System Administrator, High, or Medium user privileges can modify client names.

To change a client name...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.
3. Click the **N**ame button.
4. Edit or replace the information in any of the three Name fields.



5. Click the **S**ave button.
6. Click the **C**lose button.

## Client Addresses

TIMS can track an unlimited number of addresses for a single client. These addresses can be used to provide clinic personnel with additional information to contact clients.

Types of addresses:

- Current** The Current Address is the client's current primary residence. Current addresses appear in bold type.
- Reporting** The Reporting Address is the official address used for surveillance. Reporting addresses must be within the same state as the site entering the record. The Reporting Address appears in red. The Reporting Address is automatically generated into Question 4 a, b, c, d, & e in the Surveillance module. See *Appendix SUR I (RVCT Form Completion Instructions)* for details.
- Previous** All other addresses are considered previous addresses and are maintained for historical purposes.

**Note:** Users with Low access privileges cannot add, edit, or delete client address records.

### Add a Client Address

**City, State, County,** and **Within City Limits** entries are required to complete a client address record.

To record a client address...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Click the **Address** button.

*This displays the Client Addresses dialog box.*

Street Address	City	State	Start Date
			05/29/1997

Reporting  
 **Current**

**Current Address**  
 Street:   
 Address:   
 City:  State:  Date: 05/29/1997

**Within City Limits:**  
 Yes  No  Unknown

Reporting Address  
 Current Address

County:  Zip:  -  Census Tract:

4. Click the **New** button.

- Enter the address information as completely as possible.

**Current Address**

Street: 1234 MAIN ST

Address: APT A32

City: ATLANTA State: GA Date: 01/01/1998

Within City Limits:  
 Yes  No  Unknown  Reporting Address

County: FULTON  Current Address

Zip: 30309 - Census Tract:

- Select **Current Address** if this address is the client's current primary residence. Select **Reporting Address** if this address should be used as surveillance data.
- Click the **S**ave button.
- Click the **C**lose button.

### Edit a Client Address

You can change an existing client address using the Edit feature.

To change a client address...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Click on the **Edit Client Information** button on the toolbar to open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
- Click the **A**ddress button.
- Select the address you want to change and click the **E**dit button.

Street Address	City	State	Start Date
150 PULASKI ST	MEDFORD	OR	02/13/1998
JACKSON COUNTY JAIL	MEDFORD	OR	12/21/1997

- Make the necessary changes to the address information. You can cancel your changes by clicking the **U**ndo button.
- Click the **S**ave button.
- Click the **C**lose button.

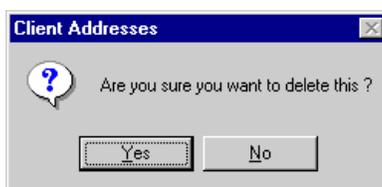
## Delete a Client Address

Invalid or out-of-date client addresses can be removed from the TIMS database. However, you may want to maintain a list of previous addresses as historical records or to assist with client location.

**Note:** Deleting the Reporting Address will remove the information from the Report of Verified Case of Tuberculosis (RVCT) in the Surveillance module.

To delete a client address...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Click on the **Edit Client Information** button on the toolbar to open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **Address** button.
4. Select the address you want to delete and click the **Delete** button.
5. Click the **Yes** button to delete the selected address. Click the **No** button to cancel the delete operation.



6. Click the **Close** button.

## Client Phone Numbers

TIMS enables you to enter and store an unlimited number of phone numbers for a single client. This enables you to track home, work, and other numbers where the client can be reached.

You must enter both the phone number and a description to record a client phone number.

**Note:** Users with Low access privileges cannot add, edit, or delete client phone numbers.

### Add a Client Phone Number

To record client phone numbers...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **Phone** button.  
*This displays the Phone Number dialog box.*

Phone Number	Description
( ) -	

Phone Number: ( ) -

Description:

New Edit Delete Save Close

4. Click the **New** button.
5. Enter the Phone Number and a Description of that number in the appropriate fields.

Phone Number: (503) 555-1101

Description: HOME

6. Click the **Save** button.
7. Click the **Close** button.

## Edit a Client Phone Number

To make changes to a client phone number...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **Phone** button.
4. Select a Phone Number record in the list and click the **Edit** button.

Phone Number	Description
(503) 555-1101	HOME
(503) 555-1102	WORK (M - F)
(503) 555-1103	WORK (SAT + SUN)

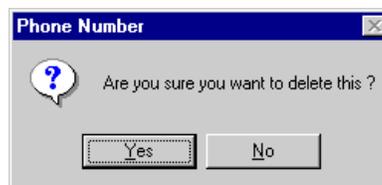
5. Make the necessary changes to the selected phone number record.
6. Click the **Save** button.
7. Click **Close** button.

## Delete a Client Phone Number

You can remove invalid or out-of-date phone numbers from a client's record. Client phone numbers should only be removed if they are not valid. Out-of-date numbers should be kept for historical reference.

To remove a phone number from a client's record...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **Phone** button.
4. Select a Phone Number record in the list and click the **Delete** button.
5. Click the **Yes** button to delete the selected record. Click the **No** button to cancel the delete operation.



6. Click the **Close** button.

## Client Aliases

People are sometimes known by more than one name and/or date of birth. To help ensure that a client is not entered in the database more than once, TIMS enables you to record aliases and will search for these additional names when adding new clients.

**Last Name** is required to record a client alias.

**Note:** Users with *Low* access privileges cannot add, edit, or delete client aliases.

### Add a Client Alias

To add a client alias...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.

*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Click the **A**lias button.

*This displays the Client Aliases dialog box.*

Last Name	First Name	M. I.	Date of Birth
			00/00/0000

Last Name:   
 First Name:   
 Middle Name:   
 Date of Birth:

New  
 Edit  
 Delete  
 Save  
 Close

4. Click the **N**ew button.
5. Enter the alias information in the appropriate fields. Aliases that are not in a standard *Lastname, Firstname* format should be entered entirely in the Last Name field.
6. Click the **S**ave button.
7. Click the **C**lose button.

## Modifying a Client Alias

You can change an existing client alias using the Edit feature.

To change a client alias...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **Alias** button.
4. Select an alias from the list and click the **Edit** button.

The screenshot shows a window titled "Client Aliases" with a table and a form. The table has columns for Last Name, First Name, M. I., and Date of Birth. The form below the table has fields for Last Name, First Name, Middle Name, and Date of Birth.

Last Name	First Name	M. I.	Date of Birth
BRADFORD	JANICE	P	01/01/1960
BRADDY	JANI	P	01/01/1960

Buttons on the right side of the window: New, Edit, Delete, Save, Close.

Form fields below the table:

- Last Name: BRADDY
- First Name: JANI
- Middle Name: P
- Date of Birth: 01/01/1960

5. Change the information on the alias form.
6. Click the **Save** button.
7. Click the **Close** button.

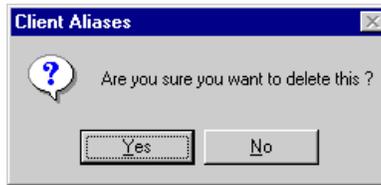
## Deleting a Client Alias

Invalid client aliases can be removed from the TIMS database.

To delete a client alias...

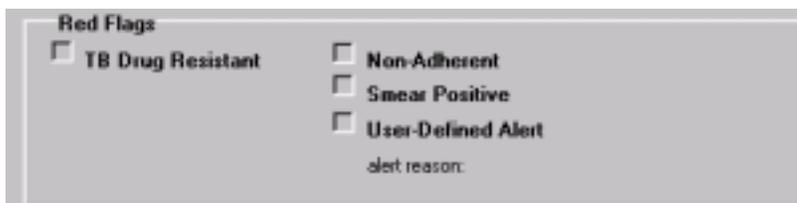
1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **Alias** button.
4. Select an alias from the list.
5. Click the **Delete** button.

6. Click the **Yes** button to delete the selected alias. Click the **No** button to cancel the delete operation.



## User - Defined Alerts

It may be worthwhile or even necessary to inform clinic staff about certain characteristics of a particular client. They may be hard to treat, dangerous to themselves or others, or have some other characteristic that should be called to the attention of those asked to provide services to them. TIMS enables you to enter a brief user-defined alert that can be viewed by all TIMS users by clicking the client's alert flag button on the Focus Line.

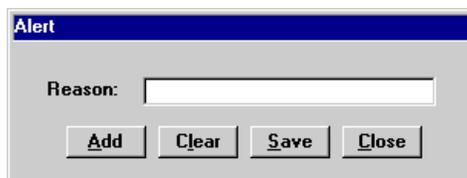


**Note:** Users with Low access privileges cannot add, edit, or delete user-defined alerts.

### Add a User-Defined Alert

To add a user-defined alert...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **A**lert button.  
*This displays the Alert dialog box.*



4. Click the **A**dd button.
5. Enter an alert message about the client in the Reason field. You can use up to 28 characters.
6. Click the **S**ave button.

### Edit a User-Defined Alert

You may need to change an alert after it was initially entered.

To change an alert...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **A**lert button.
4. Edit or replace the alert message in the Reason field.
5. Click the **S**ave button.

## Deleting a User-Defined Alert

You can delete a user-defined alert if the described alert condition is no longer valid.

To delete a user-defined alert...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the Client Information window.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **A**lert button.
4. Click the **C**lear button. Do not enter any additional text.
5. Click the **S**ave button.

## Disposition

The Disposition feature enables you to record the final outcome of a client's relationship with your facility.

While actively enrolled in a TB monitoring or treatment plan at your facility, the client is considered *Open*. When the relationship between the client and your facility ends, you should assign the *Closed* disposition to the client. The Client - Facility relationship may end for a variety of reasons: the therapy is complete, the client moved, the client is lost, etc.

The screenshot shows a software window titled "Current Client: BRADY, JAN". At the top, the "Current Status" is "Open" in green text, with a "Change..." button to its right. Below this is a table with two columns: "Disposition" and "Date". The table contains one row with an empty "Disposition" cell and the date "08/23/2000". To the right of the table are buttons for "New", "Edit", and "Save". Below the table is a "Disposition" section with a list of radio button options: "Completed Therapy", "Moved", "Not TB", "Died", "Lost", "Refused Treatment", "Adverse Reaction", "Other", "Unknown", "Active TB Developed", and "Provider Decision". A "Date:" label is followed by a text input field containing "08/23/2000". At the bottom right of the window is a "Close" button. The system clock in the bottom right corner shows "8/23/2000 2:25 pm".

Disposition	Date
	08/23/2000

## Close a Client

Closing a client terminates your relationship with the client. You may view but cannot change Closed clients in TIMS. However, a client can be re-opened for processing if the conditions change and the client will resume services at your facility.

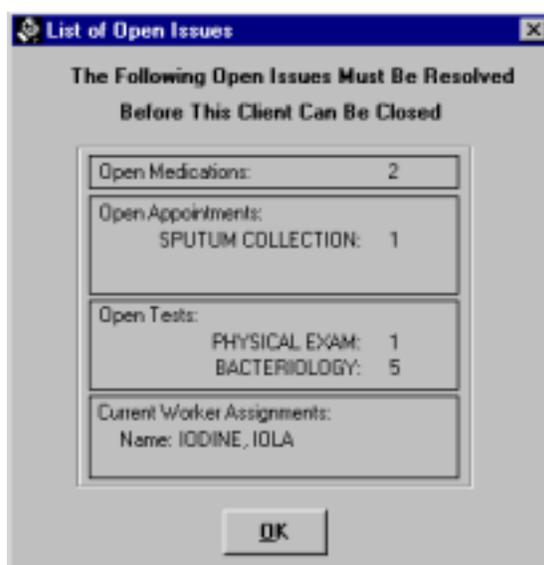
You cannot Close a client if they have pending Medications, Appointments, Tests, and/or Worker Assignments. Attempting to close a client without resolving these issues will produce an error message.

To close the client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **D**isposition.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **C**hange button in the Current Status group.
4. Select **C**losed.
5. Enter or select the date the client relationship was closed and click the **O**K button. Click the **C**ancel button to abandon the Close Client operation.



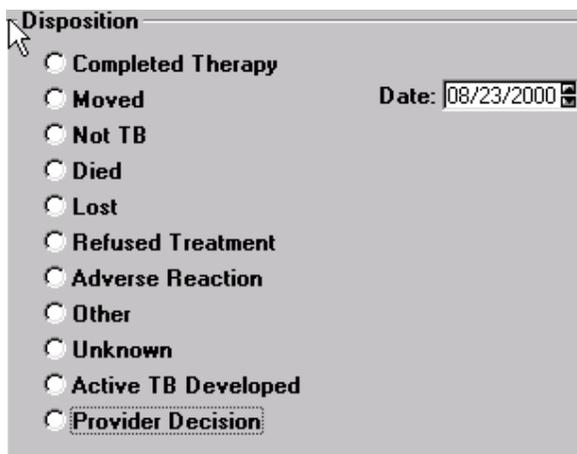
6. If there are any unresolved issues that will prevent you from closing the client, click the **O**K button to close the List of Open Issues dialog box and proceed to the appropriate areas to resolve.



- Click the **OK** button to close the Select Disposition dialog box, once all outstanding client issues have been resolved.



- Select the appropriate disposition. If the selected disposition displays additional information, add as much information as is available. Click the **Undo** button to clear the current information.



- Click the **Save** button.
- Add additional dispositions by clicking the **New** button and completing the information for the new disposition.
- Click the **Close** button.

## Edit a Disposition

Some dispositions can be modified after they have been entered.

To edit a disposition...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Open the **Client** menu and select **Disposition**.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
- Select the disposition you want to edit by clicking on it and click the **Edit** button.  
If the **Edit** button is not enabled, the selected disposition cannot be edited.
- Make the necessary changes to the disposition.
- Click the **Save** button.
- Click the **Close** button.

## Re-Open a Client

All dispositions can be reversed. If a client returns to your facility for treatment, you can re-open them by using the Disposition command.

To re-open a client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **D**isposition.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Click the **C**hange button in the Current Status group.
4. Select **O**pen in the Change Enrollment Status dialog box.
5. Click the **O**K button.
6. Click the **C**lose button to exit the Disposition window.

## Origination

You can record a client's origins in TIMS using the Origination feature. A client can have one of three origins:

<b>Contact</b>	The client is identified as a TB suspect through their association with an existing client.
<b>Transferring from Another Location</b>	This feature is not available in the current release of TIMS.
<b>Neither</b>	A client, who was originally entered at your facility, but has no documented association with another client.

### View a Client's Origins

To view the current client's origins...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **Client** menu and select **Origination**.

*The Client menu is available in the Client, Surveillance, Patient Management, and Program Evaluation modules.*

Client is . . .

a Contact  Transferring from Another Location  Neither

List of Source Cases:

Last Name	First Name
BRAVO	BEATRICE

<-Add

Delete->

List of Non-Source Cases:

Last Name	First Name
ALPHA	ANDREW
CHARLEY	CASHEW
DELTA	DAHLIA
ECHO	EDDIE
FOXROT	FELICITY
GOLF	GARRET

Close

### Changing Client Origins: Contact to Neither

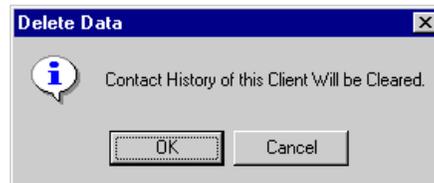
If a client was incorrectly identified as a Contact, you can change the client's Origination record. (A Contact is someone identified by a client whose relationship is such that they may be at-risk for TB infection. See the *Patient Management* chapter for details.)

To change the active client from Contact to Neither...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **Client** menu and select **Origination**.

3. Select **Neither** in the Client is group.

4. Click the **OK** button to close the Delete Data dialog box and complete the change.  
*The current client will no longer be associated with the previously identified contact.*



5. Click the **C**lose button.

### Changing Client Origins: Neither to Contact

If a client is incorrectly identified as a non-contact client, they must be properly identified as a contact of an existing client.

To record a contact relationship with the active client...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **O**rigination.  
*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*
3. Select **a Contact** in the Client is group.

4. Select the client who originally identified the current client as a contact and click the **<-Add** button.

List of Source Cases:		List of Non-Source Cases:	
Last Name	First Name	Last Name	First Name
		BRAVO	BEATRICE
		ALPHA	ANDREW
		CHARLEY	CASHEW
		<b>DELTA</b>	<b>DAHLIA</b>
		ECHO	EDDIE
		FOXTROT	FELICITY

5. Select any additional clients who identified the current client as a contact.  
*The client will then be listed as a contact on each of the source case's contact windows.*
6. Click the **C**lose button.

## Client Appointments

TIMS enables you to schedule appointments for the clients defined in your TIMS database. To create a client appointment, the following information can be entered: appointment date, time, type, location, and the worker who will service the client for the appointment. Client Appointments can be added, edited, voided (cancelled), deleted, checked in, confirmed, or rescheduled. After appointments are established, you can filter appointments by choosing a status or appointment type. The Client Appointments window will display all appointments for the selected client.

TIMS provides the capability to search for existing appointments by date and time. You can also choose to display appointments for today, a specific date, or all appointments scheduled for a worker.

**Note:** Users with Low, Medium, and High security access can add, edit, and view client appointments. Users with High security access can delete worker appointments.

### Open the Client Appointments Window

To begin working with client appointments, you must first open the Appointments window.

To open the current client's appointment window...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **Client** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

Current Client: **INDIA, IKE**

Search:

Date	Time	Appointment Type	Location	Worker	Status
04/16/1998	01:15 pm	BACTERIOLOGY	EXAMINATION 1	BRAZOS, BENJA	COMPLETED
04/18/1998	01:00 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
04/21/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
04/21/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	RESCHEDULED
05/05/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
06/02/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
06/16/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED

Filter Appointments by Status:

Scheduled

Past Due

Rescheduled

Completed

Canceled

Filter Appointments by Appointment Type:

BACTERIOLOGY  
BLOOD TEST  
CHEST X-RAY  
HIV TEST  
PHYSICAL EXAM  
SKIN TEST

## Search for Appointments

You can search appointments for the selected worker by using the For Date, Today, or All filters.

To search for appointments...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the appropriate search option:



- Click the **F**or Date button and enter a date to display all the appointments for that date (the Time portion does not affect the filter).
- Click the **T**oday button to view all appointments for the current date.
- Click the **A**ll button to view every appointment.

## Filter Appointments by Status

You can separate appointments that will appear in the browse list by selecting one or more appointment statuses.

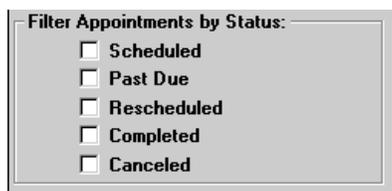
To filter appointments by status...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

- Click one or more status designations for the appointments you wish to view in the browse list: Scheduled, Past Due, Rescheduled, Completed, or Canceled.



### Filter Appointments by Type

You can separate appointments that will appear in the browse list by selecting one or more appointment types.

To filter appointments by type...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

- Select the appointment type you wish to view in the Filter Appointments by Appointment Type list.



### Add a Single Appointment

If you need to schedule a client appointment that will not occur regularly or will occur only one time, use the Single appointment option. This is the default option.

To schedule a single appointment...

- Open a client-centered module (Client, Surveillance, or Patient Management).
- Open the **C**lient menu and select **A**ppointments, or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

- Click the **N**ew button.

This displays the Add New Appointment(s) dialog box.

4. Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.

5. Select the location at your facility where the appointment will actually take place from the Location list. If the location is not on the current list, you can type in the location name to add it to the list of available options.

6. Select the staff member who will actually perform the procedure required by the appointment from the Worker Assigned list.

*Workers cannot be added at the time an appointment is created; they must have been previously defined in the Daily Program Operations module.*

7. Enter or select the appointment date in Date box.
8. Enter or select the appointment time in Time box. Be sure to specify either am or pm.
9. Click the **OK** button.

## Add a Recurring Appointment

In many cases, a client will need to return repeatedly for the same type of appointment. TIMS has a Repeat Appointment feature that automates the process of creating repeating client appointments.

To create a repeating appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments.

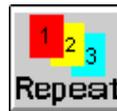


If no client is currently in focus, the Change Focus window will open, allowing you to select one.

3. Click the **N**ew button.

This displays the Add New Appointment(s) dialog box.

4. Click the **R**epeat button.



5. Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.

6. Select the location at your facility where the appointment will actually take place from the Location list. If the location is not on the current list, you can type in the location name to add it to the list of available options.

7. Select the staff member who will actually perform the procedure required by the appointment from the Worker Assigned list.

*Workers cannot be added at the time an appointment is created; they must have been previously defined in the Daily Program Operations module.*

8. Enter or select the appointment date in Date box.
9. Enter or select the appointment time in Time box. Be sure to specify either am or pm.

10. Select how often you want the appointments to occur from the Repeat Cycle group.

The image shows a dialog box titled "Repeat Cycle". It contains two radio buttons: "Daily/Weekly" and "Monthly". The "Daily/Weekly" radio button is selected.

- Select **Daily/Weekly** for appointments that should occur more than once a month.
- Select **Monthly** for appointment that should occur on a monthly basis.

11. For Daily/Weekly appointments:

The image shows a dialog box titled "Daily/Weekly". It has a section "On what day(s):" with a list box containing the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Below this are two spin boxes: "Every 1 weeks" and "Repeat 1 times".

- Select the day(s) of the week you want the appointment to occur in the **On what day(s)** list. You can select more than one day.
- Enter or select how frequently you want the appointment to occur in the **Every \_\_\_ weeks** box.
- Enter or select the number of cycles in the **Repeat \_\_\_ times** box.

12. For Monthly appointments:

The image shows a dialog box titled "Monthly". It has a section "Which week:" with a dropdown menu set to "1st". Below this is a "Day of:" dropdown menu set to "Sunday". There is a checkbox for "Specific date" with a date spinner. At the bottom are two spin boxes: "Every 1 months" and "Repeat 1 times".

- If you want the appointment to occur on a specific day and week each month (for example, every third Thursday of the month), select **Which week**, then select a week and day of the week.
- If you want the appointment to occur on a specific date each month, select **Specific date** and enter or select the date.
- For all monthly appointments, enter or select how frequently you want the appointment to occur in the **Every \_\_\_ months** box.
- Enter or select the number of times the appointment occurs in the **Repeat \_\_\_ times** box.

13. Click the **OK** button.

## Edit a Client Appointment

Some features of a client appointment may be changed if necessary. However, other appointment management functions (such as Reschedule, Cancel, etc.) should be used where appropriate. The Edit function enables you to change the appointment location, worker, and time. Appointment type and date cannot be changed with the Edit function, nor can you change a single appointment to a recurring appoint, or a recurring appointment to single appointment.

To edit a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the appointment you want to edit from the Appointments list and click the **E**dit button.

*You cannot edit a completed appointment.*

4. Make the necessary changes to the appointment.

*Not all appointment details can be changed once they have been entered. If you cannot make the necessary changes to an appointment, you may have to delete the current appointment and create a new one.*

5. Click the **O**K button.
6. Click the **C**lose button.

## Reschedule a Client Appointment

Client appointments can be moved to a different day or time if necessary. Rescheduling appointments is preferable to canceling or deleting them, since this better reflects the client's compliance with his or her treatment regimen.

To reschedule a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the appointment to be rescheduled in the Appointments list.

Date	Time	Appointment Type	Location	Worker	Status
04/16/1998	01:15 pm	BACTERIOLOGY	EXAMINATION 1	BRAZOS, BENJA	COMPLETED
04/18/1998	01:00 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
04/21/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
04/21/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	RESCHEDULED
05/05/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
05/19/1998	01:30 pm	CHEST X-RAY	RADIOLOGY	BRAZOS, BENJA	SCHEDULED
06/02/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED
06/16/1998	12:00 pm	PHYSICAL EXAM	EXAMINATION 1	BRAZOS, BENJA	SCHEDULED

4. Click the **Reschedule** button.

*The New Appointment Date and/or Time dialog box appears.*



The dialog box is titled "New Appointment Date and/or Time?". It contains two input fields: "Enter Date:" with a date picker showing "03/18/1997" and "Time:" with a time picker showing "01:00" and radio buttons for "am" and "pm" (with "pm" selected). At the bottom are "OK" and "Cancel" buttons.

5. Enter or select the new date for the appointment in the **Enter Date** box.
6. Enter or select the new time for the appointment using the **Time** box. Be sure to specify am or pm.
7. Click the **OK** button.
8. Click the **Close** button.

### Cancel a Client Appointment

Occasionally a client will need to cancel an appointment. If the appointment cannot be rescheduled, you may cancel it using the Void function.

**Note:** You will not have to opportunity to confirm that you want to cancel the appointment.

To cancel a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **Client** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the appointment you want to cancel in the appointments list.
4. Click the **Void** button.

*The selected appointment is canceled.*

The screenshot shows a software interface for managing appointments. At the top, there is a search bar with three buttons: "For Date", "Today", and "All". Below this is a table with columns: Date, Time, Appointment Type, Location, Worker, and Status. The table contains two rows of data. To the right of the table is a vertical stack of buttons: "New", "Edit", "Void", "Delete", "Confirm", "Reschedule", and "Check-In". Below the table are two filter sections: "Filter Appointments by Status:" with checkboxes for "Scheduled", "Past Due", "Rescheduled", "Completed", and "Canceled"; and "Filter Appointments by Appointment Type:" with a list box containing "APPOINTMENT 1", "APPOINTMENT 2", "APPOINTMENT 3", "APPOINTMENT 4", "BACTERIOLOGY", "BLOOD TEST", and "CHEST X-RAY". A "Close" button is located at the bottom right. The date and time "8/23/2000 2:40 pm" are displayed in the bottom right corner.

Date	Time	Appointment Type	Location	Worker	Status
03/12/2000		SKIN TEST	CLINIC 1	*WORKER, DEFA	COMPLETED ✓
05/12/2000	12:00 pm	CHEST X-RAY	A/T LOCATION 1	*WORKER, DEFA	CANCELED

## Delete a Client Appointment

Client appointments should be deleted only if they were entered accidentally and are not valid for the current client. If the client needs to cancel or reschedule, use the appropriate function to ensure that an accurate appointment compliance record for the client is maintained.

To delete a client appointment...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the appointment you want to delete from the Appointments list.
4. Click the **D**elate button.

*If the selected appointment was a single appointment and not part of a recurring appointment set, click **O**K to delete the appointment.*



5. If the selected appointment was part of a recurring appointment set, you will be asked if you want to delete the entire set. Click the **Y**es button to delete the entire set, or the **N**o button to delete only the selected appointment.

*Completed appointments in the series will not be deleted.*



## Client Check In

When a client arrives for his or her appointment, they should be checked in to indicate that they have appeared for their appointment. A check indicates the client has appeared, but does not imply that they have been treated or tested.

To check in a client...

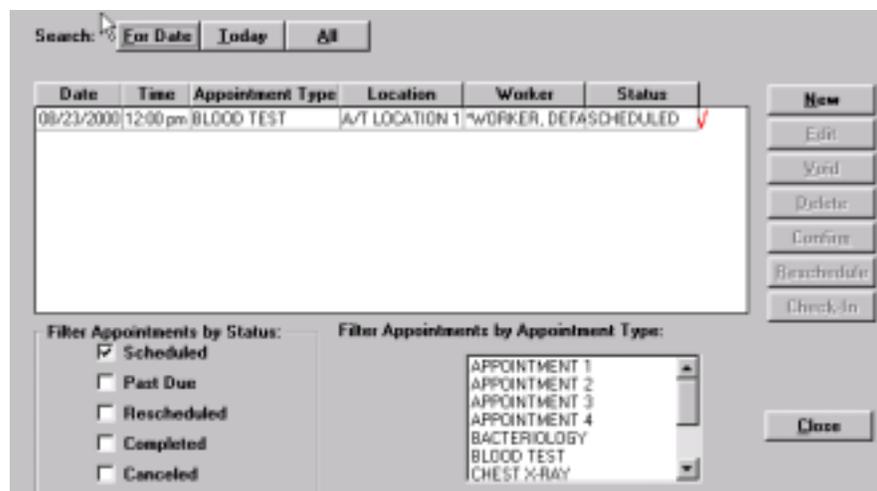
1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **A**ppointments button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the appointment the client has appeared to fulfill from the Appointments list.
4. Click the **C**heck-**I**n button.

*A check mark will appear next to the appointment indicating the patient has arrived, but the appointment status will not change until the appointment is complete.*



## Confirm / Complete a Client Appointment

Once the client has completed an appointment it must be marked **Complete**. This ensures that the client's record is up-to-date and that he or she is not considered non-adherent.

To confirm that a client's appointment has been completed...

1. Open a client-centered module (Client, Surveillance, or Patient Management).
2. Open the **C**lient menu and select **A**ppointments or click the **Appointments** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, allowing you to select one.*

3. Select the completed appointment from the Appointments list.
4. Click the **C**onfirm button.

*This will mark the appointment 'Completed'.*

Search: For Date Today All

Date	Time	Appointment Type	Location	Worker	Status
08/23/2000	12:00 pm	BLOOD TEST	A/T LOCATION 1	WORKER, DEFA	COMPLETED

Filter Appointments by Status:

- Scheduled
- Past Due
- Rescheduled
- Completed
- Canceled

Filter Appointments by Appointment Type:

- APPOINTMENT 1
- APPOINTMENT 2
- APPOINTMENT 3
- APPOINTMENT 4
- BACTERIOLOGY
- BLOOD TEST
- CHEST X-RAY

Buttons: New, Edit, Void, Delete, Confirm, Reschedule, Check-In, Close

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## Chapter 3 Patient Management Module



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### ***Overview***

The Patient Management Module is used to enter and maintain the following information for a client:

- Diagnoses
- Previous Medical History
- Test Data (Skin, Chest X-Ray, Blood, HIV, Bacteriology, and Physical Examination)
- Medications
- Contacts
- Hospitalizations
- Referrals

Most information entered in the Patient Management module can be imported into the client's Report of Verified Case of Tuberculosis (RVCT), Initial Drug Susceptibility Report, and Case Completion Report using the Data Generation option in the Surveillance module.

---

## Quick Start

### Open the Patient Management Module

There are two ways to open the Patient Management module:

- Open the **C**lient menu and select **P**atient Management.

*If the current module does not have a Client menu, choose the first menu from the left.*

Or

- Click the **Patient Management** button on the toolbar.



### Client Diagnosis

To record a diagnosis...

1. Open the **P**rofile menu and select **D**iagnosis.
2. Click the **N**ew button.
3. Enter the diagnosis information and click the **S**ave button.

### Skin Test

To record the results of a skin test...

1. Open the **T**ests menu and select **S**kin or click the **Skin Test** button on the toolbar.



2. Click the **N**ew button.
3. Enter the test information and click the **S**ave button.

### Chest X-Ray

To record the results of a chest x-ray...

1. Open the **T**ests menu and select **C**hest X-Ray or click the **Chest X-Ray** button on the toolbar.



2. Click the **N**ew button.
3. Enter the x-ray information and click the **S**ave button.

## Bacteriology

To record the bacteriological examination results for a client...

1. Open the **T**ests menu and select **B**acteriology or click the **Bacteriology** button on the toolbar.



2. Click the **N**ew button.
3. Enter the test information and click the **S**ave button.

## Medications

To enter TB-related medications for the current client...

1. Open the **T**herapy menu and select **M**edications or click the **Medications** button on the toolbar.



2. Click the **N**ew button on the medications screen and fill in the on-screen form to begin adding new drugs.
3. Follow the on-screen prompts to add additional drugs and schedule drug pick-ups.

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## Overview: Client Profile

Developing a client profile is one of the most important aspects of TIMS. A client profile keeps track of additional information about the client that is not gathered in the Client or Surveillance modules.

A profile includes:

- Contact Information
- Client Diagnoses
- Medical History
- Hospitalization Records
- Referral Information

## Contact Information

A contact is someone who is associated with a client and who may have been exposed to TB through their association with that client. Contacts must be evaluated for tuberculosis and, if necessary, converted to a client so that they can begin receiving TB-related services from your facility.

**Note:** Users with Low access privileges cannot add, edit, or delete contact information.

### Add Exposure Site Information

When available, record information about the location where a contact was exposed to the client. The exposure site should be documented as thoroughly as possible. You must have at least a site name to save the exposure site record.

To add an exposure site...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **Sites** button in the Exposure Site Information group.

*This displays the Exposure Sites dialog box.*

 The 'Exposure Sites' dialog box is shown. It has a title bar with the text 'Exposure Sites' and a close button. The main area is divided into two sections: 'Sites Identified' and 'Locating Information'.
 

Name of Site	City	Phone
AARDEMA SITE 1	LITHIA SPRINGS	(999) 999-9999

 Below the table, there are input fields for 'Site', 'Address', 'City', 'State', and 'Phone'. The 'Site' field contains 'AARDEMA SITE 1', 'Address' contains '669 SITE 1 AVE', 'City' is a dropdown menu set to 'LITHIA SPRINGS', 'State' is a dropdown menu set to 'GA', and 'Phone' contains '(999) 999-9999'. On the right side of the dialog, there are buttons for 'New', 'Edit', 'Delete', 'Save', and 'Close'.

4. Click the **New** button

*If the New button is disabled, click the selected Exposure Site in the browse list to cancel the selection.*

5. Enter a descriptive name for the site.

6. Enter as much address and phone information as possible in the appropriate fields.
7. Click the **Save** button.
8. Click the **Close** button.

### Edit an Exposure Site

If additional information about an exposure site becomes available, or existing information needs to be updated, use the Edit feature to make the changes.

To edit an exposure site...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **Sites** button in the Exposure Site Information group.
4. Select the exposure site you want to modify from the Sites Identified list and click the **Edit** button.

Sites Identified		
Name of Site	City	Phone
WNUOVZRK	BEALE AFB	(777) 555-1212

5. Make the necessary changes to the selected exposure site.
6. Click the **Save** button. To undo your changes, click the **Undo** button.
7. Click the **Close** button.

### Delete an Exposure Site

If exposure site information is no longer valid, or was originally entered erroneously, it should be removed from the client record. Use the Delete feature.

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **Sites** button in the Exposure Site Information group.
4. Select the exposure site you want to delete.
5. Click the **Delete** button.

- Click **Y**es to confirm that you want to delete the selected site.



- Click the **C**lose button.

## Add a New Contact

Enter identification, address, relationship, and other information in the Contact Information area. Contact records must have at least a first and last name.

To record information about a client contact...

- Open the **P**atient **M**anagement module.
- Open the **P**rofile menu and select **C**ontacts or click the **C**ontact button on the toolbar.



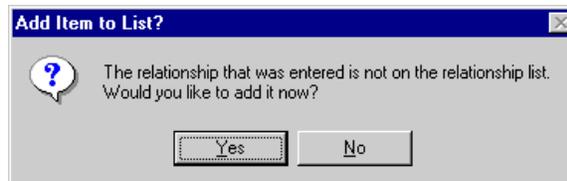
*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Click the **N**ew button.  
*If the New button is disabled, click the selected Contact in the browse list to cancel the selection.*
- Enter the contact's name and address information in the appropriate fields.

Last Name:	<input type="text"/>
First Name:	<input type="text"/>
Address:	<input type="text"/> <input type="text"/>
City:	<input type="text"/> ▼
State:	GA ▼
County:	<input type="text"/> ▼
Zip:	<input type="text"/> - <input type="text"/>

- Select the interview date from the Interview Date list if the client has been interviewed.
- Select an exposure site from the Exposure list. If the appropriate exposure site is not on the list, you can add it by clicking the **S**ites button in the Exposure Sites Information group. Also, enter the **Last Exposure Date**, which is the last date on which the contact was exposed to the potentially infectious client.  
*See Add Exposure Site Information earlier in this chapter for additional information.*
- Select the contact type from the Priority list.
  - Close indicates that the contact has had prolonged close-proximity exposure to the client.
  - Casual indicates the contact has had less intense or not as prolonged exposure to the client.

8. Select the **Not Indicated for Exam** check box if examination of Close contacts yields little or no evidence that the current client is transmitting TB (it is not necessary to test Casual contacts if Close contacts are not becoming infected). This will exclude the current contact from the Contact Report. This option is only available for Casual contacts.
9. Enter or select the Contact's date of birth in the Birthdate field.  
*This will automatically update the Age field.*
10. Select the Contact's relationship with the client from the Relationship list. If the current list does not contain the appropriate relationship, you can type a new one to add it to the list.



11. Enter the Contact's phone number in the Phone field.
12. Click the **S**ave button.
13. Click the **C**lose button.

### Edit Contact Information

If you need to modify information about a client contact, use the Edit feature.

To edit contact information...

1. Open the **Patient Management** module.
2. Open the **P**rofile menu and select **C**ontacts or click the **C**ontact button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the contact you want to edit from the Contact Information browse list and click the **E**dit button.

Contact Information				
Date Identified	Name	Relationship	Exposure Site	Priority
05/12/2000	XGFRCKRZYG_BKNBYBIHKT	UNCLE	WNIU0VZBK	CASUAL

4. Make the necessary changes to the selected contact.
5. Click the **S**ave button to record your changes. To undo your changes, click the **U**ndo button.
6. Click the **C**lose button.

## Delete Contact Information

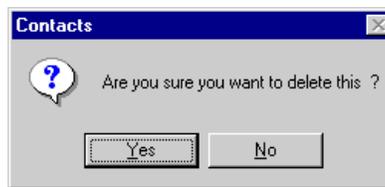
To remove a contact from the TIMS database...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the Contact you want to remove from the Client Information browse list and click the **Delete** button.
4. Click the **Yes** button to confirm that you want to delete the selected Contact. Click the **No** button to abandon the delete operation.



5. Click the **Close** button.

## Documenting Contact Interviews

Contacts should be interviewed whenever possible to confirm their association with the client and evaluate their level of exposure to tuberculosis. If necessary, the contact can be converted to a client and begin receiving TB-related services from your facility. You must have both the interview date and interviewer name to save the interview record.

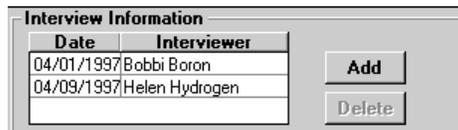
To add a contact interview record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **Add** button in the Interview Information group.



4. Enter or select the interview date, if necessary.

5. Select the name of the person who conducted the interview from the Interviewer list.
6. Click the **OK** button.

To delete a contact interview record...

1. Select the interview record in the Interview Information group.
2. Click the **Delete** button.

### Converting a Contact to a Client

If the results of a contact interview or other factors indicate that a contact needs to be evaluated for tuberculosis, they should be converted to a client. **Once a contact has been converted to a client, their information can no longer be modified in the Contacts window.**

To convert a contact to a client...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.

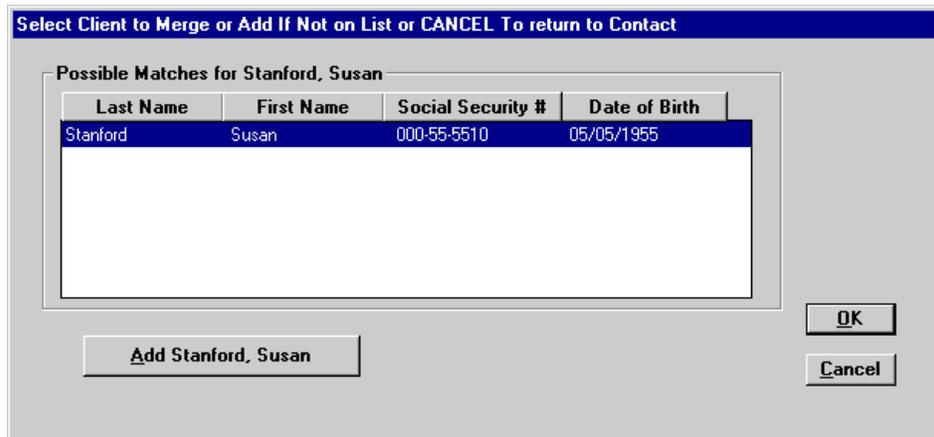


*If there is no current client, the Change Focus window will open, enabling you to select one.*

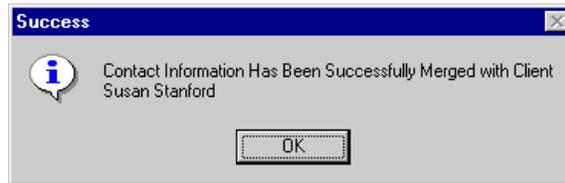
3. Select the contact you want to convert in the Contact Information list.
4. Click the **Convert** button.
5. Click **Yes** to allow TIMS to search for a match between the contact and an existing client.
6. Do one of the following, depending on the results of the search:
  - If there was no match, click the **OK** button to begin the conversion process.

Or

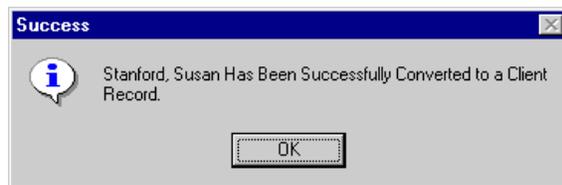
- If the search produces possible matches, evaluate the displayed clients to determine if they are the same person.



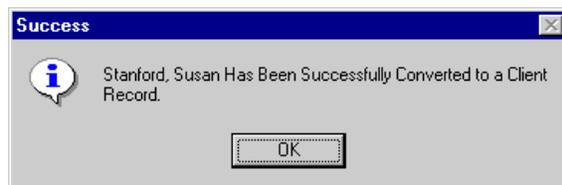
- If the contact is already listed in TIMS as a client, select the client listing and click the **OK** button. This will merge the contact information with the selected client record.



- If none of the possible matches is the same person as the contact, click the **Add** button.



7. If you are converting the contact, TIMS will inform you if the conversion was successful. Click the **OK** button to close the dialog box.



*Notice that the contact now has a client icon in the record header.*



## Merging Contact Information with an Existing Client

You may occasionally find that a person entered as a contact has also been entered as a client. TIMS allows you to combine the information entered in a contact record with the information in a client record.

To merge a contact with a client...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the contact you want to merge from the Contact Information list.
4. Click the **Merge** button.

Current Client: CONTACT, JANE

Interview Information		Exposure Site Information	
Date	Interviewer	Sites Identified:	

Date Identified	Name	Relationship	Exposure Site	Priority
05/25/2000	BRADY, PETER			CASUAL

Identified: 05/25/2000 Interview Date: Interview: Exposure Site: Last Exposure Date: 00/00/0000 Priority: CASUAL

Last Name: BRADY First Name: PETER Address: Relationship: Birthdate: 00/00/0000 Age: 5/25/2000 2:24 pm

*The system will then perform a search for all possible matches.*

5. Select a client to merge from the Choose Client to Merge window by clicking on that client.

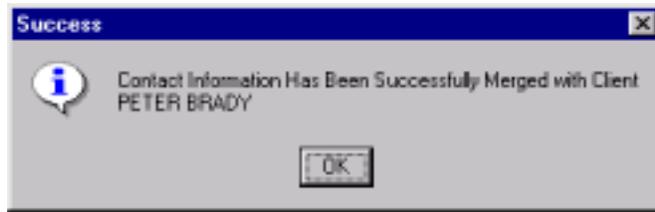
Choose Client to Merge

Possible Matches for BRADY, PETER

Last Name	First Name	DOB	State Case #	City/Cnty Case #
BRADY	JAN	01/01/1966		
BRADY	MARSHA	06/15/1959		
BRADY	MIKE	05/15/1940		
BRADY	PETER	01/01/1960		

OK Cancel

6. Click **OK**.
7. Click the **OK** button on the Success window.



## **Client Diagnosis**

A diagnosis is used to classify a client's TB status. Therapy and services provided to a client are based on the current diagnosis. Many functions in the Patient Management module (medications and tests) are not available for clients that do not have at least one diagnosis.

Although a diagnosis is entered in the Patient Management module, TIMS will not report the client's TB status (transmit the data to CDC) unless the RVCT form has been created in the Surveillance module. An RVCT should be created for clients with Case or Suspect diagnoses.

A client can have multiple diagnoses, but only one per day. The most recent diagnosis is the current diagnosis. The 'Suspect' diagnosis classification is only temporary and must be changed within 90 days.

The diagnoses are:

- Not Infected
- Infected
- Case
- Old TB
- Suspect
- Not TB
- Rule Out Infection

TIMS will allow provisional “Screened” and “Contact” status. However, only HIV and Skin tests can be documented for these clients until a diagnosis is added.

**Note:** Users with Low access privileges cannot add, edit, or delete client diagnoses.

### **Add a Client Diagnosis**

To enter a client diagnosis for the current client...

1. Open the **Patient Management** module.
2. Open the **P**rofile menu and select **D**iagnosis.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Click the **N**ew button.

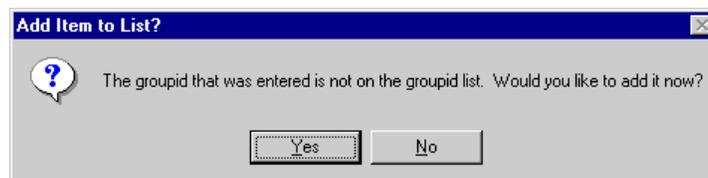
If the **New** button is disabled, click the selected **Diagnosis** in the browse list to cancel the selection.

Date	Diagnosis	Diagnostician	Screened	Contact
11/11/1999	Suspect	~WORKER, DEFAULT	Yes	Yes
07/28/2000	Case	~WORKER, DEFAULT	Yes	

4. Enter or select the diagnosis date in the Date field.  
*The current date is the system default.*
5. Select the person who made the diagnosis from the Diagnostician list.
6. Select the **Client is being screened** check box, if the client is being screened individually as part of an organized tuberculosis screening program, or for other purposes (except for being a contact to TB).  
*This will activate the Format and Activity/Group lists.*
7. Select the appropriate testing format (administrative, individual, project, referral).  
*Refer to Basic Instructions for the Aggregate Reports for Tuberculosis Program Evaluation: Targeted Testing and Treatment for Latent Tuberculosis Infection (Appendix PEI-Program Evaluation Forms) for definitions and instructions.*
8. Do one of the following:
  - If you selected Client is being screened, choose the name of the organization, group, or program sponsoring the TB screening for Activity/Group.

Or

  - If the screening organization is not in the list, type in the name and click **Y**es to confirm that you want to add it.



9. Click **OK** to clear the confirmation dialog box.

- 10.** If the client is known to have been in contact with active tuberculosis, select the **Client has been in contact with active TB** check box.

*This will be checked automatically if the client is a converted or merged contact.*

- 11.** Select the appropriate diagnosis from the Diagnosis group.

- 12.** Enter the ATS (American Thoracic Society) Classification Number code for the diagnosis.

*If the ATS code number you enter does not match the diagnosis you selected, you will be asked to reconsider your selection.*

Number	Summary	Description
“0”	No TB exposure Not infected	No history of exposure. Negative reaction to tuberculin skin test.
“1”	TB exposure No evidence of infection	History of tuberculosis exposure. Negative reaction to tuberculin skin test.
“2”	TB infection No disease	Positive reaction to tuberculin skin test. Negative bacteriologic studies (if done). No clinical or radiographic evidence of TB.
“3”	Current TB disease	M. tuberculosis culture (if done) or Positive reaction to tuberculin skin test and clinical or radiographic evidence of current disease. Corresponds with Case.
“4”	Previous TB disease	History of TB episode(s) or Abnormal but stable radiographic findings. Positive reaction to the tuberculin skin test. Negative bacteriologic studies (if done) and no clinical or radiographic evidence of current disease.
“5”	TB suspected	Diagnosis pending

- 13.** Select the appropriate response to the question: Has client had curative therapy in the past?

- 14.** When available, select a location from the Major Site of Disease option buttons and the actual disease site from the drop-down list.

Major Site of Disease:  
 PLEURAL  
 Pulmonary     Extrapulmonary     Both

- 15.** Click the **S**ave button.

- 16.** Click the **C**lose button.

### Edit a Client Diagnosis

You can change the details of a client diagnosis using the Edit feature. Changes are limited to supporting information; you cannot change the actual diagnosis. If the diagnosis changes, you must enter a new diagnosis.

To change diagnosis information...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Diagnosis**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the diagnosis you want to edit from the Client Diagnosis browse list and click the **Edit** button.

Date	Diagnosis	Diagnostician	ScreenedContact	
03/02/1996	Not Infected	Bobbi Boron		
08/08/1996	Suspect	Default Worker	Yes	
11/05/1996	Infected	Dr. Henry Helium		
04/25/1997	Case	Dr. Helen Hydrogen	Yes	Yes

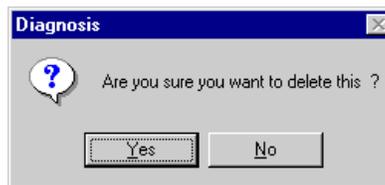
4. Make the necessary changes to the details of the diagnosis.  
**Remember:** You cannot change the actual diagnosis.
5. Click the **Save** button to record your changes. Click the **Undo** button to cancel your changes.
6. Click the **Close** button.

### Delete a Client Diagnosis

You can remove a client diagnosis using the delete function. Since a diagnosis is part of a client's permanent record, you should only delete them when absolutely necessary.

To delete a client diagnosis...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Diagnosis**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the diagnosis you want to delete from the Client Diagnosis list.
4. Click the **Delete** button.
5. Click **Yes** to confirm that you want to delete the diagnosis or **No** to cancel.



6. Click the **Close** button.

## Client History

A comprehensive tuberculosis history can help determine the proper services required to treat the client's current condition. The History function keeps track of previous TB infections, related diseases, and other information relevant to treating tuberculosis.

Information entered in the Client History screens can also be imported and used as surveillance data. See the *Generate Data* section in the Surveillance Module chapter for additional information.

**Note:** Users with Low access privileges cannot add or edit client history records.

### Record Client History

To enter a client history...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **History**.

*If there is no currently selected client, the Change Focus window will open, enabling you to select one.*

The screenshot shows a software window titled 'Client Profile Therapy Tests Reports Window Help'. The 'Current Client' is 'AARDEMA, ALEXANDER'. The 'History of Present Illness' field is empty. The 'Past Medical History' section contains the following items:

- Previous Diagnosis of TB**: Mo./Yr.: 12/1990. More than one Episode: Yes (selected), Unk.
- Previous Skin Test for TB**: Results: + (selected), -, Unk. 12 mm Mo./Yr.: 12/1990.
- BCG Vaccination**: Yes (selected), No, Unk.
- Prior HIV Test**: Results: +, - (selected), Unk. Mo./Yr.: 12/1990.
- Diabetes**: Yes, No, Unk (selected).
- Hospitalized in Last Year**: Yes, No, Unk (selected).
- Current Tobacco Use**: Amount: 23 Cig/Day.
- Silicosis**: Yes, No, Unk (selected).

The 'Risk factors for TB Infection/Disease' dropdown menu is currently empty.

3. Enter a brief text-based description of the client's current condition in the History of Present Illness field. The field can hold up to 240 characters.
4. Select the appropriate option button to answer the medical questions on the page. The options are Yes, No, and Unk (Unknown). When a **Yes** option is selected, space for additional information may be displayed. Complete the information as thoroughly as possible.
  - **Previous Diagnosis of TB** - Enter or select the month and year of the most recent prior tuberculosis episode. Select **Yes** or **Unknown** for multiple previous episodes.
  - **Previous Skin Test for TB** - Enter or select the results, induration, and month and year of a previous tuberculin skin test

- **BCG Vaccination** - Enter or select the date of the vaccination.
- **Previous HIV Test** - Enter or select the results and date of the prior HIV test.
- **Diabetes** - Indicate if the client is currently using insulin.
- **Hospitalized in Last Year** - Enter the hospital where the client was treated and the reason for the hospitalization.
- **Current Tobacco Use** - Enter the number of cigarettes the client smokes in a given time period. Use the drop-down list to describe the number of cigarettes smoked.
- **Silicosis** - Indicate if the client has ever been diagnosed with silicosis.
- **Risk Factors for TB Infection/Disease** – Indicate risk factor: medical, population, medical and population or none.

*Refer to Basic Instructions for the Aggregate Reports for Tuberculosis Program Evaluation: Targeted Testing and Treatment for Latent Tuberculosis Infection (Appendix PEI-Program Evaluation Forms) for definitions and instructions.*

5. Click the **Screen2** button.
6. Complete the additional history medical information. Valid responses are **Yes**, **No**, and **Unk** (Unknown).
7. Indicate if the client is currently taking any medication that could interfere with TB medications. If the answer is **Yes**, enter details in the space provided.
8. Record any known allergic reaction to drugs in the Medications Allergies field.
9. Click the **Screen3** button.
10. Respond appropriately in the Homeless Within Past Year group.
11. Respond appropriately in the Resident of Correctional Facility at Time of Diagnosis group. If the answer is **Yes**, select the type of facility.
12. Respond appropriately in the Resident of Long-Term Care Facility at Time of Diagnosis group. If the answer is **Yes**, select the type of facility.
13. Indicate the client's Injected/Non-Injected Drug and Alcohol use.
14. Indicate the client's Occupation(s). If the answer is Other, enter the actual occupation in the space provided.
15. Click the **Save** button. This will save information from all three Client History screens.
16. Click the **Close** button.

### **Edit Client History**

You can make changes to the client history from within the Patient Management module at any time. Changes made in client history will be automatically updated in the Surveillance module if that data resulted from a Generate Data operation.

To make changes to client history...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **History**.
3. Modify the History screens as necessary.
4. Click the **Save** button.
5. Click the **Close** button.

---

## **Hospital or Facility Chronological Summary**

The Hospital/Facility Chronology Summary allows you to keep track of medical treatment the client received outside your facility. While the information is kept for information purposes only, the additional data may help resolve problems regarding the clients' medical history, medications administered recently, and other health-related information.

Hospital/Facility records must have an admission date earlier than or on the current date.

**Note:** Users with Low access privileges cannot add, edit, or delete Hospital/Facility records.

### **Add a Hospital/Facility Chronology Summary**

To enter a Hospital/Facility Chronology Summary...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Hospital/Facility**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Click the **New** button.
4. Enter as much information about the facility and the client's relationship with the facility as possible. Also, indicate if the client received TB medication while being treated at the facility.
5. If medication was provided at the hospital upon discharge a check must be entered in the box next to **TB Medication Was Provided**.

The screenshot shows a form with the following fields and controls:

- Chart Number:** A text input field.
- Admission Date:** A date picker showing 05/15/1997.
- Discharge Date:** A date picker showing 00/00/0000.
- Hospital/Facility Name:** A text input field.
- Type:** A dropdown menu.
- Phone Number:** A text input field with a format of ( ) - .
- TB Medication Was Provided:** A checkbox.
- Comments:** A large text area for notes.

6. Click the **Save** button.
7. Click the **Close** button.

## Edit a Hospital/Facility Chronology Summary

To change a Hospital/Facility Chronology Summary...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Hospital/Facility**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the record you want to change from the Hospital/Facility Chronology Summary list and click the **Edit** button.

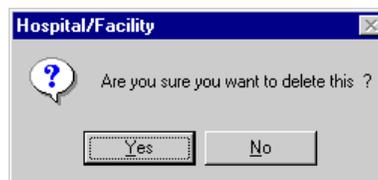
Admitted	Type	Name	Discharged	TB Meds
04/14/1997	Private Hospital	Northside	00/00/0000	Yes
04/14/1997	Not for Profit	Kennestone Hospital	04/14/1997	Yes

4. Make the necessary changes to the selected Hospital/Facility Chronology Summary record.
5. Click the **Save** button.
6. Click the **Close** button.

## Delete a Hospital/Facility Chronology Summary

To delete a Hospital/Facility Chronology Summary...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Hospital/Facility**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the record you want to delete from the Hospital/Facility Chronology Summary list and click the **Delete** button.
4. Click the **Yes** button to confirm that you want to delete the summary. Click the **No** button to cancel the delete operation.



5. Click the **Close** button.

## Client Referrals

A referral is the person or organization that sent a client to your facility. Referral information includes the name of the source, the reason for referral, the date referred, and referral contact information. A referral record must contain a referral source, referral date, and referral reason. There are no restrictions on the number of referrals associated with a client.

Note: Users with Low access privileges cannot add, edit, or delete client referral records.

### Add a Referral Record

To enter a referral record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Referrals**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Click the **New** button.

The screenshot shows a form titled 'Add a Referral Record'. It contains the following fields:

- Referral Date:** A text box containing '00/00/0000' with a calendar icon.
- Referral Reason:** A dropdown menu.
- Referral Source:** A text box.
- Name:** A text box.
- Address:** A text box.
- City:** A text box.
- State:** A dropdown menu.
- Zip:** A text box with a hyphen separator.
- Phone:** A text box with a hyphen separator.

4. Enter as much information as possible about the client referral. There must be a date, reason, and source to record the referral.
  - **Referral Reason** describes purpose for sending the client to your facility. This might include a suspicious cough, suspected exposure to infectious persons, etc.
  - **Referral Source** is the person or organization that sent the client to your facility. Organizations might include hospitals, schools, employers, etc.
5. Click the **Save** button.
6. Click the **Close** button.

### Edit a Referral Record

To modify a client referral record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Referrals**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the referral you want to modify from the browse list and click the **E**dit button.

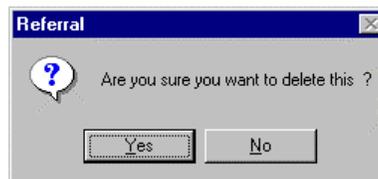
Date	Reason	Source
03/26/1997	Suspicious Cough	Acme Machine Tools Inc
04/28/1997	possible exposure to tb	Attapulgus Elk Lodge 1024

4. Make the necessary changes to the selected referral record.
5. Click the **S**ave button.
6. Click the **C**lose button.

### Delete a Referral Record

To delete a client referral record...

1. Open the **P**atient **M**anagement module.
2. Open the **P**rofile menu and select **R**eferrals.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the referral record you want to delete from the browse list and click the **D**elete button.
4. Click the **Y**es button to delete the record or click the **N**o button to cancel.



5. Click the **C**lose button.

## Overview: Client Therapy

TIMS allows users to document the following drug information for clients:

- Pickups and delivery of drugs
- Starting and stopping of drugs
- Method of delivery
- Dosages and frequencies
- Types of therapy

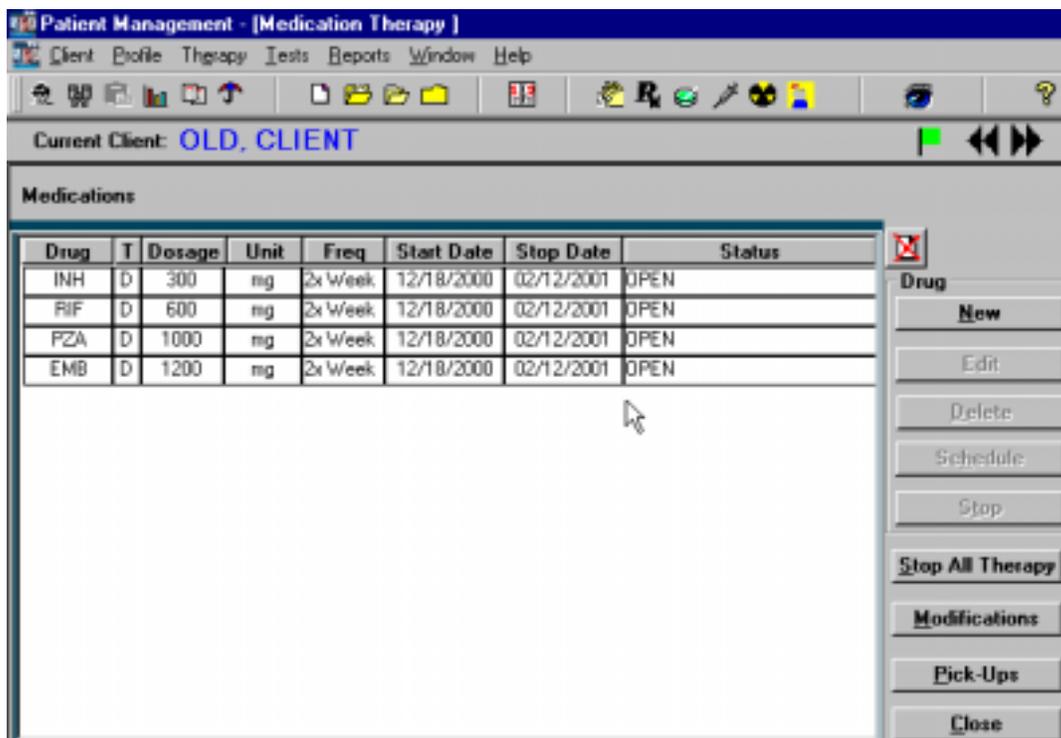
You can also record and review medications information using the Therapy menu in the Patient Management module.

- Medications
- View Pick-Up / Delivery
- Drug-O-Gram (not currently available)

## Medications

Medications records the therapeutic regimen prescribed to treat a client's tuberculosis infection or disease. There are two types of therapy: Curative and Preventive. The diagnosis will determine which therapeutic regimen to initiate and which drug(s) will be administered by the health care provider.

Pictured below is a view of the main Medication Therapy window. This window provides a list of all prescribed drugs and their current statuses. This window also allows the worker to add a new drug, edit or delete existing drugs, stop individual drugs or all therapy, view modifications to the therapeutic regimen, and schedule or reschedule drug pick-ups.



## Add New Drugs

Use the following steps to add a drug to the Medications regimen.

**Note:** TIMS will not allow you to enter a drug unless a diagnosis has been entered for the current client.

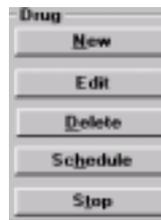
To enter drugs...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

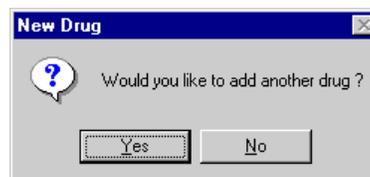
3. Click the **N**ew button in the Drug group.



4. Enter the necessary data in the designated fields of the New Drug dialog box.

**Note:** TIMS will automatically calculate an expected stop date of 8, 24, or 36 weeks after the start date. After entering the start date, right-click on the expected stop date field and select the appropriate duration.

5. Click the **O**K button, or **C**ancel to return to the main Medication Therapy window.

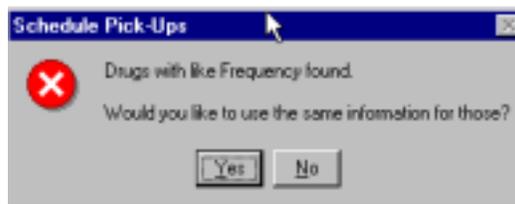


6. Click the **Y**es button to add new drugs. Repeat this procedure until all drugs have been added.
7. When all drugs are entered, click **N**o on the New Drug dialog box.

- Use the Schedule Drug Pick-Ups dialog box to schedule drug pick-up appointments for the client.

*The following example is for Directly Observed Therapy. Select a weekly or monthly repeat cycle if therapy is self-administered.*

- Click the **OK** button.
- If there are additional drugs that are on similar or identical schedules, TIMS will ask if you want to use the same pick-up schedule information for those drugs. Click the **Yes** button if appropriate.



## Edit a Drug

To edit a drug...

- Open the **Patient Management** module.
- Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Select the drug you want to edit, and click the **Edit** button.

*The Method of Delivery field may not be edited. If you need to change the method of delivery, you should delete the drug and re-enter it.*

- Make the appropriate changes and click the **OK** button.

*If you make changes to the start or stop date fields, you will be asked to reschedule the pick-ups for that drug.*

## Delete a Drug

To delete a drug...

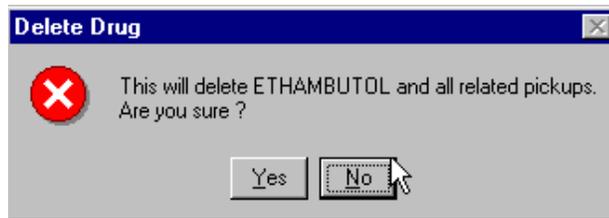
1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the drug you would like to delete, and click the **Delete** button.

*The Delete Drug message box appears.*



4. Click **Yes** to confirm that you want to delete the drug and all related pickups.

## Edit Pick-Ups (Schedule)

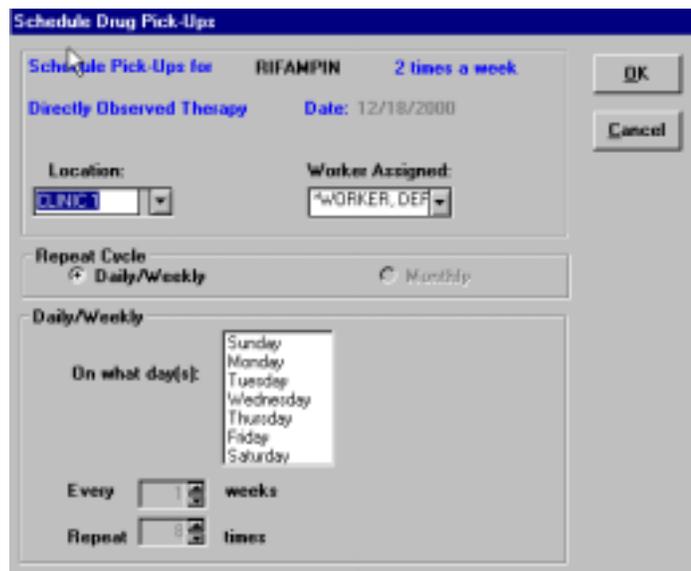
To change the location, worker, or scheduled appointments for drug pick-ups...

1. Open the Patient Management module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the drug whose pick-up schedule you would like to edit, and click the **Schedule** button.



4. Make desired changes to location, worker, or pick-up appointment schedule.
5. Click the **OK** button.

## Stop a Drug

If necessary, TIMS will allow you to permanently discontinue or reschedule medications.

**Note:** You cannot stop a medication if there are past-due pick-ups. Please resolve all outstanding drug pick-up issues before attempting to stop a medication.

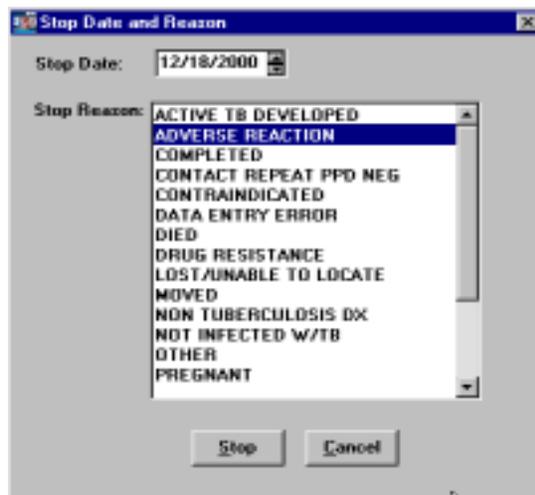
To stop a *single* drug...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



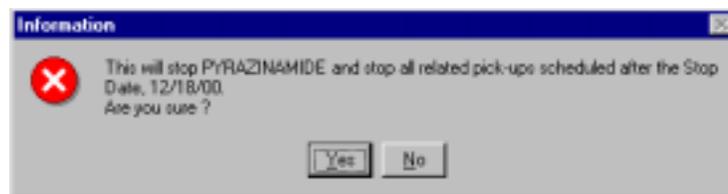
*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the drug you would like to stop and click the **Stop** button.
4. Enter the Stop Date and select the reason for stopping the medication from the list of options that appears.



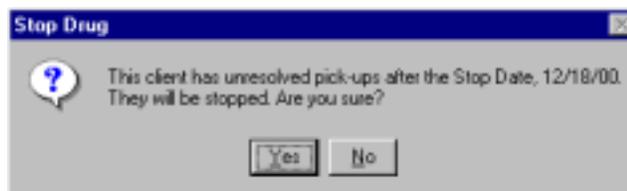
5. Click **Stop**.

*The Information dialog box appears.*



6. Click **Yes** to confirm that you want to stop the medication and all related pick-ups.

*If there are unresolved pick-ups after the stop date, the Stop Drug dialog box appears.*



7. Click **Yes** to confirm that you want to stop pick-up appointments scheduled for after the stop date.

To stop *all* drugs...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



3. Click the **Stop All Therapy** button.
4. Enter the Stop Date and select a reason for stopping all medication from the list of options that appears below.



5. Click **OK**.

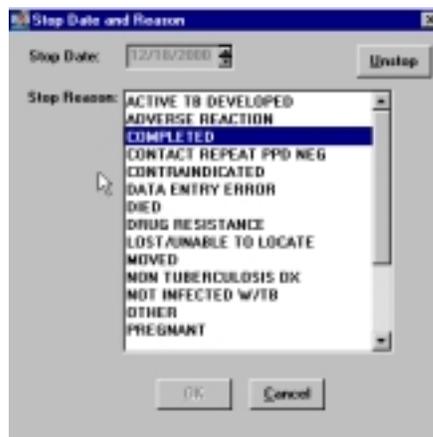
### Modify a Stop

To change the stop date or reason for a drug that was previously stopped...

1. Select a drug
2. Click the **Modify Stop** button.



3. To change the stop reason, select another reason from the list and click **OK**. To remove the stop (reopen the medication), click on the **Unstop** button and then enter the Unstop Date. Click **OK**.



## Sort the Medications Window

To sort the order in which drugs are displayed...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medication** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Right-click on one of the medication lists.
4. Select a sort criterion from the menu that appears.

Or

- Click on the gray column heading bar of the column on which you would like to sort.

Medications							
Drug	T	Dosage	Unit	Freq	Start Date	Stop Date	Status
INH		Sort By Drug		Week	05/12/2000	10/12/2000	OPEN
PZA		Sort By Start Date		Week	05/12/2000	10/24/2000	OPEN
RIF		Sort By Status		Week	05/12/2000	10/18/2000	OPEN

## View a Drug Modification Summary

You can view a list of medications entered, including any modifications that have been made, by clicking the **Modifications** button.

Drug Modifications				
Date	Drug	Modification	Field Modified	UserID
01/11/2000	INH	Added To Plan		SYSADMIN
01/11/2000	RIF	Added To Plan		SYSADMIN
01/11/2000	PZA	Added To Plan		SYSADMIN
01/11/2000	EMB	Added To Plan		SYSADMIN
01/11/2000	STR	Added To Plan		SYSADMIN
01/11/2000	RIF	Stopped in Plan		SYSADMIN

Close

You can also change the order in which modifications are displayed.

To change the sort order of the drug modifications list...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.

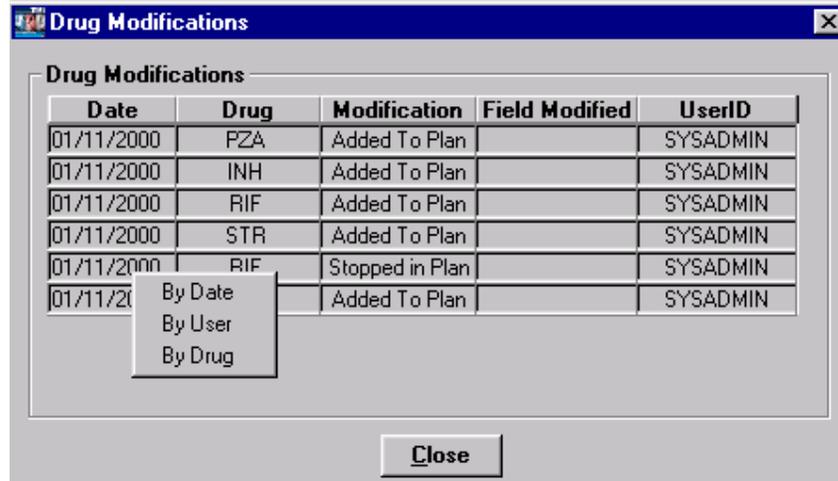


*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the browse list with the right mouse button.
4. Select the desired sort order from the menu that appears.

Or

- Click on the gray column heading bar of the column on which you would like to sort.



### Confirm Drug Pick-Ups

TIMS enables the user to keep track of the client's adherence to medicinal therapy. The Drug Pick-Ups window permits you to record the client's compliance with his or her scheduled drug pick-up appointments.

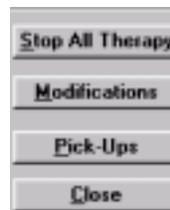
To record compliance with a drug pick-up appointment...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **Pick-Ups** button.



4. Select the drug(s) you want to process from the list. You may confirm more than one pick-up at a time (see *Confirm Multiple Pick-Ups* later in this chapter for details).

Date	Drug	T	Status	Worker	Location	Divrd	Leftover
03/27/2000	RIF		DELIVERED	*WORKER, DEFAULT	CLINIC 1	1	0
03/29/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/03/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/05/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/10/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/12/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/17/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/19/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/24/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/26/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
05/01/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		

- Click the **C**onfirm button.
- Complete the Confirm Pick-ups dialog box with the appropriate information.

Confirm a Pick-Up	
Drug:	RIFAMPIN
Status:	PAST DUE
Worker:	*WORKER, DEFAULT
Location:	CLINIC 1
Doses Delivered:	
Delivered On:	03/29/2000

*\*Warning: All changes made affect all pick-ups selected.*

- Click the **O**K button.

### Confirm Multiple Drug Pick-Ups

Use the multi-select feature to change the status of more than one drug pick-up at the same time. This feature will save time by reducing the number of times you must repeat the same task. However, you can only change status, worker and location values when more than one pick-up appointment is selected; all other values are set to their defaults.

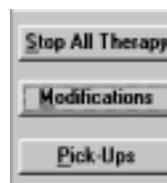
To select a range of pick-up appointments...

- Open the **P**atient Management module.
- Open the **T**herapy menu and select **M**edications or click the **M**edications button on the toolbar.



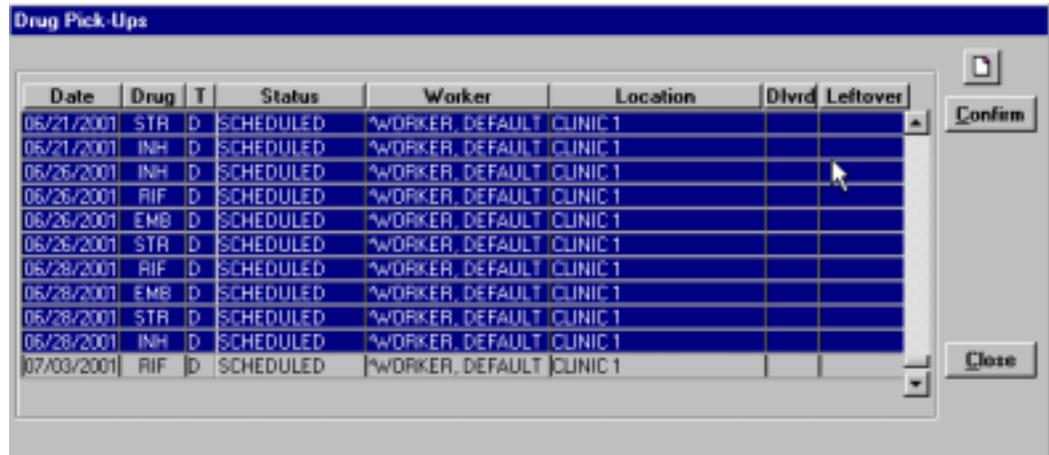
*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Click the **P**ick-Ups button.



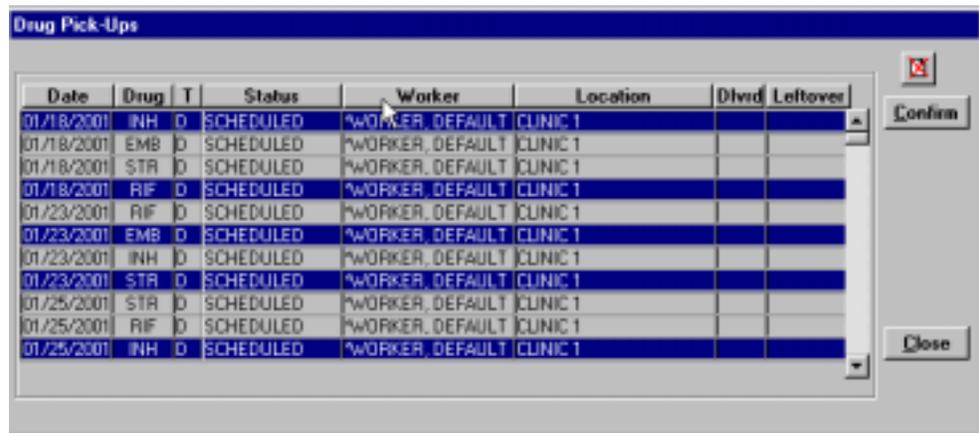
4. To select multiple *contiguous* pick-up appointments...

Select the first pick-up appointment by clicking on it with the mouse, then hold down the **Shift** key and select the last pick-up appointment you want to confirm. All pick-up appointments between the first and last ones selected will be highlighted.



To select multiple *non-contiguous* pick-up appointments...

While holding down the **Ctrl** key, select the individual pick-up appointments you want to confirm by clicking on each one with the mouse.



5. Click the **Confirm** button.

6. Enter the appropriate information in the Confirm Pick-Ups window.

Confirm a Pick-Up

Drug:

Status:

Worker:

Location:

Doses Delivered:

Delivered On:

OK

Cancel

*\*Warning: All changes made affect all pick-ups selected*

7. Click the **OK** button. All medications will be confirmed using the information provided.
8. Click **Close** to close the Confirm Pick-Ups window.

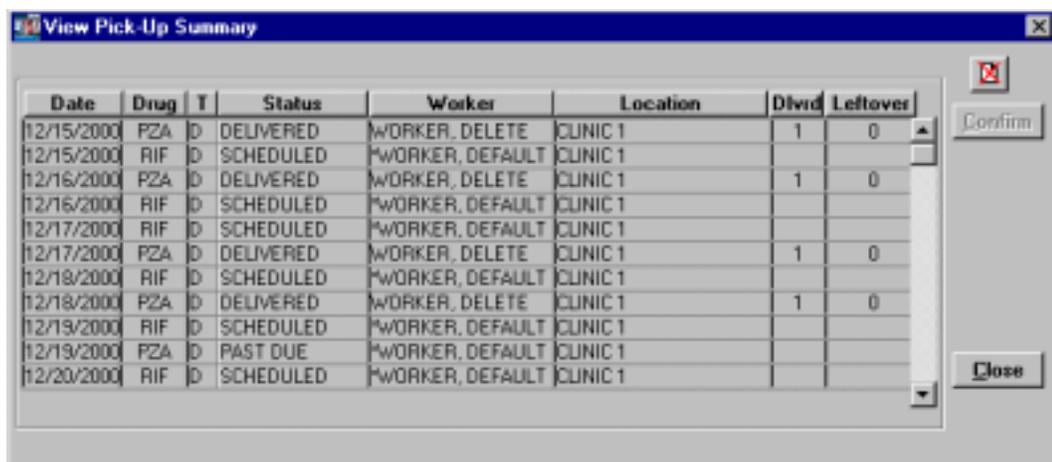
### View Pick-Up Summary

TIMS provides a **Drug Pick-Up** summary screen. This allows you to view the client's pickup record, but does not allow you to edit.

To view the pick-up summary window...

1. Open the **Therapy** menu.
2. Select **View Pick-Up/Delivery**.
3. Click **Close** to close the Drug Pick-Up Summary screen.

*The Drug Pick-Up Summary window appears.*



The screenshot shows a window titled "View Pick-Up Summary" with a table of medication pickup records. The table has columns for Date, Drug, T, Status, Worker, Location, Divid, and Leftover. The records are as follows:

Date	Drug	T	Status	Worker	Location	Divid	Leftover
12/15/2000	PZA	D	DELIVERED	WORKER, DELETE	CLINIC 1	1	0
12/15/2000	RIF	D	SCHEDULED	WORKER, DEFAULT	CLINIC 1		
12/16/2000	PZA	D	DELIVERED	WORKER, DELETE	CLINIC 1	1	0
12/16/2000	RIF	D	SCHEDULED	WORKER, DEFAULT	CLINIC 1		
12/17/2000	RIF	D	SCHEDULED	WORKER, DEFAULT	CLINIC 1		
12/17/2000	PZA	D	DELIVERED	WORKER, DELETE	CLINIC 1	1	0
12/18/2000	RIF	D	SCHEDULED	WORKER, DEFAULT	CLINIC 1		
12/18/2000	PZA	D	DELIVERED	WORKER, DELETE	CLINIC 1	1	0
12/19/2000	RIF	D	SCHEDULED	WORKER, DEFAULT	CLINIC 1		
12/19/2000	PZA	D	PAST DUE	WORKER, DEFAULT	CLINIC 1		
12/20/2000	RIF	D	SCHEDULED	WORKER, DEFAULT	CLINIC 1		

The window also features a "Confirm" button and a "Close" button on the right side.

## **Overview: Client Tests**

TIMS provides the ability to record the results of the tests associated with tuberculosis. You can view and record the results using the Tests menu in the Patient Management module.

**Note:** Users with Low access privileges cannot add, edit, or delete client tests.

- Bacteriology Test
- Blood Test
- Chest X-Ray
- HIV
- Physical Exam
- Skin
- Test Summary (not a test)

---

## **Bacteriological and Susceptibility**

The Bacteriology and Susceptibility option is used to enter and maintain information collected during the testing of a client's specimen. The Bacteriology window is used to enter smear results and culture growth data for the specimen. These results can be used to help determine the medication regimen that will provide the most effective therapy for the client.

The cultures gathered for bacteriological testing can also be used to perform susceptibility testing, and in many cases, the same laboratory can perform both tests. These two test types are so closely associated that susceptibility testing is available through the bacteriological test window.

The bacteriology test record contains the date of collection, a specimen ID, the specimen type, the anatomic site of the specimen, the results of the smear, culture growth results, species ID, and the date identified. The specimen ID, laboratory, and collection date form the basis of a susceptibility test record.

**Note:** Users with Low access privileges cannot add, edit, or delete bacteriology or susceptibility tests.

### **Add a Bacteriology Test Record**

To record the results of a bacteriology test...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **B**acteriology button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **N**ew button.

*If the New button is disabled, click the selected record in the browse list to cancel the selection.*

- Enter the information from the bacteriology test as completely as possible.

Date Collected: 04/28/1997	Results Smear: <input type="text"/>
Laboratory: <input type="text"/>	Culture Growth: <input type="text"/>
Specimen Type: Sputum	Species ID: <input type="text"/>
Anatomic Source of Specimen: <input type="text"/>	Date Identified: 00/00/0000
Specimen ID: <input type="text"/>	

- Click the **S**ave button.
- Click the **C**lose button.

### Edit a Bacteriology Test Record

To edit a bacteriology test record ...

- Open the **Patient Management** module.
- Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Select the bacteriology test record you want to modify from the Bacteriology Test Summary list and click the **E**dit button.

Bacteriology Test Summary						
Collected	Specimen ID	Specimen	Smear Results	Species ID	Identified	Susc.
03/08/1997	CB970308.1441	Sputum	Positive	M. TUBERCULOSIS	03/10/1997	Not Done
03/21/1997	CB970321.0821	Sputum	Positive	M. TUBERCULOSIS	03/21/1997	Not Done
04/19/1997	CB970419.1305	Sputum	Negative		00/00/0000	Not Done

- Make the necessary changes to the selected Bacteriology Test record.
- Click the **S**ave button
- Click the **C**lose button.

### Delete a Bacteriology Test Record

To delete a bacteriology test record ...

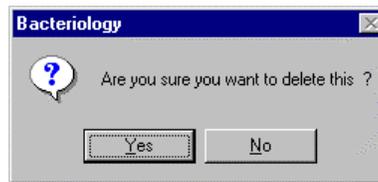
- Open the **Patient Management** module.
- Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Select the bacteriology test record you want to delete from the Bacteriology Test Summary list and click the **D**elete button.

4. Click the **Yes** button to confirm that you want to delete the selected record. Click **No** to cancel the delete operation.



5. Click the **Close** button.

## Open the Susceptibility Test Window

TIMS records the susceptibility of culture samples to treatment with one or more TB medications. This helps track drug-resistant strains of tuberculosis and determines what types of medications are appropriate.

To display the susceptibility test window...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Bacteriology** or click on the **Bacteriology** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select a bacteriology test record with a positive culture from the Bacteriology Test Summary list.

*Susceptibility tests can only be performed on positive bacteriological cultures. The Susceptibility window cannot be opened when a negative culture is selected.*

Collected	Specimen ID	Specimen	Smear Results	Species ID	Identified	Susc.
03/08/1997	CB970308.1441	Sputum	Positive	M. TUBERCULOSIS	03/10/1997	Done
03/21/1997	CB970321.0821	Sputum	Positive	M. TUBERCULOSIS	03/21/1997	Done
04/19/1997	CB970419.1305	Sputum	Negative		00/00/0000	Not Done

4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



*If the Susceptibility Test button is covered by a red X, you have not selected a positive culture specimen.*

Collected	Specimen No.	Specimen	Smear Results	Species ID	Identified	Susc.
08/23/2000		SPUTUM	POSITIVE	M. TUBERCULOSIS	00/00/0000	Done

Date Collected:	08/23/2000	Results Smear:	POSITIVE
Laboratory:	LAB ONE	Culture Growth:	POSITIVE
Specimen Type:	SPUTUM	Species ID:	M. TUBERCULOSIS
Anatomic Source of Specimen:		Date Identified:	00/00/0000
Specimen No.:			

**Susceptibility**

**Susceptibility Testing Information**

Date Reported: 04/28/1997 Specimen ID: CB970308.1441 Test # 1 of 4  
Date Collected: 03/08/1997 Lab: Central Biologic

**Drug Susceptibility**

Date	Drug	Concentration	Method	Findings	Susceptibility
04/28/1997	Isoniazid	10.0 mcg/mL	Radiometric		Resistant
04/28/1997	Isoniazid	250.0 mcg/mL	Radiometric		Susceptible
04/28/1997	Isoniazid	320.0 mcg/mL	Conventional		Susceptible

Buttons: New, Edit, Delete, Save, Close

Form fields: Drug: Isoniazid, Concentration (µg/mL): 10.0 µg/mL, Lab Findings: , Method: Radiometric, Direct, Indirect, Susceptibility: Resistant, Susceptible, Not Done, Unknown

### Add a Drug-Specific Susceptibility Test Record to the Test Series

To record the results of a drug-specific susceptibility test to the current test series...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate bacteriology test record from the Bacteriology Test Summary list.
4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. If necessary, add or adjust information in the Susceptibility Testing Information group.

**Susceptibility Testing Information**

Date Reported: 07/23/1997 Specimen ID: ABCDE001 Test # 1 of 1  
Date Collected: 07/11/1997 Lab: Central Biologic

Buttons: Add

6. Click the **N**ew button.
7. Select a drug from the Drug list.
8. Fill in the remaining fields with the susceptibility test data.

Drug: Isoniazid

Concentration (µg/mL): 50.0 µg/mL

Lab Findings:

Method:  Conventional,  Radiometric,  Direct,  Indirect

Susceptibility:  Resistant,  Susceptible,  Not Done,  Unknown

9. Click the **S**ave button.
10. Click the **C**lose button.

## Edit a Drug-Specific Susceptibility Test Record

To change an existing drug-specific susceptibility test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate bacteriology test record from the Bacteriology Test Summary list.
4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. Select the drug-specific susceptibility test you want to modify. You may need to browse through the test series to find the appropriate record.
6. Click the **E**dit button.
7. Modify the drug-specific test record as necessary.
8. Click the **S**ave button.
9. Click the **C**lose button.

## Delete a Drug-Specific Susceptibility Test Record

To delete a drug-specific susceptibility test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.

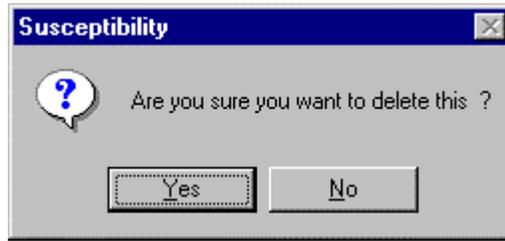


*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate bacteriology test record from the Bacteriology Test Summary list.
4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. Select the drug-specific susceptibility test you want to delete. You may need to browse through the test series to find the appropriate record.
6. Click the **D**efine button.
7. Click the **Y**es button to confirm that you want to delete the selected record. Click the **N**o button to cancel the delete operation.



8. Click the **C**lose button.

### Create a New Specimen Susceptibility Test Series

TIMS allows you to create multiple sets of tests on a single specimen.

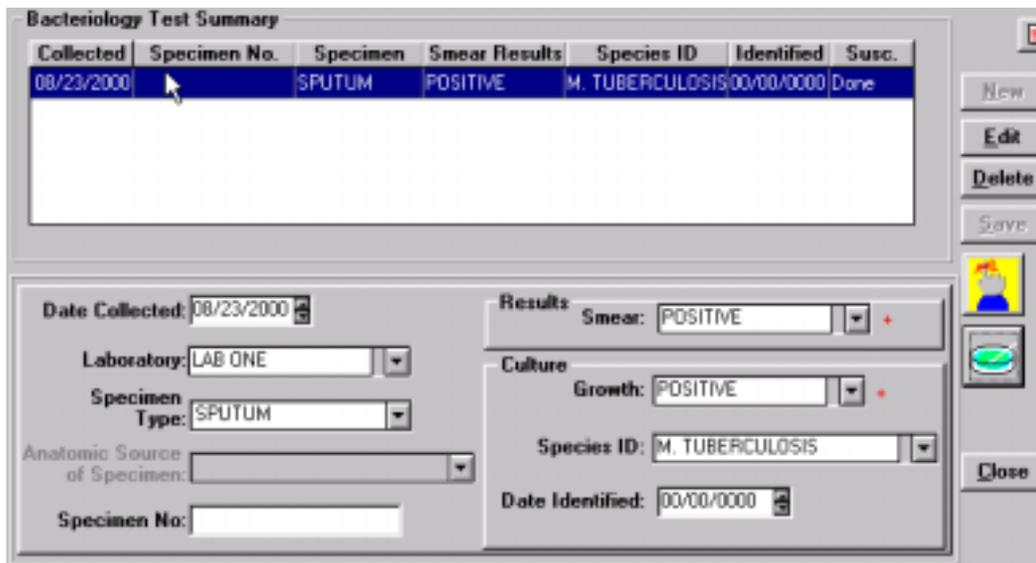
To create a new specimen susceptibility test series...

1. Open the **P**atient **M**anagement module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

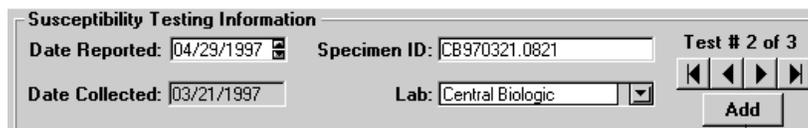
3. Select a bacteriology test record from the Bacteriology Test Summary list.



4. Click the **S**usceptibility **T**est button on the right side of the Bacteriology window.



5. Click the **A**dd button in the Susceptibility Testing Information group.

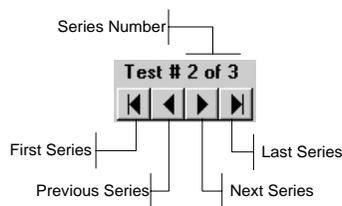


Click the Add button to create additional test series

6. If necessary, adjust the Date Reported values. The date cannot be greater than the current date or less than the Date Collected.
7. Verify the Specimen ID. If necessary, replace or modify the value to identify the test series.
8. Verify the Lab where the susceptibility testing was conducted.
9. Add drug-specific test records. See *Add a Drug-Specific Susceptibility Test Record to the Test Series* earlier in this chapter for more information.
10. Click the **S**ave button.
11. Click the **C**lose button.

### Browse the Susceptibility Test Series

Use the arrow controls to display different test series.



## Blood Test

TIMS allows you to maintain blood test records for TB clients. Blood testing can help you monitor the client's reaction to TB medications. TIMS tracks the results of five blood tests:

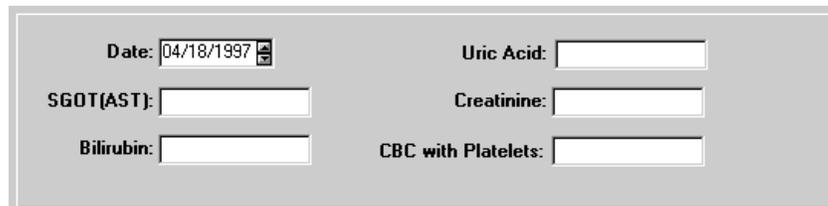
- SGOT (AST)
- Bilirubin
- Uric Acid
- Creatinine
- Complete Blood Cell (CBC) with Platelets

**Note:** Users with Low access privileges cannot add, edit, or delete blood tests. Each blood test record must contain a test date.

### Add a Blood Test Record

To create a new blood test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**lood.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Click the **N**ew button.  
*If the New button is disabled, click the selected record in the browse list to cancel the selection.*
4. Fill in the information as completely as possible from the printed blood test report. Be sure to adjust the Date field to match the date on the report.



The screenshot shows a form with the following fields:

Date:	<input type="text" value="04/18/1997"/>	Uric Acid:	<input type="text"/>
SGOT(AST):	<input type="text"/>	Creatinine:	<input type="text"/>
Bilirubin:	<input type="text"/>	CBC with Platelets:	<input type="text"/>

5. Click the **S**ave button.
6. Click the **C**lose button.

### Edit a Blood Test Record

To change an existing blood test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**lood.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the blood test record to be modified from the Blood Test Summary list.

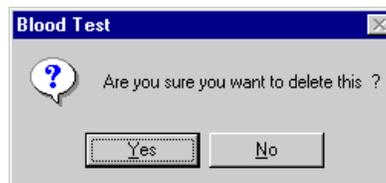
Date	SGOT(AST)	Bilirubin	Uric Acid	Creatinine	CBC with Platelets
05/17/1997	47 U/L	0.4 mg/dL	2 mg/dL	1.4 mg/dL	
04/26/1997	66 U/L	.7 mg/dL	9 mg/dL	1.8 mg/dL	
03/03/1997	87 U/L	.8 mg/dL	11 mg/dL	2.8 mg/dL	
01/12/1997	53 U/L	0.3 mg/dL	8 mg/dL	1.9 mg/dL	

4. Click the **E**dit button.
5. Change the blood test data as necessary.
6. Click the **S**ave button.
7. Click the **C**lose button.

### Delete a Blood Test Record

To delete a blood test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**lood.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the blood test record you want to delete from the Blood Test Summary list.
4. Click the **D**efine button.
5. Click the **Y**es button to confirm that you want to delete the selected record or click the **N**o button to cancel.



6. Click the **C**lose button.

## Chest X-Ray

TIMS allows you to record the results of a client's chest x-rays.

**Note:** Users with Low access privileges cannot add, edit, or delete x-ray records. Each x-ray record must indicate the date the x-ray was taken.

### Add a Chest X-Ray Record

To create a chest x-ray record from an x-ray report...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **Chest X-Ray**, or click the **Chest X-Ray** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **N**ew button.
4. If the **N**ew button is disabled, click the selected record in the browse list to cancel the selection.
5. Fill in the information as completely as possible with the information from the x-ray itself.

View: PA (Posterior-Anterior) ▼	Results <input type="radio"/> Normal <input checked="" type="radio"/> Abnormal	<input type="radio"/> Not Done <input type="radio"/> Unknown	Status <input type="radio"/> Stable <input type="radio"/> Worsening
Date Taken: 03/21/1997	Abnormality <input checked="" type="radio"/> Cavitory <input type="radio"/> Noncavitory consistent w/TB <input type="radio"/> Noncavitory not consistent w/TB		<input type="radio"/> Improving <input checked="" type="radio"/> Unknown
<input checked="" type="radio"/> By: Dr. Henry Helium <input type="radio"/> Where: ▼	Date Read: 03/21/1997	Read By: Dr. Henry Helium ▼	Comments:

6. Click the **S**ave button.
7. Click the **C**lose button.

### Edit a Chest X-Ray Record

To edit an existing chest x-ray record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **Chest X-Ray**, or click the **Chest X-Ray** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the x-ray record you want to modify from the Chest X-Ray Summary list and click the **E**dit button.

Date Taken	Result	Abnormality	X-Ray Status	View
03/13/1997	Abnormal	Noncavitary Consistent w/TB	Unknown	Lateral
04/18/1997	Abnormal	Noncavitary Consistent w/TB	Unknown	PA
04/18/1997	Abnormal	Cavitary	Worsening	PA

4. Make the necessary changes to the chest x-ray record.
5. Click the **S**ave button.
6. Click the **C**lose button.

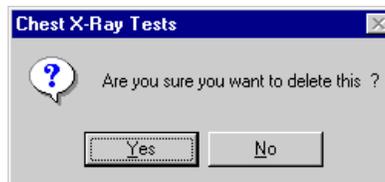
### Delete a Chest X-Ray Record

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **Chest X-Ray**, or click the **Chest X-Ray** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the x-ray record you want to delete from the Chest X-Ray Summary browse list.
4. Click the **D**delete button.
5. Click the **Y**es button to confirm that you want to delete the selected record or click the **N**o button to cancel.



6. Click the **C**lose button.

## HIV Test

HIV infection can be a factor in escalating TB infection to TB disease, TIMS allows you to keep track of a client's HIV test records.

**Note:** In order to protect client privacy, not all users will have access to HIV test records. If this command is not available, you probably do not have sufficient user privileges to view HIV-related information. See your TIMS System Administrator for details. To save an HIV test record, you must indicate if the test was offered and administered. Additional information may be required, depending on your initial responses.

### Add an HIV Test Record

To create an HIV test record...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **HIV**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Click the **New** button.  
*If the New button is disabled, click the selected record in the browse list to cancel the selection.*
4. Fill in as much HIV test data as possible from the client's HIV testing records.

Was HIV Test Offered? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk		Date Test Offered: 04/14/1997
Was HIV Test Administered? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk		Date of Test: 04/18/1997
HIV Status: <input checked="" type="radio"/> Positive <input type="radio"/> Indeterminate <input type="radio"/> Negative <input type="radio"/> Unknown <input type="radio"/> Done, Results Unknown		If Not Tested, Reason: <input type="radio"/> Previously Positive <input type="radio"/> Previously Negative <input type="radio"/> Referred Elsewhere <input type="radio"/> Client Declined <input type="radio"/> Other
If Positive: <input type="radio"/> Medical Documentation Based on: <input checked="" type="radio"/> Patient History <input type="radio"/> Unknown		CDC AIDS Patient #: 1234567 State HIV/AIDS Patient #: 1234567890 City HIV/AIDS Patient #: 1234567890
Client Post Counseling: Did Client receive Post Test Counseling? <input checked="" type="radio"/> Yes <input type="radio"/> No		Date of Post Test Counseling: 04/18/1997

5. Click the **Save** button.
6. Click the **Close** button.

### Edit an HIV Test Record

To change an HIV test record...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **HIV**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the HIV test records you want to modify from the HIV Summary list.

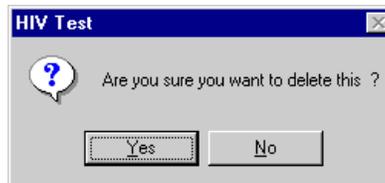
Test Date	Offer Date	Status	Based On	Date of Counseling
00/00/0000	00/00/0000			00/00/0000
04/14/1997	03/31/1997	Positive	Unknown	04/18/1997
04/18/1997	04/14/1997	Positive	Patient History	00/00/0000

4. Make the necessary changes to the HIV test record.
5. Click the **S**ave button.
6. Click the **C**lose button.

### Delete an HIV Test Record

To remove an HIV test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **HIV**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the HIV test records you want to delete from the HIV Summary list and click the **D**efine button.
4. Click the **Y**es button to confirm that you want to delete the selected record or click the **N**o button to cancel.



5. Click the **C**lose button.

## Physical Examination

Physical examinations are important in the treatment of tuberculosis. The physical state of a client can help determine how they are responding to drug therapy, if they are suffering from any medication-related side effects, and whether their condition is improving. TIMS tracks five types of physical conditions:

- Weight
- Hearing
- Vision-Acuity
- Vision-Color
- INH Metabolites

Each physical examination test record must contain a test date.

**Note:** Users with Low access privileges cannot add, edit, or delete physical examination test records.

### Add a New Physical Examination Record

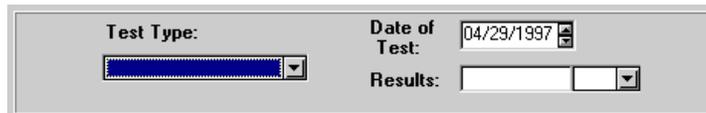
To add a new physical examination record...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Physical Exam**.

*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **New** button.

*If the New button is disabled, click the selected record in the browse list to cancel the selection.*



The screenshot shows a form with three main fields: 'Test Type' with a dropdown menu, 'Date of Test' with a date picker showing '04/29/1997', and 'Results' with a text input field and a dropdown menu.

4. Adjust the Date of Test value to match the actual date on the test report.
5. Select the Test Type from the list.
6. Enter the test data in the Results field.
7. Click the **Save** button.
8. Click the **Close** button.

### Edit a Physical Examination Record

To change a physical examination record...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Physical Exam**.

*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Select the test record you want to modify from the Physical Exam Summary list and click the **E**dit button.

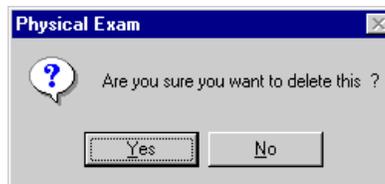
Test Date	Test Type	Results
03/03/1997	Hearing	10 db
03/03/1997	Vision-Acuity	20-20
03/03/1997	Weight	185 lbs
03/03/1997	Vision-Color	Passed
04/15/1997	Weight	170 lbs
04/15/1997	Vision-Acuity	20-20

4. Make the necessary modifications to the selected physical exam data.
5. Click the **S**ave button.
6. Click the **C**lose button.

### Delete a Physical Examination Record

To delete a physical examination record...

1. Open the **P**atient Management module.
2. Open the **T**ests menu and select **P**hysical Exam.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
3. Select the test record you want to delete from the Physical Examination Summary list and click the **D**elete button.
4. Click the **Y**es button to confirm that you want to delete the selected record. Click the **N**o button to cancel the delete operation.



5. Click the **C**lose button.

### Limiting the Number of Tests Displayed

You can reduce the number of physical tests displayed in the browse list by applying a filter. This can help you locate individual tests more quickly or evaluate the results of a single test type over a period of time.

To apply a test type filter:

1. Click the arrow on the Filter by Test Type list.
2. Select the desired test type from the list of available options.

To re-display all the client's physical examination results:

1. Click the arrow on the Filter by Test Type list.
2. Select **ALL** from the list of available options.

## Skin Tests

TIMS can manage data from the Tuberculin and other TB-related skin tests. This can help diagnose a client with tuberculosis and identify them as anergic or a converter. TIMS tracks four types of skin tests:

- Tuberculin
- Tetanus
- Candida
- Mumps

**Note:** Users with Low access privileges cannot add, edit, or delete skin test records. Each skin test record must contain a Date Tested and Type Of Test entry.

### The Skin Test Window

Skin Test Summary				
Type of Test	Date Tested	Date Read	Induration (mm)	Result
TUBERCULIN	09/20/2000	09/22/2000	00	NEGATIVE
TUBERCULIN	12/18/2000	12/20/2000	17	POSITIVE

Type of Test:  Interpretation:  Positive  
 Negative  
 Unknown

Date Tested:  Induration In Millimeters:

By:  Comments:

Date Read:

By:

Is the Patient Anergic?  Yes  No  Unknown

Does the Patient Meet the CDC Criteria for Being Classified as a Converter?  Yes  No  Unknown

### Add a New Skin Test Record

To create a new skin test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **S**kin, or click the **Skin test** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

3. Click the **N**ew button.

*If the New button is disabled, click the selected record in the browse list to cancel the selection.*

- Complete the skin test screen using information from the skin test report. Include as much information as is available.

Type of Test: TUBERCULIN	Interpretation
Date Tested: 12/18/2000	<input checked="" type="radio"/> Positive
By: *WORKER, DEFAULT	<input type="radio"/> Negative
Date Read: 12/20/2000	<input type="radio"/> Unknown
By: *WORKER, DEFAULT	Induration In Millimeters: 17
Is the Patient Anergic?	Comments:
<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	
Does the Patient Meet the CDC Criteria for Being Classified as a Converter?	
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	

- Click the **S**ave button.
- Click the **C**lose button.

### Edit a Skin Test Record

To modify a skin test record...

- Open the **Patient Management** module.
- Open the **T**ests menu and select **S**kin, or click the **Skin test** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Select the test you want to change from the Skin Test Summary list and click the **E**dit button.

Type of Test	Date Tested	Date Read	Induration (mm)	Result
TUBERCULIN	09/20/2000	09/22/2000	00	NEGATIVE
TUBERCULIN	12/18/2000	12/20/2000	17	POSITIVE

- Make the necessary modifications to the skin test record.
- Click the **S**ave button.
- Click the **C**lose button.

### Delete a Skin Test Record

To delete a skin test record...

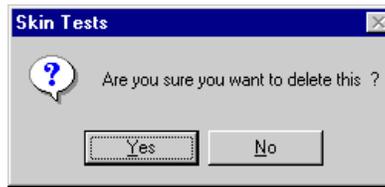
- Open the **Patient Management** module.
- Open the **T**ests menu and select **S**kin, or click the **Skin test** button on the toolbar.



*If there is no current client, the Change Focus window will open, enabling you to select one.*

- Select the test you want to delete from the Skin Test Summary list.

4. Click the **Del**ete button.
5. Click the **Yes** button to confirm that you want to delete the selected record. Click the **No** button to cancel the delete operation.



6. Click the **Close** button.

## Test Summary

The Current Test Status window provides a quick summary of all the test data it stores. Individual entries contain information about the test type, the worker who performed the test, the date the test was requested, and test status. The Test Summary window can be adjusted to display only certain types of tests or tests with a specified status.

Type of Test	Worker Assigned	Date Requested	Status
Physical Exam	Default Worker	04/02/1997	Closed
Physical Exam	Default Worker	04/02/1997	Closed
Physical Exam	Default Worker	04/02/1997	Closed
Physical Exam	Default Worker	04/02/1997	Closed
Physical Exam	Default Worker	04/03/1997	Closed
Physical Exam	Default Worker	04/03/1997	Closed
Skin Test	Dr. Henry Helium	03/21/1996	Closed
Skin Test	Default Worker	03/17/1997	Closed
Skin Test	Dr. Henry Helium	04/04/1997	Closed
Bacteriology	Default Worker	04/02/1997	Closed
Bacteriology	Default Worker	04/02/1997	Closed
Bacteriology	Default Worker	04/15/1997	Closed
Chest X-Ray	Default Worker	04/01/1997	Closed
Chest X-Ray	Default Worker	04/02/1997	Closed

### Open the Test Summary Window

There are several ways to open the Current Test Status (test summary) window.

To open the Current Test Status window from the menu bar...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **T**est Summary.

To display the Current Test Status window using the toolbar

1. Open the **Patient Management** module.
2. Click the **Test Summary** button on the toolbar.



To display a summary of a specific test type from within the test window...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select the desired test type.

- Click the **Test Summary** button on the right side of the test window.

Type of Test	Date Tested	Date Read	Induration (mm)	Result
TUBERCULIN	05/05/1997	05/07/1997	15	POSITIVE
TETANUS	05/15/1997	05/17/1997	01	NEGATIVE
CANDIDA	05/23/1997	05/25/1997	00	NEGATIVE

### Filtering the Current Test Status Window

TIMS allows you to control the number of test summaries displayed in the Current Test Status window by adjusting two variables- Test Type and Status. The two variables can be combined to further limit the number of records displayed.

To filter the Current Test Status window by test type...

- Open the **Patient Management** module.
- Open the **Tests** menu and select **Test Summary**.  
*If there is no current client, the Change Focus window will open, enabling you to select one.*
- Click the arrow on the Filter by Test Type list.
- Select an individual test type or **ALL** to display all test types.

*Selecting an individual test type will produce the same results as clicking the Test Summary button on a test window.*

To filter the Current Test Status window by status, select a status from the Filter by Status group.

## ***Patient Management Reports***

The Patient Management Module offers several reports which display information on individual patients. The reports are based on data entered into the Patient Management Module.

- Adherence: Appointments
- Adherence: Assigned Workers - This report is not available in the current version of TIMS.
- Adherence: Medication Metabolite
- Contact Report
- Medical Report: Summary
- Medical Report: Blood Tests
- Medical Report: HIV Tests
- Medical Report: Skin Tests
- Medical Report: X-Ray Tests
- Therapy: Medication
- Therapy: Medication Outcome

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## Chapter 4 Surveillance Module



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### Overview

The Surveillance module is used to record the Report of Verified Case of Tuberculosis (RVCT), Initial Drug Susceptibility Report (Follow Up Report-1), Case Completion Report (Follow Up Report-2), and Case Verification. The windows in the Surveillance module are designed in a format similar to the data collection forms to make data entry easier.

The Assurance of Confidentiality for Report of Verified Cases of Tuberculosis describes the purpose and use of surveillance data requested by CDC: “The surveillance information requested by CDC consists of detailed reports of persons with TB, including information on the individual’s HIV serostatus, demographics (e.g., homelessness, correctional institution, or long-term care facility), alcohol and drug use, drug therapy, and drug susceptibility results. The data is used by U.S. Public Health Service scientists and cooperating state and local health officials to help understand and control the spread of TB ... Information reported to CDC will be used without identifiers for statistical and analytic summaries in which no individual on whom a record is maintained can be identified and for special studies of the transmission, natural history, and epidemiology of TB associated with HIV infection.” Refer to the Introducing TIMS chapter for the complete Assurance of Confidentiality statement.

If an active TB case is verified and will be used in the annual morbidity count, the case should then be reported to the CDC. However, the CDC encourages the use of RVCT forms and TIMS to collect information on suspected cases of TB. RVCT records are classified as either "not a verified case"(0), "positive culture"(1), "positive smear/tissue"(2), "clinical case definition"(3), "verified by provider diagnosis"(4), or a "suspect case"(5). TIMS provides an automatic Case Verification value based on entries in the RVCT and the Case Completion Report question 37, Reason Therapy Stopped.

An Initial Drug Susceptibility Report should be completed for all culture-positive cases. The Case Completion Report should be completed for all clients who were alive at diagnosis.

TIMS provides the option to delete and purge surveillance data, with an option to delete patient management information. You can also generate data from the Client and Patient Management modules into the Surveillance module to alleviate the duplication of data entry.

TIMS has two data transfer features, the Surveillance transfer and the National Electronic Telecommunication System for Surveillance (NETSS) transfer. The Surveillance feature is used to prepare new, modified, and deleted RVCT, Initial Drug Susceptibility Report, and Case Completion Report records for transmission to Level 1 sites, the Reporting Area, and the CDC. The NETSS feature is used by the Reporting Area to prepare and transmit counted verified cases to the state epidemiologist's office for inclusion in the *Morbidity and Mortality Weekly Report* (MMWR).

## Quick Start

**Note:** The client's name, case number, and date of birth must be entered into the Client Information window prior to entering Surveillance data. See Chapter 2 for detailed instructions on entering and editing client information.

### Open the Surveillance Module

There are two ways to open the Surveillance module...

- Open the **C**lient menu and select **S**urveillance.

*If the current module does not have a Client menu, choose the first menu from the left.*

Or

- Click the **S**urveillance button on the toolbar.



### Add a New Client

To enter client information from the Surveillance module...

1. Open the **S**urveillance module and click the **N**ew **C**lient button on the toolbar.



2. Enter the client's last name, first name, date of birth and case number on the New Client - Set Search Criteria dialog box.
3. Click the **O**K button.
4. Click the **S**ave button followed by the **C**lose button.

## Add or Edit RVCT Data for Existing Clients

**Note:** Certain client information, such as the client's name, case number, and date of birth must be entered into TIMS before you can enter and save Surveillance data. See Chapter 2 for detailed instructions on entering and editing client information.

To add or edit RVCT information...

1. Open the **S**urveillance menu and select **R**eport of **V**erified **C**ase of **T**uberculosis or click the **RVCT** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

2. Enter the information from the paper RVCT form.
3. Click the **S**ave button.  
*The Case Verification window will appear with the appropriate classification.*
4. Click the **S**ave button followed by the **C**lose button on the Case Verification window. You will be returned to the RVCT.
5. Click the **C**lose button.

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## Data Entry Helpful Hints

The Surveillance Module consists of many windows (sometimes referred to as screens):

- Four Report of Verified Case of Tuberculosis screens
- One Initial Drug Susceptibility screen
- Two Case Completion screens
- One Case Verification screen
- One SURVS-TB User-Defined Variable screen
- One Browse screen
- One Surveillance Record Deletion screen with an additional purge screen
- One NETSS Weekly screen
- One NETSS Year-to-Date screen
- One NETSS Archived screen
- One Surveillance Transfer screen

Each screen contains one or more data entry fields. A field is a section on a screen that includes a title or question and a place for data.

### Moving among Screens

When there is more than one screen in an area, such as the RVCT screens, there will be a button on the bottom of the screen that you can use to move between the screens. Use the mouse to point and click to move between the screens.



### Moving among Fields

The best way to move from field to field is by using the mouse. Use the mouse to point and click to move to another field.

### Enabled and Disabled

Data entry fields are either Enabled or Disabled. A field that has a white background and allows data entry is Enabled. A field that has a gray background and does not allow data entry is Disabled.

<b>5. Month-Year Reported:</b> 10/1997	<b>6. Month-Year Counted:</b> 00/0000
---	--

Data entry fields will be disabled for one of the following reasons:

- The data in the field are generated from another module. For example, the data in the Date of Birth field on the RVCT are imported from the Client Information window.

Or

- The field is missing prerequisite data from another part of the TIMS application. For example, if there are not any drugs entered in the Initial Drug Regimen group on RVCT screen 4, the Date Therapy Started field will be disabled because therapy has not started.

## Entering Dates

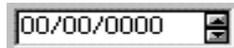
When a field requires a date, there are several ways to enter it. It can be entered as a complete date, an unknown date, or a partial date.

### Complete Dates

Enter the date by using the number keys on the keyboard,

Or

Use the spinner box by pointing the mouse to the arrow keys on the right of the date box.



### Unknown Dates

An unknown date is a valid date that can be entered instead of leaving the field blank.

To enter an unknown date, use the right mouse button to click on the date field (left mouse button if your mouse is configured for left-hand operation), then select **Unknown** on the pop-up menu.



The unknown date will appear as a question mark that covers the entire date field. In some date fields the question mark will not appear until you have left the current field.



*If Unknown is not on the pop-up menu, the field does not support unknown dates.*

### Partial Dates

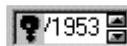
A partial date is a valid date and should be used when a month or day value is unknown.

To enter a partial date, enter the known part of the date then use the right mouse button to click on the Unknown part of the date field (left mouse button if your mouse is configured for left-hand operation), then select **Unknown** on the pop-up menu.

If **Unknown** is not on the pop-up menu, the field does not support partial or unknown dates. If the field will accept partial dates, click **Yes** on the Partial Dates dialog box that appears.

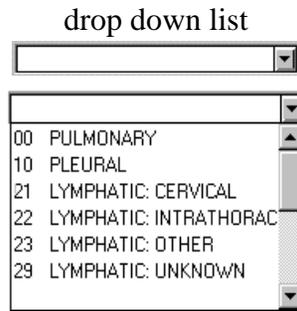
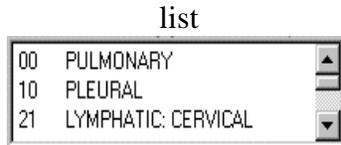


The partial date will appear as a question mark after you have left the current field.



### Choosing from a List

Some choices are displayed in a *list* (visible without clicking) or *drop down list* (click down arrow to display list).



#### List

To choose a selection from a list, use the scroll bar to view the entire list and then point and click with the mouse. The selected item will turn red and move to the top of the list. You can select multiple items from a list by repeating this step.

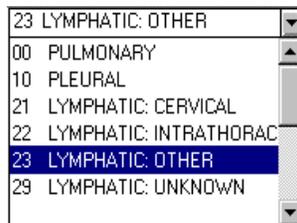


#### Drop Down List

To choose a selection from a drop down list, click on the arrow box to the right of the list.

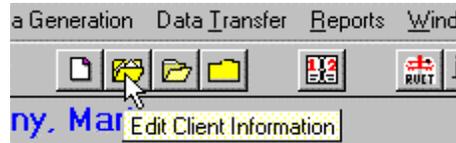


A list of possible choices will be displayed. Use the mouse to point and click on the correct answer. The item selected will be displayed at the top of the list.



## Entering Client Information

Some fields on the RVCT screens display information that is entered from the Client Information window and will appear *disabled*. To enter this information, click on the **Edit Client Information** button on the toolbar.



The Client Information window is displayed.

 A screenshot of the 'Client Information' window. The window is titled 'Client Information' and contains several sections:
 

- Name:** Last: Anthony, First: Mark, Middle: PAUL
- Client Identifiers:** State Case Number: GA9700001, Social Security #: 181-45-8888, City/County Case Number: (empty), Date of Birth: 07/22/1967, Age: 30
- Sex:** Radio buttons for Male (selected), Female, and Unknown.
- Race:** Radio buttons for White, Black, American Indian or Alaskan Native (selected), Unknown, and Asian or Pacific Islander.
- Ethnic Origin:** Radio buttons for Hispanic, Not Hispanic, and Unknown (selected).
- Country of Origin:** Radio buttons for US (selected), Not US, and Unknown. A dropdown menu shows 'UNITED STATES'. Date Entered U.S.: 00/0000.
- Language:** Primary Language: ENGLISH (dropdown menu).

 On the right side of the window, there are buttons for 'Address', 'Alert', 'Alias', 'Name', 'Phone', 'Save', and 'Close'.

From this screen you can enter the client information requested on the RVCT such as the date of birth, sex, country of origin, etc. Clicking on the **Address** button allows you to enter the address information. Remember to save the information on each screen.

## Validations

See *Appendix SUR XVI* for a complete list of validations, error messages, and warning messages for the Surveillance module.

## Data Generation

See the *Data Generation* section later in this chapter for instructions on importing data from another module into the Surveillance module.

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## ***Report of Verified Case of Tuberculosis***

The Report of Verified Case of Tuberculosis (RVCT) must be completed for all verified cases of TB that are to be included in the reporting area's annual morbidity count. CDC also encourages collecting RVCT data for suspect TB cases. The RVCT collects patient demographics, clinical and laboratory data pertinent to the diagnosis of TB, and TB risk factors (e.g., homelessness, drug use, HIV status), which are transmitted to the CDC.

RVCT information for a client can only be modified at the originating site and can only be deleted by users with the appropriate security level at the originating site. Only Reporting Areas have the ability to assign a state case number, count a TB case, and assign an MMWR Reporting Date. This information is transferred back to the originating site. New, modified, and deleted RVCT records are reported to the CDC to ensure surveillance information is up to date.

**Note:** Certain client information, such as the client's name, case number, and date of birth must be entered into TIMS before you can enter and save surveillance data. See Chapter 2 for instructions on entering and editing client information.

**Note:** Users with Low security access cannot change the RVCT. Users with High and Medium security access can only make changes if they have HIV clearance. Refer to *Appendix SYS I* for Security information.

## Add a Report of Verified Case of Tuberculosis (RVCT)

The RVCT information is entered on four screens.

To add an RVCT...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Report of Verified Case of Tuberculosis** or click the **RVCT** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

*The first RVCT screen is displayed.*

SOUNDEX F241		1. State Reporting: Alpha State Code: OR		2. State Case Number: 98J280836 City/County Case Number:	
3. Date Submitted: 06/01/1998 By: AMAZON, AMELIA		4. Address for Case Counting: City: MEDFORD Within City Limits: <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown County: JACKSON Zip Code: 97501 - 1614			
5. Month-Year Reported: 06/1998		6. Month-Year Counted: 00/0000			
7. Date of Birth: 01/01/1960		8. Sex: <input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Unknown		9. Race: <input type="radio"/> White <input type="radio"/> American Indian or Alaskan Native <input checked="" type="radio"/> Black <input type="radio"/> Asian or Pacific Islander <input type="radio"/> Unknown Specify:	
10. Ethnic Origin: <input type="radio"/> Hispanic <input checked="" type="radio"/> Not Hispanic <input type="radio"/> Unknown		11. Country of Origin: <input type="radio"/> U.S. <input type="radio"/> Unknown <input checked="" type="radio"/> Not U.S. Country: CAMEROON		12. Month-Year Arrived in U.S.:	
				13. Status at Diagnosis of TB <input checked="" type="radio"/> Alive <input type="radio"/> Unknown <input type="radio"/> Dead	
		Save		Screen 2 > Close	

3. Complete Screen 1, questions 3, 5, and 13, with information from the RVCT paper form.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter.*

*Information on this window that appears dimmed can be edited by clicking on the **Edit Client Information** button on the toolbar.*

- Click the **Screen 2** button to continue entering RVCT information.

The second RVCT screen is displayed.

<b>14. Previous Diagnosis of Tuberculosis</b> <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Unknown If yes, list year of previous diagnosis: 0000 More than one previous episode: <input type="radio"/> Yes <input type="radio"/> Unknown		<b>15. Major Site of Disease:</b> 00 PULMONARY If "other", enter anatomic code:	
<b>17. Sputum Smear:</b> <input checked="" type="radio"/> Positive <input type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown		<b>18. Sputum Culture:</b> <input checked="" type="radio"/> Positive <input type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown	
<b>20. Culture of Tissue and Other Body Fluids:</b> <input type="radio"/> Positive <input checked="" type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown		<b>16. Additional Site(s) of Disease:</b> (select all that apply) 00 PULMONARY 10 PLEURAL 21 LYMPHATIC: CERVICAL If "other", enter anatomic code: More than one additional site: <input type="checkbox"/>	
<b>22. Tuberculin (Mantoux) Skin Test at Diagnosis:</b> <input checked="" type="radio"/> Positive <input type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown Millimeters (mm) of Induration: 20 If Negative, was patient anergic? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown		<b>19. Microscopic Exam of Tissue and Other Body Fluids:</b> Enter anatomic code(s): <input type="radio"/> Positive <input checked="" type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown	
		<b>21. Chest X-Ray:</b> <input type="radio"/> Normal <input checked="" type="radio"/> Abnormal <input type="radio"/> Not Done <input type="radio"/> Unknown If Abnormal (check one): <input checked="" type="radio"/> Cavitory <input type="radio"/> Noncavitory Consistent with TB <input type="radio"/> Unknown <input type="radio"/> Noncavitory Not Consistent with TB If Abnormal (check one): <input type="radio"/> Stable <input checked="" type="radio"/> Improving <input type="radio"/> Worsening <input type="radio"/> Unknown	
<input type="checkbox"/>		<input type="button" value="Save"/> <input type="button" value=" &lt; Screen 1"/> <input type="button" value=" Screen 3 &gt;"/> <input type="button" value="Close"/>	

- Complete Screen 2 with information from the RVCT paper form.

TIMS automatically calculates question 16c according to the answers in Question 16a.

For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.

- Click the **Screen 3** button to continue entering RVCT information.

The third RVCT screen is displayed.

<b>23. HIV Status:</b> <input type="radio"/> Negative <input type="radio"/> Refused <input type="radio"/> Unknown <input checked="" type="radio"/> Positive <input type="radio"/> Not Offered <input type="radio"/> Indeterminate <input type="radio"/> Test Done, Results Unknown		<b>24. Homeless Within Past Year:</b> <input type="radio"/> No <input type="radio"/> Yes <input checked="" type="radio"/> Unknown	
If positive, based on: <input type="radio"/> Medical Documentation <input type="radio"/> Patient History		<input checked="" type="radio"/> Unknown	
If positive, list: CDC AIDS Patient Number:			
State HIV/AIDS Patient Number: OR00543210			
City/County HIV/AIDS Patient Number: 0907311500			
<b>25. Resident of Correctional Facility at Time of Diagnosis:</b> <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown If Yes: <input type="radio"/> Federal Prison <input checked="" type="radio"/> Local Jail <input type="radio"/> Other Correctional Facility <input type="radio"/> State Prison <input type="radio"/> Juvenile Correctional Facility <input type="radio"/> Unknown			
<b>26. Resident of Long-Term Care Facility at Time of Diagnosis:</b> <input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown If Yes: <input type="radio"/> Nursing Home <input type="radio"/> Mental Health Care Facility <input type="radio"/> Unknown <input type="radio"/> Hospital-Based Facility <input type="radio"/> Alcohol or Drug Treatment Facility <input type="radio"/> Residential Facility <input type="radio"/> Other Long-Term Care Facility			
<input type="checkbox"/>		<input type="button" value="Save"/> <input type="button" value=" &lt; Screen 2"/> <input type="button" value=" Screen 4 &gt;"/> <input type="button" value="Close"/>	

- Complete the window with information from the RVCT paper form.

For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.

8. Click the **Screen 4** button to continue entering RVCT information.

*The fourth RVCT screen is displayed.*

<b>27. Initial Drug Regimen:</b>											
	No	Yes	Unk		No	Yes	Unk		No	Yes	Unk
Isoniazid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ethionamide	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Kanamycin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Cycloserine	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Capreomycin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ofloxacin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Streptomycin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>28. Date Therapy Started:</b>				<b>29. Injecting Drug Use Within Past Year:</b>							
06/10/1998				<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown							
<b>30. Non-injecting Drug Use Within Past Year:</b>				<b>31. Excess Alcohol Use Within Past Year:</b>							
<input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown				<input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown							
<b>32. Occupation (Check all that apply within the past 24 months):</b>											
<input type="checkbox"/> Health Care Worker			<input checked="" type="checkbox"/> Migratory Agricultural Worker			<input type="checkbox"/> Not Employed within Past 24 Months					
<input type="checkbox"/> Correctional Employee			<input type="checkbox"/> Other Occupation			<input type="checkbox"/> Unknown					
<b>Comments:</b>											
<input type="text"/>											
<input type="button" value="Save"/> <input type="button" value=" &lt; Screen 3"/> <input type="button" value="Close"/>											

9. Complete Screen 4 with information from the RVCT paper form. Add any comments necessary for the RVCT.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

10. Click the **Save** button to save the RVCT information.

*Clicking the Save button on any RVCT screen will save information on all screens. Validations occur when the Save button is clicked.*

*The Case Verification window will display.*

<b>Case Verification</b>	
This is a Verified Case of Tuberculosis according to the following criteria.	
<b>Positive Culture</b>	
Do you want to count this patient at CDC as a verified case of TB ? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Please enter the Month-Year Counted: 06/1998	
MMWR Reporting Date: 06/12/1998 Week 23 of 1998	
<input type="button" value="Save"/>	<input type="button" value="Close"/>

*Based on the information entered on the RVCT, the appropriate Case Verification classification is calculated and displayed. This window will appear different at different levels. For more information, see the Case Verification section later in this chapter.*

11. Enter the Case Verification data if allowed at your level.

*See the Case Verification section later in this chapter for details.*

12. Click the **Save** button followed by the **Close** button to return to the RVCT screen.

13. Click the **Close** button on the RVCT screen.

## Edit a Report of Verified Case of Tuberculosis (RVCT)

If RVCT information changes, the case verification assignment is automatically re-evaluated when the RVCT is saved. If the changes affect the assignment, the case verification window will display with a new assignment when the RVCT is saved. All changes made to an RVCT will cause the RVCT to be re-transmitted as an updated record once acknowledgement of the previous RVCT transfer is received and assimilated. For information on this, see the Data Transfer section later in this chapter.

To edit an RVCT...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Report of Verified Case of Tuberculosis** or click the **RVCT** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate RVCT Screen and Field to be modified and make the correction.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

4. Click the **Save** button to save the RVCT information.

*Based on the information entered on the RVCT, the appropriate Case Verification classification is calculated and displayed. See the Case Verification section later in this chapter for more information.*

5. Click the **Close** button.

## Initial Drug Susceptibility Report

The Initial Drug Susceptibility Report (Follow Up Report-1) should be completed for all culture-positive cases. This report records the results of susceptibility testing on the first isolate for which drug susceptibility was performed and should be completed and submitted within two months of the initial RVCT. If drug susceptibility test results are delayed, submit the report as soon as results become available. The RVCT information must be entered prior to entering the Initial Drug Susceptibility Report information.

**Note:** Users with Low security access cannot change the Initial Drug Susceptibility Report.

### Add an Initial Drug Susceptibility Report

The Initial Drug Susceptibility information is entered into a single window.

To add an Initial Drug Susceptibility Report...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Initial Drug Susceptibility Report** or click the **Initial Drug Susceptibility Report** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

*The Initial Drug Susceptibility Report window is displayed.*

<b>33. Initial Drug Susceptibility Results:</b>												
Was Drug Susceptibility Testing Done: <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown												
<i>If answer is No or Unknown, do not complete rest of report.</i>												
If Yes,												
Enter the Date First Isolate Collected for Which Drug Susceptibility Was Done? 05/09/1995												
<b>34. Susceptibility Results:</b>												
	Resistant	Susceptible	Not Done	Unknown		Resistant	Susceptible	Not Done	Unknown			
Isoniazid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Rifampin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Pyrazinamide	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Ethambutol	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Streptomycin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Ethionamide	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Kanamycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
Cycloserine	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>								
<b>Comments:</b>												
<input type="text"/>												
<input type="button" value="Save"/> <input type="button" value="Close"/>												

3. Complete the window with information from the Initial Drug Susceptibility Report paper form. Add any comments necessary for the Follow Up Report - 1.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

4. Click the **S**ave button to save the Initial Drug Susceptibility information.
5. Click the **C**lose button.

### **Edit an Initial Drug Susceptibility Report**

If you change information on the Initial Drug Susceptibility Report after it has been transmitted to the next higher level, the data will be marked and re-transmitted as an updated record once acknowledgement of the previous Initial Drug Susceptibility Report transfer is received and assimilated.

To edit Initial Drug Susceptibility Report information...

1. Open the **Surveillance** module.
2. Open the **S**urveillance menu and select **I**nitial Drug Susceptibility Report or click the **I**nitial Drug Susceptibility Report button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate Field to be modified and make the correction.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

4. Click the **S**ave button to save the information.
5. Click the **C**lose button.

## Case Completion Report

The Case Completion Report (Follow Up Report-2) should be completed for all cases in which the client was alive at diagnosis. This report records information about the client's treatment and treatment outcomes. If therapy was stopped because it was determined the client did not have TB, this information can be entered into this report and the case verification value will be updated to "Not TB." Final drug susceptibility results cannot be entered if results were not entered in the Initial Drug Susceptibility Report.

This report should be updated as information becomes available during patient follow-up. The report should be completed when the case is closed to supervision.

**Note:** Users with Low security access cannot change the Case Completion Report.

### Add a Case Completion Report

The Case Completion information is entered on two screens.

To add a Case Completion Report...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Case Completion Report** or click the **Case Completion Report** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

*The first Case Completion Report screen is displayed.*

<b>35. Sputum Culture Conversion Documented:</b> <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown		If Yes, Date Specimen Collected on Initial Positive Sputum Culture: 05/09/1995	If Yes, Date Specimen Collected on First Consistently Negative Culture: 06/11/1995
<b>36. Date Therapy Stopped:</b> 11/17/1995	<b>37. Reason Therapy Stopped:</b> <input checked="" type="radio"/> Completed Therapy <input type="radio"/> Refused/Uncooperative <input type="radio"/> Other <input type="radio"/> Moved <input type="radio"/> Not TB <input type="radio"/> Unknown <input type="radio"/> Lost <input type="radio"/> Died		
<b>38. Type of Health Care Provider:</b> <input checked="" type="radio"/> Health Department <input type="radio"/> Private/Other <input type="radio"/> Both Health Department and Private/Other	<b>39. Directly Observed Therapy:</b> <input checked="" type="radio"/> No, Totally Self-Administered <input type="radio"/> In Clinic or Other Facility <input type="radio"/> Yes, Totally Directly Observed <input type="radio"/> In the Field <input type="radio"/> Yes, Both Directly Observed and Self-Administered <input type="radio"/> Both in Facility and in the Field <input type="radio"/> Unknown <input type="radio"/> Unknown		
		If Yes, Give Site(s) of Directly Observed Therapy: Number of Weeks of Directly Observed Therapy: <input type="text"/> Weeks	
<input checked="" type="checkbox"/> Save		<input type="button" value="Screen 2 &gt;"/> <input type="button" value="Close"/>	

3. Complete Screen 1 with information from the Case Completion Report paper form.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

- Click the **Screen 2** button to continue entering Case Completion Report information.

*The second Case Completion Report screen is displayed.*

**40. Final Drug Susceptibility Results:**

Was Follow-up Drug Susceptibility Testing Done?  No  Yes  Unknown

If Yes, Enter Date Final Isolate Collected for Which Drug Susceptibility Was Done:

*If answer is No or Unknown, do not complete rest of report.*

---

**41. Final Susceptibility Results:**

	Resistant	Susceptible	Not Done	Unknown		Resistant	Susceptible	Not Done	Unknown
Isoniazid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Ethionamide	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Kanamycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cycloserine	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>					

**Comments:**

- Complete Screen 2 with information from the Case Completion Report paper form. Add any comments necessary for the Follow Up Report -2.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

- Click the **Save** button to save the Case Completion Report information.  
*If Question 37 was entered as "Not TB" the Case Verification window will appear. See the "Confirm 'Not a Verified Case' Case Verification with Question 37" section later in this chapter for details.*
- Click the **Close** button.

## Edit a Case Completion Report

If you change information on a Case Completion Report after it has been transmitted to the next higher level, the data will be marked and re-transmitted as an updated record once acknowledgement of the previous Case Completion Report transfer is received and assimilated.

To edit the Case Completion Report information...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Case Completion Report** or click the **Case Completion Report** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate Case Completion Screen and Field to be modified and make the correction.

*For additional information, refer to the Data Entry for Surveillance Fields section later in this chapter. See the Data Generation section later in this chapter for information on generating or clearing data. If a field has been generated, it will appear dimmed and you must use the Data Generation Clear function before you can enter new data.*

4. Click the **Save** button to save the information.

*If Question 37 was changed from "Not TB" or to "Not TB," the Case Verification window will appear. See the "Confirm 'Not a Verified Case' Case Verification with Question 37" section later in this chapter for details.*

5. Click the **Close** button.

## **Case Verification**

Case Verification is assigned to a surveillance record based on data entered on the RVCT and the Case Completion Report. The assigned value is based on calculations performed on information that is entered in a record. Verified, counted cases of TB are eligible for inclusion in the MMWR. The Reporting Area enters Count information and the MMWR Reporting Date.

There are six case verification values:

- Positive Culture
- Positive Smear/Tissue
- Clinical Case Definition
- Verified by Provider Diagnosis
- Suspect Case
- Not a Verified Case

The calculation of Suspect Case can be overwritten at the originating site with Verified by Provider Diagnosis or Not a Verified Case of TB. A case verification can be determined either when an RVCT is saved or by selecting the Case Verification option from the Surveillance menu. If you have count authority, a case will be counted at the CDC if you select **Yes** in response to **Do you want to count this patient at CDC as a verified case of TB?** and enter the month and year the case should be counted. If you enter a MMWR Reporting Date, the record will be included in the NETSS transfer.

Refer to *Appendix SUR IV* for the calculation of the Case Verification Values.

**Note:** Users with Medium and Low security access cannot change the Case Verification criteria.

## Count a Case

The site that enters the record will also confirm the Case Verification value. However, only the Reporting Area can enter count data for a case. A case can be counted if the Case Verification value is Positive Culture, Positive Smear/Tissue, Clinical Case Definition, or Verified by Provider Diagnosis. Level 1 and Level 2 sites can determine the assigned value, but the count data are disabled.

Any updates to this window by the originating or Reporting Area site will cause the data to be re-transmitted to both upper and lower-level sites as an updated record once acknowledgement of the previous data is received and assimilated.

To count a case...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Case Verification** or click the **Case Verification** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

3. The appearance of the Case Verification dialog box will be different depending on the Case Verification value:
  - Positive Culture
  - Positive Smear/Tissue
  - Clinical Case Definition

*For one of the values above, the following dialog box with the appropriate criteria is displayed.*

**Case Verification**

This is a Verified Case of Tuberculosis  
according to the following criteria.

**Positive Culture**

Do you want to count this patient at CDC as a verified case of TB ?  Yes  No

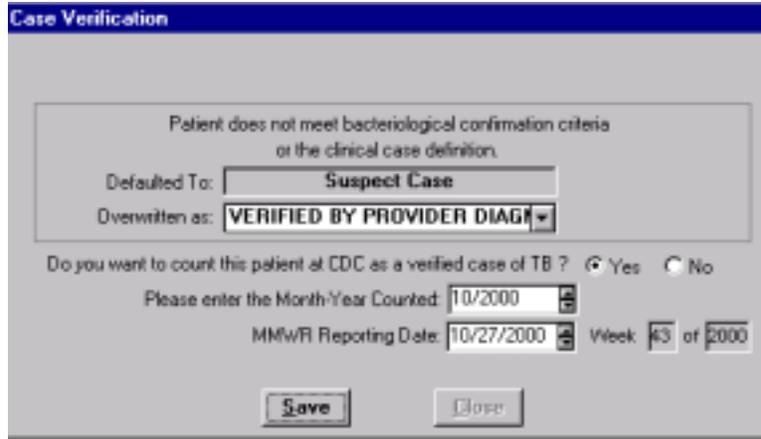
Please enter the Month-Year Counted: 10/2000

MMWR Reporting Date: 10/27/2000 Week: 43 of 2000

**Save** **Close**

- Verified By Provider Diagnosis

If you overwrite a Suspect Case value with Verified by Provider Diagnosis, the following dialog box is displayed:



The image shows a 'Case Verification' dialog box with a blue title bar. The main text reads: 'Patient does not meet bacteriological confirmation criteria or the clinical case definition.' Below this, there are two fields: 'Defaulted To:' with a dropdown menu showing 'Suspect Case', and 'Overwritten as:' with a dropdown menu showing 'VERIFIED BY PROVIDER DIAGNOSIS'. Below these fields, there is a question: 'Do you want to count this patient at CDC as a verified case of TB?' with radio buttons for 'Yes' (selected) and 'No'. Below the question, there are two date fields: 'Please enter the Month-Year Counted:' with a dropdown showing '10/2000', and 'MMWR Reporting Date:' with a dropdown showing '10/27/2000' and a 'Week' field showing '43 of 2000'. At the bottom, there are two buttons: 'Save' and 'Close'.

See the following section "Overwrite a Case Verification of Suspect" for directions on changing the value to Verified by Provider Diagnosis.

4. If you have count authority, answer the remaining questions on the window.

Depending on your level, you may or may not have access to all the fields. Only the Reporting Area has count authority and will be able to enter data on the lower portion of the dialog box. You must use the **TAB** key to enable the MMWR Reporting Date field when initially entering data on this window.

The MMWR Week and Year are automatically calculated from the MMWR Reporting Date entered.

5. Click the **S**ave button to save the information.
6. Click the **C**lose button.

## Overwrite a Case Verification of Suspect

If the calculated verification value is Suspect, you can manually change the value to Verified by Provider Diagnosis or Not a Verified Case of TB, or you can leave the value as Suspect and update the record at another time.

To overwrite the case verification value of Suspect...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select **Case Verification** or click the **Case Verification** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one. The Case Verification dialog box is displayed.*

3. To overwrite the assignment of Suspect Case, select either the *Verified By Provider Diagnosis* or *Not a Verified Case of TB* assessment from the Overwritten As list.
  - Verified By Provider Diagnosis

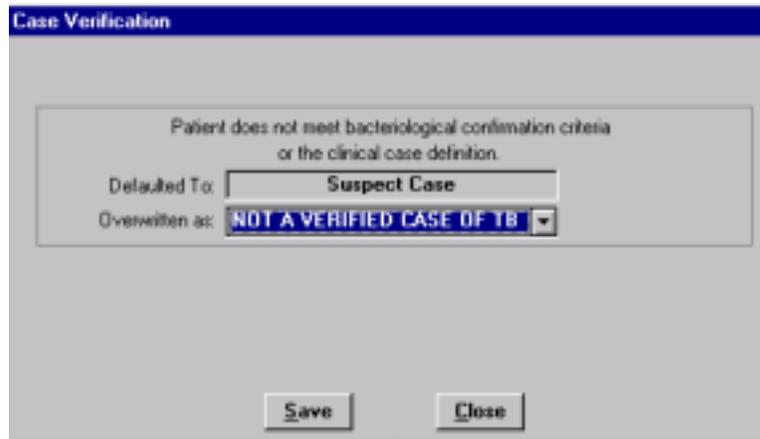
*If you select Verified by Provider Diagnosis, the following dialog box is displayed.*

Depending on your level, you may or may not have access to all the fields. Only the Reporting Area has count authority and will be able to enter data on the lower portion of the dialog box. You must use the **TAB** key to enable the MMWR Reporting Date field when initially entering data on this window.

The MMWR Week and Year are automatically calculated from the MMWR Reporting Date entered.

- Not a Verified Case of TB

If you select *Not a Verified Case of TB* the following dialog box is displayed.

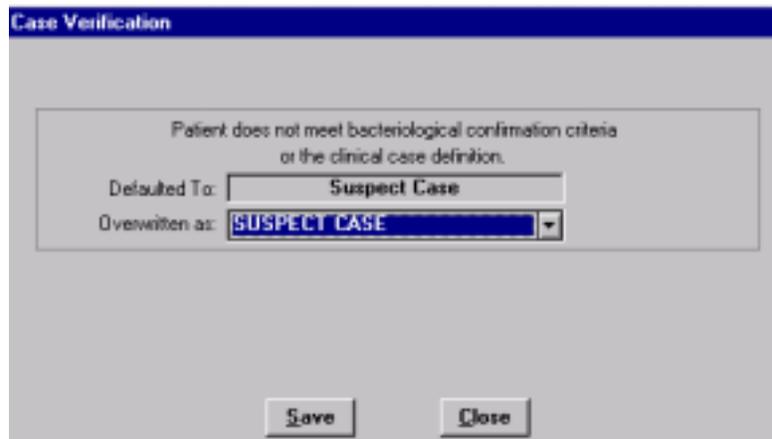


The screenshot shows a dialog box titled "Case Verification" with a blue header. The main text reads: "Patient does not meet bacteriological confirmation criteria or the clinical case definition." Below this, there are two labels: "Defaulted To:" and "Overwritten as:". The "Defaulted To:" label is followed by a text box containing "Suspect Case". The "Overwritten as:" label is followed by a dropdown menu with "NOT A VERIFIED CASE OF TB" selected. At the bottom of the dialog box are two buttons: "Save" and "Close".

TIMS can automatically calculate the value *Not a Verified Case of TB*. See the following section "*Confirm 'Not a Verified Case' Case Verification with Question 37*" for an explanation.

- Suspect Case

If you choose to update the record at another time, select *Suspect Case* from the *Overwritten* as list. The following dialog box is displayed.

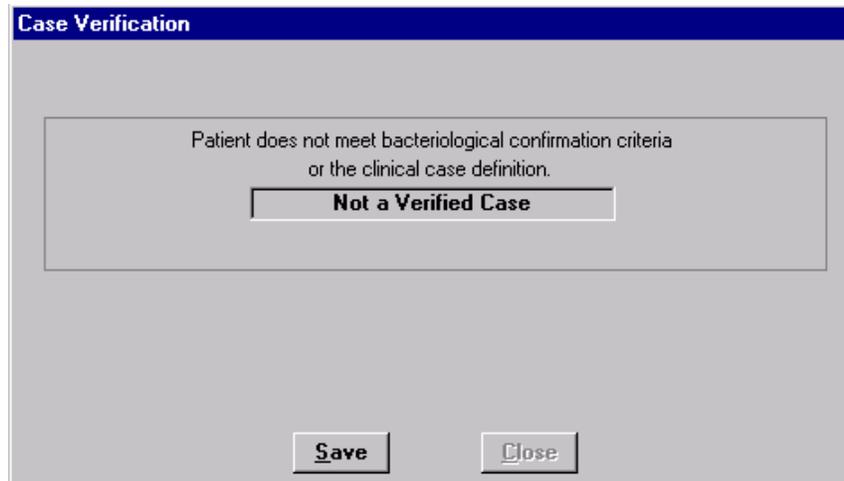


The screenshot shows a dialog box titled "Case Verification" with a blue header. The main text reads: "Patient does not meet bacteriological confirmation criteria or the clinical case definition." Below this, there are two labels: "Defaulted To:" and "Overwritten as:". The "Defaulted To:" label is followed by a text box containing "Suspect Case". The "Overwritten as:" label is followed by a dropdown menu with "SUSPECT CASE" selected. At the bottom of the dialog box are two buttons: "Save" and "Close".

4. Click the **S**ave button to save the information.
5. Click the **C**lose button.

**Confirm 'Not a Verified Case' Case Verification with Question 37**

If a client has been started on therapy and therapy is stopped because the client does not have *M. tuberculosis*, Question 37 (Reason Therapy Stopped) of the Case Completion Report should be marked "Not TB." When the Case Completion Report is saved, the Case Verification window will appear with a value of "Not a Verified Case." The only way to change this Case Verification value is to change the value for Question 37, Reason Therapy Stopped on the Case Completion Report.



1. Click the **S**ave button.
2. Click the **C**lose button.

## ***SURVS-TB User Defined Variables***

User Defined Variables (UDVs) initially collected in SURVS-TB have been incorporated into TIMS as SURVS-TB UDVs. Some information collected in SURVS-TB as a UDV may now be collected in a TIMS module. For example, other illnesses or medication allergies are now collected on the History window of the Patient Management module.

There are 42 SURVS-TB User Defined Variable fields and each one accepts 45 alphanumeric characters. This information is not validated nor transferred to CDC. However, the information is transmitted to the Reporting Area. The UDV data can also be exported.

A client must have an RVCT to access the SURVS-TB User Defined Variable window. All changes made to a UDV will cause the UDV to be re-transmitted as an updated record once acknowledgement of the previous UDV transfer is received and assimilated.

Each Reporting Area is responsible for defining the UDVs for the sites within the Reporting Area.

### **Add SURVS-TB User Defined Data**

To add SURVS-TB UDV information...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select the **SURVS-TB UDV** option or click the **SURVS-TB UDV** button on the toolbar.



*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

*The SURVS-TB User Defined Variable window is displayed.*

*You can use the vertical scroll bar to display additional User fields.*

3. Enter the user defined variable information in the appropriate User field.
4. Click the **S**ave button.
5. Click the **C**lose button.

## Edit SURVS-TB User Defined Data

To edit SURVS-TB UDV information...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select the **SURVS-TB UDV** option or click the **SURVS-TB UDV** button on the toolbar.



3. Modify the UDV.
4. Click the **S**ave button to save the data.
5. Click the **C**lose button.

## Browse Surveillance Reports

Browse allows you to view a list of clients who have RVCT, Initial Drug Susceptibility, or Case Completion data entered in TIMS. You can filter the list to display clients with one, two, or all three reports.

**Note:** All users have access to the Browse Reports.

### Review Browse Reports

To view a list of clients with reports...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select the **Browse** option or click the **Browse** button on the toolbar.



*The Browse window is displayed.*

Surveillance Reports						
Date Reported	Last Name	First Name	Report	St Case #	City/Cnty #	
04/01/1996	JAMES	BETTY	RVCT	930000007		
03/01/1996	JONES	PAUL	RVCT	930000004		
01/01/1996	JONES	SHARON	RVCT	930000024		
01/01/1996	JONES	SHARON	Follow Up 2	930000024		
01/01/1996	JONES	SHARON	Follow Up 1	930000024		
04/01/1996	MABEY	JACKIE	RVCT	930000030		
04/01/1996	MABEY	JACKIE	Follow Up 2	930000030		
04/01/1996	MCCALL	JOHN	RVCT	930000021		
04/01/1996	MCCALL	JOHN	Follow Up 2	930000021		
04/01/1996	MCCALL	JOHN	Follow Up 1	930000021		
04/01/1996	MILLER	JOAN	RVCT	930000033		

Filter

RVCT     Follow Up 1     Follow Up 2   

*By default, all surveillance reports are displayed. You can click on the column headings to re-sort data in the list. For example, clicking on the Last Name heading will re-sort the data in alphabetical order according to last names. You can use the vertical scroll bar to display additional surveillance reports.*

3. Select the filter option(s) to display only the specific reports checked.

Filter

RVCT     Follow Up 1     Follow Up 2

4. Click the **C**lose button to exit the window.

***Surveillance Record Deletion***

TIMS allows the initiating site of a record to delete, undelete, and purge surveillance data from TIMS (this includes RVCT, Initial Drug Susceptibility Report, Case Completion Report, Case Verification, and surveillance-related UDV). TIMS also allows the deletion of both the surveillance and client information if the client does not have any patient management information. When only surveillance data are deleted, information that is generated from the Client and Patient Management modules are not deleted.

A new, never transmitted record can be deleted and then purged, or a new record can be deleted and then undeleted. Previously transmitted data can be marked for deletion and transferred as a deletion. In addition, previously transmitted data can be marked for deletion and then undeleted prior to creating a data transfer file. Once the transferred data have been assimilated at the upper level and the acknowledgement assimilated at the initiating level, the deleted record must be purged prior to creating another Surveillance data transfer.

**Note:** Only the TIMS System Administrator can delete, undelete, and purge a surveillance record.

**Note:** Data for clients with surveillance records marked for deletion will not appear on most of the surveillance module reports.

## Status Codes

The following table explains the status codes that display on the Deletion of RVCT window and the Deleted Records Report.

Status	Status Code	Description	Available Actions
New	NYQ	<ul style="list-style-type: none"> <li>• Entered</li> <li>• Never Transferred</li> <li>• Not Deleted</li> </ul>	N/A
New Deleted	XYQ	<ul style="list-style-type: none"> <li>• Entered</li> <li>• Never Transferred</li> <li>• Deleted</li> </ul>	<ul style="list-style-type: none"> <li>• Can be Undeleted</li> <li>• Can be Purged</li> </ul>
Transferred	XYK	<ul style="list-style-type: none"> <li>• Record Transferred</li> <li>• Acknowledgment not Assimilated</li> <li>• Not Deleted</li> </ul>	N/A
Transferred-Deleted	DYK	<ul style="list-style-type: none"> <li>• Record Transferred</li> <li>• Acknowledgment not Assimilated</li> <li>• Deleted post-transfer</li> </ul>	<ul style="list-style-type: none"> <li>• Can be Undeleted by initiating site</li> <li>• Cannot be Undeleted by non-initiating site</li> <li>• Cannot be Purged by either site</li> </ul>
Updated	UYQ	<ul style="list-style-type: none"> <li>• Record Transferred</li> <li>• Acknowledgment Assimilated</li> <li>• Not Deleted</li> </ul>	N/A
Updated-Deleted	DYQ	<ul style="list-style-type: none"> <li>• Record Transferred</li> <li>• Acknowledgment Assimilated</li> <li>• Deleted (pre or post Acknowledgment Assimilated)</li> </ul>	<ul style="list-style-type: none"> <li>• Can be Undeleted by initiating site</li> <li>• Cannot be Undeleted by non-initiating site</li> <li>• Cannot be Purged by either site</li> </ul>
Deleted	DNK	<ul style="list-style-type: none"> <li>• Deletion Record transferred</li> <li>• Acknowledgment not Assimilated</li> </ul>	<ul style="list-style-type: none"> <li>• Cannot be Undeleted</li> <li>• Cannot be Purged</li> </ul>
Purge	DNQ	<ul style="list-style-type: none"> <li>• Deletion Record Transferred</li> <li>• Acknowledgment Assimilated</li> </ul>	<ul style="list-style-type: none"> <li>• Cannot be Undeleted</li> <li>• Must be Purged</li> </ul>
Incomplete	DYL	<ul style="list-style-type: none"> <li>• Transfer process terminated prior to creating the data transfer file</li> </ul>	N/A

**Note:** Records converted from SURVS-TB at the Reporting Area will initially display "New." Records "spun-off" to level-one sites will initially display "Updated."

## Surveillance Record Deletion (RVCT Data)

TIMS allows you to delete surveillance data. RVCT, Initial Drug Susceptibility, Case Completion Report, and SURVS-TB UDV data make up the deleted surveillance record. If the record you are deleting has already been transmitted as an active record to the next highest-level but the acknowledgement has not been assimilated, a "delete record" instruction is sent when this record is eligible for its next transfer. When the acknowledgement of the deletion is received and assimilated, the record can be purged. For a complete list of deleted records and records that are eligible to be purged, run the Deleted Records report. See Appendix RPT SUR for details.

Updates to client and address information for clients with deleted RVCTs are saved in the client's record but are not transmitted to the next higher level.

On the Surveillance Record Deletion window, converted SURVS-TB records have a New status. Converted records at Level 1 display an Updated status.

To delete an RVCT (Surveillance data)...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select the **Surveillance Record Deletion** option or click the **Surveillance Record Deletion** button on the toolbar.



The Surveillance Record Deletion client list window is displayed.

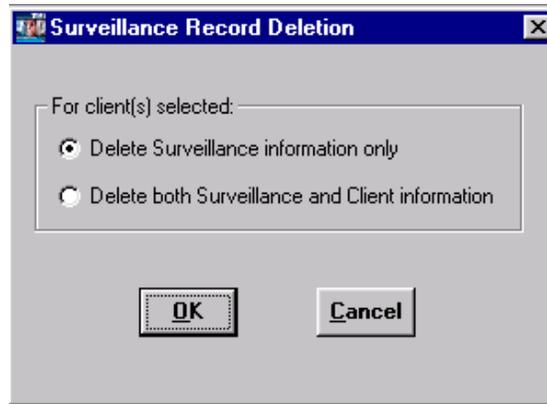
Surveillance Record							
Last Name	First Name	MI	Date of Birth	Date Reported	State #	City/Cnty#	Status
AFFLICTED	BEN		01/10/1974	04/01/1998	00CA12345	CA2100210	Updated
ANNOYING	DEFECT		08/31/1990	08/01/2000		341234234	Updated
ARDVARK	ANDY		01/23/1947	02/01/1998	260050095	071750017	New
BOY	BIG		08/07/1961	10/01/1999	KwL000001	000097869	New
BRONX	MORTB		03/05/1961	03/01/1998	00RAMDRTB	043434934	New
CLINICAL	CASE		07/21/1911	06/01/1999	07-21-199	000007XL1	Updated
FADS	FSD	D	11/21/1990	07/01/1999		000005FDS	New
FORBES	FORBES	F	03/05/1970	05/01/1999		989856765	New
FOXX	REDD	R	05/03/1961	08/01/1999		0L1SITE67	Updated
FOXX	REDD	R	05/03/1961	09/01/1999	REPORTARE	0L1SITE67	New
GLOBAL	GLOBAL	E	12/12/1971	07/01/1999	111111111	222222222	New

You can click on the column headings to re-sort data in the list. For example, clicking on the Last Name heading will re-sort the data in alphabetical order according to last names. Only records that can be deleted or purged at your site will be displayed. Lower level records that do not need to be purged will not appear.

3. Click on the record to be deleted and click the **Delete** button.

To select more than one record at a time, hold down the control key and select appropriate records by clicking with the mouse. Only the options appropriate for that record will be enabled. Once deleted, the status of the record will be updated to New-Deleted, Transferred-Deleted, or Updated-Deleted.

The Surveillance Record Deletion option window is displayed.

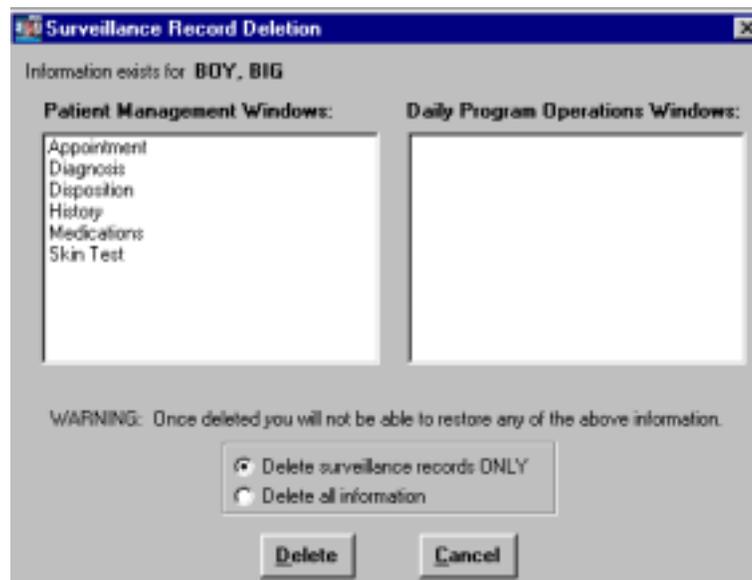


4. Choose to **Delete Surveillance information only** or **Delete both Surveillance and Client information**.

*If you select to delete both Surveillance and Client information, TIMS will provide you with a list of any program management and/or daily program operations information that exists for the client. You will be able to delete this information along with Surveillance and Client information. However, you will not be able to undelete program management and/or daily program operations information once you delete it. Also, if the client has any contacts that have been converted or merged, then you may only choose to delete surveillance records.*

5. Click **OK** to proceed or **Cancel** to return to the Surveillance Record Deletion client list window.
6. If you choose to Delete Surveillance Information only, proceed to step 7.

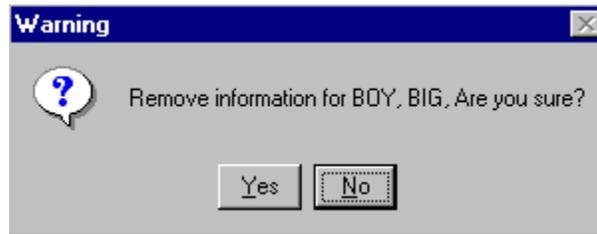
If you choose to Delete both Surveillance and Client information (and if Patient Management and/or Daily Program Operations information exists for the client), the following window is displayed:



After viewing the Patient Management and/or Daily Program Operations information that exists for the client, choose to **Delete surveillance records ONLY** or **Delete all information**.

Click **D**elete to continue, or **C**ancel to return to the Surveillance Record Deletion client list window.

*The Warning message box appears.*



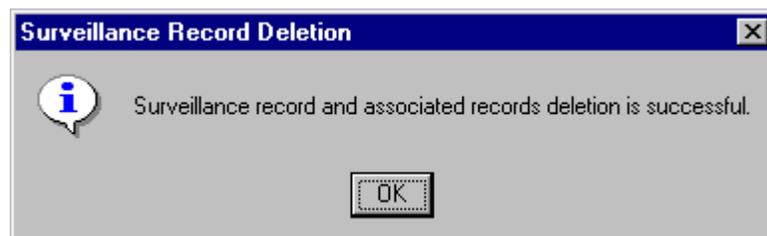
Click **Y**es to confirm that you want to remove the information or click **N**o to return to the previous window.

7. If the record has a status of Transferred, the Transfer Flags Information message box is displayed. Since the record had previously been transferred, other levels need to be notified of the deletion. This will occur during the next transfer process. Click the **O**K button to close the Transfer Flags message box.

*The message box will appear once for each record type deleted i.e., RVCT, Initial Drug Susceptibility, and Case Completion Report.*



8. Click the **O**K button to close the Surveillance Record Deletion message box.



9. If there are no more records to delete, click the **C**lose button.

### Undelete an RVCT (Surveillance Data)

TIMS allows you to undelete (return to active status) previously deleted surveillance records. If client information was deleted that information will be restored with the surveillance information. Only the site that entered and deleted a record can undelete the record. A surveillance record cannot be undeleted if it has already been prepared for transfer as a deleted record.

To undelete an RVCT (surveillance data)...

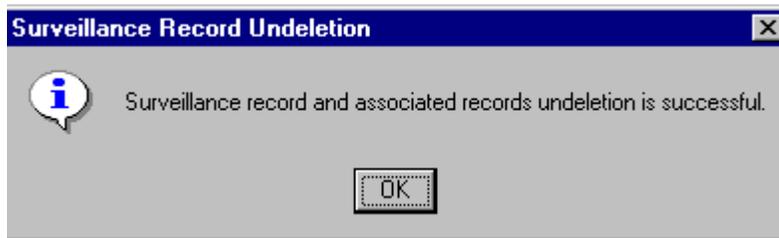
1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select the **Surveillance Record Deletion** option or click the **Surveillance Record Deletion** button on the toolbar.



3. Click on the record to be undeleted and click the **Undelete** button.

*To select more than one record at a time, hold down the control key and select appropriate records by clicking with the mouse. If the Undelete button is not enabled, the selected record cannot be Undeleted. See the Status Codes chart earlier in this chapter for additional information. The status of the record will be updated to New, Transferred, or Updated.*

*The Surveillance Record Undeletion message box is displayed.*



4. Click the **OK** button to close the Surveillance Record Undeletion message box.
5. Click the **Close** button.

## Purge an RVCT (Surveillance Data)

The Purge button is used only when a deleted surveillance record that is eligible for permanent removal must be removed from the TIMS Database. Client, Patient Management, and Daily Program Operations information will either be purged or not purged depending on the option chosen during the delete process. Choosing the Purge button will allow you to see the records eligible to be purged.

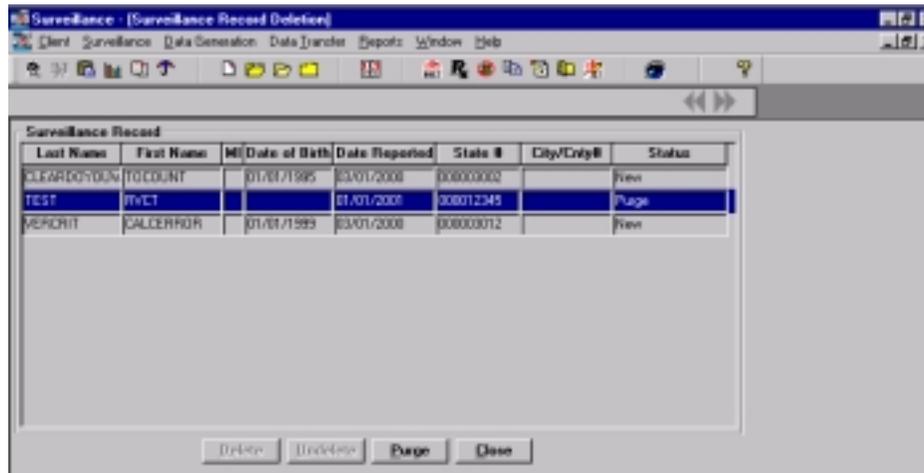
**Warning:** Once a surveillance record is purged from the database, it cannot be retrieved.

To purge an RVCT (surveillance data)...

1. Open the **Surveillance** module.
2. Open the **Surveillance** menu and select the **Surveillance Record Deletion** option or click the **Surveillance Record Deletion** button on the toolbar.



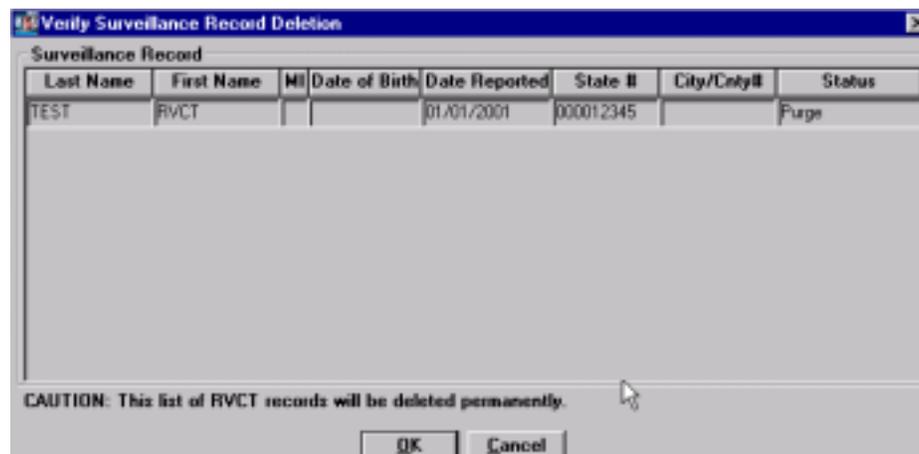
The Surveillance Record Deletion window is displayed.



If the Purge button is not enabled (does not appear in black), there are no records to be purged.

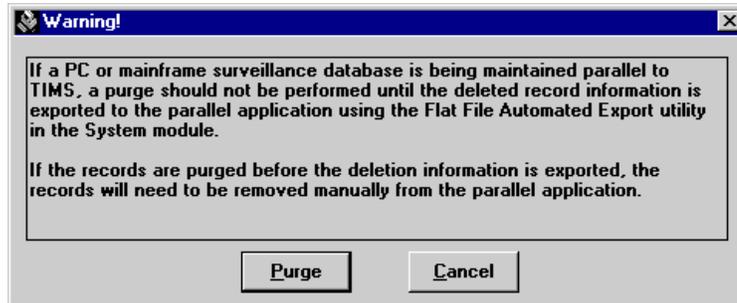
3. Click the **Purge** button.

All records that are eligible to be purged will be displayed in the Verify Surveillance Record Deletion window.



4. Click the **OK** button to verify the removal of the surveillance record(s). Click the **Cancel** button to stop the purge operation and return to the Surveillance Record Deletion window.

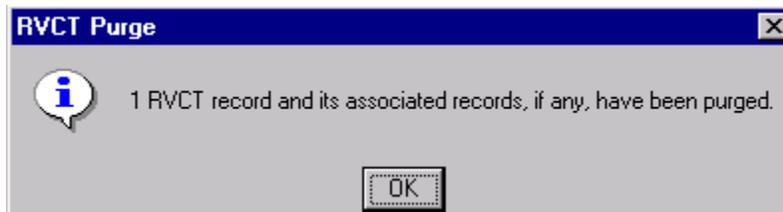
*The Warning message box appears.*



5. Read the warning, and then click the **Purge** button to complete the purge operation. Click the **Cancel** button to stop the purge operation and return to the Surveillance Record Deletion window.

*All the eligible surveillance records are permanently removed from the list and the database.*

6. Click the **OK** button to close the RVCT Purge message box.



7. Click the **Close** button on the Surveillance Record Deletion window.

## **Data Generation**

Some information in the Surveillance module can be entered in the Client and Patient Management modules. The Data Generation feature allows you to copy entries from the Client and Patient Management modules into the Surveillance module, prohibiting duplicate entries. Some questions are automatically generated and others are designed to allow you to manually generate and clear the generated fields to enter different data. If data are generated using the Data Generation feature, it will be updated each time the Report is opened. For any generated question, any information manually entered will be replaced with the corresponding information from the Patient Management module. If there is no corresponding information from Patient Management, the field will be blank. Once the information is generated for a field, it is disabled for entry until it is cleared.

In order for generated data to be 'refreshed,' the surveillance window must be re-opened and re-saved.

TIMS provides the following options under the Data Generation option:

- **Generate** - generate a single question or multiple questions
- **Generate All** - generate all eligible questions
- **Clear** - clear a single question or multiple questions
- **Clear All** - clear all generated questions

A list of all items that are generated is available on the Data Generation Table later in this chapter. Items that are automatically generated are: State Reporting, State Case Number, City/County Case Number, Address for Case Counting, Month-Year Counted, Date of Birth, Sex, Race, Ethnic Origin, Country of Origin, and Month-Year Arrived in U.S. All these items except Month-Year Counted are entered in the Client module. Month-Year Counted is entered on the Case Verification window.

**Note:** Users with Medium and Low security access cannot use the manual Data Generation option.

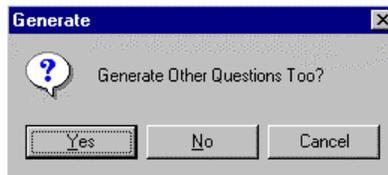
## Generate a Single Question

Data Generation is performed in the Surveillance module for questions in the currently displayed report (i.e., RVCT, Initial Drug Susceptibility, or Case Completion).

To generate a single question...

1. Open the **Surveillance** module.
2. Select the report that includes the question to be generated: **RVCT**, **Initial Drug Susceptibility**, or **Case Completion**.  
*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*
3. Select the question you want to generate by clicking within that question.
4. Do one of the following:
  - Open the **Data Generation** menu and select **Generate**.
  - Right-click the mouse on the question number and select **Generate** from the pop-up menu.
5. Click the **No** button on the Generate dialog box to generate only the selected question. Click **Cancel** to abandon the generate operation.

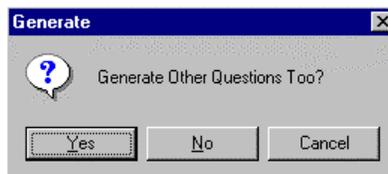
*Any manually entered data will be overwritten.*



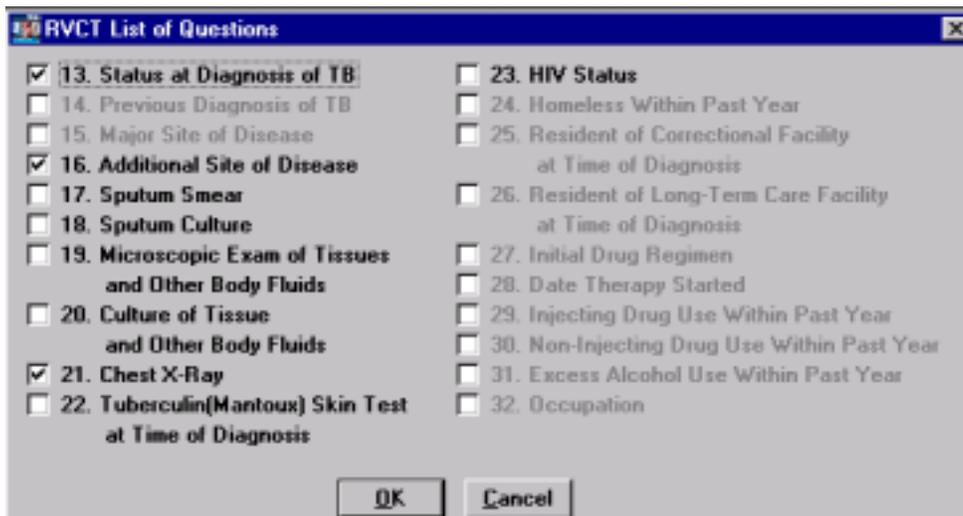
## Generate Multiple Questions

To generate multiple questions...

1. Open the **Surveillance** module.
2. Select the report that includes the questions to be generated: **RVCT**, **Initial Drug Susceptibility**, or **Case Completion**.  
*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*
3. Select a question you want to generate by clicking within that question.
4. Do one of the following:
  - Open the **Data Generation** menu and select **Generate**.
  - Right-click the mouse on a question number and select **Generate** from the pop-up menu.
5. Click the **Yes** button on the Generate dialog box to generate multiple questions. Click **Cancel** to abandon the generate operation.



The List of Questions window is displayed.



If the question has a ✓ or an X it will be generated. To remove the selection of a question, click on the question again. If a question is listed with gray type rather than black type, it is not eligible for generation.

6. Select the questions to be generated.
7. Click the **OK** button to generate the information. Click **Cancel** to abandon the generate operation.

## Generate All Questions

**Note:** This feature will overwrite previously entered information with the corresponding information entered in the Patient Management module or will clear the information if no Patient Management information is available.

To generate all questions...

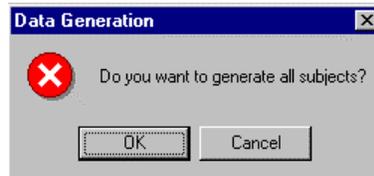
1. Open the **Surveillance** module.
2. Select the report which includes the questions to be generated: **RVCT**, **Initial Drug Susceptibility**, or **Case Completion**.

*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Do one of the following:

- Open the **Data Generation** menu and select **Generate All**.
- Right-click the mouse and select **Generate All** from the pop-up menu.

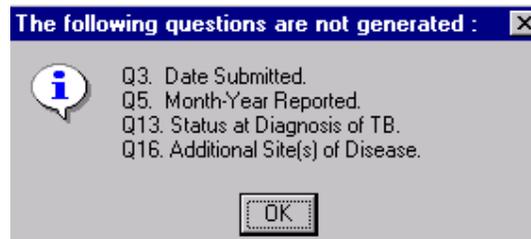
*The Data Generation dialog box is displayed.*



4. Click the **OK** button on the Data Generation dialog box to generate all questions. Click the **Cancel** button to abandon the generate operation.

*Questions which contain generated data appear with gray type rather than black type and cannot be edited.*

5. TIMS displays an information window that provides the user with a list of questions that were not generated. Click the **OK** button.

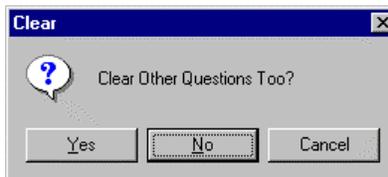


## Clear a Single Question

A single question can be cleared whether it was manually input or generated.

1. Open the **Surveillance** module.
2. Select the report that includes the question to be cleared: **RVCT**, **Initial Drug Susceptibility**, or **Case Completion**.  
*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*
3. Do one of the following:
  - Open the **Data Generation** menu and select **Clear**.
  - Right-click the mouse on the question number and select **Clear** from the pop-up menu.

*The Clear dialog box is displayed.*



4. Click the **No** button in the Clear dialog box to clear only the field selected. Click the **Cancel** button to abandon the clear operation.

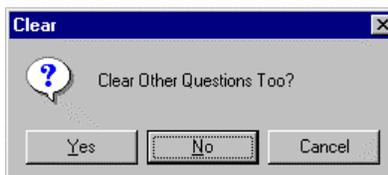
## Clear Multiple Questions

Only generated questions can be cleared using the Clear Multiple Questions feature.

To clear multiple questions...

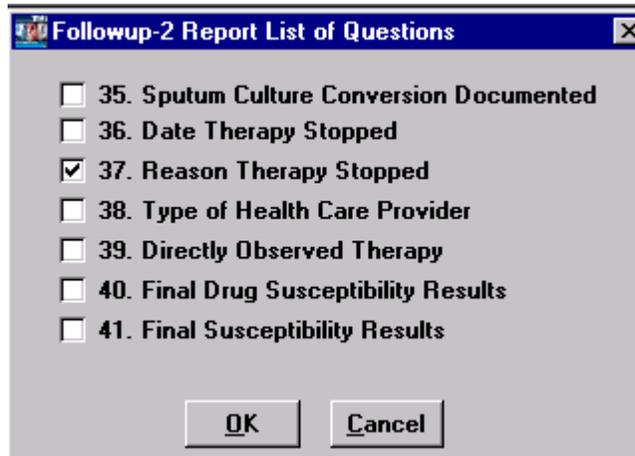
1. Open the **Surveillance** module.
2. Select the report that includes the questions to be cleared: **RVCT**, **Initial Drug Susceptibility**, or **Case Completion**.  
*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*
3. Do one of the following:
  - Open the **Data Generation** menu and select **Clear**
  - Right-click the mouse over the question and select **Clear** from the pop-up menu.

*The Clear dialog box is displayed.*



4. Click the **Yes** button in the Clear dialog box to select the questions to be cleared. Click the **Cancel** button to abandon the clear operation.

The List of Questions window is displayed.



If the question has a ✓ or an X it will be cleared. To remove the selection of a question, click on the question again.

If a question is listed with gray type rather than black type, it is not eligible to be cleared.

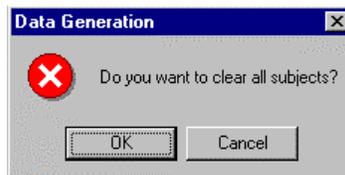
5. Select the questions to be cleared.  
*Only questions that have been generated will be available to be cleared.*
6. Click the **OK** button. Click the **Cancel** button to abandon the clear operation.

### Clear All Generated Questions

To clear all generated questions leaving them blank and enabled for data entry...

1. Open the **Surveillance** module.
2. Select the report that includes the questions to be cleared: **RVCT**, **Initial Drug Susceptibility**, or **Case Completion**.  
*If no client is currently in focus, the Change Focus window will open, enabling you to select one.*
3. Do one of the following:
  - Open the **Data Generation** menu and select **Clear All Generated**.
  - Right-click the mouse and select **Clear All Generated** from the pop-up menu.

The Data Generation dialog box is displayed.



4. Click the **OK** button in the Data Generation dialog box to clear all generated questions. Click the **Cancel** button to abandon the clear operation.

---

## Data Transfer

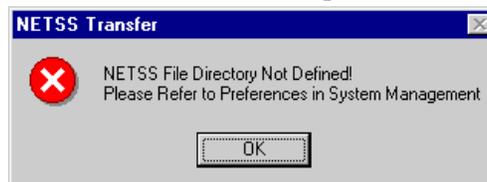
TIMS has two surveillance data transfer features, the Surveillance transfer and the National Electronic Telecommunication System for Surveillance (NETSS) transfer. The Surveillance transfer feature is used to prepare new, modified, and deleted Report of Verified Case of Tuberculosis (RVCT), Initial Drug Susceptibility Report, and Case Completion Report records for transmission to the next higher level and the Division of Tuberculosis Elimination (DTBE) at CDC; DTBE receives and analyzes surveillance data collected in TIMS. The NETSS feature creates a file of counted case information for the state epidemiologist's office to transmit to CDC to be included in the *Morbidity and Mortality Weekly Report* (MMWR).

After surveillance information is entered, edited, or deleted, the Surveillance transfer will prepare the record for transmission to the next higher level until it reaches the DTBE. Patient identifiers (i.e., name and client address), user-defined fields, and comments are not transmitted to the CDC. Reporting Area sites add State Case Number, count status, Month-Year Counted, and MMWR Reporting Date information to surveillance records that originate at lower-level sites. This information is transferred to the originating site and added to the originating site's surveillance RVCT record.

Surveillance records are encrypted during the transfer process to ensure patient confidentiality. The records are also compressed to reduce transmission time.

NETSS files should be transmitted to the state epidemiologist's office on a weekly basis as requested by CDC. All TB cases assigned an MMWR Reporting Date on the Case Verification window will be included in the NETSS transfer. The Reporting Area should coordinate with the state epidemiologist's office to determine a weekly schedule for submitting data from TIMS. The NETSS files do not contain any confidential patient identifiers and are not encrypted. See Appendix SUR XI for the NETSS record format.

The TIMS System Administrator must specify the destination to which the Surveillance and NETSS files will be copied in the Preferences option of the System module. If the destination directory is not specified, an error will occur and the operation will fail.



**Note:** Only the Reporting Area level can access the NETSS Transfer. Users with Medium and Low security access cannot use the Surveillance Data Transfer option.

### **Surveillance Transfer Definitions**

**Transfer** - the electronic preparation of data that will be sent from one site to another. The information is prepared in the Surveillance module, using the Data Transfer feature. The actual transmission of the data to the other site is done using the OutBox feature in the System module. See *Chapter 7 - System Module* for information about OutBox.

**Acknowledgement** - an electronic confirmation that previously-transmitted data have been received and assimilated by the intended site. The acknowledgement is automatically created when the surveillance data received are assimilated into the receiving site's database. The acknowledgement is delivered during the next transmission session when a lower site calls the higher site. See *Chapter 7 - System Module* for information about the Dial feature.

**Transmission** - a feature in the System module that provides electronic movement of prepared data from one site to another site via modem. See *Chapter 7 - System Module* for more information about Transmission.

## Surveillance Reporting Hierarchy

Surveillance data are collected and transferred to the next higher level until reaching the CDC. During a Surveillance transmission, information can be transmitted between a:

- Level 2 site and a Level 1 site
- Level 1 site and the Reporting Area
- Reporting Area and the CDC

Data cannot be transmitted between:

- Local sites at the same level (Level 1 to Level 1, Level 2 to Level 2)
- Reporting Areas
- Reporting Area and Level 2 sites
- CDC and Level 1 or Level 2 sites

The Reporting Area is the only location that can enter a State Case Number, count status, Month-Year Counted, and MMWR Reporting Date. This information is returned to the originating site as a surveillance data transfer during a future modem transmission. If the originating site is a Level 2 site, the information will be transmitted first through the intermediary Level 1 site and then to the Level 2 site.

After the information is transmitted and assimilated by the receiving site, an acknowledgement is automatically created at the receiving site to confirm that the information was successfully received and assimilated. The acknowledgement will be transmitted to the originating site during the next data transmission session initiated by the lower level site.

**Note:** While data flows in both directions, the lower-level sites must always initiate (dial) data transmission sessions. See *Chapter 7 - System Module* for additional information.

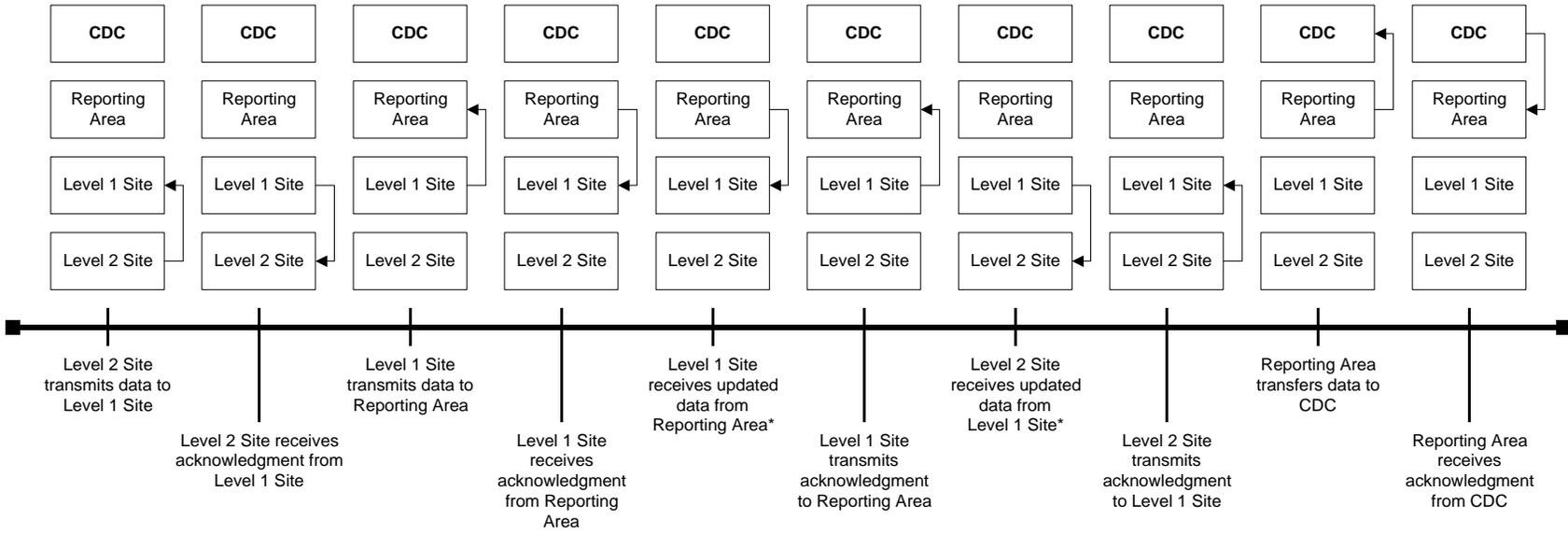
The Case Number fields (State and City/County) are disabled and are no longer accessible once the data have been prepared for transfer.

If a record has been updated but the acknowledgement of the previous transfer for the record has not been received and assimilated, the current changes to this record will not be included in the next transfer.

**Note:** A higher site cannot call a lower site. Information is only exchanged during a data transmission session initiated by the lower site to the higher site.

The chart on the following page displays the flow of Surveillance data between the different levels.

# Surveillance Reporting Hierarchy



\*Updated data pertains to State Case Number, count status, Month-Year Counted, and MMWR Reporting Date.

## Transfer Surveillance Information

Surveillance data travels in two directions. New and updated Client and Address data along with new, updated, and deleted RVCT, Follow Up-1, Follow Up-2, and SURVS-TB user-defined variables (SUDV) transfer up to the next higher-level site. Client and RVCT records that are updated at the reporting area travel down to the Level 1 or Level 2 site where the record originated. If the originating site was a Level 2 site, the data are prepared for transfer to the intermediary Level 1 site. The Level 1 site will later prepare the data for transfer to the originating Level 2 site.

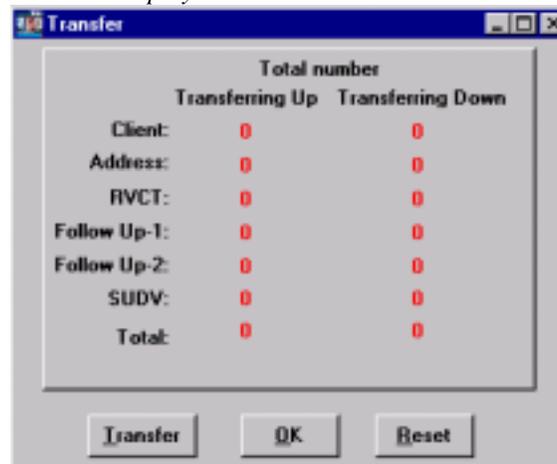
	<b>Record Status: Transferring UP</b>	<b>Record Status: Transferring DOWN</b>
<b>Client</b>	New and Updated	Updated
<b>Address</b>	New and Updated	
<b>RVCT</b>	New, Updated, Deleted	Updated
<b>Follow Up-1</b>	New and Updated	
<b>Follow Up-2</b>	New and Updated	
<b>SUDV</b>	New and Updated	

To transfer Surveillance data...

1. Open the **Surveillance** module.
2. Open the **Data Transfer** menu and select **Surveillance**.

*The TIMS System Administrator should designate the location of the OutBox in the Preferences window of the System module prior to transferring surveillance data (See Chapter 7 - System Module).*

*The Transfer window is displayed.*



3. Click the **T**ransfer button to create a transfer.

Click the **OK** button to cancel the transfer operation. The use of the **R**eset button is described in the Reset Surveillance Transfer Flags section later in this chapter.

TIMS performs two searches when performing the transfer operation. First, TIMS checks to ensure that there are no records that must be purged in the database. If these records exist, the following error message appears and you must use the Purge command on the Deletion of RVCT window before you can transfer the surveillance data. See *Purge an RVCT (Surveillance Data)* later in this chapter for details.



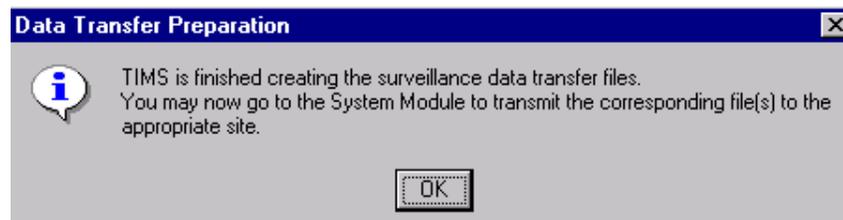
Second, if no records need to be purged, TIMS searches the database for the records that need to be transferred to the next higher-level site (and at the Reporting Area, for any records that were updated at the Reporting Area and need to be transferred back to the originating site).

Information about the tasks the Transfer process is performing appears in a series of windows. If there are only a few records to transfer, this information will appear and disappear very quickly.

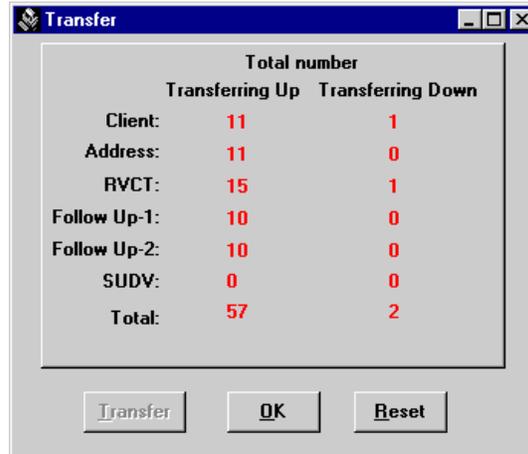
When the transfer process is complete, the Data transfer preparation is complete message box appears. Click **OK** to close this message.



The Data Transfer Preparation window is then displayed. Click **OK** to close this window and view the Transfer window.



The Transfer window displays the number of each type of record included in the transfer up and transfer down.



	Total number	
	Transferring Up	Transferring Down
Client:	11	1
Address:	11	0
RVCT:	15	1
Follow Up-1:	10	0
Follow Up-2:	10	0
SUDV:	0	0
Total:	57	2

Buttons: Transfer, OK, Reset

The example above was created at a Level 1 site. As the window indicates, 11 Client records, 11 Address records, 15 RVCT records (four records are deleted), 10 Follow Up-1 records, and 10 Follow Up-2 records will be transferred to the Reporting Area site. One Client record and 1 RVCT record have been updated and will be transferred back to the Level 2 site. The Client record count will always match the RVCT record count on records transferring down.

Only Client and RVCT records are transferred down and there is always a one-to-one correlation.

The following information is transferred:

- Client - new and updated records
- Address - new or updated address
- RVCT - new, updated, and deleted records
- Follow Up-1 - new and updated records
- Follow Up-2 - new and updated records
- SUDV - new and updated records. Changes to TIMS Global User Defined Variables will increase the count status for their corresponding record type and will be transferred to the Reporting Area. See *Chapter 7 - System Module* for information on TIMS Global User Defined Variables.

Only the form that is added or updated is transferred, not the entire record. For example, when a Follow Up-2 is added or updated, only the Follow Up-2 is transferred. The associated RVCT and Follow Up-1 are not transferred unless they have also been added or updated.

When at a Reporting Area site, the Client, Address, and SUDV figures will always be 0 in the Transferring Up column. Patient identifiers (i.e., name and client address), user-defined fields, and comments are not transmitted to the CDC.

When an RVCT is deleted, only the RVCT record (with the delete information) is transferred to the higher site. The associated records (Follow Up-1, Follow Up-2, and SUDV) are removed when the surveillance record is purged. Client and

Address information is not deleted. Case Number (State and City/County) information is sent with the Client information and is not affected by RVCT deletions.

If there are no records eligible for transfer, the Data Transfer Complete message box will appear. Click **OK** to close it and return to the Surveillance Transfer window.



4. Click the **OK** button to return to the Surveillance main menu.

*You must go to the System module to complete the transmission, receive acknowledgement, and print reports. See Chapter 7 - System Module for more details.*

## Reset Surveillance Transfer Flags

If record counts or updates between sites do not correspond and all attempts to correct the situation have failed, it may be necessary to transfer all surveillance records to the next level. This is a password-protected functionality.

When you prepare surveillance records for transmission using the Data Transfer function, an unseen value associated with each record that will be transferred changes from Unsent to Sent. If your site must re-send all the surveillance records, use the Reset command to change the value for each surveillance record to Unsent.

The Unsent flag affects records that travel both up and down. You will then use the usual data transfer steps to prepare these records for transfer. Deleted surveillance records must be purged prior to performing the reset operation.

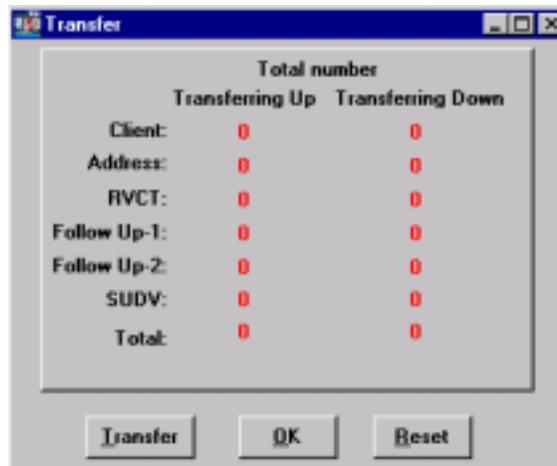
**Note:** Only a TIMS System Administrator can perform the Reset operation.

To reset surveillance transfer flags...

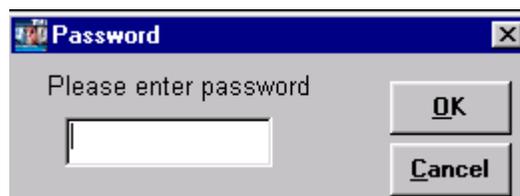
1. Call the TIMS Help Desk at (404) 639-8155 to receive a Reset password.
2. Open the **Surveillance** module.
3. Open the **Data Transfer** menu and select **Surveillance**.

*The TIMS System Administrator should designate the location of the OutBox in the Preferences window of the System module prior to transferring surveillance data (See Chapter 7 - System Module).*

*The Surveillance Transfer window is displayed.*



4. Click the **Reset** button.
5. Enter the password provided by the TIMS Help Desk and click the **OK** button. Click the **Cancel** button to close the Password dialog box and return to the Transfer window.



6. Select the **Type of Reset**. Click **Cancel** to terminate the Reset process.



- Select **All** to reset the surveillance transfer flags for all records (proceed to steps 8-10).
  - Select **Partial** to reset only unacknowledged transferred records (proceed to step 7).
7. If Partial Reset is selected:

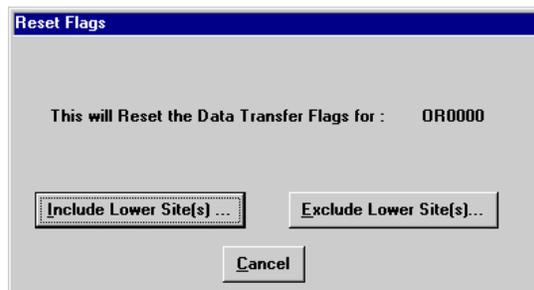
Once the transfer flags have been reset on the unacknowledged records, the following message box appears.



Click the **OK** button to close the Partial Reset message box. Proceed to step 11.

8. If All records are selected to be reset:

*The Reset Flags dialog box is displayed.*



Do one of the following:

- Click the **Include Lower Site(s)** button to reset the transfer flags for all the surveillance records stored in the database at your site, including the records created at lower level sites. Using the Include Lower Site(s) feature synchronizes the entire reporting hierarchy on the data at your site. The records are then sent both up and down to all appropriate sites during the normal transfer and transmission process. Once assimilated at the other sites on the reporting hierarchy, the data are synchronized at all points on the hierarchy.

*If the site has a large database, this process may take a few minutes.*

Or

- Click the **Exclude Lower Site(s)** button to reset the transfer flags for only those records created at your site. The transfer flags for the records that have been transferred from lower-level sites (if any) will remain unchanged.

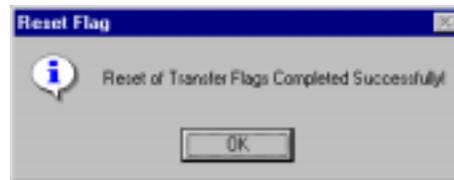
Or

- Click the **Cancel** button to abandon the reset transfer flags operation and return to the Transfer window.
9. If deleted records exist, the Purge RVCT Records message box will appear telling you that you need to purge the records before proceeding.



Click the **OK** button to return to the Transfer window. Once the deleted records have been purged, you can re-start the Reset option on the Transfer window.

10. When all transfer flags have been reset, the Reset Flag message box appears. Click the **OK** button to close the Reset Flag message box.



11. Click the **OK** button to close the Transfer window.

## ***Transferring NETSS Files***

Reporting Areas can transfer data collected in TIMS using the National Electronic Telecommunication System for Surveillance (NETSS). Although not required, CDC strongly encourages Reporting Areas to use TIMS to send NETSS files to the state epidemiologist's office on a weekly basis. This data will be subsequently included in the *Morbidity and Mortality Weekly Report* (MMWR). Using TIMS to prepare the file will ensure consistency in the number of TB cases reported to the MMWR and to the Division of Tuberculosis Elimination (the division at CDC that receives and analyzes surveillance data collected in TIMS). The weekly deadline for submitting NETSS data from the state epidemiologist's office to CDC varies by Reporting Area and is at Noon (12 p.m.) on either Monday or Tuesday. TB program personnel should coordinate with the state epidemiologist to determine a weekly schedule for submitting NETSS data from TIMS.

Clients with RVCT records that are given an MMWR Reporting Date on the Case Verification window are included in the NETSS transmission. The MMWR Week and Year is calculated on the Case Verification window from the MMWR Reporting Date. An MMWR week is Sunday through Saturday. An MMWR year consists of a series of MMWR weeks, thus the start and end date of an MMWR year may differ slightly than a standard calendar year. For example, the MMWR year 1998 is from 1/4/1998 to 1/2/1999.

The TIMS System Administrator should specify the destination to which the NETSS files will be copied in the Preferences option of the System module.

When more than one diskette is used, the same sequence in which the file is copied must be maintained by the receiving site when processing the diskettes into their database. Label all diskettes in the correct sequence.

The NETSS files does not contain any confidential patient identifiers and are not encrypted.

There are three types of NETSS records: Detail, Deletion, and Verification. See *Appendix SUR XI* for detailed information on the record layout.

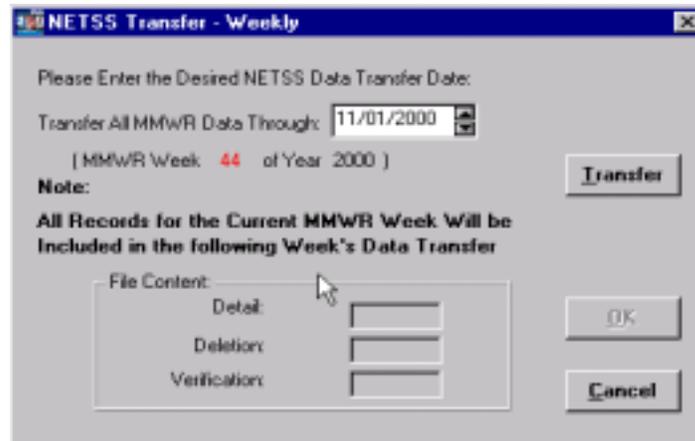
## Create a Weekly NETSS File

The Weekly NETSS transfer file must be generated even if zero (0) records are to be transferred. The Weekly NETSS transfer file contains at least one verification record that indicates the total count from the beginning of the MMWR Reporting year through the current MMWR Week. Multiple verification records will be included in the NETSS transmission file if the file contains NETSS records that span more than one MMWR year. If records are updated from a previous year, the records will be included in the next NETSS transmission and there will be two verification records: one for the previous year and one for the current year.

To create a weekly NETSS file...

1. Open the **Surveillance** module.
2. Open the **Data Transfer** menu and select **NETSS**. Select **Weekly** from the NETSS sub-menu.

*The NETSS Weekly Data Transfer window is displayed.*



3. Enter or select a date in the **Transfer All MMWR Data Through:** field. Click the **Cancel** button to abandon the Weekly NETSS Transfer operation.

*The default date in the prompt window will be the current date. TIMS will automatically display the correct MMWR week and year for the date entered. If the MMWR week displayed is incorrect (for example, if the transmission is being prepared later than usual), enter the date for the desired week and year of transmission. Only those records that have been added, deleted, or modified on or before the ending date of the MMWR week specified will be included in the transmission. In some instances this could include records that have been updated after the exact transmission date selected. A record is eligible for transmission if it has been added, updated, or deleted after the previous MMWR week transmission and the MMWR Reporting Date falls on or before the specified MMWR week of the transfer.*

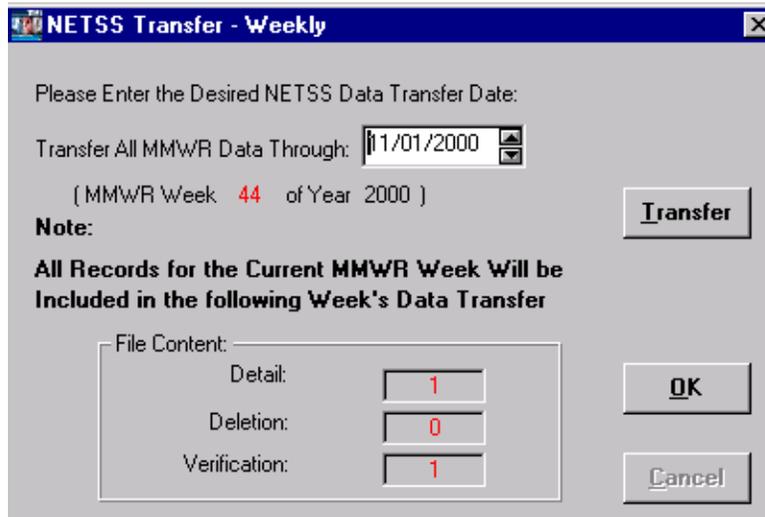
4. Click the **Transfer** button to initiate the transfer process. A series of status windows provide information about the tasks the NETSS process is performing. If there are only a few records to transfer, the windows will appear and disappear very quickly.

A message providing the file name and location is displayed when the transfer is complete. The NETSS Weekly transfer file is always named TB.DAT. TIMS creates an archive copy of each weekly NETSS transfer file. See the Transfer Archived NETSS Files section for additional information.



5. Click the **OK** button to close the NETSS Transfer message box.

The NETSS Transfer - Weekly window will display the number of Detail, Deletion, and Verification records included in the transfer.



6. Click the **OK** button to close the NETSS Transfer - Weekly dialog box.

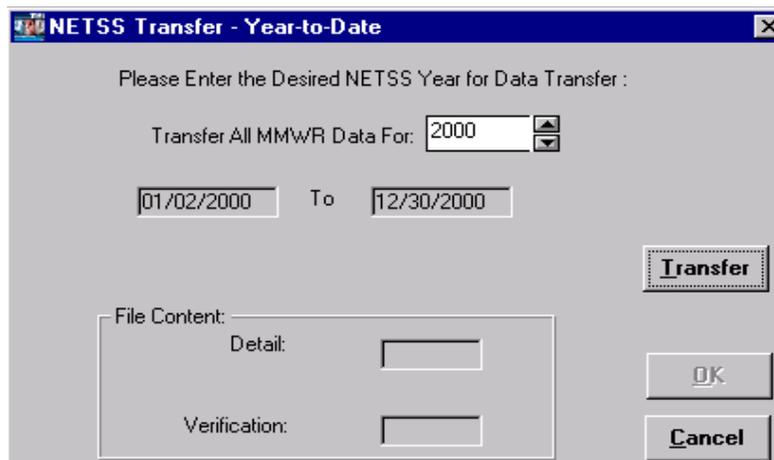
## Create a Year-to-Date NETSS File

The Year-to-Date transfer should occur only when there is a problem with the data previously transferred. It contains one verification record that indicates the total year-to-date count and all detail records to date for the selected year. Deletion records are never included in Year-to-Date NETSS Transfer. The state epidemiologist's office must coordinate with the CDC NETSS Coordinator at (404) 639-3673, prior to the transfer of the Year-to-Date file.

To create a Year-to-Date NETSS file...

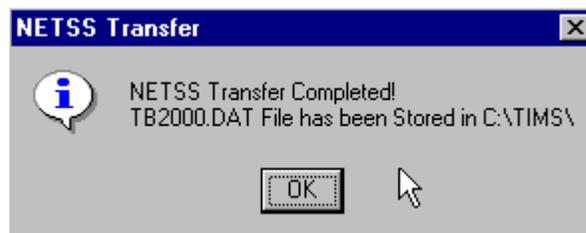
1. Open the **Surveillance** module.
2. Open the **Data Transfer** menu and select **NETSS**. Select **Year-to-Date** from the NETSS sub-menu.

*The NETSS Year-to-Date Data Transfer window is displayed.*



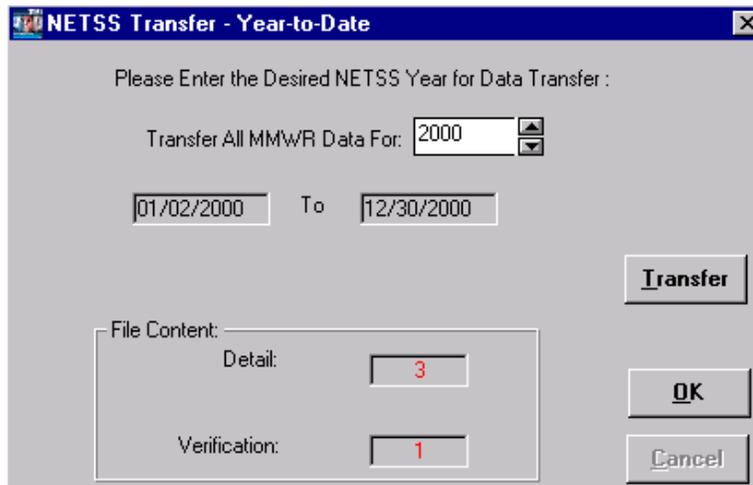
3. The default year is the current year. You may change the year by entering or selecting a new a year in the **Transfer All MMWR Data For:** box in the prompt window.
4. Click the **Transfer** button to initiate the transfer process. Click the **Cancel** button to abandon the NETSS Transfer Year-to-Date operation. A series of status windows provide information about the tasks the NETSS process is performing. If there are only a few records to transfer, the windows will appear and disappear very quickly.

*The NETSS Transfer information dialog box displays the path and file name of the Year-to-Date file. Year-to Date files are named TBxxx.DAT, where xxx is the year specified.*



5. Click the **OK** button to close the NETSS Transfer message box.

*The window will display the number of Detail and Verification records included in the transfer. The Year-to-Date file always contains one verification record. In this example, there are three (3) detail records and one (1) verification record.*



6. Click **OK** to close the NETSS Transfer - Year-to-Date window.

## Transfer Archived NETSS Files

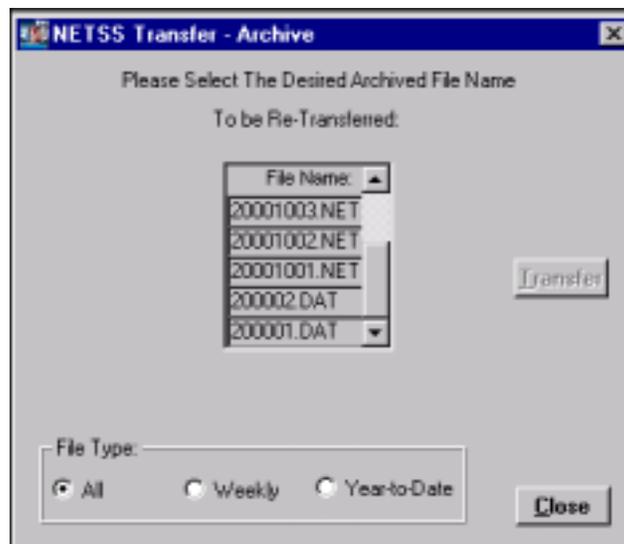
The NETSS Transfer - Archive function allows you to transfer duplicates of the NETSS Weekly and Year-to-Date transfer files. These files can be re-sent in the event that the original data transfer is damaged or lost. The naming convention for the two types of NETSS archive files is as follows:

- The Weekly NETSS file name includes the MMWR transmission year plus the MMWR transmission week number plus a sequence number followed by the *NET* file extension (e.g., 20004401.NET). When sending weekly NETSS files, you must include all the files in the sequence for the MMWR week you are sending because the data the files contain are not inclusive. For example, if a record that was included in 20004401.NET is then updated, you must create a new NETSS transfer file (20004402.NET) to transfer the updated information. 20004402.NET would contain only the updated record. The records in 20004401.NET that were not updated will not be included in 20004402.NET.
- Year-to-Date NETSS files are named with the year they were created (YYYY) plus the sequence they were created (01, 02, etc.) followed by the *DAT* file extension (e.g., 200002.DAT).

To transfer Archived NETSS files...

1. Open the **Surveillance** module.
2. Open the **Data Transfer** menu and select **NETSS**. Select **Archived** from the NETSS sub-menu.

*The NETSS Archived Data Transfer window is displayed.*

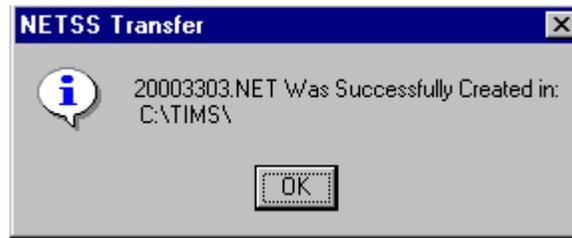


3. Use the options in the File Type group to filter the type of files displayed.
4. Select the Weekly or Year-to-Date file to be transferred.

*The Transfer button is enabled when a file is selected. You can use the vertical scroll bar to view additional files.*

5. Click the **Transfer** button to initiate the transfer process. Click the **Close** button to abandon the Transfer Archived NETSS Files operation.

*A message box describing the progress of the transfer will appear. When more than one diskette is used, the sequence in which the file is copied must be used by the receiving site to process the diskettes into their database. Label all diskettes in the correct sequence.*



6. Click the **OK** button to close the NETSS Transfer information window.
7. Click the **C**lose button to close the NETSS Transfer - Archive.

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## **Reports**

The Surveillance Reports are defined in Appendix RPT SUR. A sample of each report is also given. The reports include Case Verification, Counted Cases, Not Counted Cases, Demographics, Clinical Data, Case Follow-up, Completed RVCTs, Incomplete RVCTs, Facsimile, Updated-in-Session, and Deleted Records.

## Data Entry for Surveillance Fields

A sample of each surveillance data entry screen is provided in this section with data entry instructions on how to enter data from the paper form into each field. If a word is in italics see the Data Entry Helpful Hints section earlier in this chapter for a definition for detailed instructions.

**Note:** See *Appendix SUR I* for instructions on completing the data collection forms.

### First RVCT Screen

#### *The First RVCT Screen*

<b>SOUNDEX</b> <input type="text" value="F236"/>		<b>1. State Reporting:</b> Alpha State Code <input type="text" value="OR"/>		<b>2. State Case Number:</b> <input type="text" value="988131604"/> <b>City/County Case Number:</b> <input type="text"/>	
<b>3. Date Submitted:</b> <input type="text" value="06/01/1998"/> By: <input type="text" value="AMAZON, AMELIA"/>		<b>4. Address for Case Counting:</b> City: <input type="text" value="PORTLAND"/> Within City Limits: <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown County: <input type="text" value="DOUGLAS"/> Zip Code: <input type="text" value="99999"/> - <input type="text" value="99999"/>			
<b>5. Month-Year Reported:</b> <input type="text" value="06/1998"/>		<b>6. Month-Year Counted:</b> <input type="text" value="06/1998"/>			
<b>7. Date of Birth:</b> <input type="text" value="01/01/1960"/>		<b>8. Sex:</b> <input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> Unknown		<b>9. Race:</b> <input type="radio"/> White <input type="radio"/> American Indian or Alaskan Native <input checked="" type="radio"/> Black <input type="radio"/> Asian or Pacific Islander <input type="radio"/> Unknown Specify: <input type="text"/>	
<b>10. Ethnic Origin:</b> <input type="radio"/> Hispanic <input checked="" type="radio"/> Not Hispanic <input type="radio"/> Unknown		<b>11. Country of Origin:</b> <input checked="" type="radio"/> U.S. <input type="radio"/> Unknown <input type="radio"/> Not U.S. Country: <input type="text"/>		<b>12. Month-Year Arrived in U.S.:</b> <input type="text" value="00/0000"/>	
				<b>13. Status at Diagnosis of TB</b> <input checked="" type="radio"/> Alive <input type="radio"/> Unknown <input type="radio"/> Dead	
<input type="button" value="Save"/>		<input type="button" value="Screen 2 &gt;"/>		<input type="button" value="Close"/>	

This first screen is used to enter the answers to questions 3, 5, and 13. TIMS displays the client's demographic information *disabled* in the Surveillance module because it can only be entered and edited from the Client Information window.

### Soundex

<b>SOUNDEX</b> <input type="text" value="A535"/>
---

The Soundex is a method of phonetically reducing a name to a code. This field is automatically calculated and entered by TIMS during data entry of the client's last name.

### Q1 State Reporting



1. State Reporting:  
Alpha State Code

This field indicates the two-letter abbreviation of the Reporting Area submitting the RVCT to CDC. This field displays information entered in the Site Information table when the site is established.

### Q2 Case Numbers

*This is a required field.*



2. State Case Number:   
City/County Case Number:

This field indicates the official state and city/county identification numbers. This field displays information entered on the Client Information window. To enter this information, *go to the Client Information window* and enter the appropriate case number. Both case numbers accept a maximum of nine (9) alphanumeric characters. The value will automatically right justify and insert zeros to the left if there are less than nine characters.

The **State Case Number** field is a required entry at the Reporting Area and is only accessible at the reporting area level. The **City/County Case Number** field is required and is accessible only at the local level one or level two site (city/county/district) that entered the record.

### Q3 Date Submitted



3. Date Submitted:  
 By:

Enter the date the RVCT form was submitted to or completed by the Reporting Area (e.g., state health department). Eight numeric characters are used to enter the date in MM/DD/YYYY format. Use the *spinner box* to indicate the date or type the date in the box. An *unknown date* can be entered in this field by clicking the right mouse button. See the *Data Entry Helpful Hints* section earlier in this chapter for details.

Select the name of a worker from the *drop down list* box to indicate who should be contacted if there is a question about the data on the RVCT form (Questions 1-32). The worker name does not transfer.

See *Appendix SUR XVI* for validations for this field.

#### Q4 Address for Case Counting

4. Address for Case Counting:

City:

Within City Limits:  Yes  No  Unknown

County:

Zip Code:  -

This field indicates the address of the client's residence used for submitting the RVCT to CDC. This field displays information entered in the **City**, **County**, **Zip Code**, and **Within City Limits** fields of the client's **Reporting Address**. To enter this information, *go to the Client Information window* and click on the **Address** button. This will display the Address window and you can enter the client's address. See Chapter 2 for more information.

#### Q5 Month-Year Reported

*This is a required field.*

5. Month-Year Reported:

Indicate the date when the health department first became aware that the client might have TB. If the client has had a previous diagnosis of tuberculosis, the Month-Year Reported applies to the current episode. Six numeric characters are used for this entry in MM/YYYY format. Use the *spinner box* to indicate the month and year or type the month and year in the box.

See *Appendix SUR XVI* for validations and warning messages for this field.

#### Q6 Month-Year Counted

6. Month-Year Counted:

This field indicates the month and year the health department verified the case as TB and included it in the official case count. The Reporting Area enters the Month-Year Counted on the Case Verification window.

See *Appendix SUR XVI* for validations and warning messages for this field.

#### Q7 Date of Birth

*This is a required field.*

7. Date of Birth:

This field displays information entered from the Date of Birth field on the Client Information window. This date can be an *unknown date*. To enter this information, *go to the Client Information window*.

See *Appendix SUR XVI* for validations for this field.

### Q8 Sex



8. Sex:

Male

Female

Unknown

This field indicates the client's biological sex. This field displays information entered in the Sex field on the Client Information window. To enter this information, *go to the Client Information window*.

See *Appendix SUR XVI* for validations for this field.

### Q9 Race



9. Race:

White

Black

Unknown

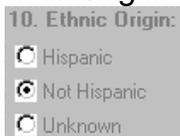
American Indian or Alaskan Native

Asian or Pacific Islander

Specify:

This field displays information entered in the Race field on the Client Information window. To enter this information, *go to the Client Information window*. A value of Asian or Pacific Islander will display the Race: Specify question. Use the *drop down list* to find the appropriate classification.

### Q10 Ethnic Origin



10. Ethnic Origin:

Hispanic

Not Hispanic

Unknown

This field displays information entered in the Ethnic Origin field on the Client Information window. To enter this information, *go to the Client Information window*.

### Q11 Country of Origin



11. Country of Origin:

U.S.

Not U.S.

Unknown

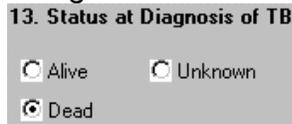
Country:

This field displays information entered in the Country of Origin field of the Client Information window. To enter this information, *go to the Client Information window*. Indicate the Country of Origin as U.S., Not U.S., or Unknown. If Country of Origin is Not U.S., use the *drop down list* to indicate the country of origin.

**Q12 Month -Year Arrived in U.S.**

The month and year arrived in U.S. is retrieved from the Date Entered U.S. field *of the Client Information window*. If the Country of Origin is entered as Not U.S., then the Date Entered U.S. field is *enabled* for entry. The Date Entered U.S. can be a *partial* or *unknown date*.

See *Appendix SUR XVI* for validations for this field.

**Q13 Status at Diagnosis of TB**

Indicate if the client was Alive, Dead, or status Unknown at the time TB was diagnosed.

See *Appendix SUR XVI* for validations for this field.

## Second RVCT Screen

### *The Second RVCT Screen*

<b>14. Previous Diagnosis of Tuberculosis</b> <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Unknown If yes, list year of previous diagnosis: 0000 More than one previous episode: <input type="radio"/> Yes <input type="radio"/> Unknown		<b>15. Major Site of Disease:</b> If "other", enter anatomic code: 00 PULMONARY	
		<b>16. Additional Site(s) of Disease:</b> (select all that apply) If "other", enter anatomic code: 00 PULMONARY 10 PLEURAL 21 LYMPHATIC: CERVICAL More than one additional site: <input type="checkbox"/>	
<b>17. Sputum Smear:</b> <input checked="" type="radio"/> Positive <input type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown		<b>18. Sputum Culture:</b> <input checked="" type="radio"/> Positive <input type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown	
		<b>19. Microscopic Exam of Tissue and Other Body Fluids:</b> Enter anatomic code(s): <input type="radio"/> Positive <input checked="" type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown	
<b>20. Culture of Tissue and Other Body Fluids:</b> Enter anatomic code(s): <input type="radio"/> Positive <input checked="" type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown		<b>21. Chest X-Ray:</b> <input type="radio"/> Normal <input type="radio"/> Abnormal <input checked="" type="radio"/> Not Done <input type="radio"/> Unknown If Abnormal (check one): <input type="radio"/> Cavitory <input type="radio"/> Noncavitory Consistent with TB <input type="radio"/> Unknown <input type="radio"/> Noncavitory Not Consistent with TB If Abnormal (check one): <input type="radio"/> Stable <input type="radio"/> Improving <input type="radio"/> Worsening <input type="radio"/> Unknown	
<b>22. Tuberculin (Mantoux) Skin Test at Diagnosis:</b> <input type="radio"/> Positive <input checked="" type="radio"/> Not Done <input type="radio"/> Negative <input type="radio"/> Unknown Millimeters (mm) of Induration: If Negative, was patient anergic? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown			
<input type="button" value="Save"/> <input type="button" value=" &lt; Screen 1"/> <input type="button" value=" Screen 3 &gt;"/> <input type="button" value="Close"/>			

This screen is used to enter the answers to questions 14 through 22 from the client's RVCT form.

### *Q14 Previous Diagnosis of TB*

<b>14. Previous Diagnosis of Tuberculosis</b> <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown If yes, list year of previous diagnosis: 1995 More than one previous episode: <input type="radio"/> Yes <input type="radio"/> Unknown	
--	--

Indicate if the client had a previous diagnosis of TB. If "Yes" is selected, enter the year of the most recent previous diagnosis and indicate if there was more than one previous diagnosis. Four numeric characters are used to enter the year of previous diagnosis in the YYYY format. The year can be entered as an *unknown date*. The Year of Previous Diagnosis does not contain a month designation therefore the validation against Month-Year Counted may result in a warning message.

See *Appendix SUR XVI* for validations for this field or warning messages.

### Q15 Major Site of Disease

Indicate the appropriate site from the *drop down list* box to indicate one major site of disease. Intrathoracic lymphatic includes hilar, bronchial, mediastinal, peritracheal, and other lymph nodes within the thorax. If "Other" is selected, the appropriate anatomic code should be selected from the adjacent *drop down list* box. Only valid anatomic codes for the client will be available. The list of valid codes is restricted based on values entered in Sex, Microscopic Exam of Tissue and Other Body Fluids, Enter anatomic codes, and Culture of Tissue and Other Body Fluids, Enter anatomic codes.

**Note:** If the Major Site of Disease is miliary, TIMS will not allow an entry for question 16, Additional Site(s) of Disease.

See *Appendix SUR XVI* for validations for this field.

### Q16 Additional Site(s) of Disease

This field is used when the client's TB is known to affect additional anatomic sites. The appropriate site(s) can be selected from the *drop down list* box. More than one additional site can be selected. When the site(s) are selected, the site will turn red and move to the top of the list. If "Other" is selected, the appropriate anatomic code should be selected from the adjacent *drop down list* box. Only valid anatomic codes for the client will be available. The list of valid codes is restricted based on values entered in Sex, Microscopic Exam of Tissue and Other Body Fluids, Enter anatomic codes, and Culture of Tissue and Other Body Fluids, Enter anatomic codes. The last part of this question, More than one additional site is automatically calculated based on the number of additional sites selected.

See *Appendix SUR XVI* for validations for this field.

### Q17 Sputum Smear

Indicate the results of the sputum smear for acid-fast organisms. If the results are pending, leave this field blank. Do not include the results of microscopic examination of pulmonary secretions obtained by tracheal suction, bronchoscopy, or gastric aspiration.

See *Appendix SUR XVI* for validations for this field.

### Q18 Sputum Culture

**18. Sputum Culture:**

Positive     Not Done  
 Negative     Unknown

Indicate the results of the sputum culture for *M. tuberculosis* complex. If the results are pending leave the field blank. If Sputum Culture is Negative, Not Done, Unknown, or blank, then Question 35 (Sputum Culture Conversion Documented) is disabled.

See *Appendix SUR XVI* for validations for this field.

### Q19 Microscopic Exam of Tissue and Other Body Fluids

**19. Microscopic Exam of Tissue and Other Body Fluids:** Enter anatomic code(s):

Positive     Not Done       
 Negative     Unknown   

Indicate the results of the smear for acid-fast organisms for specimens other than sputum. If exam results are "Positive," the appropriate anatomic code should be selected from the *drop down list* box. One or two tissue or fluid codes can be entered. All anatomic codes are available for selection. If an incorrect code is entered, you will be notified upon saving.

If the results are pending leave the field blank.

See *Appendix SUR XVI* for validations for this field.

### Q20 Culture of Tissue and Other Body Fluids

**20. Culture of Tissue and Other Body Fluids:** Enter anatomic code(s):

Positive     Not Done       
 Negative     Unknown   

Indicate the results of culture for *M. tuberculosis* complex for non-sputum specimens. If Culture of Tissue and Other Body Fluids is "Positive" then Reason Therapy Stopped cannot be equal to "Not TB."

If Culture of Tissue and Other Body Fluids is "Positive," the appropriate anatomic code should be selected from the *drop down list* box. One or two tissue or fluid codes can be entered. All anatomic codes are available for selection. If an incorrect code is entered, you will be notified upon saving.

If the results are pending leave the field blank.

See *Appendix SUR XVI* for validations for this field.

## Q21 Chest X-Ray

**21. Chest X-Ray:**

Normal   
 Abnormal   
 Not Done   
 Unknown

If Abnormal (check one)

Cavitory   
 Noncavitory Consistent with TB  
 Unknown   
 Noncavitory Not Consistent with TB

If Abnormal (check one)

Stable   
 Improving  
 Worsening   
 Unknown

Indicate the result of the chest radiograph taken during the diagnostic evaluation. Do not update chest radiograph information throughout the course of a client's follow-up. The If Abnormal fields are enabled or disabled depending on the selection in the first part of this question (Q21a). If the Chest X-Ray value is Abnormal, the If Abnormal, (check one) fields are enabled. Select a value to describe the abnormality and the chest x-ray condition. If Chest X-Ray is not marked Abnormal, both the Chest X-Ray: If Abnormal fields will have no value (null).

## Q22 Tuberculin (Mantoux) Skin Test at Diagnosis

**22. Tuberculin (Mantoux) Skin Test at Diagnosis:**

Positive   
 Not Done   
 Millimeters (mm) of  Induration  
 Negative   
 Unknown

If Negative, was patient anergic?

Yes   
 No   
 Unknown

Indicate the result of the Mantoux (tuberculin, PPD, 5TU) skin test performed during the diagnostic evaluation. If the skin test is "Positive" or "Negative," enter the **Millimeters of Induration** using the spinner box or type the number.

If a value of "Negative" is selected, indicate if the patient is anergic in the **If Negative, was patient anergic?** field. The **If Negative, was patient anergic?** field is enabled or disabled depending on the selection in the first part of this question (Q22a).

See *Appendix SUR XVI* for validations for this field.

### Third RVCT Screen

*The Third RVCT Screen*

**23. HIV Status:**  Negative  Refused  Unknown  
 Positive  Not Offered  
 Indeterminate  Test Done, Results Unknown

If positive, based on:  Medical Documentation  Patient History  Unknown

If positive, list: CDC AIDS Patient Number   
 State HIV/AIDS Patient Number   
 City/County HIV/AIDS Patient Number

**24. Homeless Within Past Year:**  
 No  
 Yes  
 Unknown

**25. Resident of Correctional Facility at Time of Diagnosis:**  No  Yes  Unknown

If Yes,  Federal Prison  Local Jail  Other Correctional Facility  
 State Prison  Juvenile Correctional Facility  Unknown

**26. Resident of Long-Term Care Facility at Time of Diagnosis:**  No  Yes  Unknown

If Yes,  Nursing Home  Mental Health Care Facility  Unknown  
 Hospital-Based Facility  Alcohol or Drug Treatment Facility  
 Residential Facility  Other Long-Term Care Facility

This screen is used to enter the answers to questions 23 through 26 from the client's RVCT form.

#### Q23 HIV Status

**23. HIV Status:**  Negative  Refused  Unknown  
 Positive  Not Offered  
 Indeterminate  Test Done, Results Unknown

If positive, based on:  Medical Documentation  Patient History  Unknown

If positive, list: CDC AIDS Patient Number   
 State HIV/AIDS Patient Number   
 City/County HIV/AIDS Patient Number

Indicate the client's HIV status. Depending on the value selected, the other areas in this field will be enabled or disabled. If "Positive," the appropriate option button should be selected from the If positive, based on field to indicate whether the status is based on medical documentation, patient history, unknown, or you can leave it blank.

If "Positive," the client's AIDS Patient Numbers should be indicated in the **If positive, list AIDS Patient Numbers** fields.

#### Q24 Homeless Within Past Year

**24. Homeless Within Past Year:**  
 No  
 Yes  
 Unknown

Indicate if the client was homeless at any time during the 12 months prior to the time when the initial diagnostic studies were performed.

**Q25 Resident of Correctional Facility at Time of Diagnosis**

**25. Resident of Correctional Facility at Time of Diagnosis:**  No  Yes  Unknown

If Yes,  Federal Prison  Local Jail  Other Correctional Facility

State Prison  Juvenile Correctional Facility  Unknown

Indicate if the client was an inmate of a correctional facility when the initial TB diagnostic evaluation was performed. Depending on the value selected, the **If Yes** field will be enabled or disabled. If "Yes," select the appropriate option button to indicate the type of institution. If "Yes," the answer to question 26 must be "No."

See *Appendix SUR XVI* for validations for this field.

**Q26 Resident of Long-Term Care Facility at Time of Diagnosis**

**26. Resident of Long-Term Care Facility at Time of Diagnosis:**  No  Yes  Unknown

If Yes,  Nursing Home  Mental Health Care Facility  Unknown

Hospital-Based Facility  Alcohol or Drug Treatment Facility

Residential Facility  Other Long-Term Care Facility

Indicate if the client was a resident of a long-term care facility when the initial TB diagnostic evaluation was performed. Depending on the value selected, the **If Yes** field will be enabled or disabled. If "Yes," select the appropriate option button to indicate the type of facility. If "Yes," the answer to question 25 must be "No."

See *Appendix SUR XVI* for validations for this field.

## Fourth RVCT Screen

The Fourth RVCT Screen

<b>27. Initial Drug Regimen:</b>			<b>28. Date Therapy Started:</b>			<b>29. Injecting Drug Use Within Past Year:</b>		
No	Yes	Unk	No	Yes	Unk	No	Yes	Unk
Isoniazid	<input checked="" type="radio"/>	<input type="radio"/>	Ethionamide	<input checked="" type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input type="radio"/>	Kanamycin	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input type="radio"/>	Cycloserine	<input type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>
<input type="text" value="00/00/0000"/>			<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown			<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown		
<b>30. Non-injecting Drug Use Within Past Year:</b>			<b>31. Excess Alcohol Use Within Past Year:</b>			<b>32. Occupation (Check all that apply within the past 24 months):</b>		
<input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown			<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown			<input type="checkbox"/> Health Care Worker <input type="checkbox"/> Migratory Agricultural Worker <input type="checkbox"/> Not Employed within Past 24 Months <input type="checkbox"/> Correctional Employee <input type="checkbox"/> Other Occupation <input type="checkbox"/> Unknown		
<b>Comments:</b> <input type="text"/>								
<input type="button" value="Save"/>			<input type="button" value=" &lt; Screen 3"/>			<input type="button" value="Close"/>		

This screen is used to enter the answers to questions 27 through 32 from the client's RVCT form.

### Q27 Initial Drug Regimen

<b>27. Initial Drug Regimen:</b>			<b>28. Date Therapy Started:</b>			<b>29. Injecting Drug Use Within Past Year:</b>		
No	Yes	Unk	No	Yes	Unk	No	Yes	Unk
Isoniazid	<input checked="" type="radio"/>	<input type="radio"/>	Ethionamide	<input checked="" type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input type="radio"/>	Kanamycin	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input type="radio"/>	Cycloserine	<input type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>
<input type="text" value="05/23/1996"/>			<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown			<input checked="" type="radio"/> No <input type="radio"/> Yes <input type="radio"/> Unknown		

Indicate the client's drug regimen initially prescribed for treatment of the disease and taken for at least two weeks. If no drugs are marked "Yes," then Date Therapy Started and Date Therapy Stopped are disabled.

See *Appendix SUR XVI* for validations and warning messages for this field.

See *Appendix SUR XVIII* for abbreviations of antituberculosis drugs.

### Q28 Date Therapy Started

<b>28. Date Therapy Started:</b>
<input type="text" value="05/23/1996"/>

Indicate the date the client's therapy started. At least one drug in the Initial Drug Regimen field must be marked "Yes" to *enable* this field. Eight numeric characters are used to enter the date in the MM/DD/YYYY format. Use the *spinner box* to indicate the date or type the date in the box. An *unknown* or *partial* date can be entered.

See *Appendix SUR XVI* for validations for this field.

**Q29 Injecting Drug Use Within Past Year**

**29. Injecting Drug Use Within Past Year:**  
 No     Yes     Unknown

Indicate if the client was an injecting drug user within the past 12 months.

**Q30 Non-Injecting Drug Use Within Past Year**

**30. Non-injecting Drug Use Within Past Year:**  
 No     Yes     Unknown

Indicate if the client used non-injecting drugs within the past 12 months. Alcohol is not included as a drug in this section.

**Q31 Excess Alcohol Use Within Past Year**

**31. Excess Alcohol Use Within Past Year:**  
 No     Yes     Unknown

Indicate if the client has used alcohol to excess within the past 12 months.

**Q32 Occupation**

**32. Occupation (Check all that apply within the past 24 months):**

<input type="checkbox"/> Health Care Worker	<input type="checkbox"/> Migratory Agricultural Worker	<input checked="" type="checkbox"/> Not Employed within Past 24 Months
<input type="checkbox"/> Correctional Employee	<input type="checkbox"/> Other Occupation	<input type="checkbox"/> Unknown

Indicate the occupation of the client within the past 24 months. More than one option can be selected. However, if either "Not Employed within Past 24 Months" or "Unknown" is selected, no other options can be selected.

See *Appendix SUR XVI* for validations for this field.

**Comments**

**Comments:**

Include any additional information that is pertinent to the RVCT. Double-click on the Comments field to open this field allowing you to enter the comments in a word processor-like environment.

## Initial Drug Susceptibility Report Screen

### Initial Drug Susceptibility Report Screen

<b>33. Initial Drug Susceptibility Results:</b>									
Was Drug Susceptibility Testing Done: <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown									
<i>If answer is No or Unknown, do not complete rest of report.</i>									
If Yes, Enter the Date First Isolate Collected for Which Drug Susceptibility Was Done? 05/09/1995									
<b>34. Susceptibility Results:</b>									
	Resistant	Susceptible	Not Done	Unknown		Resistant	Susceptible	Not Done	Unknown
Isoniazid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Salicylic Acid	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Ethionamide	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Kanamycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cycloserine	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Comments:</b>									
<input type="text"/>									
		<input type="button" value="Save"/>		<input type="button" value="Close"/>					

This screen is used to enter the answers to questions 33 and 34 from the client's Initial Drug Susceptibility Report form.

### Q33 Initial Drug Susceptibility Results

<b>33. Initial Drug Susceptibility Results:</b>	
Was Drug Susceptibility Testing Done: <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown	
<i>If answer is No or Unknown, do not complete rest of report.</i>	
If Yes, Enter the Date First Isolate Collected for Which Drug Susceptibility Was Done? 00/00/0000	

Indicate if the client has an isolate for which drug susceptibility testing was performed. If "Yes," enter the date the first isolate was collected. Use the *spinner box* to indicate the date or type the date in the box. Eight numeric characters are used to enter the date in the MM/DD/YYYY format. An *unknown date* can be entered. If "No" or "Unknown," the remaining fields on this screen are *disabled*. If Initial Drug Susceptibility is blank, No, or Unknown then Questions 40 and 41, Final Drug Susceptibility Results, is disabled.

See *Appendix SUR XVI* for validations for this field.

### Q34 Susceptibility Results

34. Susceptibility Results:									
	Resistant	Susceptible	Not Done	Unknown		Resistant	Susceptible	Not Done	Unknown
Isoniazid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethionamide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kanamycin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cycloserine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					

This field is *enabled* for entry if "Yes" is entered in the Initial Drug Susceptibility Results field. Enter the results of susceptibility testing on the first isolate for which drug susceptibility testing was performed by selecting the appropriate button for each drug listed.

See *Appendix SUR XVIII* for abbreviations of antituberculosis drugs.

### Comments

Comments:

Include any additional information that is pertinent to the Initial Drug Susceptibility Report. Double-click on the Comments field to open this field allowing you to enter the comments in a word processor-like environment.

## First Case Completion Report Screen

The First Case Completion Report Screen is displayed.

<b>35. Sputum Culture Conversion Documented:</b> <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown		If Yes, Date Specimen Collected on Initial Positive Sputum Culture: <input type="text" value="05/09/1995"/>	If Yes, Date Specimen Collected on First Consistently Negative Culture: <input type="text" value="06/11/1995"/>
<b>36. Date Therapy Stopped:</b> <input type="text" value="11/17/1995"/>	<b>37. Reason Therapy Stopped:</b> <input checked="" type="radio"/> Completed Therapy <input type="radio"/> Refused/Uncooperative <input type="radio"/> Other <input type="radio"/> Moved <input type="radio"/> Not TB <input type="radio"/> Unknown <input type="radio"/> Lost <input type="radio"/> Died		
<b>38. Type of Health Care Provider:</b> <input checked="" type="radio"/> Health Department <input type="radio"/> Private/Other <input type="radio"/> Both Health Department and Private/Other	<b>39. Directly Observed Therapy:</b> If Yes, Give Site(s) of Directly Observed Therapy: <input checked="" type="radio"/> No, Totally Self-Administered <input type="radio"/> In Clinic or Other Facility <input type="radio"/> Yes, Totally Directly Observed <input type="radio"/> In the Field <input type="radio"/> Yes, Both Directly Observed and Self-Administered <input type="radio"/> Both in Facility and in the Field <input type="radio"/> Unknown <input type="radio"/> Unknown    Weeks Number of Weeks of Directly Observed Therapy: <input type="text"/>		
<input type="button" value="Save"/>		<input type="button" value="Screen 2 &gt;"/>	

This screen is used to enter the answers to questions 35 through 39 from the client's Case Completion Report form.

### Q35 Sputum Culture Conversion Documented

<b>35. Sputum Culture Conversion Documented:</b> <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> Unknown	If Yes, Date Specimen Collected on Initial Positive Sputum Culture: <input type="text" value="00/00/0000"/>	If Yes, Date Specimen Collected on First Consistently Negative Culture: <input type="text" value="00/00/0000"/>
---	--	--

This field is *enabled* if the client has a positive result on Question 18, Sputum Culture. This field is used to provide information on sputum culture conversion for clients with pulmonary TB (with or without extrapulmonary disease) who had initially positive sputum cultures.

If "Yes" is selected, the following two fields are *enabled*. Enter the collection date of the initial positive sputum and the date of the first consecutively negative culture. Eight numeric characters are used to enter the date in the MM/DD/YYYY format. Use the *spinner box* to indicate the date or type the date in the box. An *unknown date* can be entered in these fields.

See *Appendix SUR XVI* for validations for this field.

### Q36 Date Therapy Stopped

<b>36. Date Therapy Stopped:</b> <input type="text" value="00/00/0000"/>
---

Indicates the date therapy stopped. This field is *enabled* if a date was entered in Question 28 Date Therapy Started field. Use the *spinner box* to indicate the date or type the date in the box. Eight numeric characters are used to enter the date in the MM/DD/YYYY format. An *unknown* or *partial* date may be entered in this field.

See *Appendix SUR XVI* for validations for this field.

### Q37 Reason Therapy Stopped

**37. Reason Therapy Stopped:**

Completed Therapy     Refused/Uncooperative     Other  
 Moved     Not TB     Unknown  
 Lost     Died

Indicate the reason therapy was ended and not resumed. This entry is made when the case is closed. This field is *enabled* when at least one drug is entered for Question 27, Initial Drug Regimen. If either Question 18, Sputum Culture or Question 20, Culture of Tissue and Other Body Fluids is positive, then "Not TB" will result in an error message.

See *Appendix SUR XVI* for validations for this field.

### Q38 Type of Health Care Provider

**38. Type of Health Care Provider:**

Health Department  
 Private/Other  
 Both Health Department and Private/Other

Indicate the type of health care provider that provided services to the client.

### Q39 Directly Observed Therapy

**39. Directly Observed Therapy:**    If Yes, Give Site(s) of Directly Observed Therapy:

No, Totally Self-Administered     In Clinic or Other Facility  
 Yes, Totally Directly Observed     In the Field  
 Yes, Both Directly Observed and Self-Administered     Both in Facility and in the Field  
 Unknown     Unknown    Weeks

Number of Weeks of Directly Observed Therapy:

Indicate if the client received directly observed therapy (DOT), if not indicate the type of therapy received. Depending on the value selected, the other areas in this field will be *enabled* or *disabled*.

If a medication was administered under DOT, the If Yes, Give Site(s) of Directly Observed Therapy field and the Number of Weeks of Directly Observed Therapy field will be *enabled* for entry. The number of weeks must be equal to or less than the number of weeks between Question 28, Date Therapy Started and Question 36, Date Therapy Stopped.

See *Appendix SUR XVI* for validations for this field.

## Second Case Completion Report Screen

The Second Case Completion Report Screen is displayed.

**40. Final Drug Susceptibility Results:**  
 Was Follow-up Drug Susceptibility Testing Done?  
 No  Yes  Unknown  
 If answer is No or Unknown, do not complete rest of report.

If Yes, Enter Date Final Isolate Collected for Which Drug Susceptibility Was Done: 06/11/1995

---

**41. Final Susceptibility Results:**

	Resistant	Susceptible	Not Done	Unknown		Resistant	Susceptible	Not Done	Unknown
Isoniazid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Ethionamide	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Kanamycin	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cycloserine	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>				<input checked="" type="radio"/>	<input type="radio"/>

**Comments:**

This screen is used to enter the answers to questions 40 and 41 from the client's Case Completion Report form.

### Q40 Final Drug Susceptibility Results

**40. Final Drug Susceptibility Results:**  
 Was Follow-up Drug Susceptibility Testing Done?  
 No  Yes  Unknown  
 If answer is No or Unknown, do not complete rest of report.

If Yes, Enter Date Final Isolate Collected for Which Drug Susceptibility Was Done: 00/00/0000

Indicate if follow-up drug susceptibility testing was done. This field is *enabled* if "Yes" is indicated for Question 33, Initial Drug Susceptibility Testing.

If final drug susceptibility was performed, enter the date in the Final Isolate Collected for Which Drug Susceptibility Was Done field. Use the *spinner box* to indicate the date or type the date in the box. Eight numeric characters are used to enter the date in the MM/DD/YYYY format. An *unknown date* can be entered in this field. If "No" or "Unknown" is selected, the remaining fields on this screen are *disabled*.

See *Appendix SUR XVI* for validations for this field.

### Q41 Final Susceptibility Results

41. Final Susceptibility Results:									
	Resistant	Susceptible	Not Done	Unknown		Resistant	Susceptible	Not Done	Unknown
Isoniazid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Capreomycin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rifampin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Para-Amino Salicylic Acid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pyrazinamide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Amikacin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethambutol	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rifabutin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Streptomycin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ciprofloxacin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ethionamide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Ofloxacin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kanamycin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cycloserine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					

This field is *enabled* for entry if "Yes" is selected in the Final Drug Susceptibility Results field. Enter the results of susceptibility testing on the final isolate for which drug susceptibility testing was performed by selecting the appropriate button for each drug listed.

See *Appendix SUR XVIII* for abbreviations of antituberculosis drugs.

### Comments

Comments:

Include any information that is pertinent to the Case Completion Report. Double-click on the Comments field to open this field allowing you to enter the comments in a word processor-like environment.

### Case Verification Screen

A Case Verification screen similar to one of the examples below will display.

*This Case Verification screen is displayed if the verification value is Positive Culture, Positive Smear/Tissue, or Clinical Case Definition.*

The screenshot shows a window titled "Case Verification". Inside, a text box contains the message: "This is a Verified Case of Tuberculosis according to the following criteria." Below this, a button labeled "Positive Culture" is highlighted. Underneath, there is a question: "Do you want to count this patient at CDC as a verified case of TB?" with radio buttons for "Yes" (selected) and "No". Below that are two date pickers: "Please enter the Month-Year Counted:" with the value "10/2000" and "MMWR Reporting Date:" with the value "10/27/2000" and "Week 43 of 2000". At the bottom are "Save" and "Close" buttons.

*This Case Verification screen is displayed if the client is considered a Suspect. The verification value can be changed to Verified by Provider Diagnosis or Not a Verified Case of TB, or it can remain a Suspect Case.*

The screenshot shows a window titled "Case Verification". Inside, a text box contains the message: "Patient does not meet bacteriological confirmation criteria or the clinical case definition." Below this, there are two dropdown menus: "Defaulted To:" with the value "Suspect Case" and "Overwritten as:" with the value "VERIFIED BY PROVIDER DIAGN". Underneath, there is a question: "Do you want to count this patient at CDC as a verified case of TB?" with radio buttons for "Yes" (selected) and "No". Below that are two date pickers: "Please enter the Month-Year Counted:" with the value "10/2000" and "MMWR Reporting Date:" with the value "10/27/2000" and "Week 43 of 2000". At the bottom are "Save" and "Close" buttons.

*This Case Verification screen is displayed when Question 37, Reason Therapy Stopped, is Not TB. To change this value, change the answer to Question 37.*

The screenshot shows a window titled "Case Verification". Inside, a text box contains the message: "Patient does not meet bacteriological confirmation criteria or the clinical case definition." Below this, a button labeled "Not a Verified Case" is highlighted. At the bottom are "Save" and "Close" buttons.

*This is a Verified Case of Tuberculosis...*

This is a Verified Case of Tuberculosis according to the following criteria.

**Positive Culture**

This field will display if the current client is calculated as a case of Tuberculosis.

*Patient does not meet bacteriological...*

Patient does not meet bacteriological confirmation criteria or the clinical case definition.

**Not a Verified Case**

This field will display if Question 37, Reason Therapy Stopped, is Not TB.

*Defaulted To*

Defaulted To: **Suspect Case**

This field displays only if the assignment is a non-verified record based on the answers to questions in the Surveillance module. If the value is Suspect, you have the option to change it in the Overwritten As field.

*Overwritten As*

Overwritten as:

Indicate if the value of Suspect should be overwritten with Not a Verified Case of TB, or Verified by Provider Diagnosis.

**Note:** The Reporting Area decides if each case should be counted at CDC as a Verified Case of Tuberculosis. Therefore, only the Reporting Area can enter values for Do you want to count this patient at CDC as a verified case of TB?, Please enter the Month-Year Counted, and MMWR Reporting Date.

*Do you want to count this patient at CDC as a verified case of TB?*

Do you want to count this patient at CDC as a verified case of TB ?  Yes  No

Indicate if the record should be counted at CDC.

See *Appendix SUR XVI* for validations for this field.

*Please enter the Month-Year Counted*

Please enter the Month-Year Counted: 05/1996

Indicate the month and year the patient should be counted at CDC. This date will be automatically displayed in Question 6 on the first RVCT screen.

**Note:** You must use the TAB key to move to the next field.

See *Appendix SUR XVI* for validations for this field.

### *MMWR Reporting Date*

MMWR Reporting Date:   Week  of

Only verified, counted cases are eligible for inclusion in the MMWR. TIMS will calculate and display the correct MMWR Week and Year based on the MMWR Reporting Date entered.

**Note:** You must use the **TAB** key to access the field.

See *Appendix SUR XVI* for validations for this field.

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### ***Data Generation Table***

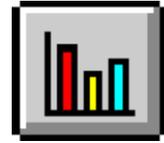
The following table indicates the screens from which the RVCT, Follow Up-1, and Follow Up-2 information is generated.

<b><i><u>Q.</u></i></b>	<b><i><u>Field Name</u></i></b>	<b><i><u>Screen</u></i></b>
1.	State Reporting	Site Information
2.	Case Numbers	Client Information
4.	Address for Case Counting	Address
6.	Month-Year Counted	Case Verification
7.	Date of Birth	Client Information
8.	Sex	Client Information
9.	Race	Client Information
10.	Ethnic Origin	Client Information
11.	Country of Origin	Client Information
12.	Month-Year Arrived in U.S.	Client Information
14.	Previous Diagnosis of TB	History
15.	Major Site of Disease	Diagnosis
17.	Sputum Smear	Bacteriology
18.	Sputum Culture	Bacteriology
19.	Microscopic Exam of Tissue and Other Body Fluids	Bacteriology
20.	Culture of Tissue and Other Body Fluids	Bacteriology
21.	Chest X-Ray	Chest X-Ray Test
22.	Tuberculin Skin Test at Diagnosis	Skin Test
23.	HIV Status	HIV Test or History
24.	Homeless Within Past Year	History
25.	Resident of Correctional Facility at Time of Diagnosis	History
26.	Resident of Long-Term Care Facility at Time of Diagnosis	History
27.	Initial Drug Regimen	Medications
28.	Date Therapy Started	Medications
29.	Injecting Drug Use Within Past Year	History
30.	Non-Injecting Drug Use Within Past Year	History
31.	Excess Alcohol Use Within Past Year	History
32.	Occupation	History
33.	Initial Drug Susceptibility Results	Bacteriology
34.	Susceptibility Results	Bacteriology

<b><u>Q.</u></b>	<b><u>Field Name</u></b>	<b><u>Screen</u></b>
35.	Sputum Culture Conversion Documented	Bacteriology
36.	Date Therapy Stopped	Medications
37.	Reason Therapy Stopped	Medications
40.	Final Drug Susceptibility Results	Bacteriology
41.	Final Susceptibility Results	Bacteriology

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## Chapter 5 Program Evaluation Module



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### Overview

The Aggregate Reports for Program Evaluation (ARPE) can be used to evaluate how well tuberculosis programs test and treat infected tuberculosis clients, as well as their success in following-up with contacts to tuberculosis cases.

Aggregate Reports for Program Evaluation differ from other reports found in TIMS. While many of the controls are the same, ARPEs are unique; the report information is entered directly on a report-like data entry screen, not generated from information entered elsewhere in TIMS.

There are two Aggregate Reports for Program Evaluation: *Follow-up and Treatment for Contacts to Tuberculosis Cases* and *Targeted Testing and Treatment for Latent Tuberculosis Infection*.

- The **Follow-up and Treatment for Contacts to Tuberculosis Cases** report is an annual summary of the core activities of obtaining and evaluating contacts to tuberculosis cases and treating the contacts who have latent TB infection.
- The **Targeted Testing and Treatment for Latent Tuberculosis Infection** report is an annual summary of activities to find and treat latent tuberculosis infection through targeted and other testing.

## Open the Program Evaluation Module

Use the Program Evaluation module to process ARPE.

To open the Program Evaluation module, use one of the following procedures...

- Open the **C**lient menu and select **P**rogram Evaluation.

Or

- Click the **Program Evaluation** button on the toolbar.



## Open an ARPE Reports Selector Window

The two ARPE Reports Selector windows enable you to create, edit, combine, delete, browse, and transfer ARPE documents.

To open the Reports Selector window...

1. Open the **Program Evaluation** module.
2. Click either the **F**ollow-up and Treatment for Contacts to Tuberculosis Cases or **T**argeted Testing and Treatment for Latent Tuberculosis Infection buttons on the toolbar.

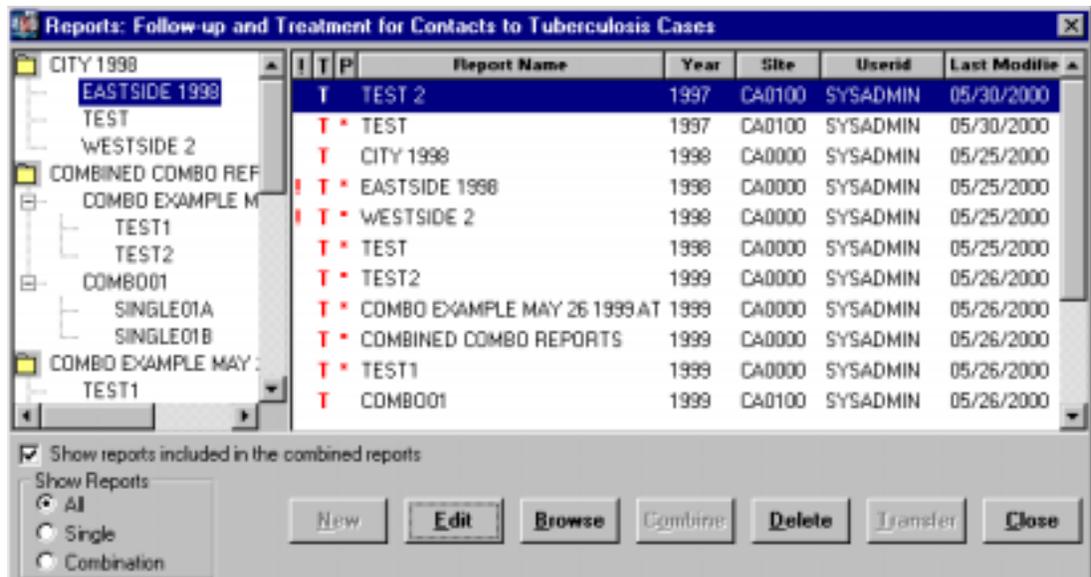


Or

Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

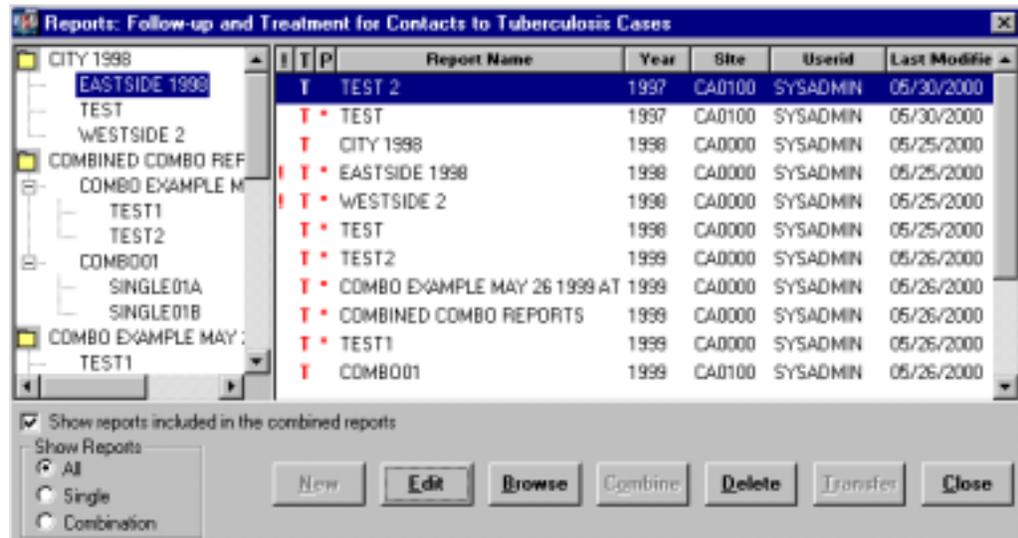


The Reports Selector window appears (Follow-up and Treatment for Contacts to Tuberculosis Cases Report, in this example).



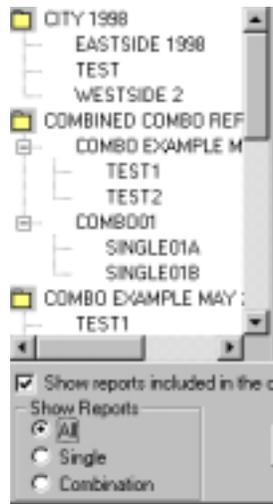
## Reports Selector Window

The Reports Selector window is identical for both ARPE report types. The Report Selector window is divided into two panes: **Combination** and **Detail**.



### Combination Pane

The Combination pane is located on the left side of the window. It displays representations of both single and combination reports and allows you to modify the contents of combination reports using the drag-and-drop method. Selections in the Combination pane cannot be manipulated by using the command buttons.



Use one of the following methods to filter reports listed in the Combination pane:

In the Show Reports group...

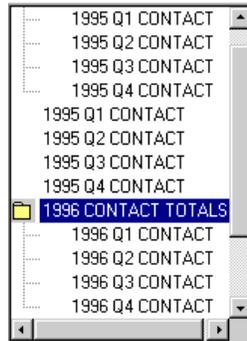
- Select **All** – This will display all reports including combination and single reports.
- Select **Single** – This will display only single reports.
- Select **Combination** – This will display only combination reports.

Use one of the following methods to view sub-reports contained within combination reports:

- Check the **Show reports included in the combined reports** checkbox. Uncheck this check box to hide the sub-reports.

Or

- Double-click a combination report to display the sub-reports. Double-click again to hide the sub-reports.



## Detail Pane

The Detail pane is located on the right side of the window. It provides explicit information about individual reports and methods to control and manipulate those reports.

I	T	P	Report Name	Year	Site	Userid	Last Modified
	T		TEST 2	1997	CA0100	SYSADMIN	05/30/2000
	T *		TEST	1997	CA0100	SYSADMIN	05/30/2000
	T		CITY 1998	1998	CA0000	SYSADMIN	05/25/2000
I	T *		EASTSIDE 1998	1998	CA0000	SYSADMIN	05/25/2000
I	T *		WESTSIDE 2	1998	CA0000	SYSADMIN	05/25/2000
	T *		TEST	1998	CA0000	SYSADMIN	05/25/2000
	T *		TEST2	1999	CA0000	SYSADMIN	05/26/2000
	T *		COMBO EXAMPLE MAY 26 1999 AT	1999	CA0000	SYSADMIN	05/26/2000
	T *		COMBINED COMBO REPORTS	1999	CA0000	SYSADMIN	05/26/2000
	T *		TEST1	1999	CA0000	SYSADMIN	05/26/2000
	T		COMBO01	1999	CA0100	SYSADMIN	05/26/2000

Header	Description
<b>Incomplete Indicator (!)</b>	Displays an exclamation point (!) when the user has flagged the report as "Incomplete".
<b>Transfer Indicator (T)</b>	Displays a star (★) when a report is marked for transfer. The star will also appear when a previously transferred report has been modified and must be re-transferred. Displays a T when report has been transferred.
<b>Preliminary / Final Indicator (P)</b>	Displays a (★) when a report is preliminary report.
<b>Report Name</b>	Name assigned to the report by the person who created it.
<b>Year</b>	Cohort year for the report.
<b>Site</b>	Site owning the report.
<b>User ID</b>	The TIMS User ID of the person who created the report.
<b>Last Modified</b>	The date the report was last modified.

## Command Buttons

Use the command buttons to process reports in the Detail pane. The command buttons do not affect the items in the Combination pane. Be sure to check which report(s) is (are) selected in the Detail pane before clicking a command button.

	To create a new report.
	To modify the selected report.
	To view the selected report or reports.
	To create a new report using the data from the selected reports.
	To permanently remove the selected report.
	To prepare a file containing all ARPE reports marked for transfer. This file will then be transmitted to the CDC (via the Reporting Area sites, if necessary).
	To exit the Reports Selector window.

## Creating Reports

Use the following steps to create a new ARPE. Once created, the report can be modified, combined with other reports, deleted, and transferred.

### The New Window

To create a new ARPE...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Click the **New** button.

*The New window appears*

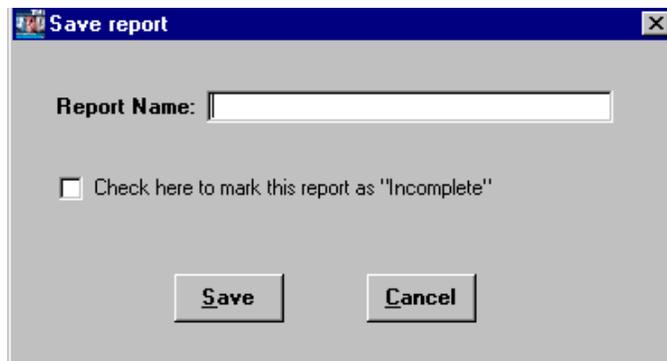
 A screenshot of the 'Program Evaluation - [Follow-up and Treatment for Contacts to Tuberculosis] - [NEW]' window. The window title bar includes 'TIMS', 'Reports', 'Window', and 'Help'. The toolbar shows a yellow folder icon. The main content area features the CDC logo and text: 'DEPARTMENT OF HEALTH AND HUMAN SERVICES, PUBLIC HEALTH SERVICE, CERTIFICABLE DISEASE CONTROL AND PREVENTION, NATIONAL CENTER FOR HIV, STD, AND TB PREVENTION, DIVISION OF TUBERCULOSIS AND RESPIRATORY DISEASES, NEW YORK, NY'. The form includes fields for 'Reporting Area: LA0000', 'Cohort Year: [ ]', 'Preliminary Date for Follow-up: 08/01', and 'Total TB Cases Reported: [ ]'. There are radio buttons for 'Preliminary Report' (selected) and 'Final Report'. A table titled 'Part I. Cases and Contacts' is present, with a sub-header 'Types of Cases for Investigation:' and columns for 'Sputum smear +', 'Sputum smear - cult. +', and 'Others'. The table rows include 'Cases for Investigation...', 'Cases with No Contacts...', 'Number of Contacts...', 'Evaluated...', 'TB Disease...', 'Latent TB Infection...', 'Started Treatment...', 'Completed Treatment...', and 'Reasons Treatment Not Completed:'. The 'Reasons Treatment Not Completed:' section includes a row for 'Death...'. The status bar at the bottom shows 'Ready' and the date/time '10/13/2000 8:54 am'.

4. Enter Cohort year.
5. Select a Report status from the available options:
  - **Preliminary Report** indicates that the report will be modified at a later date. This is the default option. The preliminary report is submitted during the first year after the cohort year.

- **Final Report** indicates that the report is complete and will not be modified. Final reports are submitted during the second year after the cohort year.
6. For the *Follow-up and Treatment for Contacts to Tuberculosis Cases* report only, enter Total TB Cases Reported; the default is the number of cases entered into TIMS for current site during the specified cohort year.
  7. Complete the form by entering the appropriate data in the corresponding boxes.  
*See Basic Instructions for the Aggregate Reports for Tuberculosis Program Evaluation: Targeted Testing and Treatment for Latent Tuberculosis Infection or Basic Instructions for the ARPE: Follow-up and Treatment for Contacts to Tuberculosis Cases, for detailed information on the appropriate data for each field. (Appendix PEI- Program Evaluation forms)*
  8. Click the **Save** button.



The *Save* report dialog box will appear.



9. Type a name into the Report Name box.
10. Put a check in the check box if the report is considered incomplete.
11. Click the **S**ave button to save. Click the **C**ancel button to abandon the save operation and return to the report window.
12. Click the **C**lose button to return to the reports selector window.



## New Window Buttons

These buttons are available on the **N**ew window.

	<b>Transfer</b>	Mark the report for transfer.
	<b>Save</b>	Save changes to the report.
	<b>Print</b>	Print the current report.
	<b>Close</b>	Close the active report and return to the Reports Selector window.

## Editing Reports

Use the following steps to modify an existing ARPE report.

*Note: If you edit a report which has already been transferred, TIMS will mark it to be transferred again.*

### The Edit Window

To edit an existing ARPE ...

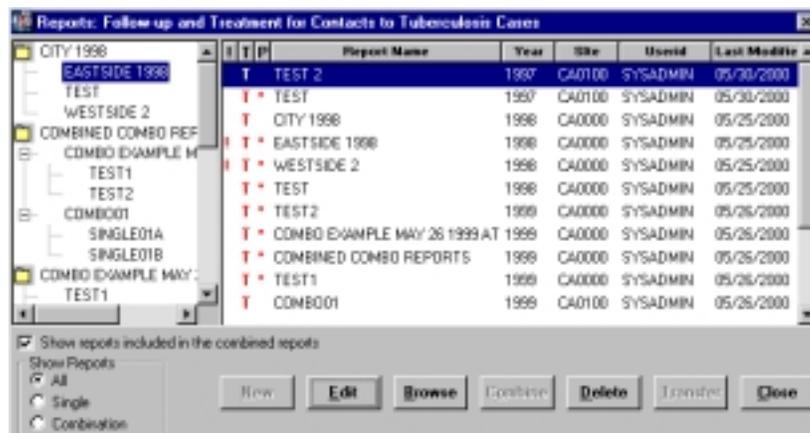
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Click on a report in the Report Folders window (Detail pane) and click the **Edit** button.



The selected report appears in edit mode.

Reporting Area: L8000  
Cohort Year: 2001  
Closure Date for Follow-up: 05/01/2003 (Report it at the second year after the cohort year)  
Total No Cases Reported: 376

Part I: Cases and Contacts

	Types of Cases for Investigation		
	Serotype unclear =	Serotype unclear - risk =	Others
Cases for Investigation	61	350	111
Cases with No Contacts	74	374	23
Number of Contacts	1111	350	111
Evaluated	1110	349	23
TB Disease	2	2	1
Latent TB Infection	562	50	20
Started Treatment	601	41	14
Completed Treatment	701	31	10

Reasons Treatment Not Completed:

Deaths	21	2	0
--------	----	---	---

Ready 10/12/2000 9:58 am

4. Complete intended modifications and click the **Save** button.



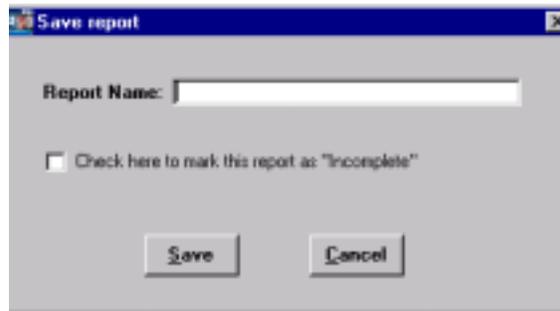
The Save as dialog box will appear.



5. Click **Y**es to save the current report under a different name. Click **N**o to save report under current name.

See Create a New Report from an Existing Report later in this chapter for additional information. Click **C**ancel to stop the save operation and return to the Edit window.

6. If you selected to Save as a new report, enter the new name and click **S**ave. If you chose to save the report under the same name, click **S**ave.



7. Click the **C**lose button

### Edit Window Buttons

The following buttons are available on the Edit window.



**Transfer** Mark the report for transfer.



**Save** Save changes to the report.



**Print** Print the current report.



**Close** Close the active report and return to the Reports Selector window.

## Browsing Reports

The Browse feature allows you to preview several reports at a time, as they would be printed. Information in the Browse window cannot be edited.

### Open the Browse Window

To preview an ARPE ...

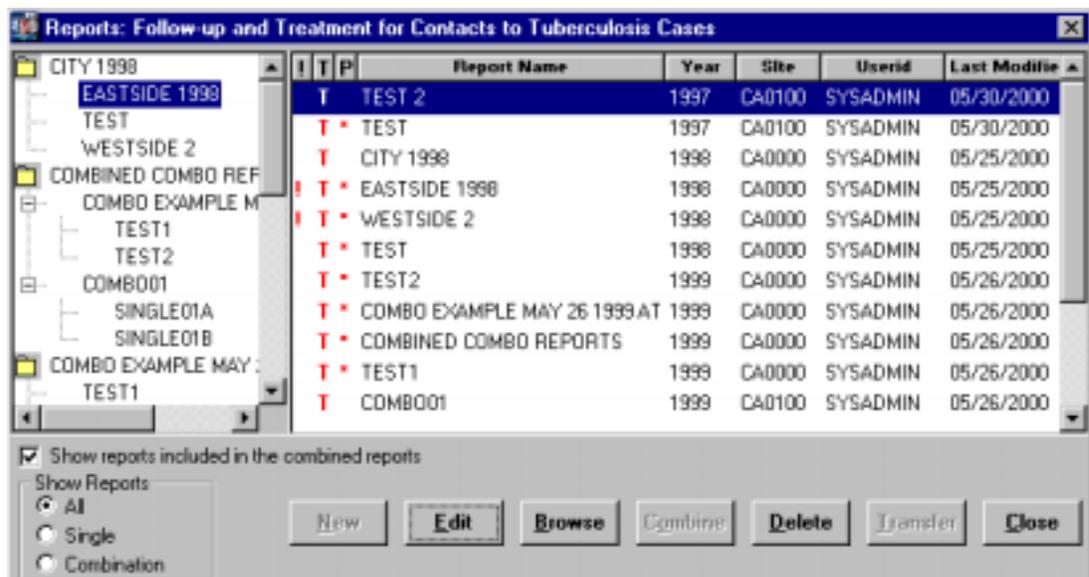
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

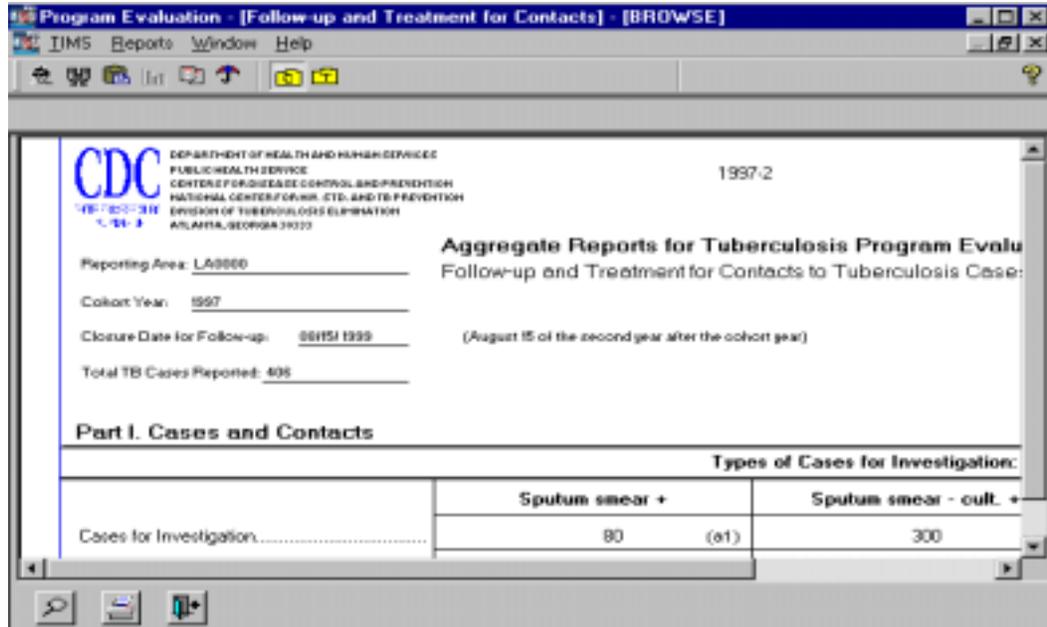
3. Use one of the following methods to open the Browse window:
  - Select a report from the list in the Detail (right) pane of the Report Folders window, (use the Ctrl key and mouse to select multiple reports) and click the **Browse** button.



Or

- Double-click the report in the Detail (right) pane.

The Browse window appears.



4. When you have finished viewing the report in the browse window, click the **Close** button.



### Viewing Included Sub - Reports while Browsing a Combination Report

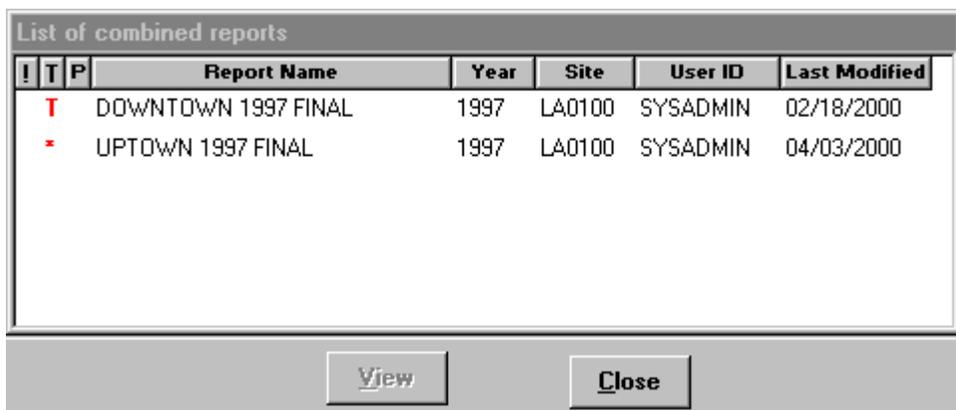
You can view the sub-reports that make up a Combination Report while viewing the Combination Report in the Browse window.

To browse the sub-reports of a Combination Report from the Browse window...

1. Click the **List of Included Reports** button.

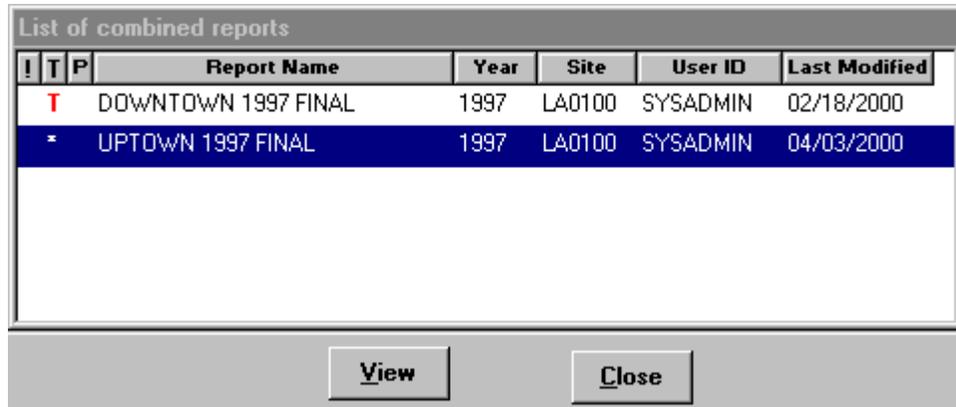


The List of Combined Reports window appears.



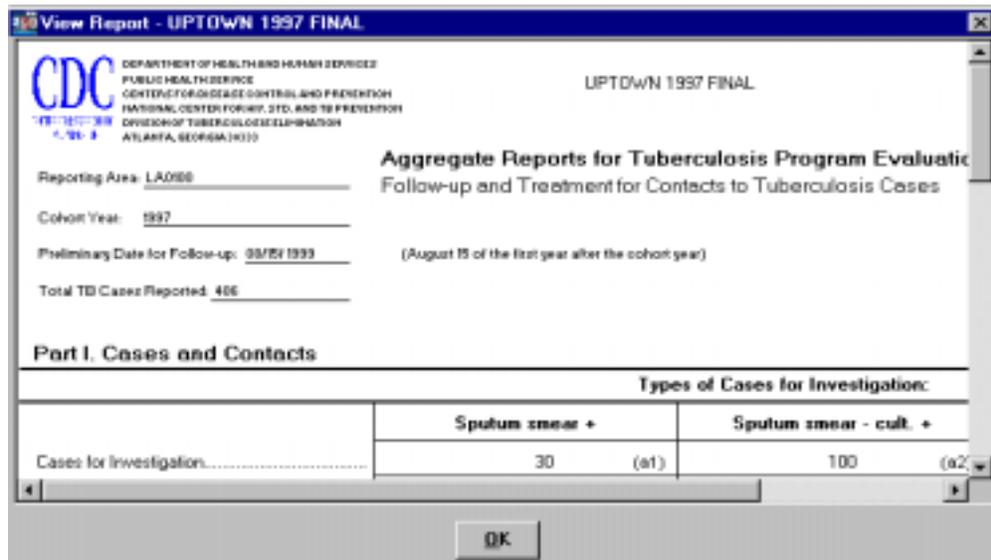
2. Use one of the following methods to browse an included sub-report:

- Select a report in the pop-up window and click **View**.



Or

- Double-click the report in the pop-up window  
*The View Report window appears.*



3. Click the **OK** button to close the View Report window.
4. Click the **Close** button.

### Browse Window Buttons



Zoom

Adjust the magnification of the report.



Print

Print the report.



Close

Close the active report and return to the Report Selector window.



List of Included Reports

Display the sub-reports within a combination report. (Active for Combination Reports only)

## Using the Zoom Feature

TIMS allows you to adjust the magnification of the viewing area in the Browse window.

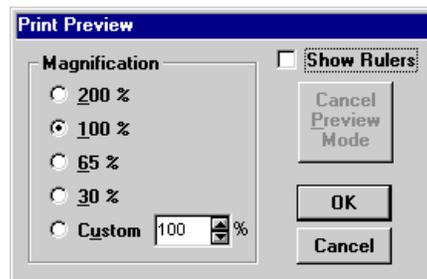
To adjust a magnification...

1. Click the **Zoom** button.

*This displays the Print Preview dialog box.*



2. Select a Magnification setting from the preset options or enter your own (between 1 and 1000%) in the Custom box.



3. Click the **OK** button.

## Adjust Report Margins

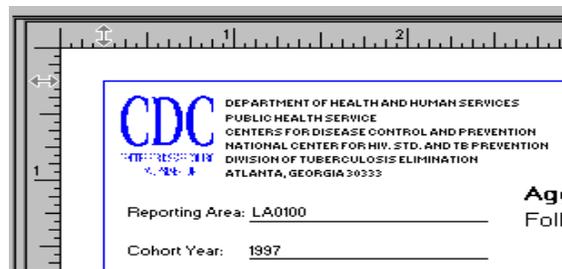
You can temporarily adjust the margins for viewing or printing (the area between the printed material and the edge of the page) by dragging the margin indicators to a new location on the horizontal and vertical rulers. The margins will return to their default location the next time you use the Browse feature to view the report.

1. Click the **Zoom** button.

*This displays the Print Preview dialog box.*



2. Select **Show Rulers**.
3. Click **OK**.
4. Drag the double-headed arrows to a new location to adjust the report margins.

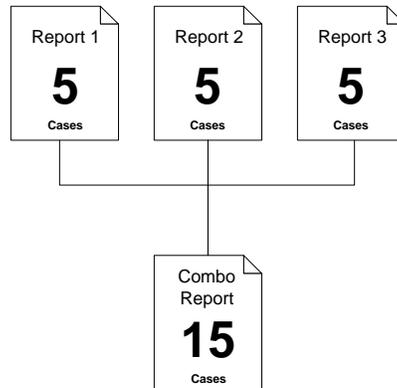


5. Click the print icon to print report.

*The report will print with the newly adjusted margins.*

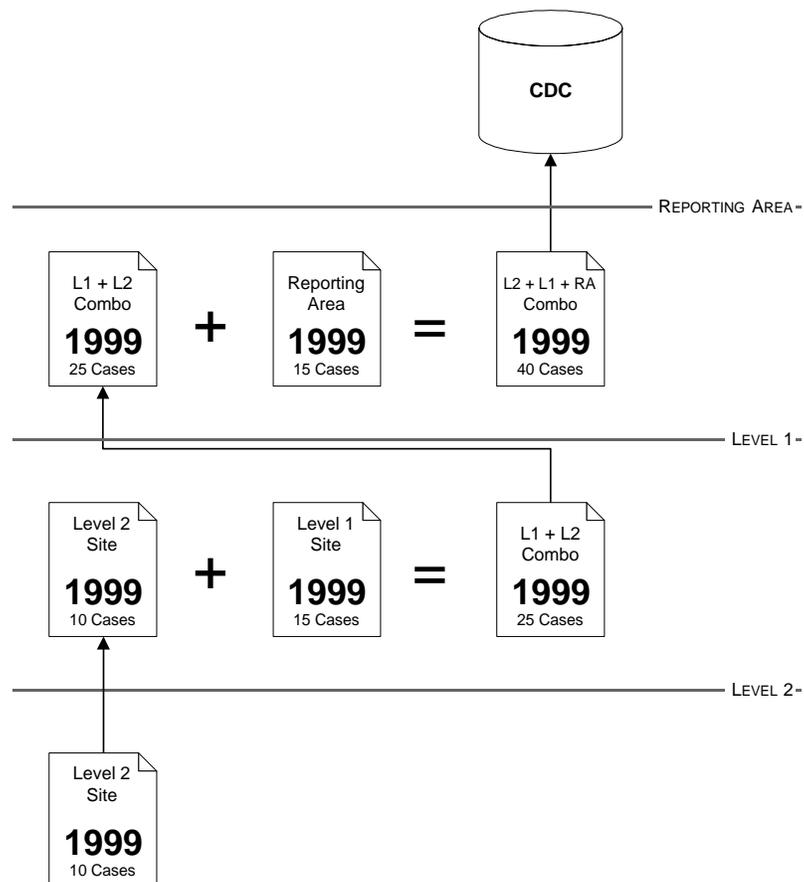
## Combination Reports

Combination reports are created by joining two or more standard ARPEs for the same cohort year. The resulting combination report represents the data from all the individual component reports.



## Combining Reports from Lower-Level Sites

If your site receives ARPEs from lower-level sites, you can combine the lower-level report(s) from the same cohort year with the report you intend to transmit to the CDC.



## Create a Combination Report

You can create a combination report from two or more single and/or combination reports.

To create a combination report...

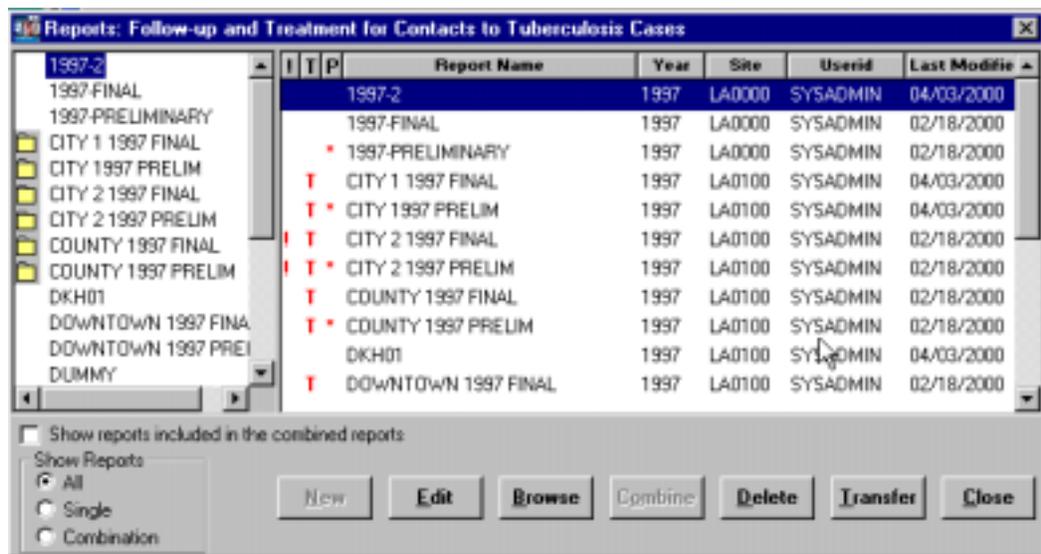
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Select the first report you want to include in the combination report by clicking on it in the Detail pane.



4. While holding down the CTRL key, use the mouse to select the next report to be included in the combination report. Repeat this process until all reports to be included in the combination report have been selected.



- Click the **C**ombine button.

A new report window appears with the totals from all included reports displayed in the designated locations.

Reporting Area: GA0000  
 Cohort Year: 1997  
 Preliminary Date for Follow-up: 09/97 (August 15 of the first year after the cohort year)  
 Total TB Cases Reported: 0

Form Approved  
 OMB No. 0920-0457  
 Exp. Date: 10/30/2002

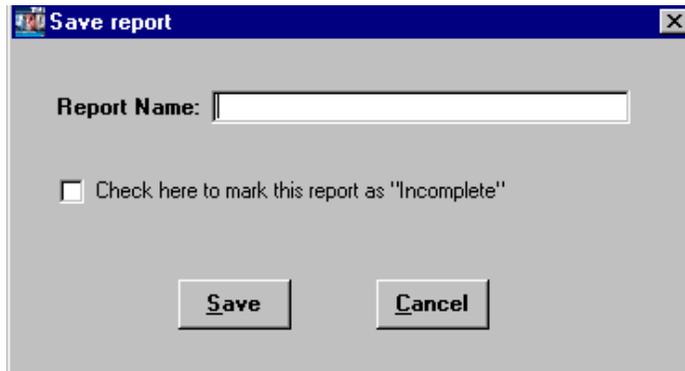
Preliminary Report  
 Final Report

Cases for Investigation	Types of Cases for Investigation:		
	Sputum smear +	Sputum smear - cult. +	Others
Cases with No Contacts			
Number of Contacts Evaluated			
TB Disease			
Latent TB Infection			
Started Treatment			
Completed Treatment			
<b>Reasons Treatment Not Completed:</b>			
Death			
Contact Moved (follow-up unknown)			

- Select a Report status from the available options:
  - Preliminary Report** indicates that the report will be modified at a later date. Preliminary reports are submitted during the first year after the cohort year.
  - Final Report** indicates that the report is complete and will not be modified. Final reports are submitted during the second year after the cohort year. This is the only data item that can be changed on a combination report.
- Click the **S**ave button.



- Enter a name for the report.



9. If the report is incomplete, put a check in the check box.
10. Click the **S**ave button.
11. Click the **C**lose button.

### Add a Report to an Existing Combination Report

Reports can be added to existing combination reports by using the ‘drag & drop’ method in the Combination pane. The data will be added to the report totals.

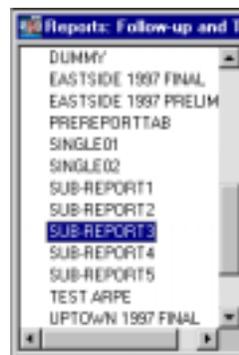
1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

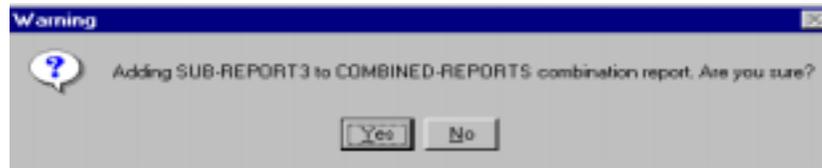
Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

3. Using the mouse, select the report to be added to the combination report in the Combination Pane.



4. While holding down the left mouse button, drag the selected report to the desired combination report, and release the mouse button.
5. Release the mouse button.

*The Warning message box appears.*



- Click **Y**es to add the report to the combination report. Click **N**o to cancel operation.

*The report has been added to the combination report.*



### Remove a Sub-Report From a Combination Report

A sub-report can be removed from a combination report. As a result, the data is subtracted from the report totals.

To remove a sub-report from a combination report...

- Open the **Program Evaluation** module.
- Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

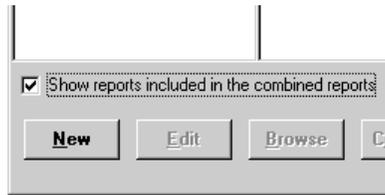
Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

- Use one of the following methods to display the components of a combination report:
  - Double-click the combination report icon in the Combination Pane to display the component reports

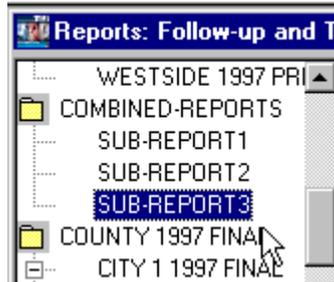


Or

- Select **Show reports included in the combined reports** directly below the Combination Pane

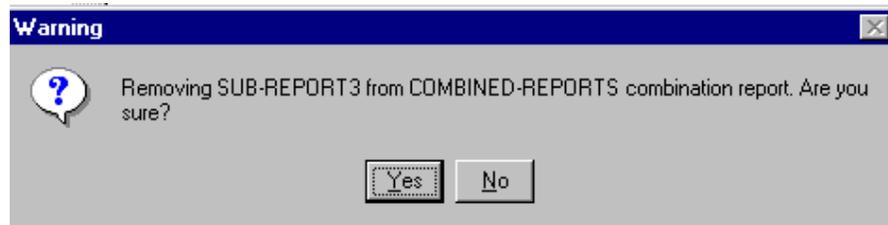


4. In the Combination Pane, use the mouse to select report to be removed from the combination report.



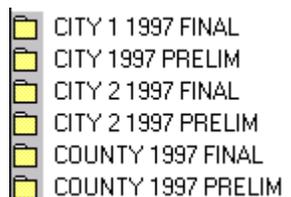
5. While holding down the mouse button, drag the sub-report to a blank area of the Combination Pane, and release the mouse button.

*The Warning message box appears.*



6. Click **Y**es to remove the sub-report from the combination report. Click **N**o to abandon the remove operation.

*The sub-report is removed from the Combination Report.*



## Deleting Reports

Deleting a report will remove all of its data from TIMS.

**Note:** A report cannot be deleted if it has already been transferred to the next higher level.

### Delete a Single Report

To delete a single, uncombined report...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



Or

Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

3. In the Detail Pane, select the report you want to delete and click the **D**elete button.
4. Click the **Y**es to delete the selected report. Click the **N**o to abandon the delete operation and return to the Report Selector window.



### Delete a Sub-Report of a Combination Report

To delete a sub-report of a combination report...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.

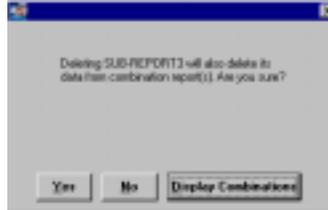


Or

Open the **R**eports menu and select either **F**ollow-up and Treatment for Contacts to TB Cases or **T**argeted Testing and Treatment for Latent TB Infection.

3. In the Detail Pane, select the report you want to delete and click the **D**elete button.

The confirmation box appears.



4. Click **Yes** to delete the selected report. Click **No** to abandon the delete operation and return to the Reports Selector window. Display the Combination reports that include the selected report by clicking **Display Combinations** button.

TYPE	Report Name	Year	Site	User ID	Last Modified
	EASTSIDE 1999	1999	CA0100	SYSADMIN	10/19/2000
	WESTSIDE 1999	1999	CA0100	SYSADMIN	10/19/2000

### Delete a Combination Report

To delete a combination report...

**Note:** Subreports will not be deleted during this operation

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.

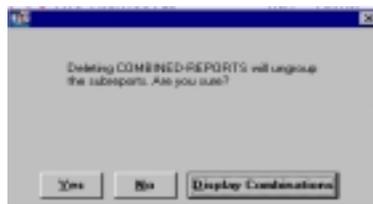


Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. On the Detail Pane, select the report you want to delete and click the **Delete** button.

The Confirmation box appears.



4. Click **Yes** to delete the selected report. Click **No** to abandon the delete operation and return to the Reports Selector window. Click the **Display Combination** button to view reports that include the selected report.

## Transferring Reports

The Aggregate Reports for Program Evaluation provide CDC with important information about local TB program activities. CDC receives this information through the TIMS ARPE transfer function. This function is similar to the process in which surveillance data is transferred.

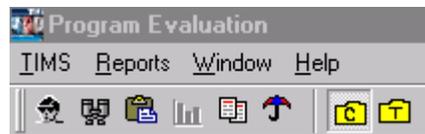
**Note:** Only one report of each type can be transferred per cohort year. Once transferred, the report can be edited and/or transferred again.

ARPEs are transferred through a three-step process: 1) mark for transfer, 2) prepare transfer file, and 3) transmit the file to the next higher-level site. Two of these steps, mark for transfer and prepare transfer file, are performed in the Program Evaluation module. The third, transmit file, is performed in the System module.

## Marking Reports for Transfer

There are two ways to mark an ARPE report for transfer.

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.



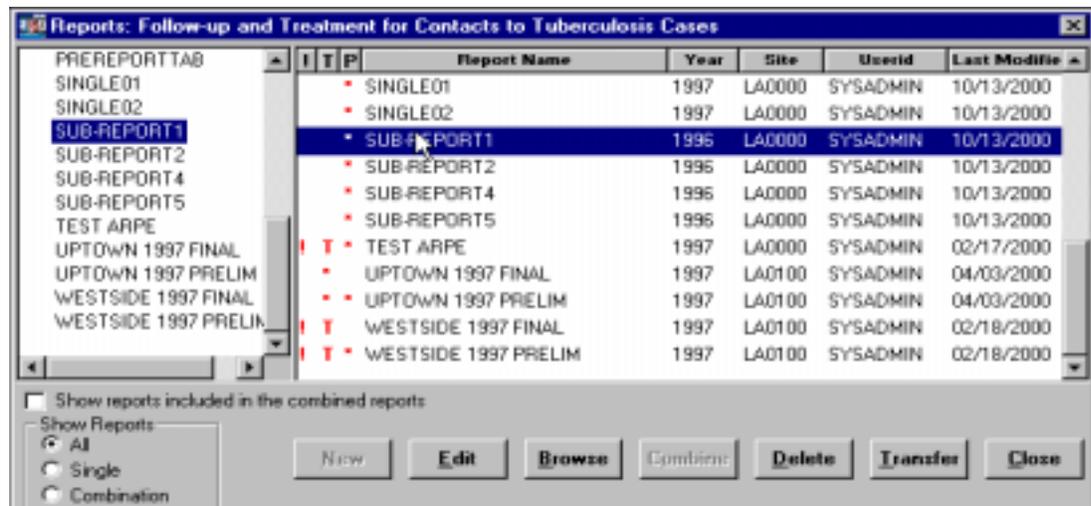
Or

Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Select a report in the Detail Pane and right-click with the mouse.
4. Select **Mark for Transfer**.

Or

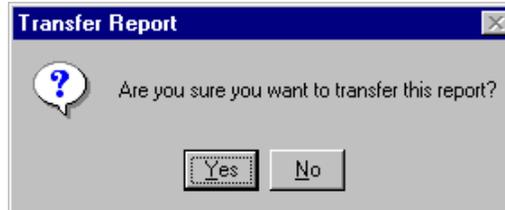
1. Select a report in the Detail Pane and click the **Edit** button.



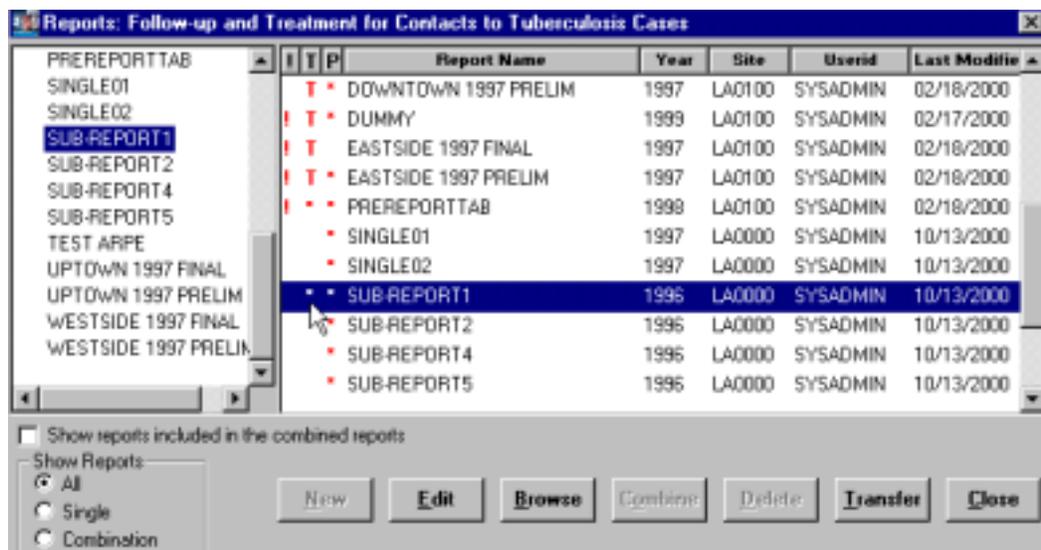
2. Click the **Mark for Transfer** button.



3. Click **Yes** to complete the mark for transfer operation. Click **No** to abandon the Mark for Transfer operation and return to the Edit window.



An asterisk '\*' will appear in the 'T' column (Transfer Indicator) of reports that are successfully marked for transfer. **Note:** When a combination report is marked for transfer, all included sub-reports are also marked for transfer.



To remove 'Mark for Transfer' from a report, right click on the report and select **Unmark for transfer**, or click the **Edit** button and the **Mark for Transfer** button. The asterisk will disappear from the 'T' column. **Note:** A report cannot be unmarked for transferred if it has already been transferred.

## Preparing the Transfer File

Use the Transfer button, located on the Reports Selector window, to create and prepare files for transport to the next level in the reporting hierarchy.

To prepare marked reports for transfer...

1. Open the **Program Evaluation** module.
2. Click either the **Follow-up and Treatment for Contacts to Tuberculosis Cases** or **Targeted Testing and Treatment for Latent Tuberculosis Infection** buttons on the toolbar.

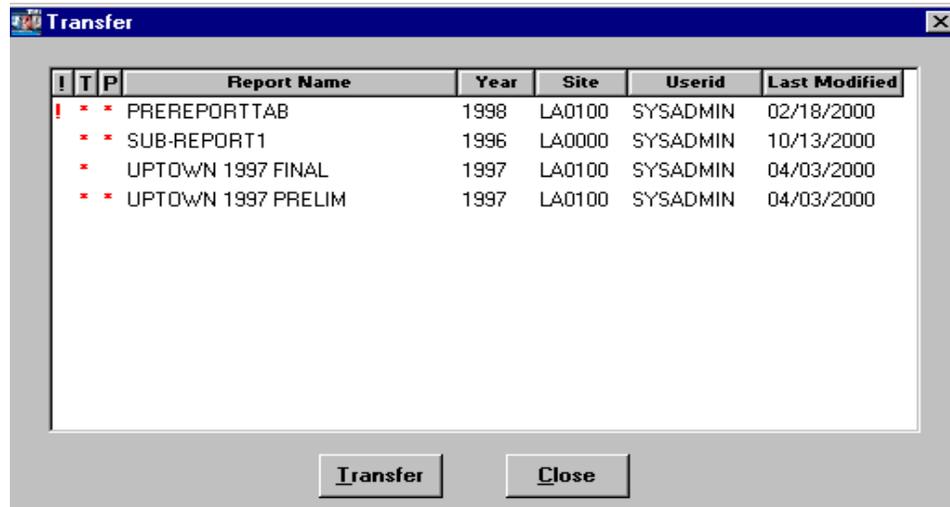


Or

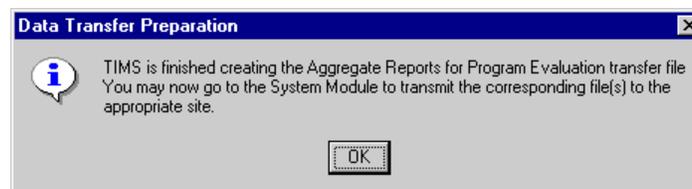
Open the **Reports** menu and select either **Follow-up and Treatment for Contacts to TB Cases** or **Targeted Testing and Treatment for Latent TB Infection**.

3. Click the **Transfer** button.

*The Transfer window appears.*



4. Click the **Transfer** button and an ARPE transfer file that includes the listed reports will be created.
5. Click **OK** to close the Data Transfer Preparation message box.



6. Click the **Close** button to close the **Transfer** window. A 'T' will appear in the 'T' column (Transfer Indicator) of reports that have been sent to the system module for transfer.

### Transfer File to the Next Higher Level Site

The ARPE transfer file can be transmitted to the next site in the reporting hierarchy by using the transmission process in the System Module (See *Chapter 7—System Module* for more details on the ARPE transmission process).

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## Chapter 6 Daily Program Operations Module



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### **Overview**

The Daily Program Operations module allows you to record and maintain information about workers at your site. You can record information about a worker's capabilities, help workers schedule and track appointments with other workers, and assign clients to workers.

The Worker information entered in this module contains the worker's name, Worker ID, phone number, job title, position, supervisor name, status, languages spoken and understood, and a profile.

TIMS compares languages the worker speaks with the client's primary language and notifies you if there is no common language between client and worker. TIMS permits worker-client assignments where there is no common language, but gives you a warning and provides an opportunity to assign the client to a language-compatible worker. Worker Assignments may be transferred to other workers.

The Appointments option is used to schedule appointments for workers at your site. Worker appointments are scheduled with other workers. Client appointments with workers can be viewed but not created or edited on the Worker Appointment window. All modifications to client appointments are done on the client's appointment window.

When worker appointments are scheduled, the date, time, and appointment type (e.g., staff meeting, training session, etc.) are required.

## Quick Start

### Open the Daily Program Operations module

There are two ways to open the Daily Program Operations module...

- Open the **C**lient menu and select **D**aily **P**rogram **O**perations.  
*If the current module does not have a Client menu, choose the first menu from the left.*

Or

- Click the **D**aily **P**rogram **O**perations button on the toolbar.



### Add a Worker

To add a worker...

1. Open the **W**orker menu and select **N**ew or click the **N**ew **W**orker button on the toolbar.



2. Enter the worker's name and click the **O**K button.
3. Enter the remaining information about the worker and click the **S**ave button.

### Add a Worker Assignment

To add a Worker Assignment...

1. Open the **W**orker menu and select **A**ssignments or click the **A**ssignments button on the tool bar.



2. Click the **N**ew button.
3. Select the client from the browse list and click the **O**K button.
4. Enter information about the assignment and click the **S**ave button.

### Add a Worker Appointment

To add a Worker Appointment...

1. Open the **W**orker menu and select **A**ppointments or click the **A**ppointments button on the tool bar.



2. Click the **N**ew button.
3. Enter the information about the appointment and click the **O**K button.

## Worker Information

Worker information includes the worker's name, job title, supervisor's name, identification number, phone number, languages spoken, and profile. This information can be easily modified.

**Note:** Users with Medium and High security access can add, edit, and view worker information. Users with High security access can delete worker information.

### Add a Worker

To add a worker...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **New** or click the **New** button on the toolbar.



3. Enter the worker's Last Name, First Name, and Worker ID if known.

*The last name and first name fields are required.*

 A dialog box titled "New Worker - Add Information" with a blue title bar. It contains three text input fields: "Last Name:", "First Name:", and "Worker ID:". At the bottom, there are "OK" and "Cancel" buttons.

4. Click the **OK** button.

*The Worker Information window appears*

 A detailed form for adding worker information. Fields include: Last Name (TENSAW), First Name (TRENT), Middle Initial (checkbox), Job Title (dropdown), Supervisor Name (dropdown), ID (text), Phone (text with area code), Active (radio buttons Yes/No), and Supervisor (radio buttons Yes/No). There are also sections for "Languages Spoken" and "Profiles", each with an "Edit..." button. At the bottom right are "Save" and "Close" buttons.

5. Enter the worker's phone number.

6. Select the worker's job title from the drop-down list.

*If the appropriate job title is not among the available options, have a TIMS System Administrator add it to the list using the Table Maintenance command in the System module. Since this is a required field, you may have to temporarily select an inaccurate job title or close the window without saving.*

7. Select the worker's supervisor's name from the Supervisor Name list.

*If the supervisor's name is not on the list, check the supervisor's record to ensure that they are designated as a supervisor.*

8. If the worker is actively working at present, select **Yes** in the Active group.

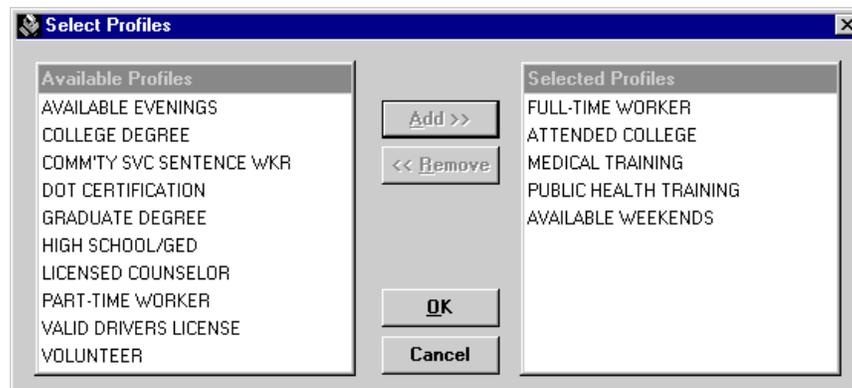
9. If the worker is a supervisor, select **Yes** in the Supervisor group.

*This adds the name to the Supervisor Name List.*

10. In the Languages Spoken group, click the **Edit** button to select the languages spoken. Select the individual languages the worker speaks or understands in the Available Languages column and click the **Add>>** button. If you make a mistake, select the language in the Selected Languages column and click the **<<Remove** button. Click **OK** when finished.



11. In the Profiles group, click the **Edit** button to select locally defined worker attributes for the current worker. The number and type of profiles available depend on what profiles were defined by the TIMS System Administrator. Select the individual profiles in the Available Profiles column and click the **Add>>** button. If you make a mistake, select the profile in the Selected Profiles column and click the **<<Remove** button. Click **OK** when finished.



12. Click the **Save** button.

13. Click the **Close** button to exit the Worker Information window.

## Open a Worker (Change Focus)

The standard method for recording and maintaining information in TIMS is to select a client or worker and then select commands to perform to that person's records. This process is called Change Focus. If you select a command before a worker is in focus, the change focus window will automatically appear enabling you to select one.

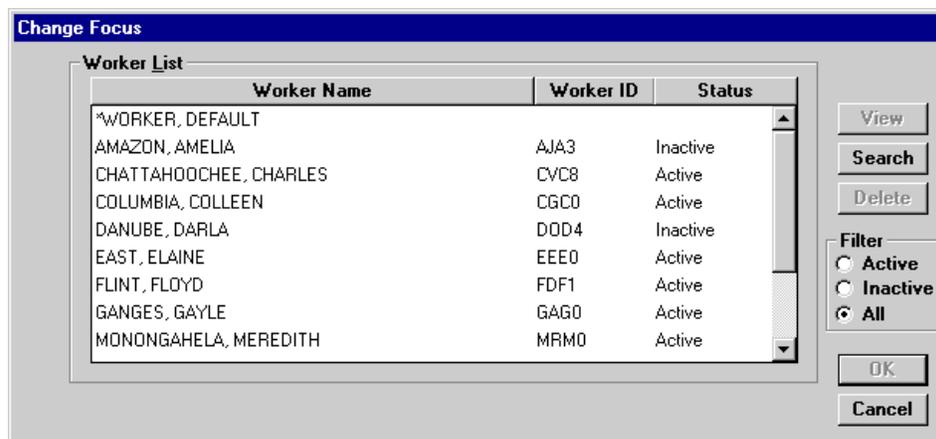
To open a worker (change worker focus)...

1. Open the **Worker** menu and select **Open**.

*You can also use the Open or Change Focus buttons on the toolbar.*



2. Select the worker you want to open from the list.



3. Click the **OK** button.

## Search for a Worker

The Change Focus window provides basic search capabilities that allow you to find a particular worker quickly.

To search for a worker...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Open**.

*You can also use the Open or Change Focus buttons on the toolbar.*



3. Click the **Search** button.

- Enter the worker's last name or Worker ID number.

Search Worker - Set Search Criteria

Last Name:

First Name:

OR

Worker ID:

OK Cancel

- Click the **OK** button.
- Select the worker from the list of possible matches, or click **Cancel** if none of the workers is the correct one.

Possible Matches for BRAZ,

Worker Name	Worker ID	Status
BRAZOS, BEATRICE	BZB0	Active
BRAZOS, BENJAMIN	BOB3	Active

View

Search

Delete

Filter

Active

Inactive

All

OK

Cancel

- Click the **OK** button.

## Edit Worker Information

When the worker's information changes, it should be updated.

To edit worker information...

- Open the **Daily Program Operations** module.
- Open the Worker menu and select **Edit** or click the **Edit** button on the toolbar.



*If no worker is currently in focus, the Change Focus window will open, enabling you to select one.*

- Modify the information.
- Click the **Save** button.
- Click the **Close** button to exit the Worker Information window.

## Delete a Worker

If a person was entered as a worker erroneously, they should be deleted. However, workers cannot be deleted once they appear elsewhere in the TIMS database. If a worker is no longer actively working at your facility, they should be marked Inactive instead of deleted. Once you delete a worker, that person will no longer appear in TIMS.

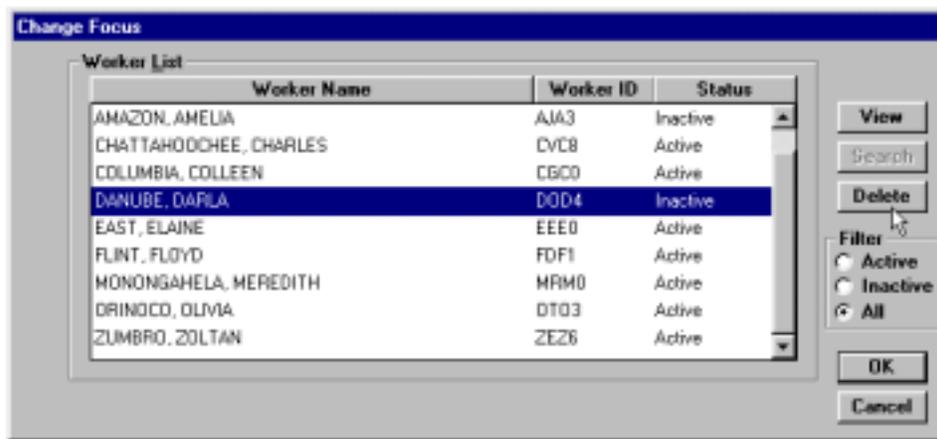
To delete a worker...

1. Open the **Daily Program Operations** module.
2. From the **Worker** menu, select **Open**.

*You can also use the Open or Change Focus buttons on the toolbar.*



3. Select the worker you want to delete on the Change Focus browse list.



4. Click the **Delete** button.
5. Click **Yes** to confirm that you want to delete the worker.
6. Click **OK** close the Delete Worker confirmation dialog box.
7. Click the **Cancel** button to close the Change Focus window.

## Worker Assignments

The Worker Assignment function is used to document a worker's professional relationship with one or more clients. Assignment information includes, assignment date, assignment status, status date, who assigned or reassigned the client, current client assignment (if reassigned), and additional assignment-related comments. During the assignment process, TIMS compares the languages the worker speaks with the client's native language (or ability to understand English) to ensure that the worker and client can communicate. A client can be assigned to more than one worker.

**Note:** Users with Low and Medium security access can view worker assignments. Users with High security access can add, edit, and delete worker assignments.

### Assign a Worker to a Client

Client-Worker assignments should last throughout the client's tuberculosis regimen.

To add an assignment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Assignments** or click the **Assignments** button on the toolbar.



*If no worker is currently in focus, the Change Focus window will open, enabling you to select one. The Worker Assignment window is displayed.*

Date	Client Name	Status	Status Date
03/25/1998	ALPHA, ANDREW	Current	
03/25/1998	FOXTR0T, FELICITY F	Current	
03/25/1998	GOLF, GARRET NEWT	Current	
03/25/1998	ECHO, EDDIE ERNESTO	Reassigned	03/25/1998

<b>Client Information</b>	
Name: ALPHA, ANDREW	Language: ENGLISH
City/County Case No.:	<input type="checkbox"/> Speak English
State Case No.: 988130838	<input type="checkbox"/> Understand English
<b>Assignment Information</b>	
Date Assigned: 03/25/1998	Status: Current
Assigned By: ORINOCO, OLIVIA	Status Date: 00/00/0000
Reassigned To:	
Comment:	

3. Click the **New** button.

The Client list is displayed.

Last Name	First Name	MI	State Case#	City/County Case#	Primary Language
AARDEMA	ALEXANDER		0FLT66934		SPANISH
ALAPHA	AMES		00FLT9354		JAPANESE
ALLURE	BROWN		GA1250820		ENGLISH
ALLURE	YELLOW		0FLT18145		JAPANESE
AMES	ALEX		0FLT70438		ENGLISH
ARGON	HENRY		097GA1967		ENGLISH
BODACIOUS	GEORGE		0FLT58881		ENGLISH
BUGS	SQA	A	00FLT1970		ENGLISH
BUSSY	ANGELA		0FLT81291		ENGLISH
CLIENT	WITHCONTACTS		GA1965028		ENGLISH
CLOSED	CLIENT		0097GA205		ENGLISH
COFFEE	POT		0FLT66934		ENGLISH
COMPAQ	BRIEF		0FLT66934		ENGLISH

4. Select the client to be assigned and click the **OK** button.

*If you need additional information about a client that you are about to assign to the current worker, you can click the View button to display a read-only version of the selected client's Client Information window.*

5. If the selected client and the current worker do not have a compatible language, this warning will appear.

**Client Language Validation**

The Worker and Client do not have a compatible language! Do you want to keep this assignment?

Yes No Suggest Alternate Workers...

- Click **Yes** to assign the selected client to the current worker even though there is no compatible language between them.
  - Click **No** to cancel the process that would assign the current worker to the selected client.
  - Click **Suggest Alternate Workers** to display a list of workers who have a language compatible with the selected client. If no worker speaks the client's language, the entire list of active workers is displayed.
6. Enter data in the Assignment Information area of the window.

**Assignment Information**

Date Assigned: 08/01/1997 Status: Current Status Date: 00/00/0000

Assigned By: KIDD, KIRK K Reassigned To:

Comment:

- Enter or select the date the client was assigned to the worker in the Date Assigned field. The current date is entered by default, but the date can be any time between the client enrollment date and the current date.
- Select the name of the supervisor who requested the client-worker assignment in the Assigned By drop-down list.

- Comments related to the client-worker assignment can be added in the Comment box.
7. Click the **C**lose button to exit the Worker Assignment window.

## Edit a Worker Assignment

Sometimes the information on the Worker Assignment window needs to be updated with current information.

To edit an assignment...

1. Open the **D**aily **P**rogram **O**perations module.
2. Open the **W**orker menu and select **A**ssignments or click the **A**ssignments button on the toolbar.



*If no worker is currently in focus, the Change Focus window will open, enabling you to select one. The Worker Assignment window is displayed.*

Date	Client Name	Status	Status Date
03/25/1998	ALPHA, ANDREW	Current	
03/25/1998	FOX TROT, FELICITY F	Current	
03/25/1998	GOLF, GARRET NEWT	Current	
03/25/1998	ECHO, EDDIE ERNESTO	Reassigned	03/25/1998

<b>Client Information</b>	
Name: ALPHA, ANDREW	Language: ENGLISH
City/County Case No.: [ ]	<input type="checkbox"/> Speak English
State Case No.: 988130838	<input type="checkbox"/> Understand English
<b>Assignment Information</b>	
Date Assigned: 03/25/1998	Status: Current
Assigned By: ORINOCO, OLIVIA	Status Date: 00/00/0000
Reassigned To: [ ]	
Comment: [ ]	

3. Select a client from the browse list and click the **E**dit button.
  4. Modify the Assignment Information and click **S**ave.
- Worker languages spoken or understood should match the client's language whenever possible.*
5. Click the **C**lose button to exit the Worker Assignment window.

## Delete a Worker Assignment

When worker assignments are made incorrectly, they should be deleted.

To delete an assignment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Assignments** or click the **Assignments** button on the toolbar.



*If no worker is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Select a client from the browse list and click the **Delete** button.
4. Select **Yes** to confirm that you want to delete this assignment. The assignment will be permanently removed from TIMS.
5. Click the **Close** button to exit the Worker Assignment window.

## Reassign a Client

Sometimes clients need to be reassigned to another worker. Once a client has been reassigned to another worker, that client assignment record cannot be modified any further. If additional assignments are required, the current assignment record must be stopped and a new assignment record begun.

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Assignments** or click the **Assignments** button on the toolbar.



*If no worker is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Select a client from the browse list and click the **Reassign** button.
4. Click **Yes** to confirm that you want to reassign the client.

*The Select New Worker window is displayed.*

Worker Name	Worker ID	Status
CHATTAHOOCHEE, CHARLES	CVC8	Active
COLUMBIA, COLLEEN	CGC0	Active
EAST, ELAINE	EEE0	Active
FLINT, FLOYD	FD11	Active
GANGES, GAYLE	GAG0	Active
MONONGAHELA, MEREDITH	MRM0	Active
ORINOCO, OLIVIA	OTD3	Active
PURGATOIRE, PATTY	POP4	Active

Filter:  
 Active  
 Inactive  
 All

OK  
Cancel

Languages Spoken:  
 ENGLISH  
 FRENCH  
 SPANISH

5. Select the Worker who will now be responsible for the client and click the **OK** button.

*Note that the languages the worker speaks are displayed when the worker is selected. The client's status changes to 'Reassigned.' The client's assignment can be viewed on the new worker's assignment window.*

6. Click the **C**lose button to exit the Worker Assignment window.

## Stop a Worker Assignment

When a client is no longer receiving TB-related services, you can stop the assignment.

To stop an assignment...

1. Open the **Daily Program Operations** module.
2. Open the **W**orker menu and select **A**ssignments or click the **A**ssignments button on the toolbar.



*If no worker is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Select the client from the browse list and click the **S**top button.
4. Click **Y**es to confirm that you want to stop the assignment. The client's status will change to 'Stopped.'
5. Click the **C**lose button to exit the Worker Assignment window.

## Worker Appointments

TIMS allows you to schedule appointments for workers defined in your TIMS database. To create a worker appointment, the following information can be entered: appointment date and time, appointment type, and appointment location. Worker appointments can be added, edited, voided (cancelled), deleted, confirmed, or rescheduled. After appointments are established, you can filter which appointments are displayed by choosing a status or appointment type.

The Worker Appointment window will display all appointments for the selected worker. This includes appointments with other workers and appointments with clients. Only appointments with other workers can be entered or modified from the Worker Appointment window. All appointments with clients must be entered or modified on the client's appointment window. The client appointment window will display only the appointments for the selected client.

TIMS provides the capability to search for existing appointments by date and time. You can also choose to display appointments for today, a specific date, or all appointments scheduled for a worker.

**Note:** Users with Low, Medium, and High security access can add, edit, and view worker appointments. Users with High security access can delete worker appointments.

### Open the Worker Appointments Window

To begin working with worker appointments, you must first open the Appointments window.

To open the current worker's appointment window...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointment** button on the toolbar.



If there is no current worker, the Change Focus window will appear enabling you to select one.

Search: <u>For Date</u>   <u>Today</u>   <u>All</u>						
Date	Time	Location	Appt. Type	Worker	Client	Status
08/10/1998	08:00 am	EXAMINATION 2	BLOOD TEST		CHARLEY, CASHEW C	PAST DUE
08/10/1998	11:00 am	RADIOLOGY	CHEST X-RAY		CHARLEY, CASHEW C	COMPLET
08/10/1998	02:00 pm	EXAMINATION 1	BACTERIOLOG		CHARLEY, CASHEW C	COMPLET
08/10/1998	09:00 pm	EXAMINATION 1	PHYSICAL EX		CHARLEY, CASHEW C	COMPLET
08/12/1998	04:00 pm	CONFERENCE A	STAFF MEET	AMAZON, AMELIA		RESCHED
08/12/1998	09:00 pm	FIELD	FIELD SURVE	COLUMBIA, COLL		SCHEDUL
08/13/1998	08:40 am	RADIOLOGY	CHEST X-RAY		NOVEMBER, NANCY	SCHEDUL
08/13/1998	04:00 pm	CONFERENCE A	STAFF MEET	AMAZON, AMELIA		SCHEDUL
08/15/1998	01:00 pm	EXAMINATION 1	SKIN TEST		JULIETT, JANE J	SCHEDUL

**Filter Appointments by Status:**

Scheduled

Past Due

Rescheduled

Completed

Canceled

**Filter Appointments by Type:**

BACTERIOLOGY

BLOOD TEST

CHEST X-RAY

HIV TEST

PHYSICAL EXAM

SKIN TEST

CLIENT DOT

**Close**

## Search for Appointments

You can search for the selected worker's appointments by using the For Date, Today, or All filters.

To search for appointments...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no worker is in focus, the Change Focus window will open, enabling you to select one.*

3. Select the appropriate search option:



- Click the **For Date** button and enter a date to display all the appointments for that date (the Time portion does not affect the filter) and click the **OK** button.

The dialog box titled "Enter Filter Date" contains the following fields and controls:

- Enter Date:** A text input field containing "01/01/1985" with a calendar icon to its right.
- Time:** A text input field containing "01:00" with a clock icon to its right, followed by radio buttons for "am" and "pm", with "pm" selected.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

- Click the **Today** button to view all appointments for the current date.
- Click the **All** button to view all the worker's appointments.

## Filter Appointments by Status

You can limit which appointments will appear in the browse list by selecting one or more appointment statuses.

To filter appointments by status...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no worker is in focus, the Change Focus window will open, enabling you to select one.*

3. Click one or more status designations for the appointments you wish to view in the browse list: **Scheduled**, **Past Due**, **Rescheduled**, **Completed**, or **Canceled**.

The dialog box titled "Filter Appointments by Status:" contains the following list of checkboxes:

- Scheduled
- Past Due
- Rescheduled
- Completed
- Canceled

## Filter Appointments by Type

You can separate appointments that will appear in the browse list by selecting one or more appointment types.

To filter appointments by type...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no worker is in focus, the Change Focus window will open, enabling you to select one.*

3. Select the appointment types you wish to view in the Filter Appointments by Type list.



## Add a Single Appointment

If you need to schedule a worker appointment that will not occur regularly or will occur only one time, use the Single appointment option. This is the default option.

To schedule a single appointment...

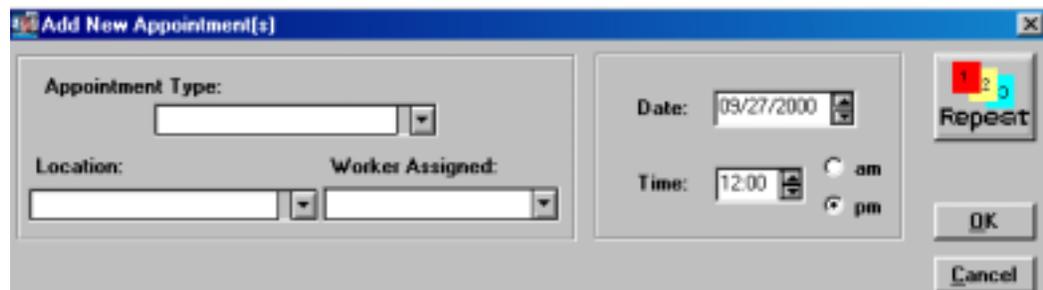
1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



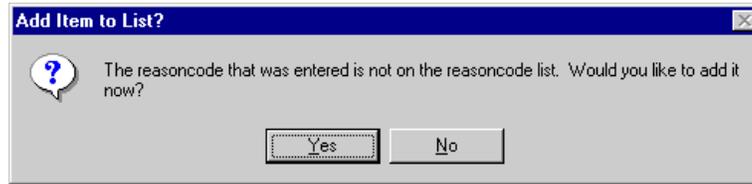
*If no worker is currently in focus, the Change Focus window will open, enabling you to select one.*

3. Click the **N**ew button.

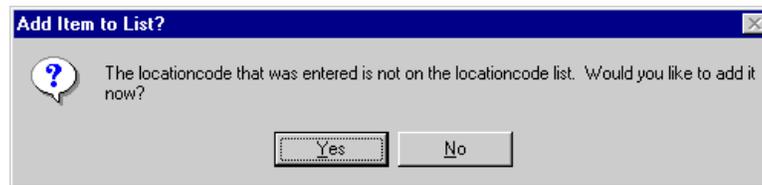
*This displays the Add New Appointment dialog box.*



4. Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.



5. Select the location at your facility where the appointment will actually take place from the Location list. If the location is not on the current list, you can type in the location name to add it to the list of available options.



6. If appropriate, select the staff member who the appointment is with from the Appointment With list.

*Workers cannot be added at the time an appointment is created; the worker must have been previously defined in the Daily Program Operations module.*

7. Enter or select the appointment date in Date box.
8. Enter or select the appointment time in Time box. Be sure to specify either a.m. or p.m.
9. Click the **OK** button.

### Add a Recurring Appointment

Workers may have the same type of appointment on multiple occasions. TIMS has a Repeat Appointment feature that automates the process of creating repeating worker appointments.

To create a repeating appointment...

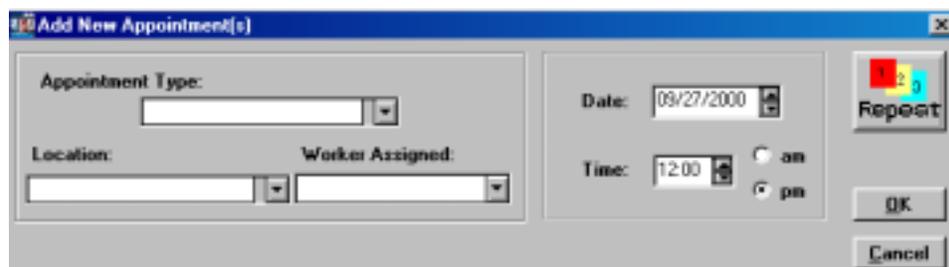
1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no worker is in focus, the Change Focus window will open, enabling you to select one.*

3. Click the **N**ew button.

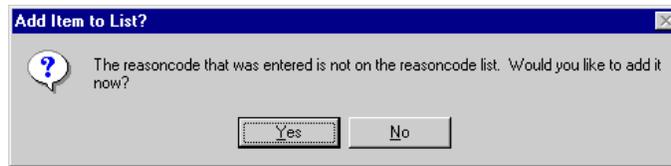
*This displays the Add New Appointment dialog box.*



4. Click the **Repeat** button.

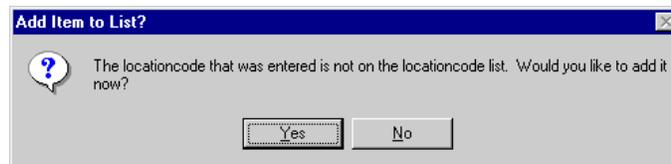


5. Select the type of appointment from the Appointment Type list. If the list does not contain the appropriate appointment type, type in a new appointment type description to add it to the list of available options.



6. Select the location at your facility where the appointment will actually take place from the Location list.

If the location is not on the current list, you can type in the location name to add it to the list of available options.



7. If appropriate, select the staff member who the appointment is with from the Appointment With list.

*Workers cannot be added at the time an appointment is created; the worker must have been previously defined in the Daily Program Operations module.*

8. Enter or select the appointment date in Date box.
9. Enter or select the appointment time in Time box. Ensure to specify either a.m. or p.m.
10. Select how often you want the appointments to occur from the Repeat Cycle group.

Repeat Cycle

Daily/Weekly  Monthly

- Select **Daily/Weekly** for appointments that should occur more than once a month.
- Select **Monthly** for appointment that should occur on a monthly basis.

11. For Daily/Weekly appointments:

Daily/Weekly

On what day(s):

Sunday  
Monday  
Tuesday  
Wednesday  
Thursday  
Friday  
Saturday

Every 1 weeks

Repeat 1 times

- Select the day(s) of the week you want the appointment to occur in the **On what day(s)** list. You can select more than one day.
- Enter or select how frequently you want the appointment to occur in the **Every \_\_\_ weeks** box.

- Enter or select the number of cycles in the **Repeat** \_\_\_ **times** box.

## 12. For Monthly appointments:

The image shows a dialog box titled "Monthly" with the following fields and options:

- Which week: 1st
- Day of: Sunday
- Specific date
- Every: 1 months
- Repeat: 1 times

- If you want the appointment to occur on a specific day and week each month (for example, every third Thursday of the month), select **Which Week**, then select a week and day of the week.
- If you want the appointment to occur on a specific date each month, select **Specific Date** and enter or select the date.
- For all monthly appointments, enter or select how frequently you want the appointment to occur in the **Every** \_\_\_ **months** box.
- Enter or select the number of times the appointment occurs in the **Repeat** \_\_\_ **times** box.

## 13. Click the **OK** button.

## Edit a Worker Appointment

Sometimes it is necessary to adjust the details of an appointment after it has been entered. Only worker-specific appointments can be edited; client appointments with the selected worker that appear in the appointment list cannot be edited. Not all appointment details can be modified.

To edit an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no worker is in focus, the Change Focus window will open, enabling you to select one.*

*The Worker Appointment window is displayed.*

The screenshot shows the "Worker Appointment" window with the following details:

- Current Worker: WORKER, DEFAULT
- Search: For Date Today All
- Table columns: Date, Time, Location, Appt. Type, Worker, Client, Status
- Table rows (selected row highlighted):
 

Date	Time	Location	Appt. Type	Worker	Client	Status
06/12/2008	12:08 pm	A7 LOCATION 1	SKIN TEST		STONE, SAH MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	PHYSICAL EX		PEE, EM MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	HIV TEST		TINES, LAN MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	BACTERIOLOG		GLEES, GUCK MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	BLOOD TEST		PLANS, MEDICATION MR	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	BACTERIOLOG		SPEN, CLINT MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	BACTERIOLOG		PREACTON, JANS MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	BLOOD TEST		REPORTS, MEDICAL MN	SCHEDULED
06/12/2008	12:08 pm	A7 LOCATION 1	WORKER APPOINTMENT			SCHEDULED
- Filter Appointments by Status:
  - Scheduled
  - Past Due
  - Rescheduled
  - Completed
  - Canceled
- Filter Appointments by Type:
  - BACTERIOLOGY
  - BLOOD TEST
  - CHEST XRAY
  - HIV TEST
  - PHYSICAL EXAM
  - SKIN TEST
  - WORKER APPOINTMENT 1
- Buttons: Edit, Print, Delete, Confirm, Reschedule
- Footer: 6/24/2008 1:02 pm

3. Select the appointment you want to edit from the Appointments list.  
*Completed appointments cannot be edited.*
4. Click the **Edit** button.

5. Make the necessary changes to the appointment.

*Not all appointment details can be changed once they have been entered. If you cannot make the necessary changes to a worker appointment, you may have to delete the current appointment and create a new one.*

6. Click the **OK** button.

7. Click the **Close** button.

## Reschedule a Worker Appointment

If necessary, appointments can be rescheduled for another time or date.

To reschedule an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



*If no worker is in focus, the Change Focus window will open, enabling you to select one.*

*The Worker Appointment window is displayed.*



3. Select the appointment in the browse list that needs to be changed.

*'Completed' appointments cannot be rescheduled.*

4. Click the **Reschedule** button.

*The New Appointment Date and/or Time dialog box appears.*



5. Enter or select the new date for the appointment in the Enter Date box.

6. Enter or select the new time for the appointment using the Time box. Be sure to specify am or pm.

7. Click the **OK** button.

## Cancel a Worker Appointment

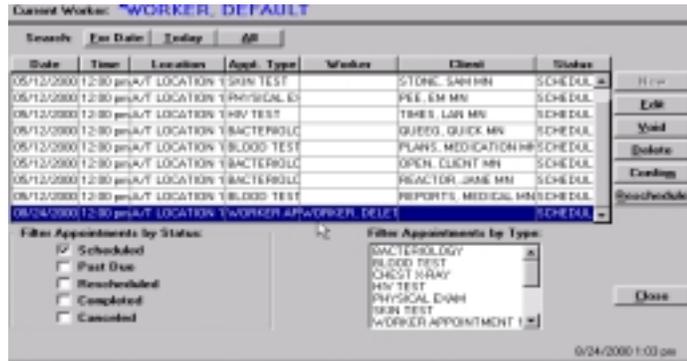
Some appointments need to be canceled without being rescheduled. If the appointment cannot be rescheduled, you may cancel it using the Void function.

To cancel an appointment...

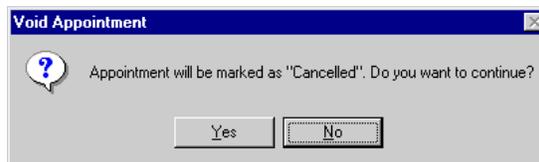
1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one. The Worker Appointment window is displayed.



3. In the browse list, select the appointment that needs to be canceled.  
*Completed appointments cannot be voided.*
4. Click the **Void** button.
5. Click the **Yes** button to confirm that you want to cancel the appointment.



The Status changes to 'Canceled.'



6. Click the **Close** button.

### Delete a Worker Appointment

When an appointment was made in error, it should be removed from the TIMS database.

To delete an appointment...

1. Open the **Daily Program Operations** module.

- Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



If no worker is in focus, the Change Focus window will open, enabling you to select one.

The Worker Appointment window is displayed.



- In the browse list, select the appointment that needs to be deleted.  
*Completed appointments cannot be deleted.*
  - Click the **Delete** button.
- The appointment is removed from TIMS.
- If the selected appointment was a single appointment (not part of a set), click the **Yes** button to delete the appointment, or click the **No** button to end to operation.



- If the selected appointment was part of a recurring appointment set, you be asked if you want to delete the entire set. Click the **Yes** button to delete the entire set, or the **No** button to delete only the selected appointment.  
*Completed appointments in the series will not be deleted.*



- Click the **Close** button to exit the Worker Appointment window.

## Confirm a Worker Appointment

When an appointment is completed, it should be confirmed.

To confirm an appointment...

1. Open the **Daily Program Operations** module.
2. Open the **Worker** menu and select **Appointments** or click the **Appointments** button on the toolbar.



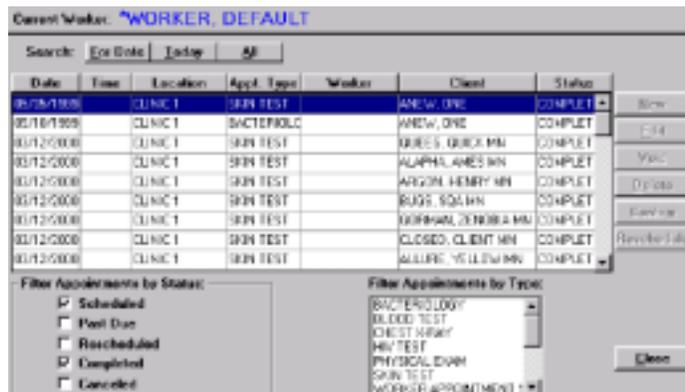
If no worker is in focus, the Change Focus window will open, enabling you to select one.

The Worker Appointment window is displayed.



3. Select the appointment in the browse list that needs to be confirmed.
4. Click the **Confirm** button.
5. Click **Yes** to confirm that you want to mark the appointment as “completed.”

The Status will display ‘Completed’.



6. Click the **Close** button to exit the Worker Appointment window.

## **Reports**

The Daily Program Operations offers several reports. They are:

- Appointment-By Client (Not available in this version of TIMS)
- Appointment - By Worker (Not available in this version of TIMS)
- Assignment - By Client (Not available in this version of TIMS)
- Assignment - By Worker (Not available in this version of TIMS)
- Assignment - Number and Types of Clients
- DOT Summary - By Worker
- DOT Summary - All Workers
- Exception Report: Clients Who Are Smear Positive
- Exception Report: Smears Pending More Than x Days
- Exception Report: Cultures Pending More Than x Days
- Exception Report: Clients with Drug-Resistant TB
- Exception Report: Cases/Suspects with No Positive Bacteriology
- Exception Report: Cases/Suspects Without a Worker Assignment
- Exception Report: Cases/Suspects with No Contacts Identified
- Exception Report: Clients Who Have Been a Suspect for More Than x Days

See *Appendix RPT DPO - TIMS Reports* for detailed information about these and other TIMS reports.

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## Chapter 7 System Module



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### Overview

The System Module is used primarily by TIMS System Administrators and TIMS users with High security access. The System module performs tasks such as:

- Transmitting and receiving data from other TIMS sites
- Managing TIMS data
- Managing the TIMS system
- Performing TIMS-related administrative tasks
- Creating system-related reports and logs

The Transmission feature includes dialing or answering a call from another TIMS site, receiving TIMS files in the Inbox, sending TIMS files from the Outbox, sending non-TIMS information, and adjusting the COMM Port settings. Data Management functions include Ad-Hoc Queries, Frequency Report, Data Dictionary, Export, User-Defined Variables, Database Backup, Database Recovery, Purge Records by Site, and Purge Client Records.

The System Management (Mgt) feature consists of setting system preferences and security assignments. Administrative tasks include the creation of spin-off diskettes (used by the Reporting Area level only) and TIMS table maintenance. System reports include Activity Log, Transmission Log, User-Defined Data Dictionary, Users Rights/Access, Unacknowledged Transfer File Report, and Unacknowledged Record Report.

The TIMS System Administrator will setup most of the TIMS system information, such as preferences, user security, and table maintenance before individual users access TIMS.

## Quick Start

### Open the System Module

There are two ways to open the System module...

- Open the **C**lient menu and select **S**ystem.  
*If the current module does not have a Client menu, choose the first menu from the left.*

Or

- Click the **S**ystem button on the toolbar.



### Change Password

A user with Low, Medium, or High security access can change their personal password. The information below is for individual users. The System Administrator can also use this feature to reset the SYSADMIN password.

To change your TIMS password...

1. Open the **S**ystem Mgt menu and select **S**ecurity.



2. Enter the old Password and press the **T**AB key.
3. Enter the new Password and press the **T**AB key.
4. Retype the new Password for confirmation.
5. Click the **S**ave button and then the **C**lose button.

### Add a New User

**Note:** Only a TIMS System Administrator can add a new user.

To add a new TIMS user...

1. Open the **S**ystem Mgt menu and select **S**ecurity.



2. Click the **N**ew button.
3. Enter the detail information on the bottom of the window.
4. Click the **S**ave button to create the account.
5. Click the **C**lose button.

## Edit System Preferences

**Note:** Only a TIMS System Administrator can edit System Preferences.

1. Open the **S**ystem **M**gt menu and select **P**references

Or

Click the **P**references button on the toolbar.



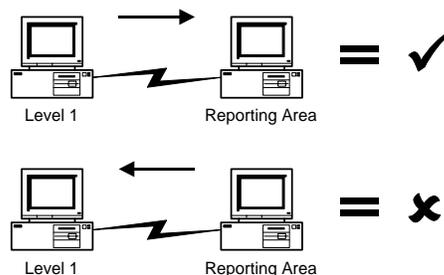
2. Enter the desired preference settings for the items listed.
3. Click the **F**iles button.
4. Enter the location for the TIMS files.  
*Most of the file locations will be entered automatically during installation.*
5. Click the **S**ave button on the Location of TIMS Files window, then click the **C**lose button.
6. Click the **S**ave button on the System Preferences window, then click the **C**lose button.

## Transmission Overview

The **Transmission** functions are used to send and receive surveillance data, ARPE data, and other files via modem. Surveillance and ARPE data are collected and prepared for transmission in the Surveillance and Program Evaluation modules, respectively, but the transfer file is actually sent and received by the transmission functions of the System module.

### Data Flow Restrictions

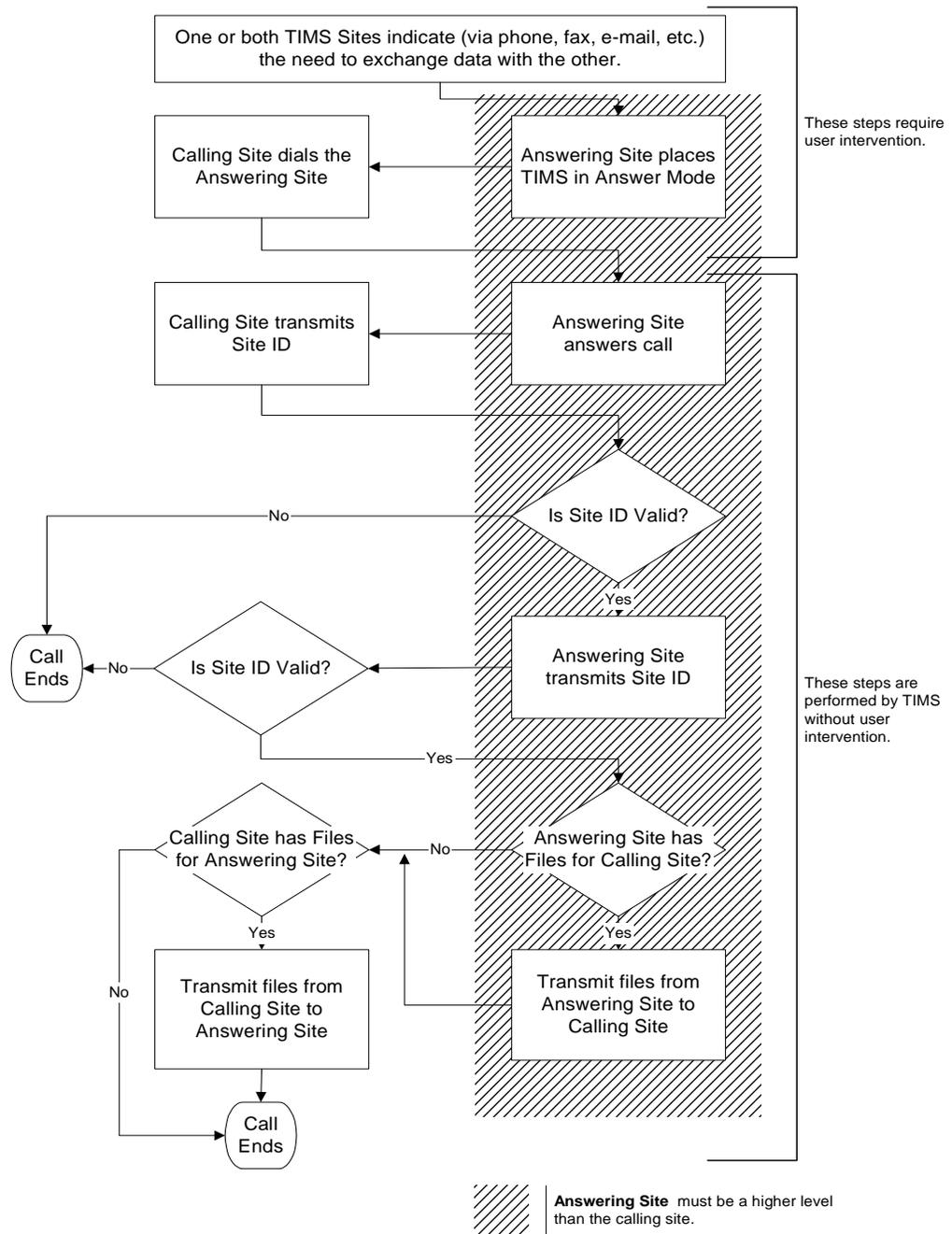
To ensure data integrity and prevent data duplication errors, TIMS restricts the data flow between different TIMS levels. The lower site on the hierarchy must always initiate the data transmission call. For example, a Level 1 site may dial a Reporting Area site, but a Reporting Area site cannot dial a Level 1 site. Any Reporting Area files which must be transmitted to a Level 1 site (acknowledgements, State Case Numbers, etc.) must wait until the Level 1 site dials the Reporting Area before the files are transmitted. See the Surveillance Reporting Hierarchy chart in the Surveillance Module chapter (Chapter 4) for details.



When a modem connection is established, the TIMS application will automatically perform the following operations:

1. The Answering Site verifies the Calling Site's TIMS ID. If the Answering Site does not recognize the Site ID, the call is terminated.
2. The Calling Site verifies the Answering Site's TIMS ID. If the Calling Site does not recognize the Site ID, the call is terminated.
3. From its Outbox, the Answering Site transmits all files intended for the Calling Site.
4. From its Outbox, the Calling Site transmits all files intended for the Answering Site.
5. The call ends.

### Transmission Data Flow



TIMS automatically places the files received into the proper location (e.g., Inbox). TIMS also provides a Transmission Log Report that allows you to review all incoming and outgoing transmissions.

**Note:** Users with System Administrator and High user access privileges can send and receive data between TIMS sites. Only TIMS System Administrators can use the Assimilation function to incorporate the transmitted data into the TIMS database.

## Person-To-Person Cooperation

Exchanging data between sites requires that the TIMS users on both ends of the transaction communicate and cooperate with one another. In the following example, a Level One site transfers a surveillance file to the Reporting Area and picks up the acknowledgement file.

Step	Level One	Reporting Area
1	Calls Reporting Area to say that there are data to transmit.	•••
2	•••	Puts TIMS in Answer mode.
3	Uses the TIMS Dial command to dial the Reporting Area site.	•••
4	TIMS transmits the Surveillance data (SURV) file to the Reporting Area site.	TIMS receives the Surveillance data (SURV) file from the Level One site.
5	TIMS call ends.	TIMS call ends.
6	•••	Assimilates the surveillance data received from the Level One site. An Acknowledgment (ACK) file is created and placed in the Outbox.
7	•••	Calls Level One site with request to pick up Acknowledgment (ACK) file.
8	•••	Puts TIMS in Answer mode.
9	Uses the TIMS Dial command to dial the Reporting Area site.	•••
10	TIMS receives the Acknowledgement (ACK) file from the Reporting Area site.	TIMS sends the Acknowledgement (ACK) file to the Level One site.
11	TIMS call ends.	TIMS call ends.
12	Assimilates the Acknowledgment (ACK) file.	•••

## Transmission: Dialing and Answering

### Calling Another TIMS Site

Use the **Dial** function to initiate a data transfer to another TIMS site. When a connection is made, all files for both sites will be exchanged automatically.

In order for the call to be successful, the TIMS application at both sites must be properly registered, and the Answering Site must have TIMS in Answer Mode.

To dial a TIMS site...

1. Open the **System** module.
2. Use one of the following methods to display the TIMS Dialing List:
  - Open the **S**ystem menu and select **T**ransmission, then select **D**ial
  - Click the **Dial** button on the toolbar



- Press **Ctrl + D**

The TIMS Dialing List window appears. To close the window, click **C**ancel.

Site Name	Modem Phone Number
CA LEVEL 1	(404)321-5176
CA LEVEL 2A	(222)222-2222
CA LEVEL 2	(404)321-9428
CALIFORNIA	(404)321-0343

Dialing Prefix:       Dialing Suffix:

Use Alternate Modem Number:       Alternate Number:

Add the Alternate Number to the List:       Replace Current with Alternate:

Long Distance:       Include Area Code:

3. Select the TIMS site you want to connect to by clicking its name in the list.
 

*Sites are added to this list during the Setup and Spin-Off processes. To maintain data security, users cannot add new TIMS sites to the list.*
4. If your phone system requires that you enter a code before dialing a phone number, enter the code in the **Dialing Prefix** box.
 

*For example, many institutional phone systems require that you dial a 9 to access an outside line.*
5. If your phone system requires that you enter a code after dialing a phone number, enter the code in the **Dialing Suffix** box.
 

*For example, some institutional phone systems require an access code to use long-distance service.*
6. If the Answering site requests that you temporarily dial a different number to connect to them, select **Use Alternate Modem Number** and enter the different number in the Alternate Number box.

The alternate phone number will only be used for the current call.

Use Alternate Modem Number:  Alternate Number: [ ] -

7. Select **Include Area Code** if you need to dial the area code for the number you are calling, but the number is still within the local calling area.

For example, the metropolitan Atlanta, GA area has several area codes making it necessary to dial all ten digits for local phone calls (404-555-1212).

8. Select **Long Distance** if you are calling a number that is long distance.

This adds a 1 to the dialing prefix.

9. Click the **OK** button to dial the selected TIMS site.

The Dial Monitor window is displayed. Click the **Abort** button to cancel the dialing process.



The Dial Monitor displays the status of the call. Once the connection is established, the two sites will automatically begin exchanging files.

### Adding an Alternate Phone Number for a TIMS Site

You can add an alternate number for TIMS sites previously registered on your system to the TIMS dialing list.

**Note:** TIMS will dial the new number when the procedure is complete. You can click the **Abort** button at any time to stop the outgoing call.

To add a number to the TIMS Dialing List...

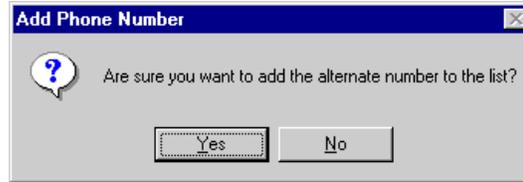
1. Open the **System** module.
2. Use one of the following methods to display the TIMS Dialing List:
  - Open the **S**ystem menu and select **T**ransmission, then select **D**ial
  - Click the **Dial** button on the toolbar



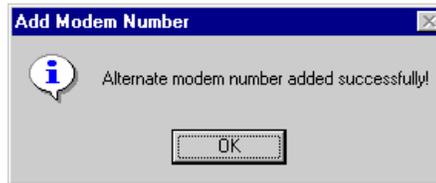
- Press **Ctrl + D**
3. Select the appropriate TIMS site.
  4. Select **Use Alternate Modem Number** and enter the different number in the Alternate Number box.
  5. Select **Add the Alternate Number to the List**.

Add the Alternate Number to the List:

6. Click the **OK** button.
7. Click **Yes** to confirm that you want to add the new number to the TIMS Dialing List or click **No** to cancel the Add Phone Number operation and continue dialing with the alternate number.



8. Click the **OK** button to close the Add Modem Number dialog box and dial the new number.



*The Alternate phone number will appear in the list.*

OR-DPH DISTRICT 12 (BEND)	(404)555-1003
OR-DPH DISTRICT 12 (BEND)	(404)555-1005

### Permanently Replacing a Modem Phone Number for a TIMS Site

If the phone number for a TIMS site registered on your system has changed permanently, you can replace the current modem phone number with the new one.

**Note:** TIMS will dial the new number when the procedure is complete. You can click the **Abort** button at any time to stop the call.

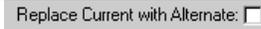
To replace a modem phone number for a site in the TIMS Dialing List...

1. Open the **System** module.
2. Use one of the following methods to display the TIMS Dialing List:
  - Open the **System** menu and select **Transmission**, then select **Dial**
  - Click the **Dial** button on the toolbar



- Press **Ctrl + D**
3. Select the appropriate TIMS site.
  4. Select **Use Alternate Modem Number** and enter the new number in the Alternate Number box.

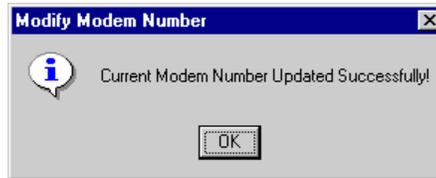
5. Select **Replace Current with Alternate**.



6. Click the **OK** button.
7. Click **Yes** to confirm that you want to change the modem phone number or click **No** to cancel the Change Phone Number operation and continue dialing with the alternate number.



8. Click the **OK** button to close the Modify Modem Number dialog box and dial the new number.



*The new modem phone number will appear in the list.*

## Deleting an Alternate Phone Number

If an alternate phone number you've added to the dialing list is no longer valid, TIMS allows you to delete it.

To delete an alternate phone number...

1. Open the **System** module.
2. Use one of the following methods to display the TIMS Dialing List:
  - Open the **System** menu and select **Transmission**, then select **Dial**
  - Click the **Dial** button on the toolbar



- Press **Ctrl + D**
3. Select the alternate phone number you want to delete.

*Only alternate phone numbers can be deleted. Primary phone numbers added through the spin-off process cannot be deleted.*

Site Name	Modem Phone Number
Centers for Disease Control	(404)321-2098
OREGON DEPT PUBLIC HEALTH - TB DIV	(404)321-0343
OREGON DEPT PUBLIC HEALTH - TB DIV	(404)555-1005
OR-DPH DISTRICT 12 (BEND)	(404)555-1003

4. Click the **Delete** button.

- Click the **Y**es button to confirm that you want to delete the alternate phone number. Click the **N**o button to cancel the delete operation.



- Click the **O**K button to close the Delete Modem Number message box.



## Ending a TIMS Communication Session

A TIMS communication session will end for one of two reasons:

- All the files have been transferred and the two sites have disconnected normally
- Or
- An error has occurred and the session must be terminated.

The procedure for ending a communication session is the same at both the calling and answering sites.

## End a Normal Communication Session

To end a communication session that has successfully completed...

- Click the **O**K button to close the Dial Monitor window.

## Terminate a Communication Session

To prematurely end a communication session...

- Click the **A**abort button on the Dial Monitor window to disconnect the modem and stop data flowing between the two sites. Any file in the process of being transferred will remain in the sending site's Outbox.
- Click the **O**K button to close the Dial Monitor window.

*The other TIMS site modem will automatically disconnect when it no longer detects a response from your site.*

## Accepting Calls from Other TIMS Sites

The **A**nswer function activates the modem and the TIMS software to receive calls from other TIMS sites. While in Answer mode, TIMS will wait for incoming calls and begin communicating with the other site and transmitting data files as soon as the call is received. By default, TIMS will accept calls for 20 minutes from the time it was placed in Answer Mode. If no calls are received in the 20-minute period, Answer Mode automatically ends and TIMS will not answer incoming calls. After the connection is made, no further user actions are required to process incoming phone calls.

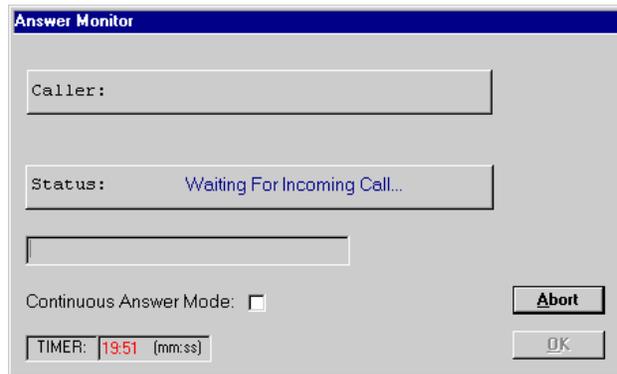
To place TIMS in answer mode...

1. Open the **System** module.
2. Use one of the following methods to begin Answer Mode:
  - Open the **S**ystem menu and select **T**ransmission, then select **A**nswer
  - Click the **Answer Mode** button on the toolbar



- Press **Ctrl + A**

*The Answer Monitor window is displayed.*



To end Answer Mode, use one of the following procedures:

- If a communication session has been initiated and completed, or the 20-minute answer period has expired, click the **OK** button to close the Answer Monitor window.

Or

- To end Answer Mode before a call has arrived or completed, or before the 20-minute answer period has ended, click the **A**bsort button then the **OK** button to close the Answer Monitor window.

### Placing TIMS in Continuous Answer Mode

TIMS provides a continuous answer mode that extends the answer period beyond the standard 20 minutes and allows you to receive multiple consecutive calls. Continuous Answer Mode resets the timer at the end of each 20-minute cycle.

To place TIMS in continuous answer mode...

1. Open the **System** module.
2. Use one of the following methods to begin Answer Mode:
  - Open the **S**ystem menu and select **T**ransmission, then select **A**nswer.
  - Click the **Answer Mode** button on the toolbar



- Press **Ctrl + A**

**3. Select Continuous Answer Mode.**

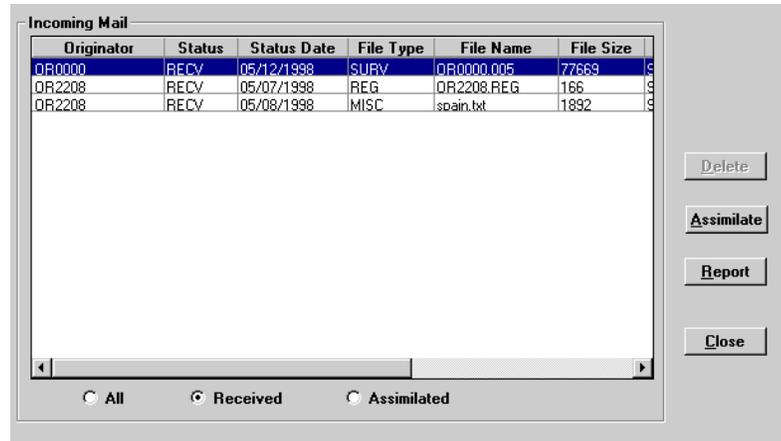
Continuous Answer Mode:

To end Continuous Answer Mode...

1. Clear the **Continuous Answer Mode** check box.
2. Click the **Aabort** button.
3. Click the **OK** button.

## The TIMS Inbox

The Inbox is a directory on your computer or network where TIMS files received from other sites are displayed and processed. Use the Inbox to assimilate received data into your database, create reports on the received data files, and delete received data files.



### Incoming Mail List

The Incoming Mail list allows you to select and process files that your site has received from other TIMS sites.

The list is divided into nine columns, each displaying a different type of information. Not all the column headers are visible at all times; use the horizontal scroll bar at the bottom of the Incoming Mail list to adjust the visible portion of the list.

- **Originator** - The Site ID of the site that created the file.
- **Status** - The status of the transmitted file. Valid options are RECV (received), ASSIM (assimilated) and DELETE (deleted).
- **Status Date** - The date the file received its current status.
- **File Type** - A code describing the type of file in the Inbox.
  - ACK** (Acknowledgement): An electronic receipt which informs the sender that their surveillance data have been received and assimilated by the receiving site.
  - SURV** (Surveillance Data): Surveillance records from another TIMS site.
  - PMR** (ARPE Data): ARPE records from another TIMS site.
  - SITE** (Site Information): Information used during the registration process.
  - REG** (Registration Info): Information used to register a lower-level TIMS site with your system.
  - MISC** (Miscellaneous file): A file received via the TIMS Misc. File Transfer option.
- **File Name** - The actual name of the file. See *Transfer File Naming Conventions* later in this chapter for additional details.
- **File Size** - The size of the transferred file, in bytes.
- **Initiator** - The assigned user ID of the person who received the file from the sending TIMS site.

- **Transmit Date/Time** - The date and time the file was transmitted from the sending TIMS site.
- **Userid** - The assigned user ID of the last person to process the file.

## Filtering Options

You can adjust which files are displayed in the Incoming Mail list by selecting the appropriate filter option button at the bottom of the list.

- **All** - Displays all transmitted files in your Inbox directory, regardless of their current status.
- **Received** - Displays all transmitted files in your Inbox directory that have not been assimilated. Received is the default option.
- **Assimilated** - Displays all previously assimilated files.

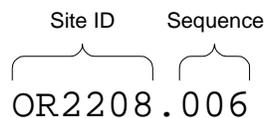
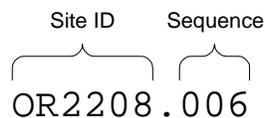
## Buttons

The Inbox window also has the following buttons:

- **Delete** - Click **D**el~~e~~te to remove the selected file from the inbox. See *Deleting Files from the Inbox* later in this chapter for additional information.
- **Assimilate** - Click **A**ssimilate to integrate the data from the selected transfer file with your database. See *Assimilating Data from the Inbox* later in this chapter for additional information.
- **Report** - Click **R**eport to display a series of reports on the selected data file. See *File Transmission Reports (Inbox and OutBox)* later in this chapter for additional information.
- **Close** - Click **C**lose to close the Inbox window.

## Transfer File Naming Conventions

The name of data transfer files consists of a Site ID and a three-digit sequence number. For example, OR2208.006 would be the sixth (006) data transfer file created by Oregon (OR) site 2208. The sequence is always incremented by one, regardless of the data file's destination.

Site ID	Sequence
	
OR2208	.006

Acknowledgement filenames add "AC" to the original data transfer file name. For example, OR2208.006 would be acknowledged by OR2208AC.006.

Registration files are named with the Site ID with a REG extension. For example, OR2208.REG would contain registration information for Oregon site 2208.

## Open the Inbox

To open the TIMS Inbox...

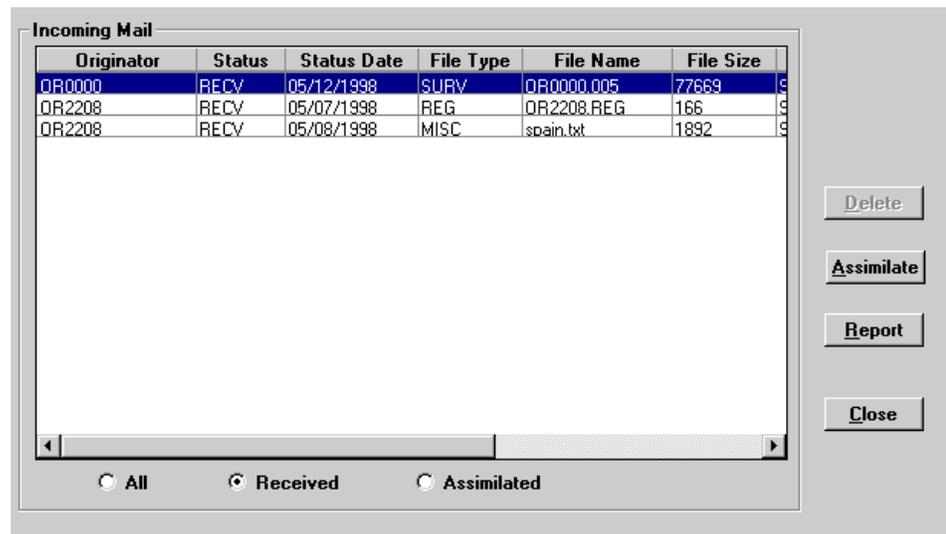
1. Open the **System** module.
2. Open the **System** menu and select **Transmission**, then select **InBox**

Or

- Click the **Inbox** button on the toolbar.



The Incoming Mail window is displayed.



## Assimilating Data from the Inbox

The Inbox lists files that have been transmitted to your site. These files must be assimilated for them to be incorporated into your database. Different file types require slightly different assimilation procedures and accomplish different things.

**Note:** Only a TIMS System Administrator can use the Assimilate function.

## General Assimilation Steps

The following steps are required to assimilate all file types.

To assimilate...

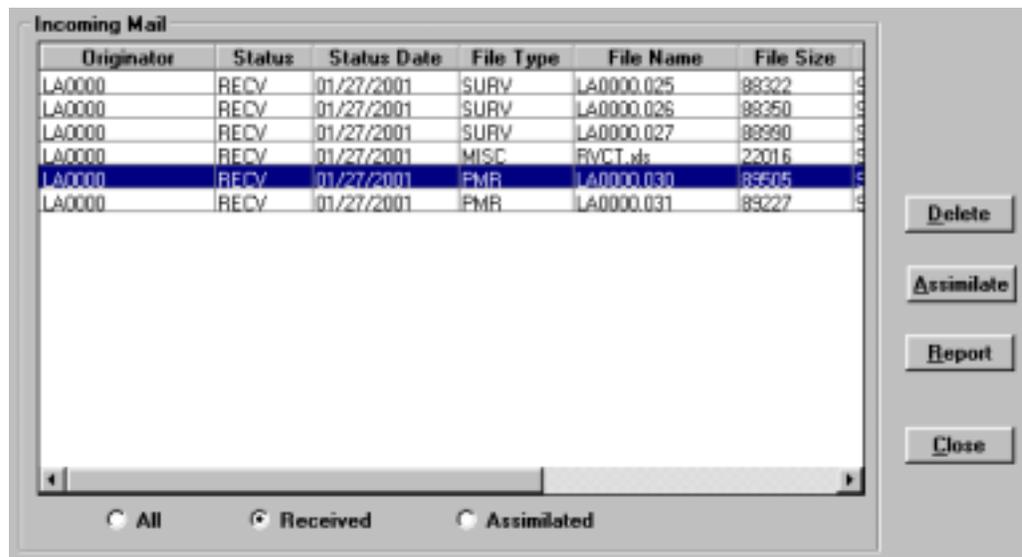
1. Open the **System** module.
2. Open the **System** menu and select **Transmission**, then select **InBox**

Or

- Click the **Inbox** button on the toolbar.



The Incoming Mail window is displayed.



3. Select a file with RECV status in the Incoming Mail list.  
*Files from the same originator must be assimilated in the order they were received.*
4. Click the **A**ssimilate button.  
*If the Assimilate button is not active, the selected file cannot be assimilated.*

### Assimilate Surveillance, ARPE, and Site Information Data

Assimilating a surveillance, ARPE, or site information file will incorporate data from another TIMS site into your TIMS database, or update or delete existing records which had already been transferred and assimilated.

To assimilate surveillance data, ARPE data, and site information...

1. Open the **S**ystem module.
2. Open the **S**ystem menu and select **T**ransmission, then select **I**nBox  
Or
  - Click the **I**nbox button on the toolbar.



3. Select the file you want to assimilate from the Incoming Mail list.
4. Click the **A**ssimilate button.  
*The assimilation process may take several minutes to complete.*
5. Click the **O**K button to close the Assimilation is complete dialog box.

*The number of assimilated records should match the total number of records transferred in the corresponding data transmission.*



## Assimilate Miscellaneous File Transfers and Registration Files

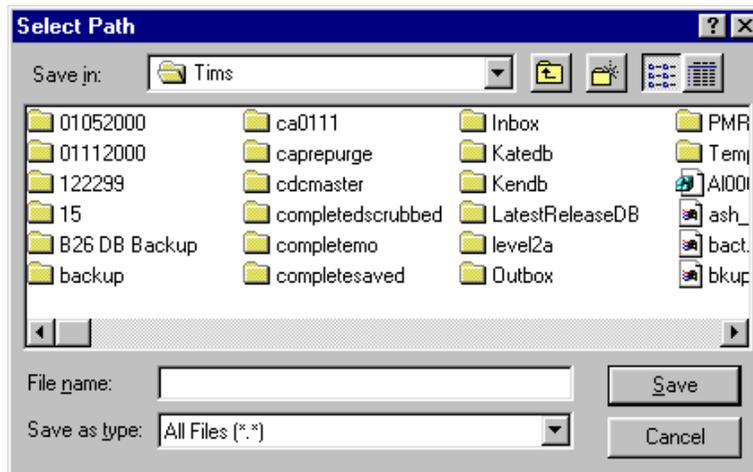
Registration Files and files transferred using the Miscellaneous File Transfer feature are not integrated into the TIMS database. The assimilation process allows you to specify a location where they will be stored.

To assimilate miscellaneous file transfers and registration files...

1. Open the **System** module.
  2. Open the **System** menu and select **Transmission**, then select **InBox**
- Or
- Click the **Inbox** button on the toolbar.



3. Select the file you want to assimilate from the Incoming Mail list.
4. Click the **Assimilate** button.
5. Use the Select Path dialog box to select the directory where you want to place the registration file or miscellaneous file.



6. Enter the **File name** for the file.  
*DO NOT select one of the files in the list. This will give the file to be assimilated the same name as the selected file, which will overwrite the selected file.*
7. Click the **Save** button to complete the assimilation. Click the **Cancel** button to stop the assimilation process.

## Deleting Files from the Inbox

TIMS allows you to remove surveillance, ARPE and miscellaneous files (files transferred to your site through the Misc File Transfer function in TIMS) from the Incoming Mail list before they are assimilated. Registration and Acknowledgement files cannot be deleted. Once assimilated, surveillance and ARPE files cannot be deleted.

It is important to note that the Inbox Delete function simply removes the file from the Incoming Mail list, or in the case of surveillance or ARPE transfer files, marks them Deleted. No files are removed from the system and no disk space is freed. To actually delete the file, you must use the delete function in your operating system.

To delete files from the Inbox...

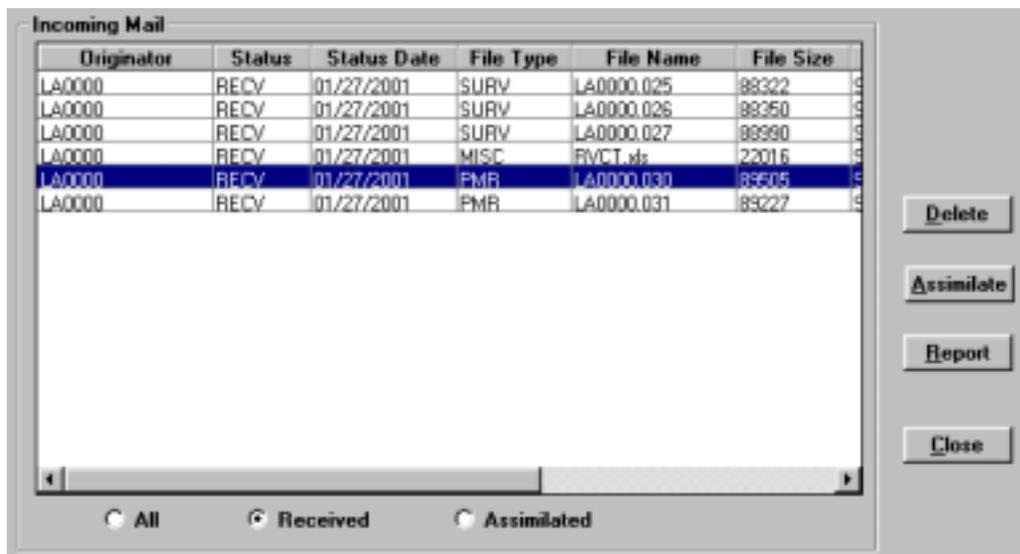
1. Open the **System** module
2. Open the **System** menu and select **Transmission**, then select **InBox**

Or

- Click the **Inbox** button on the toolbar.



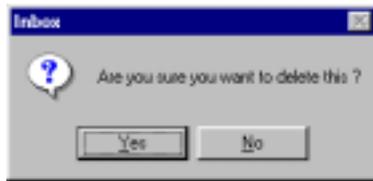
3. Select the file you want to delete from the Incoming Mail list.



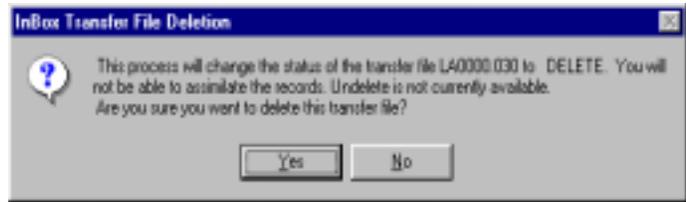
4. Click the **Delete** button.

*If the delete button is not active, the selected file cannot be deleted.*

5. Different file types will display different confirmation dialog boxes for different file types. In either case, click **Yes** to confirm that you want to delete the selected file or click **No** to cancel the delete operation and return to the Inbox.



*Miscellaneous (.MISC) File*

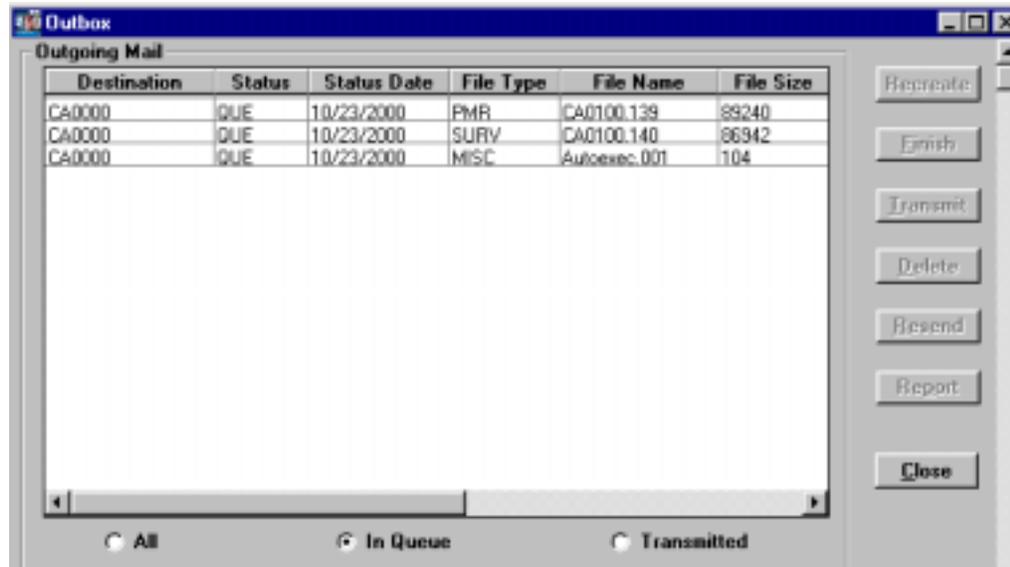


*Surveillance (.SURV) or ARPE (.PMR) File*

6. If there are no more files to delete or process, click **C**lose to close the Inbox window.

## The TIMS Outbox

The Outbox is a directory on your computer or network where files that are to be transmitted to other TIMS sites are stored prior to their transmission. The TIMS Outbox window displays relevant information about the outgoing files and provides several options for processing them.



### Outgoing Mail List

The Outgoing Mail list allows you to transmit, resend, recreate, finish and delete transfer files, in addition to creating reports on files being transferred to other TIMS sites.

The list is divided into ten columns, each displaying a different type of information. Not all the column headers are visible at all times; use the horizontal scroll bar at the bottom of the Outgoing Mail list to adjust the visible portion of the list.

- **Destination** - The TIMS Site ID that will receive the file being transmitted from your Outbox.
- **Status** - The status of the file to be transmitted. Valid statuses are:
  - QUE**: Waiting to be sent (the status code is short for queue).
  - SENT**: The file has already been sent.
  - DELETE**: The file has been deleted.
  - INCOMP**: A problem developed while the file was being created and it is incomplete. Use the Finish command to complete it.
- **Status Date** - The date the file received its current status.
- **File Type** - A code describing the type of file in the Outbox.
  - ACK** (Acknowledgement): An electronic receipt that informs the sender that their surveillance data have been received and assimilated by the receiving site.
  - SURV** (Surveillance Data): Surveillance records for another TIMS site.
  - PMR** (ARPE Data): ARPE files for another TIMS site.
  - SITE** (Site Information): Contains TIMS Site data, used during registration.
  - REG** (Registration Info): Information used to register a lower-level TIMS site.

**-MISC** (Miscellaneous file): File placed in The Outbox via the Misc. File Transfer option.

- **File Name** - The actual file name of the file to be transferred.
- **File Size** - The size in bytes of the file to be transferred.
- **Initiator** - The assigned User ID of the person who prepared the file for transfer.
- **Transmit Date** - The date and time the file was transmitted.  
*00/00/0000 00:00:00:000 indicates the file has not been transmitted yet.*
- **Data/Time** - The date and time the file was created.
- **User ID** - The assigned User ID of the last person to process the file.

### Filtering Options

You can adjust which files are displayed in the Outgoing Mail list by selecting the appropriate filter option button at the bottom of the list.

- **All** - Displays all files that have been or will be transmitted from your Outbox directory, regardless of their current status.
- **In Queue** - Displays all files that are waiting to be transmitted from your Outbox directory. In Queue is the default option.
- **Transmitted** - Displays all previously transmitted files.

### Buttons

The Outbox window also has the following buttons:

- **Recreate** – Click **Recreate** to recreate a surveillance transfer file. See *Recreate a Surveillance Transfer file* later in this chapter for additional information.
- **Finish** – Click **Finish** to continue creating an incomplete surveillance file. See *Finish Creating Surveillance Data Transfer Files* later in this chapter for more details.
- **Transmit** – Click **Transmit** to send a file directly from the outbox. See *Transmitting from the Outbox* later in this chapter for more details.
- **Delete** – Click **Delete** to remove a file from the Outbox. See *Deleting Files from the Outbox* later in this chapter for additional information.
- **Resend** – Click **Resend** to resend a previously transmitted file. See *Re-Send a Previously Transmitted File* later in this chapter for more information.
- **Report** - Click **Report** to display a series of reports on the selected data file. See *File Transmission Reports (Inbox and OutBox)* later in this chapter for additional information.
- **Close** – Click **Close** to close the Outbox window.

## Recreate a Surveillance Transfer File

TIMS allows you to recreate a surveillance transfer file if it has not already been acknowledged by the receiving site. To use this function, you must contact the TIMS Help Desk at (404) 639-8155 to receive a Recreate Surveillance Transfer File password.

To recreate a surveillance transfer file...

1. Open the **System** module.
2. Open the **S**ystem menu and select **T**ransmission, then select **O**utBox

Or

- Click the **Outbox** button on the toolbar.



3. Select the surveillance transfer file you want to recreate from the Outgoing Mail list.
  4. Click the **Recreate** button.
- Note: If the Recreate button is not active, then the selected file cannot be recreated.*
5. Enter the password provided by the TIMS Help Desk and click the **OK** button. Click the **Cancel** button to stop the recreate process.



*A series of windows will appear providing details of the Recreate process.*

6. When the Recreate process is complete, the following dialog box appears.



7. Click the **OK** button to close the dialog box.

## Finish Creating Surveillance Data Transfer Files

Use the Finish function if the process of creating the surveillance data transfer file (in the Surveillance module) was interrupted before it was completed. Unfinished files have INCOMP status.

To finish creating surveillance data transfer file...

1. Open the **System** module.
2. Open the **S**ystem menu and select **T**ransmission, then select **O**utBox,

Or

- Click the **Outbox** button on the toolbar.

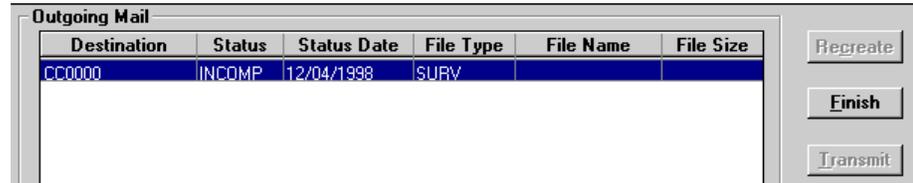


3. Select the **All** or **In Queue** filter option button at the bottom of the Outgoing Mail list.



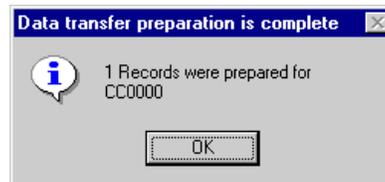
4. Select the unfinished transmission file and click the **Finish** button.

*Unfinished files will have INCOMP status.*



*A series of windows will appear providing details about the Finish process.*

5. When the Finish process is complete, the following dialog box appears.



6. Click the **OK** button to close the dialog box.

## Transmitting from the Outbox

You can transmit files to a specific site directly from the Outbox without having to use the Dial command.

To transmit data...

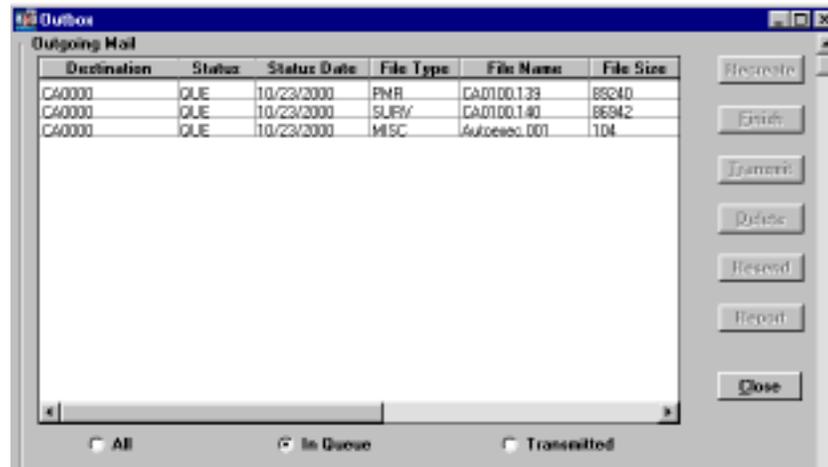
1. Open the **System** module.
2. Open the **System** menu and select **Transmission**, then select **OutBox**,

Or

- Click the **Outbox** button on the toolbar.



The *Outgoing Mail* window is displayed.



3. Select the **In Queue** filter option button to display only those files waiting to be transmitted.
4. Select the file that needs to be transmitted.

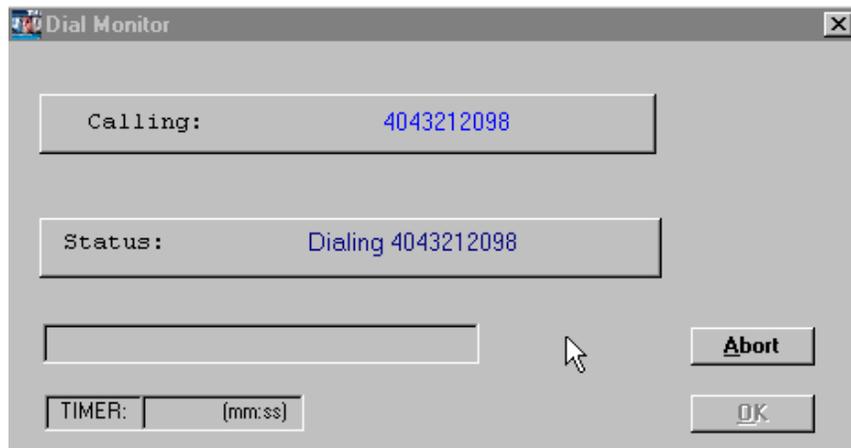
*All files that are in queue for the same site as the selected file will be sent.*

5. Click the **Transmit** button.

*The MODEM NUMBER window is displayed.*

6. If necessary, adjust the MODEM NUMBER dialog box to accommodate your dialing conditions:
  - If your phone system requires that you enter a code before dialing a phone number, enter the code in the **Dial Prefix** box.
  - If your phone system requires that you enter a code after dialing a phone number, enter the code in the **Dial Suffix** box.
  - Select **Long Distance** if you are calling a number that is long distance.
  - Select **Include Area Code** if you need to include the area code for the number you are calling, but the number is still within the local calling area.
7. Click the **OK** button to dial the selected TIMS site.

The Dial Monitor window is displayed.



8. When the communication session is complete, click **OK** to close the Dial Monitor window. Click **Abort** to cancel the dialing function.

### Deleting Files from the OutBox

You can delete miscellaneous (.MISC) and ARPE (.PMR) files from the OutBox. These files can only be deleted before they have been transferred to another site. TIMS does not allow you to delete surveillance data files or acknowledgements.

To delete files from the OutBox...

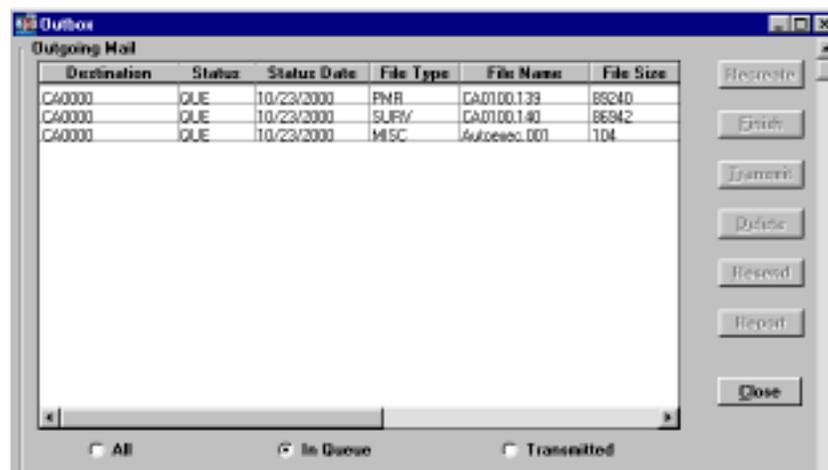
1. Open the **System** module.
2. Open the **System** menu and select **Transmission**, then select **OutBox**

Or

- Click the **Outbox** button on the toolbar.



The Outgoing Mail window is displayed.

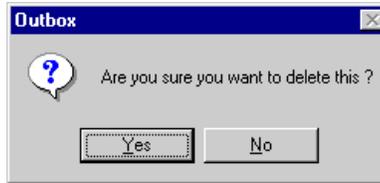


3. Select the **In Queue** filter option at the bottom of the Outgoing Mail list to display files that have not yet been transmitted.
4. Select the MISC or PMR file to be deleted.

- Click the **Delete** button.

*If the Delete button is not active, you cannot delete the selected file.*

- Click the **Yes** button to confirm that you want to delete the file. Click **No** to cancel the Outbox File Deletion operation.



### Re-Send a Previously Transmitted File

Previously transmitted surveillance data transfer files may need to be re-sent due to an error at the receiving site. Check with your contact at the receiving site to confirm that they did not receive the file prior to re-sending any file.

To re-send a previously transmitted file...

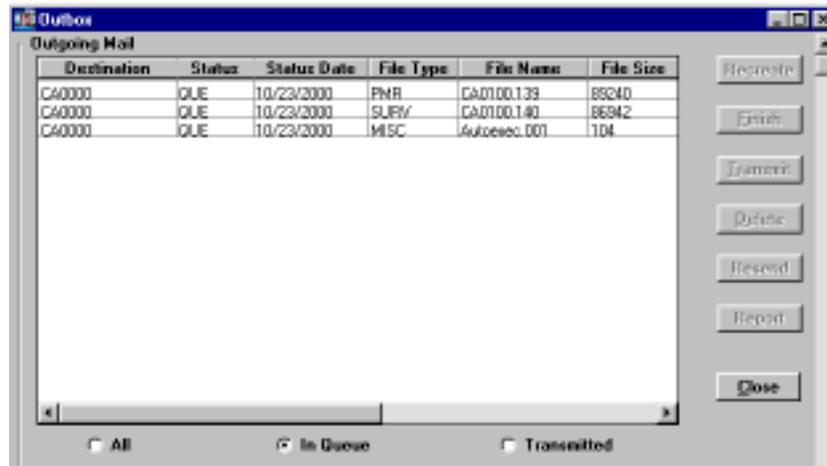
- Open the **System** module.
- Open the **System** menu and select **Transmission**, then select **OutBox**

Or

- Click the **Outbox** button on the toolbar.



*The Outgoing Mail window is displayed.*



- Select the **Transmitted** filter option button to display a list of previously transmitted files.



- Select the file that needs to be re-transmitted.
- Click the **Resend** button to change the file's status to QUE.

*If the Resend button is not active, then the selected file cannot be resent.*

*The file will be transmitted to the appropriate site during the next connection to that site.*

## ***File Transmission Reports (Inbox and OutBox)***

TIMS provides surveillance and ARPE file transmission reports for files transmitted to and transferred from your site. Reports on files transferred to your site are generated in the Inbox; reports on files transferred from your site are generated in the Outbox. The following information is provided in the heading for each surveillance report: **From** (Site ID of the site initiating the transfer), **To** (Site ID of the site receiving the transfer), **Transmission Number** (filename of the transferred file), and the **Date/Time Created** (the date and time the transmission report was generated).

An ARPE report and six Surveillance reports are available:

- **Aggregate Reports for Program Evaluation (ARPE)** - Displays the actual Aggregate Report for Program Evaluation contained in the file.
- **Status of Transferred Records** - A one-page report that displays the number for each status (New, Updated, and Deleted) and each type (RVCT, Follow-Up 1, Follow-Up 2, Client, Address, and SURVS-TB UDV) of records transferred with the selected file. A Database Summary of the total number of each type of record is displayed.
- **Frequency of Reported Records** - A total of non-deleted transferred records sorted by Month-Year Reported and Site ID.
- **Frequency of Count Value** - Displays the number of New or Updated verified cases by the Month-Year Counted, Count Decision and Case Verification value included in the selected surveillance data file. This report is sorted by Month-Year Counted and Case Verification value and is paginated by Site ID. The total number of records for each Site ID is included at the end of the data for each site.
- **Data Transmission Counted Data** - Lists the Client Name, Site ID, State and City/County Case Numbers, the date the record was last updated, the Status Code (N=New, U=Updated, D=Deleted), and Case Verification assignment. For verified cases of TB, the Count Status and Month-Year Counted values are displayed. Within each type of record, (RVCT, FU-1, FU-2, Client, Address, SUDV), the line-list is sorted by Site ID, and State and City/County Case Numbers.
- **Non-Verified Records Listing** - A list of New or Updated non-verified records of TB (Suspects and records classified as Not TB) which are included in the transfer file. This list is sorted by Site ID, and State Case Number and City/County Case Number. The report includes Site ID, State Case Number, City/County Case Number, Month-Year Reported, and Case Verification.
- **Deleted Records Listing** - A list of deleted records, sorted by Site ID, State Case Number and City/County Case Number. The report includes Site ID, State Case Number, City/County Case Number, Month-Year Reported, Case Verification, and Count Decision.

### **View a Transfer Report**

The transfer reports are identical between the Inbox and the OutBox. The following screen captures are taken from the OutBox, however, the same procedures apply to the Inbox.

To view a transfer report...

1. Open the **System** module.

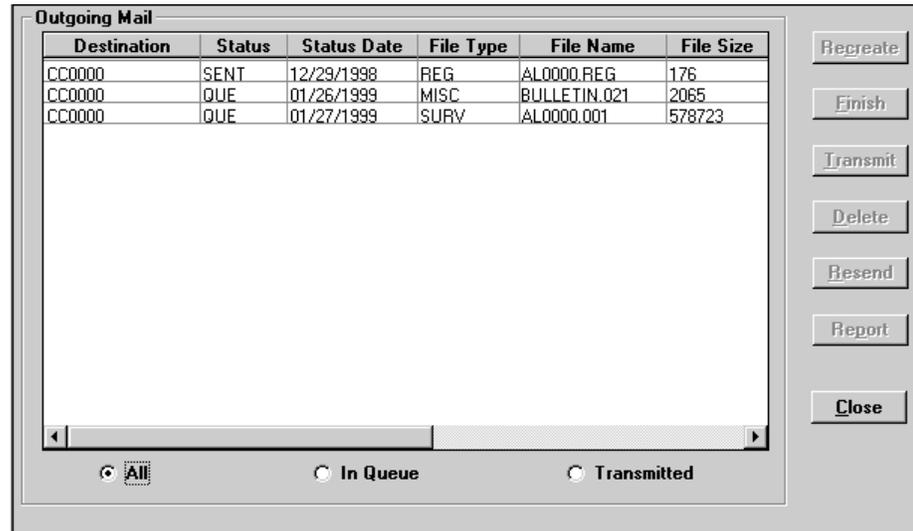
- Open the **S**ystem menu and select **T**ransmission, then select **O**utBox (or **I**nBox)

Or

- Click the **O**utbox or **I**nbox button on the toolbar.



The *Outgoing or Incoming Mail window is displayed.*



- Select a filter option using the buttons at the bottom of the Outgoing or Incoming Mail list.

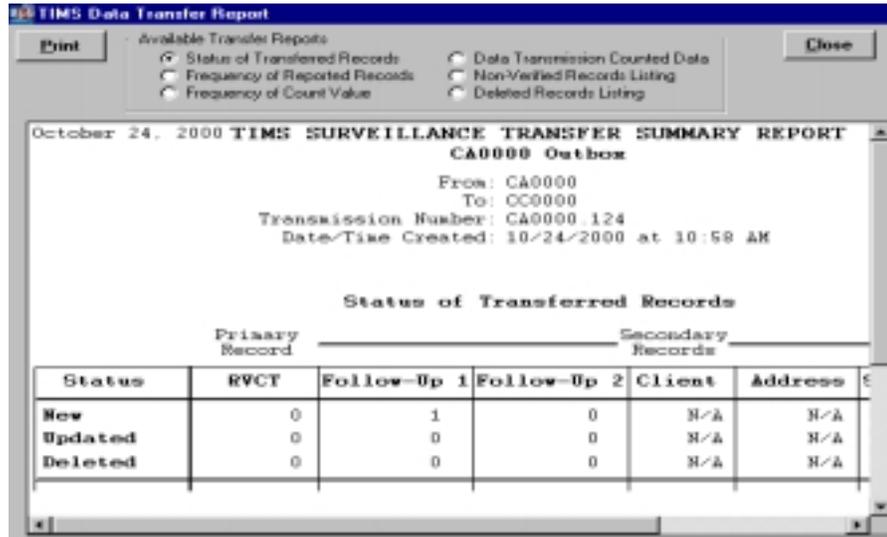


- Select the surveillance transfer (SURV) file or ARPE transfer (PMR) file from the document list.

Outgoing Mail					
Destination	Status	Status Date	File Type	File Name	File Size
CC0000	QUE	10/24/2000	SURV	CA0000.124	88977
CC0000	QUE	10/24/2000	PMR	CA0000.125	89231

- Click the **R**eport button.

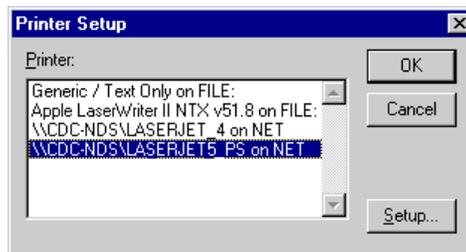
For surveillance transfer files, the Status of Transferred Records report automatically appears. This is the default report.



- For surveillance transfer files, select the desired report from the Available Transfer Reports group.



- Review the report. Use the horizontal and vertical scroll bars to navigate through the report.
- To print the report, click the **Print** button. Select a printer from the Printer Setup dialog box and click the **OK** button. Click **Cancel** to return to the report screen. Click **Setup** to specify printer options.



- To view a different report from the same surveillance transfer file, select a different report name from the Available Transfer Reports group. The report window will automatically update with the selected report.
- When finished viewing and printing reports, click the **Close** button to return to the Incoming Mail or Outgoing Mail window.
- Click **Close** to return to the System window.

## Transferring Miscellaneous Files

The Miscellaneous File Transfer option allows TIMS to transfer non-TIMS files to another TIMS site. The miscellaneous file transfers are placed in the OutBox to be transmitted.

**WARNING!** Do not select a file in the TIMS Outbox (defined in the Preferences section of the System module). Selecting a file in the TIMS Outbox will produce a TIMS error and destroy the selected file.

To transmit Miscellaneous files...

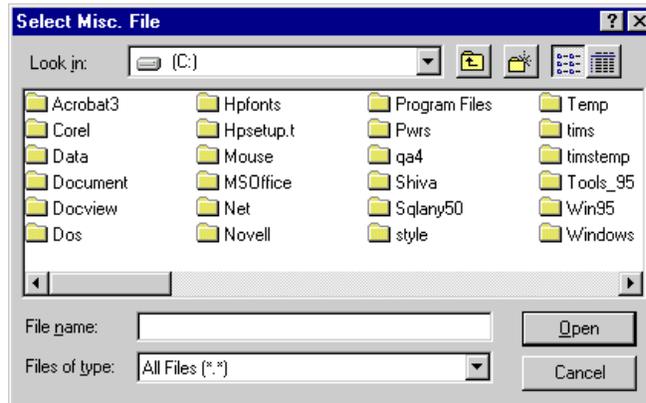
1. Open the **System** module.
2. Open the **System** menu and select **Transmission** then select **Misc. File Transfer**

Or

- Click the **Misc. File Transfer** button on the toolbar.

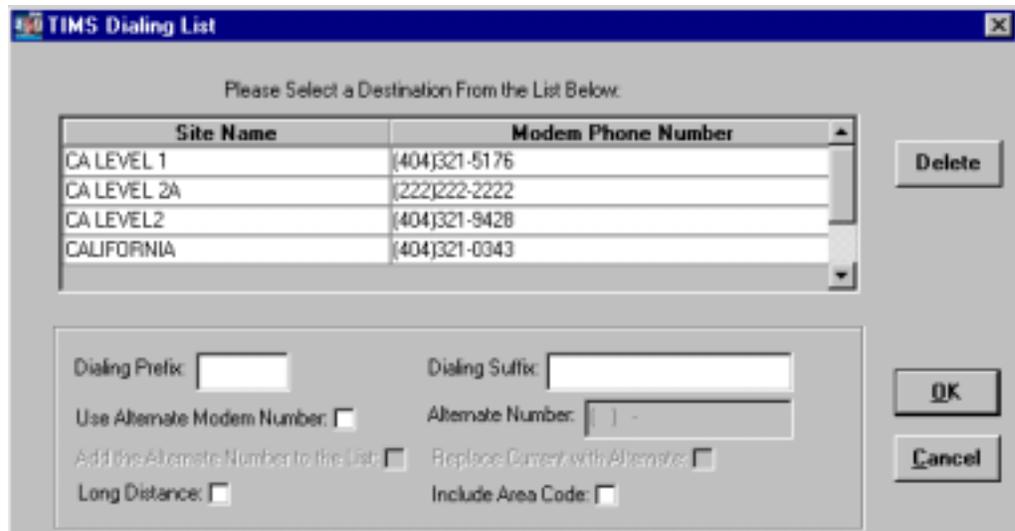


The Select Misc. File dialog box is displayed.



3. Select the file you want to transfer. **DO NOT** select a file from the TIMS Outbox directory.
4. Click the **Open** button.

This will display the TIMS Dialing List.



5. Select the destination site from the Site Name list and click the **OK** button.

*The selected file is placed in the Outbox and will be transferred to the specified site during the next communication session with that site.*

6. Click the **OK** button to close the File Transfer message box.



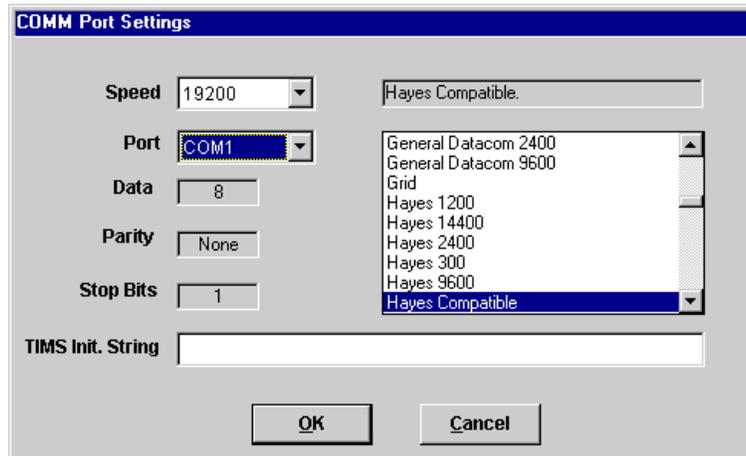
## Configure TIMS Modem Settings

**COMM Port Settings** allows you to configure and fine-tune your modem. If you are having trouble connecting to another TIMS site, adjusting the settings on the COMM Port Settings dialog box may help solve the problem.

To configure your modem...

1. Open the **System** module.
2. Open the **S**ystem menu and select **T**ransmission, then select **C**omm Port Setting.

*The COMM Port Settings dialog box is displayed.*



3. Select your modem from the list on the right side of the dialog box.  
*If your model is not listed, select **Hayes Compatible**.*
4. Select the fastest speed your modem supports from the Speed list.
5. Select the COM port your modem is attached to (or configured as, if you have an internal modem) from the Port list.  
*The Data, Parity, and Stop Bits values cannot be edited.*
6. The TIMS Init. String box allows you to enter custom initialization values for your modem. This should be left blank unless you are specifically instructed to enter a value by a TIMS Help Desk representative.
7. Click the **OK** button.

## Ad-Hoc Queries

The Ad-Hoc Query feature allows users to extract TIMS information from the database. With Ad-Hoc Query, you can specify exactly what information is displayed by selecting specific tables and column(s) within those tables, and imposing criteria filters on the information that is extracted.

There are three steps to creating a query:

1. Select a primary table and secondary table(s).
2. Select column(s) from within the selected table(s).
3. Add criteria and sort conditions.

**Note:** Users with Medium, High, and System Administrator security rights have access to the Ad-Hoc Query feature.

### Create an Ad-Hoc Query

To create an Ad-Hoc Query...

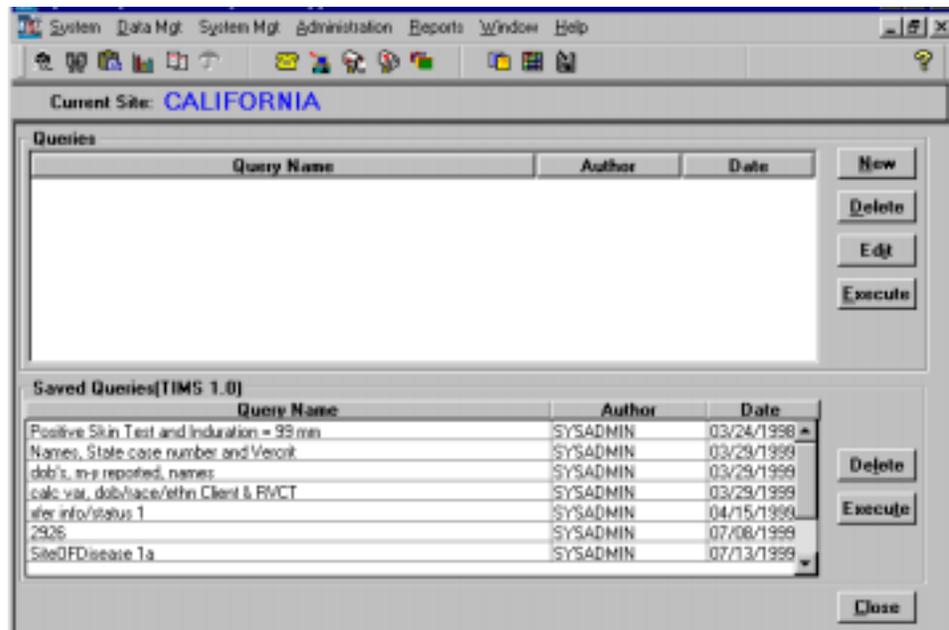
1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Ad-Hoc Queries**

Or

- Click the **Ad-Hoc Query** button on the toolbar.

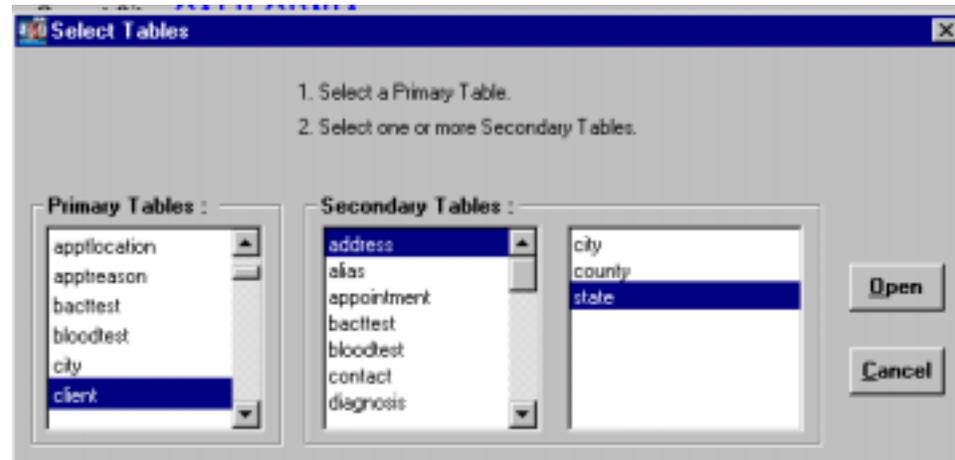


The Ad-Hoc Query Summary window is displayed.



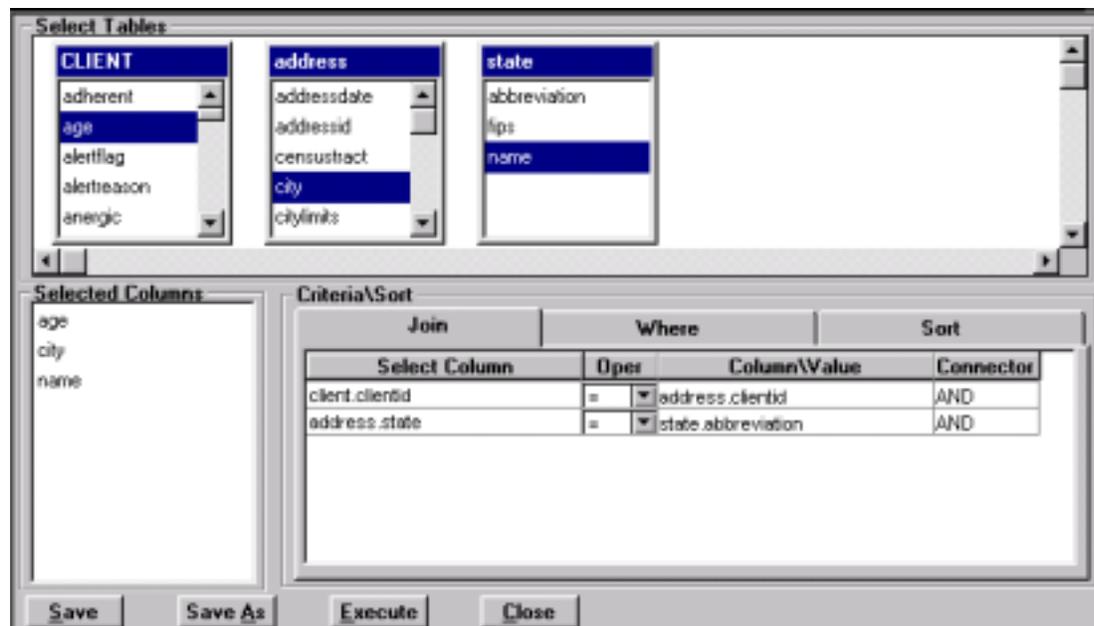
3. Click the **New** button on the Ad-Hoc Query Summary window.

The Select Tables window is displayed.



4. Select a primary table from the Primary Tables list then select one or more secondary tables from the Secondary Tables list.
5. Click the **Open** button to accept the selected tables and create the query specifics.

The Create a Query window is displayed.



6. To specify each column required for the query, select that column name from the appropriate table in the Select Tables area. The highlighted column(s) will appear in the Selected Columns list. To remove a column from the query, click on the previously highlighted column in the Select Tables area to remove the highlighting. The column should disappear from the Selected Columns list. **NOTE:** Only the columns listed in the Selected Columns list will appear on the query report.

*\*To view the description and usage information for a column, just place the mouse over the column and the yellow description/usage help will display. To turn off the help display, right click in the Select Tables area and select Show Help to remove the check mark from the menu. Likewise if Help is not visible, right click in the Select Tables area and select Show Help to place the check mark on the menu.*



7. To add conditions to the amount of information and order of information that is displayed for the query use the three tab pages (**Join**, **Where** and **Sort**) in the Criteria/Sort Area. See *Adding Query Criteria* for additional information.
8. Click the **S**ave or **S**ave **A**s button to save the query. Enter a Query Table Name and click the **S**ave button.
9. Click the **E**xecute button to perform the query. See *Executing an Ad-Hoc Query* for additional information.
10. View the report and then select one or more of the following options:
  -  Create a **title** for the report. Enter the title for your report and click **O**K
  -  Modify the **magnification** of the preview. Select the magnification or show rulers and click **O**K.
  -  **P**rint the report. Select the appropriate printer and click **O**K.
  -  **F**ind **t**ext within the report. Enter the exact text to find within the report, and then click **F**ind **N**ext to find the next match. Click **C**ancel to cancel the find.
  -  **S**ave the report. Enter a file name and select a file format and location and click **S**ave.
11. Click the **C**lose button to close the Ad-Hoc Query window.

### Adding Query Criteria

The criteria feature allows you to extract very specific information from the TIMS database using the **Join** and **Where** tabs. It also allows you to determine the sort order for the report using the **Sort** tab. The **Join** tab enables you to modify the table joins, such as modifying the table join to an outer join. The **Where** tab permits you to setup a WHERE clause for your query, for example, WHERE lastname = 'SMITH' will only return those records of clients with the last name of 'SMITH'. The **Sort** tab allows you to determine the order in which the items will appear on the report.

*Join Tab*

Criteria\Sort			
Join	Where		Sort
Select Column	Oper	Column\Value	Connector
client.clientid	=	address.clientid	AND
address.state	=	state.abbreviation	AND

The standard joins are defined for each table displayed in the **Join** tab when the tables are selected. These joins are also added/deleted appropriately as tables are added/deleted. You may modify the operator for the joins.

*The available operators are:*

<u>Numerical Operator</u>	<u>Description</u>
=	Equals
>	Greater Than
<	Less Than
<>	Not Equal To
>=	Greater Than or Equal To
<=	Less Than or Equal To
*=	Left Outer Join
=*	Right Outer Join

For example,

A LEFT OUTER JOIN B (A \*= B)

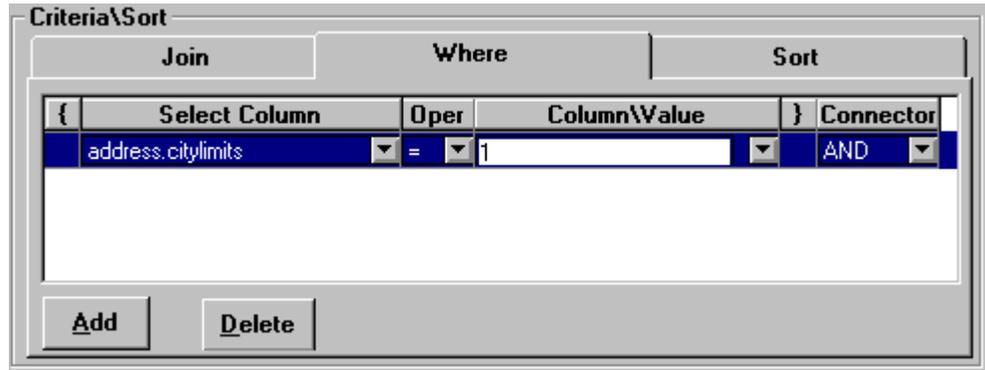
includes all rows of table A whether or not there is a row in B that satisfies the join condition. If a particular row in A has no matching row in B, the columns in the join corresponding to table B will contain the NULL value.

Similarly,

A RIGHT OUTER JOIN B (A = \*B)

includes all rows of table B whether or not there is a row in A that satisfies the join condition.

### Where Tab



The **Where** tab allows you to extract very specific information from the TIMS database.

1. Select **A**dd button to add a new **Where** criteria.
2. Select column from the **Select Column** dropdown list.
3. Select an operator from the **Operator** dropdown list.

The available operators are:

<u>Operator</u>	<u>Description</u>
=	Equals
>	Greater Than
<	Less Than
<>	Not Equal To
>=	Greater Than or Equal To
<=	Less Than or Equal To
Is Missing	Is Blank or Null
Is Not Missing	Is Not Blank or Not Null
Like	Similar to a specified pattern
Not Like	Not similar to a specified pattern

### Like and Not Like

The **Like** and **Not Like** conditions require a pattern to be specified for the column to be compared to. This pattern may contain any number of wild cards. The wild cards are:

<u>Wild Card</u>	<u>Matches</u>
_ (underscore)	Any one character
% (percent)	Any string of zero or more characters
[]	Any single character in the specified range or set
[^]	Any single character not in the specified range or set

All other characters must match exactly.

For example, the search condition

```
... name Like 'a%b_'
```

returns any row(s) where name starts with the letter a and has the letter b as its second last character.

Similarly,

```
...name Like 'sm[iy]th'
```

returns any row(s) where name is the one of the following strings 'smith' or 'smyth'.

A range of characters is specified by giving the ends of the range, separated by a hyphen. For example,

```
...name Like '[a-r]ough'
```

returns the strings 'bough' and 'rough', but not 'tough'. The range of characters [a-z] is interpreted as "greater than or equal to a, and less than or equal to z". The lower end of the range must precede the higher end of the range. For example, any LIKE condition containing the expression [z-a] returns no rows, as no character matches the [z-a] range. You can combine ranges and sets within a square bracket.

For example,

```
... name Like '[a-rt]ough'
```

returns the strings 'bough', 'rough', and 'tough'.

The caret character (^) is used to specify a range of characters that is excluded from a search. For example,

```
... name Like '[^a-r]ough'
```

returns the string 'tough', but not the strings 'rough', or 'bough'. The caret negates the entire rest of the contents of the brackets.

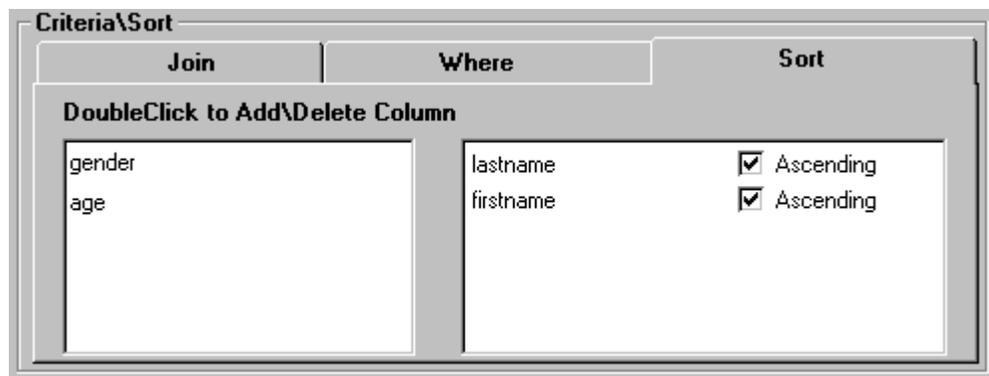
4. Select a column/value for the **Column/Value** column. To select a value, type in the value (refer to the Usage information about the type of data and potential values stored in the selected column). Note that the **Is Missing** and **Is Not Missing** operators do not require any value to be typed in the **Column/Value** column.

To add additional criteria, click the **Add** button again and repeat the process. Be sure to add a connector in the Connector column. The available connectors are:

<u>Connector</u>	<u>Description</u>
AND	Both the criteria in this line and the next line must be met.
OR	The criteria in this line or the next line must be met.

*You may also set up parentheses (), to group criteria. Be sure to select both a left parenthesis and a right parenthesis.*

### Sort Tab



The **Sort** tab allows you to specify the order in which the records should display in the report.

1. Double-click on a column in the left box to move the selected column to the right (sort order) box. The order of the columns in the right box (from top to bottom) is the sorting order in which the records will display.
2. To remove a column from the right box, double-click on the selected column and it will return to the left box.
3. To change the column's sort from ascending to descending, click on the check mark in the **Ascending** box to clear it and therefore sort in descending order.

### Deleting an Ad-Hoc Query

Only the author of a query or a TIMS System Administrator can delete an Ad-Hoc Query.

To delete an Ad-Hoc Query ...

1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Ad-Hoc Queries**

Or

- Click the **Ad-Hoc Query** button on the toolbar.



3. Select the query you want to delete.

4. Click the **D**el~~e~~te button.
5. Click **Y**es button to confirm that you want to delete the query.

### Editing an Ad-Hoc Query

To edit an existing Ad-Hoc Query ...

1. Open the **S**ystem module.
  2. Open the **D**ata Mgt menu and select **A**d-Hoc Queries
- Or
- Click the **A**d-Hoc Query button on the toolbar.



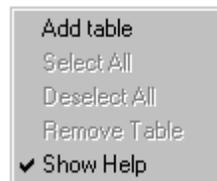
3. Select the query you want to edit.
4. Click the **E**dit button, and then modify selected tables, columns, and criteria as required.

**Note:** If you are not the author of the query, you must use the **S**ave **A**s command to save the changes (you cannot edit another user's query).

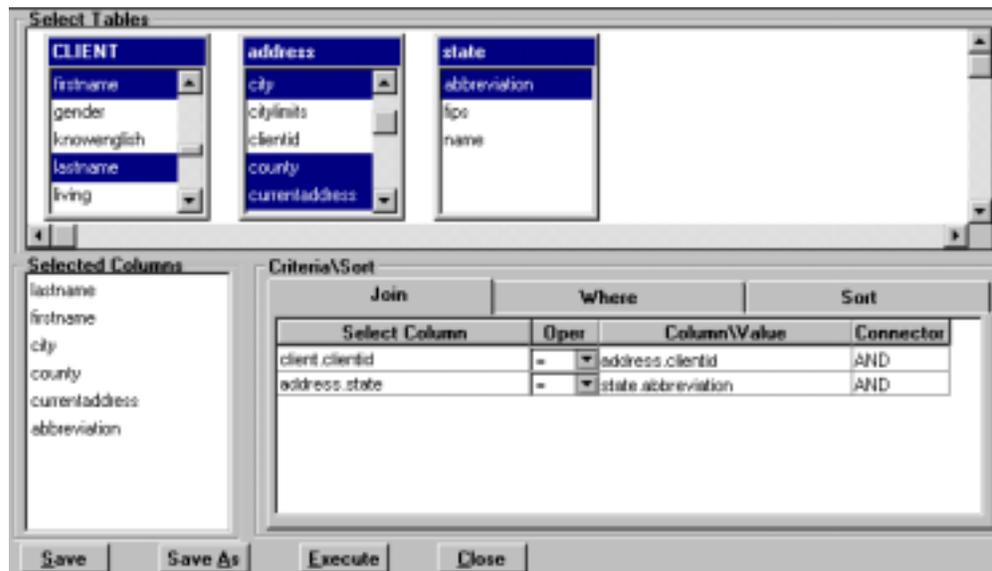
### Adding/Deleting Tables

To add a new table to the query ...

1. Right click in the Select Tables area and select **A**dd Table.



*The Select Tables window appears.*



2. Select the new secondary table to be added then click the **Open** button. **NOTE:** To add a new primary table you must create a new query.

To delete a table from the query ...

Right click on the table (in the Select Tables area) to be deleted and select **Remove Table**.



### Executing an Ad-Hoc Query

To execute a query ...

1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Ad-Hoc Queries**

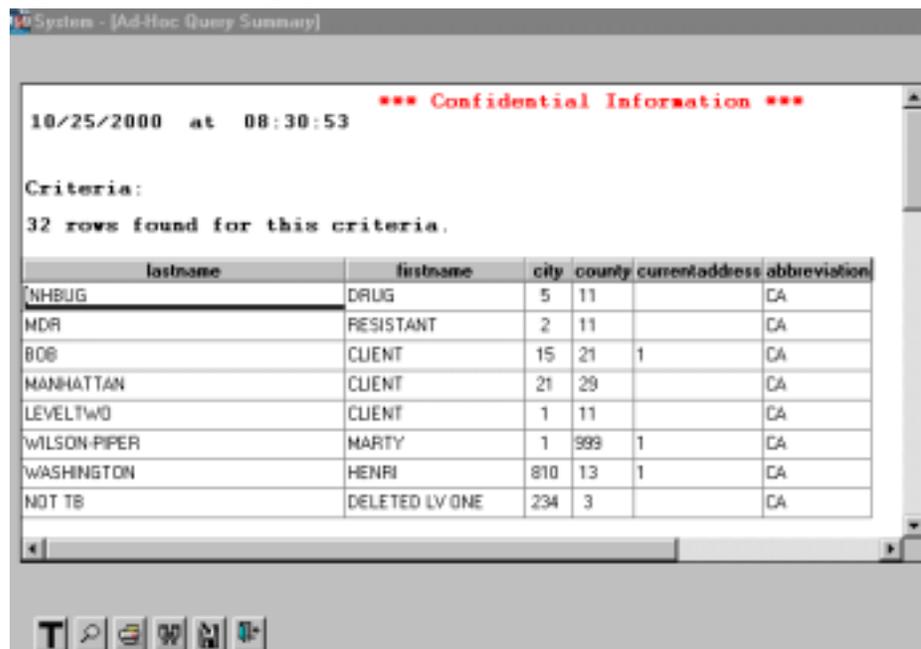
Or

- Click the **Ad-Hoc Query** button on the toolbar.



3. For an existing query, select the query you want to run, and then click the **Execute** button.
4. For a new query, create a query by clicking the **New** button, then selecting tables and columns and setting up criteria for the query, then click the **Execute** button as described in previous section.

*The results preview window is displayed.*



This window enables the user to preview the query results.

-  Create a **title** for the report. Enter the title for your report and click **OK**.
-  Modify the **magnification** of the preview. Select the magnification or show rulers and click **OK**.
-  **Print** the report. Select the appropriate printer and click **OK**.
-  **Find text** within the report. Enter the exact text to find within the report, and then click **Find Next** to find the next match. Click **Cancel** to cancel the find.
-  **Save** the report. Enter a file name and select a file format and location and click **Save**.

The available formats are:

<b>CSV</b>	Comma Separated Values
<b>CSV with headers</b>	Comma Separated Values with headers
<b>DBase 2</b>	dBASE II
<b>DBase 3</b>	dBASE III
<b>DIF</b>	Data Interchange Format
<b>Excel</b>	Microsoft Excel Worksheet
<b>Excel with headers</b>	Microsoft Excel Worksheet with headers
<b>HTML Table</b>	Hypertext Markup Language, table layout
<b>PowerSoft Report</b>	PowerSoft Report
<b>SQL</b>	SQL Tables.
<b>SYLK</b>	Symbolic Link format
<b>SYLK with headers</b>	Symbolic Link format with headers
<b>Text</b>	Tab-delimited text (ASCII) format
<b>Text with headers</b>	Tab-delimited text (ASCII) format with headers
<b>WKS</b>	Lotus 123 worksheet (Version 1.0 and 1.0a)
<b>WKS with headers</b>	Lotus 123 worksheet with headers (Version 1.0 and 1.0a)
<b>WK1</b>	Lotus 123 worksheet (Version 2.x)
<b>WK1 with headers</b>	Lotus 123 worksheet with headers (Version 2.x)
<b>Windows Metafile</b>	Windows Metafile format (graphic)

5. Click the **Close** button to close the preview screen.



## Saved TIMS 1.10 Queries

The Ad-Hoc Query feature allows execution and deletion of queries saved in prior versions of TIMS.

**Note:** This feature will be REMOVED in a later version of TIMS; therefore you should create new queries for any old queries to be retained.

## Executing a Saved TIMS 1.0 Query

To execute a Saved TIMS 1.0 Ad-Hoc Query...

1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Ad-Hoc Queries**

Or

- Click the **Ad-Hoc Query** button on the toolbar.



*The Ad-Hoc Query Summary window is displayed.*

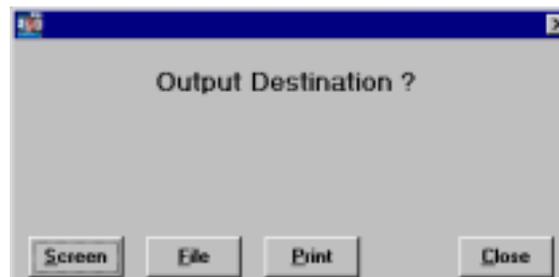
3. Select the query from the Saved Queries (TIMS 1.0) area that you want to run.

Saved Queries(TIMIS 1.0)		
Query Name	Author	Date
Positive Skin Test and Induration = 99 mm	SYSADMIN	03/24/1998 ▲
Names, State case number and Vercrit	SYSADMIN	03/29/1999
dob's, m-y reported, names	SYSADMIN	03/29/1999
calc var, dob/race/ethn Client & RVCT	SYSADMIN	03/29/1999
xfer info/status 1	SYSADMIN	04/15/1999
2926	SYSADMIN	07/08/1999
SiteDFDisease 1a	SYSADMIN	07/13/1999 ▼

Delete  
Execute

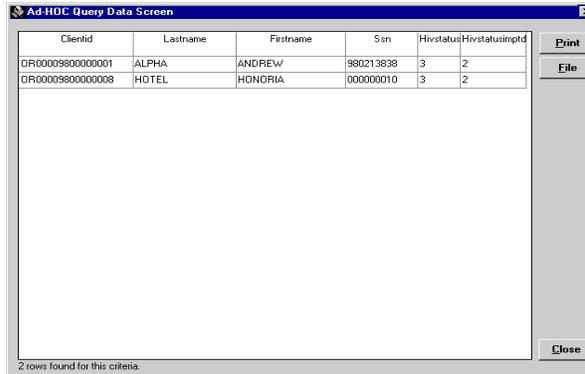
4. Click the **Execute** button.

*The Output Destination window is displayed.*



5. Select the output destination for your query: **S**creen, **F**ile, or **P**rint.

- **S**creen displays the results in a window that provides the option of printing the query or saving it to a file. Click the **C**lose button to return to the query window.



- **F**ile allows you to save the query results in a variety of file formats. Enter a file name, select a file format and location and click the **S**ave button. Click **OK** to close the Confidentiality Warning Statement. Click the **C**lose button to close the Output Destination window.

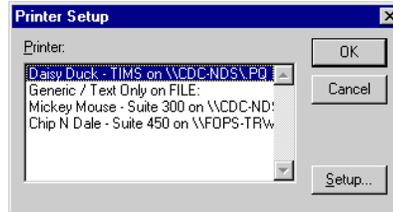


Windows 95 or NT

The available formats are:

<b>CSV</b>	Comma Separated Values
<b>CSV with headers</b>	Comma Separated Values with headers
<b>DBase 2</b>	dBASE II
<b>DBase 3</b>	dBASE III
<b>DIF</b>	Data Interchange Format
<b>Excel</b>	Microsoft Excel Spreadsheet
<b>Excel with headers</b>	Microsoft Excel Spreadsheet with headers
<b>HTML Table</b>	Hypertext Markup Language, table layout
<b>PowerSoft Report</b>	PowerSoft Report
<b>SQL</b>	SQL Tables.
<b>SYLK</b>	Symbolic Link format
<b>SYLK with headers</b>	Symbolic Link format with headers
<b>Text</b>	Tab-delimited text (ASCII) format
<b>Text with headers</b>	Tab-delimited text (ASCII) format with headers
<b>WKS</b>	Lotus 123 worksheet (Version 1.0 and 1.0a)

- WKS with headers** Lotus 123 worksheet with headers (Version 1.0 and 1.0a)
  - WK1** Lotus 123 worksheet (Version 2.x)
  - WK1 with headers** Lotus 123 worksheet with headers (Version 2.x)
  - Windows Metafile** Windows Metafile format (graphic)
- **P**rint enables you print the results of your query. Select the appropriate printer and click the **OK** button. Click the **C**lose button to close the Output Destination window.



### Deleting a Saved TIMS 1.0 Query

Only the author of a query or a TIMS System Administrator can delete an Ad-Hoc Query.

To delete an Ad-Hoc Query...

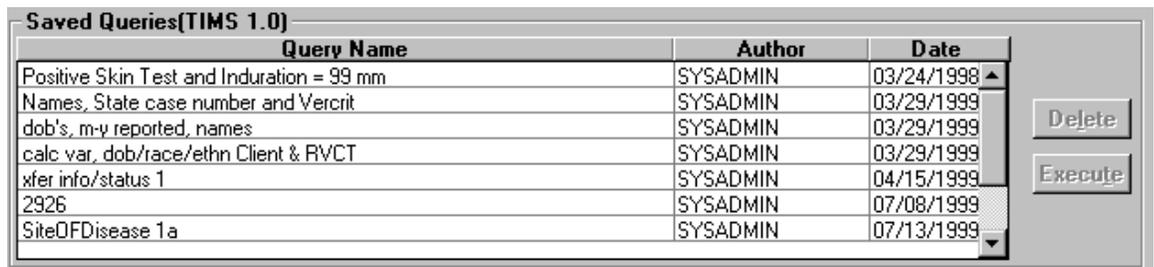
1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **A**d-Hoc Queries

Or

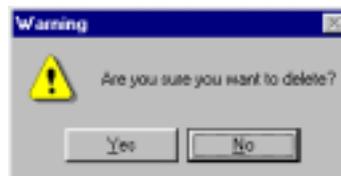
- Click the **A**d-Hoc Query button on the toolbar.



3. Select the query from the Saved Queries (TIMS 1.0) area that you want to delete.



4. Click the **D**elete button.
5. Click the **Y**es button to confirm that you want to delete the query.



## Frequency Reports

The Frequency Report feature allows TIMS users to generate a frequency table for any data item collected in TIMS. The report displays the number of occurrences, percentage of occurrences, percentages by row and percentages by column.

There are four steps to creating a Frequency Report:

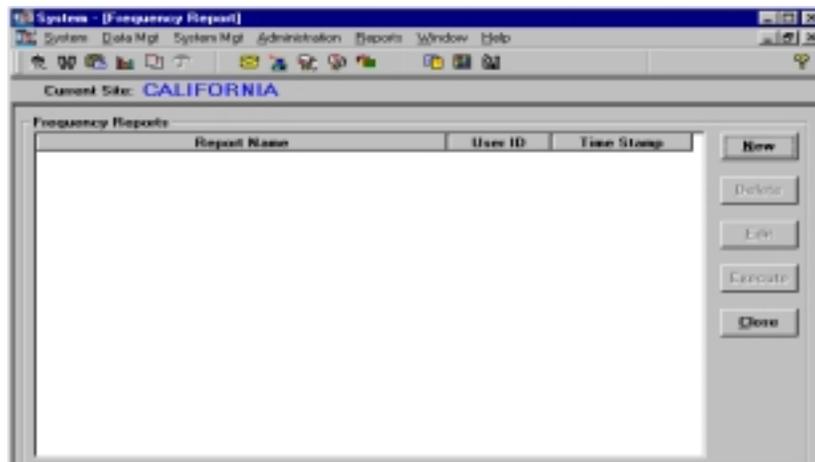
1. Select a table and select a row from within the selected table.
2. Select a column from the same table or select a second table and then select a column.
3. Specify display values, if desired.
4. Add criteria conditions, if desired.

### Create a Frequency Report

To create a Frequency Report ...

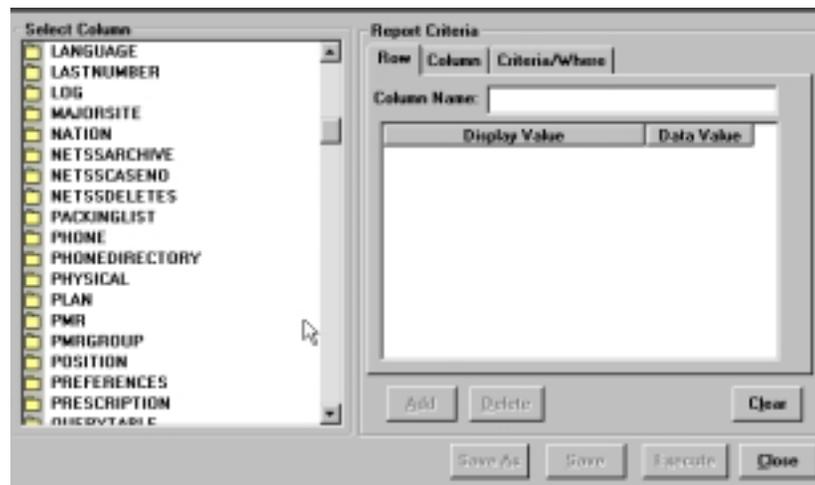
1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Frequency Report**

*The Frequency Report main window is displayed.*

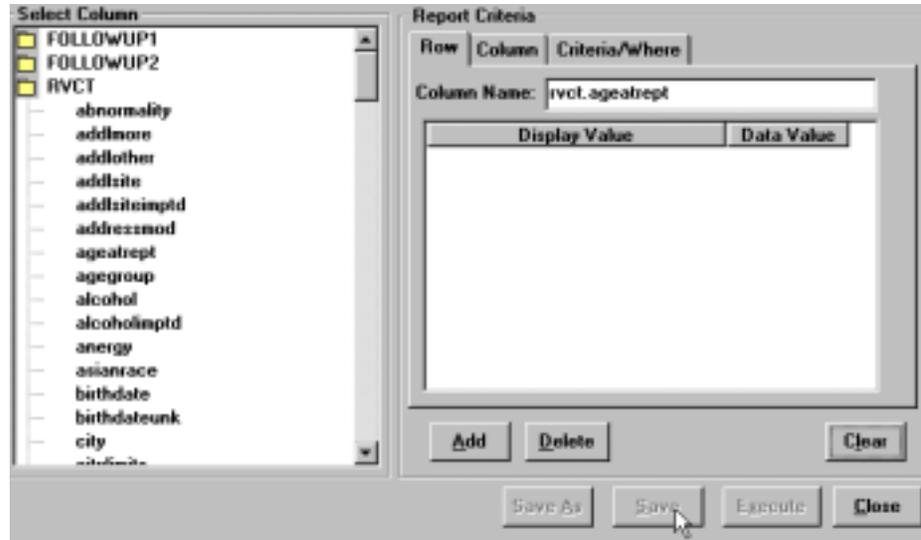


3. Click the **New** button on the Frequency Report window.

*The Frequency Report Setup window is displayed.*



- To select a **Row Column Name**: Select (double-click) the appropriate table name in the Select Column area to display the list of columns within that table. Select a column name and either drag it to the Row Column Name field or double-click on it to place the selected column in the Row Column Name field.



- To set up display information for the row item selected, first decide whether you need a value display (default display) or a range display. To change from value display to range display, right click below the Display Value column and select **Group Range**.



- Click the **Add** button and enter the Display Value (labels that will be displayed as row headers) and the Data Value or the From/To values. Repeat this process until all display values required are entered.

**Note:** If any display values are specified, those variables whose display values are not specified will not appear on the frequency report.

**Report Criteria**

Row | Column | Criteria/Where

Column Name: rvct.ageatrept

Display Value	From	To
<=20		-20
21-40	21	-40
41-60	41	-60
61-80	61	-80
81-100	81	-100
>100	100	-999

Add Delete Clear

7. Select the **Column** tab and repeat above steps 4-6 to select a **Column Column Name** and setup its display values.
8. To setup an extraction of more specific information from the TIMS database, select the **Criteria/Where** tab.
9. Click the **Add** button, then select the appropriate field from the dropdown list for placement in the Where column.

*In the following example, the specified criteria is rvct.vercrit (the vercrit field from the RVCT table)=1 (positive culture). Note that data dictionary information is available by positioning the cursor over the fieldname.*

**Report Criteria**

Row | Column | Criteria/Where

Select Column	Oper	Column/Value	Connector
rvct.vercrit	=	1	

vercrit  
Description : Calculated Variable: Case Verification Criteria

Usage : Length: 1, 0=Not a Verified Case, 1=Positive Culture, 2=Positive Smear/Tissue, 3=Clinical Case Definition, 4=Verified by Provider Diagnosis, 5=Suspect Case, See Appendix SUR IV of the TIMS User Guide

Add Delete Clear

10. Select an operator from the Operator dropdown list.

*The available operators are:*

<b><u>Operator</u></b>	<b><u>Description</u></b>
=	Equals
>	Greater Than
<	Less Than
<>	Not Equal To
>=	Greater Than or Equal To
<=	Less Than or Equal To
Is Missing	Is Blank or Null
Is Not Missing	Is Not Blank or Not Null
Like	Similar to a specified pattern
Not Like	Not similar to a specified pattern

11. Enter the value to match in the Where value column.

12. To add additional criteria, click the **Add** button again and repeat the process. Be sure to select a connector from the Connector column.

*The available connectors are:*

<b><u>Connector</u></b>	<b><u>Description</u></b>
AND	Both the criteria in this line and the next line must be met.
OR	The criteria in this line or the next line must be met.

**Note:** Click **Del**ete to delete a selected criteria row. To start completely over at any time, click the **Cl**ear button and all information will be cleared.

13. Click **Save** button to save the query. Enter a name for the query and click the **Save** button.
14. Click **Exec**ute button to perform the query. See *Execute a Frequency Report* for additional information.
15. Click **Cl**ose button to close the Frequency Report Setup window.

## Delete a Frequency Report

To delete a Frequency Report ...

1. Open the **S**ystem module.
2. Open the **Data Mgt** menu and select **Frequency Report**.
3. Select the report you want to delete.
4. Click the **Del**ete button.

*A Warning message window is displayed.*



5. Click **Y**es button to confirm that you want to delete the report.

### Edit a Frequency Report

To edit an existing frequency report ...

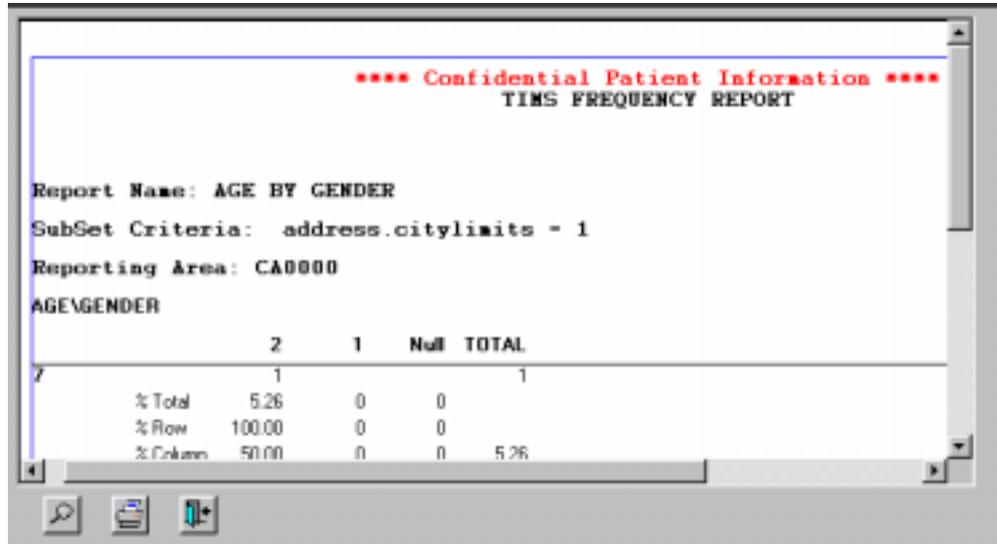
1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **F**requency Report.
3. Select the report you want to edit.
4. Click the **E**dit button, and then modify row/column display values and criteria as required. **Note:** In order to edit the row or column selected, you must reset the report and start completely over.
5. Click **S**ave **A**s or **S**ave button to save the query. Enter a name for the query and click the **S**ave button.
6. Click **E**xecute button to perform the query. See *Execute a Frequency Report* for additional information.
7. Click **C**lose button to close the Frequency Report Setup window.

### Execute a Frequency Report

To execute a frequency report ...

1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **F**requency Report.
3. For an existing report, select the report you want to run, and then click the **E**xecute button.
4. For a new report, create a simple report by clicking the **N**ew button, then selecting row, column and criteria for the report, and then click the **E**xecute button.

*The Frequency Report preview window is displayed.*



*This window allows you to preview the report results.*



Modify the **magnification** of the preview. Select the magnification or show rulers and click **OK**.



**Print** the report. Select the appropriate printer and click **OK**.

5. Click the **Close** button to close the preview window.



Sample Report

\*\*\*\* Confidential Patient Information \*\*\*\*

TIMS FREQUENCY REPORT

Report Name: AGE BY GENDER

Subset Criteria: uscitizen = 1

Reporting Area: GAOOOO

1 →	AGEIGENDER			2
<=20		%Total % Row %Column		
21-40		% Total % Row % Column		
41-60		% Total % Row % Column	4 → 6 →	← 5 ← 7
3 →	61-80	%Total % Row % Column	← 9	
81-100		%Total % Row %Column		
>100		%Total % Row % Column		
TOTAL		% Row	8	

\*\*\*\* Confidential Patient Information \*\*\*\*

06/06/2000 at 14:45:06

Page 1 of 1

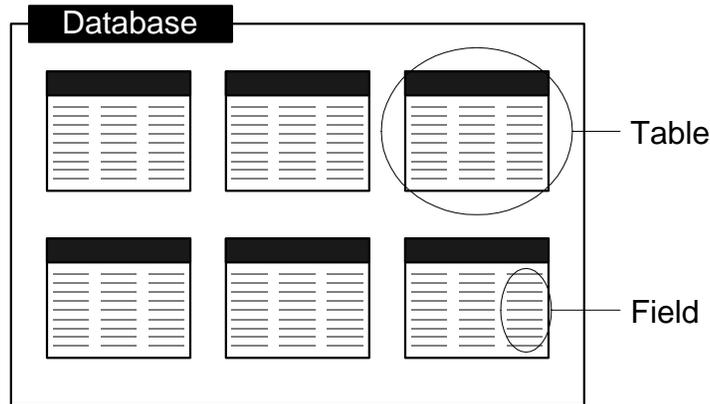
\*

### **Item Descriptions**

- 1.** The Output Data Items selected from the Select Columns list are displayed. The first data item is always the row and the second is always the column. In the sample report, the row Output Data Item is <AGE> and the column Output Data Item is <GENDER>.
- 2.** The assigned Display Values or if none are assigned the values found in the database for the column Output Data Item are displayed. In the sample report, the following Display Values are displayed: Male, Female and Unk are displayed.
- 3.** The assigned Display Values or if none are assigned the values found in the database for the row Output Data Item are displayed. In the sample report, the following Display Values are displayed: <=20, 21-40, 41-60, 61-80, 81-100 and >100.
- 4.** The frequency for the row/column cell is displayed. This number displays how many records in the report have the characteristics of the row value and column value that intersect this cell. In the sample report, the number “5” in the report cell means that five records in the report are Males in the age group 41-60 (criteria value) (column value) (row value).
- 5.** The percent total for the cell is displayed. This number displays what percentage of the total number of records included in the report is represented by the frequency for this cell. In the sample report, the number “45.45” means that 45.45% (5/11) of all records in the report are males in the age group 41-60.
- 6.** The percent row for the cell is displayed. This number displays what percentage of the total number of records with the specific row value is represented by the frequency for this cell. In the sample report, the number “100.00” means that in the age group 41-60 100.00% (5/5) are males.
- 7.** The percent column for the cell is displayed. This number displays what percentage of the total number of records with the specific column value is represented by the frequency for this cell. In the sample report, the number “71.43” means that of males 71.43% (5/7) are in the age group 41-60.
- 8.** The percent total for the column is displayed. This number displays what percentage of the total number of records is in the specific column value. In the sample report, the number “63.64” means that of all the records included in the report 63.64% (7/11) are males.
- 9.** The percent total for the row is displayed. This number displays what percentage of the total number of records is in the specific row value. In the sample report, the number “45.45” means that of all the records included in the report 45.45% (5/11) are in the age group 41-60.
- 10.** The total number of records for the row. In the sample report, there are a total of 5 records (1 male, 2 females, and 1 Unk) in the age group 21-40.
- 11.** The total number of records for the column. In the sample report, there are a total of 7 male records (1 in age group 21-40, 5 in age group 41-60, and 1 in age group 61-80).
- 12.** The total number of records included in the report. In the sample report, there are a total of 11 records.

## Data Dictionary

The TIMS application is built around a large and complicated database. A database is a collection of tables that are composed of related fields. The Data Dictionary feature allows you to view information about the TIMS database including its tables and fields. Information in the Data Dictionary is view-only; it can be displayed and printed, but it cannot be modified in any way.



**Note:** Users with Medium, High, and System Administrator security rights can view the Data Dictionary.

Not all tables are available in the TIMS Data Dictionary. If you need information about tables or fields that do not appear in the data dictionary, call the TIMS Help Desk at (404) 639-8155.

### Viewing the Data Dictionary

To view the data dictionary...

1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Data Dictionary**.

*The Data Dictionary window is displayed.*

TIMS Fieldname	Size	Type	Description	Required
deathcert	10	varchar	Currently not implemented	No
deleted	1	char	Currently not implemented	No
episodeid	16	char	Currently not implemented	Yes
ethnicity	1	char	Ethnic Origin	No
eventstamp	8	timestamp	Last date and time this record was modified	Yes
firstname	30	varchar	First Name:	Yes
gender	1	char	Sex	No
knowenglish	1	char	Language: Understand English	No
lastname	35	varchar	Last Name:	Yes
living	1	char	Currently not implemented	No
localid	9	char	City/County Case Number:	No
middlename	20	varchar	Middle Name:	No

3. Select a table from the Subject list to display all the fields within that table.

*A description of the table is displayed in the Description box.*

Each field description is divided into five columns:

- **TIMS Fieldname** - The actual fieldname as defined in the TIMS database.
- **Size** - The maximum number of characters the field will hold.
- **Type** - The type of data stored in the field. The following data types occur in the TIMS database:

**-Date:** A calendar date, such as a year, month and day. The year can be from the year 0001 to 9999. For historical reasons, a DATE column can also contain an hour and minute; however, the TIMESTAMP data type is recommended for anything with hours and minutes. A DATE value requires 4 bytes of storage.

**-Time:** Time of day, containing hour, minute, second and fraction of a second. The fraction is stored to 6 decimal places. A TIME value requires 8 bytes of storage. (ODBC standards restrict TIME data type to an accuracy of seconds. For this reason you should not use TIME data types in WHERE clause comparisons that rely on a higher accuracy than seconds.)

**-Timestamp:** A point in time, containing year, month, day, hour, minute, second and fraction of a second. The fraction is stored to 6 decimal places. A TIMESTAMP value requires 8 bytes of storage. Although the range of possible dates for the TIMESTAMP data type is the same as the DATE type (covering years 0001 to 9999), the useful range of TIMESTAMP date types is from 1600-02-28 23:59:59 to 7911-01-01 00:00:00. Prior to, and after this range the time portion of the TIMESTAMP may be incomplete.

**-Numeric:** A decimal number with precision total digits and with scale of the digits after the decimal point. The defaults are scale=6 and precision=30.

**-Char:** Character or alphanumeric characters of fixed length.

**-Varchar:** Character or alphanumeric characters of variable length.

**-Longvarchar (Longvarch):** Arbitrary length character data. The maximum size is limited by the maximum size of the database file (currently 2 gigabytes).

**-Integer (Int):** Signed integer of maximum value 2,147,483,647 requiring 4 bytes of storage (e.g., in the range of -2,147,483,647 to +2,147,483,647).

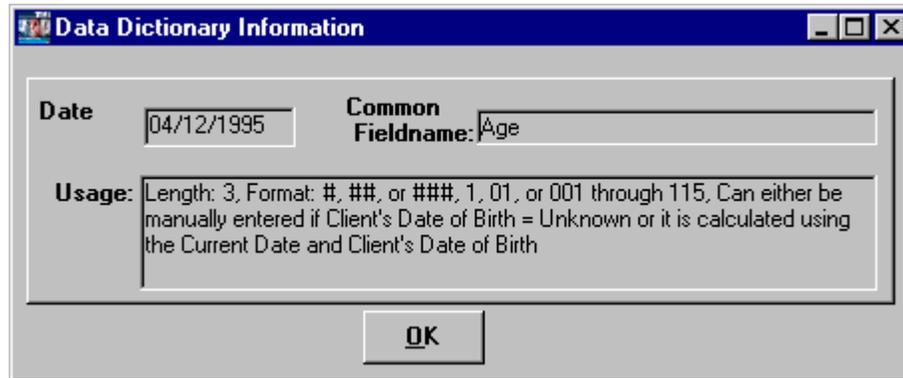
**-Smallint:** Signed integer of maximum value 32,767 requiring 2 bytes of storage (e.g., in the range of -32,767 to +32,767).

**-Tinyint:** Signed integer of maximum value 255 requiring 1 byte of storage (e.g., in the range of -255 to +255).

**-Binary:** Binary data of maximum length size (in bytes). If size is omitted, the default is 1. The maximum size allowed is 32,767. The BINARY data type is identical to the CHAR data type except when used in comparisons. BINARY values will be compared exactly while CHAR values are compared without respect to upper/lowercase (depending on the case-sensitivity of the database) or accented characters.

**-Long Binary:** Arbitrary length binary data. The maximum size is limited by the maximum size of the database file (currently 2 gigabytes).

- **Description** - A brief description of the field.
  - **Required** - Indicates whether the field must contain data.
4. To view specific information about a field, select it in the list and click the **Usage** button.



- **Date** - The date the field was added to the TIMS database.
  - **Common Fieldname** - The name that appears on the TIMS data entry window where the information is entered.
  - **Usage** - provides a list of acceptable values (where applicable) for data in that field.
5. Click the **OK** button to close the Data Dictionary Information window.
  6. Click the **Print** button to print the fields of the current Subject table.
  7. Click the **Close** button to exit the Data Dictionary window.

## Export

TIMS allows you to export entire database tables in a variety of common file formats. Once data have been exported, the data can be imported into other applications for further processing. Please note that exported data does not meet CDC security requirements. It is your responsibility to ensure that client confidentiality is maintained. Refer to the *TIMS User's Guide Introductory Chapter*, pages xii-xviii, for more information about confidentiality.

There are three types of TIMS data exports:

**Table** - Exports fields from a particular TIMS table or tables.

**UDV** - Exports all the user-defined variables associated with a particular TIMS table or tables.

**Flat File** - Exports a fixed length ASCII file that can be imported and processed by both PCs and Mainframes.

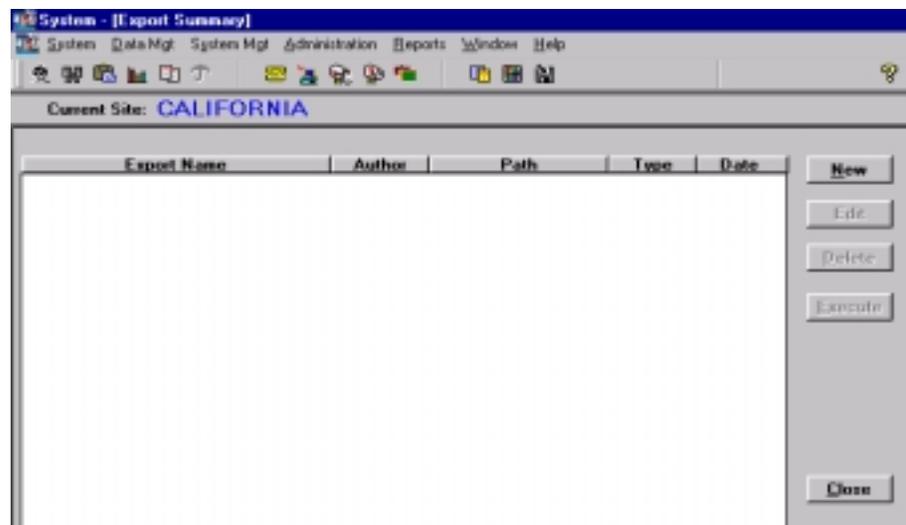
**Note:** Users with High or System Administrator security rights and HIV clearance have full access to the Export feature.

### Exporting Data from TIMS Tables or User-Defined Variables (UDV)

To export data from the TIMS database...

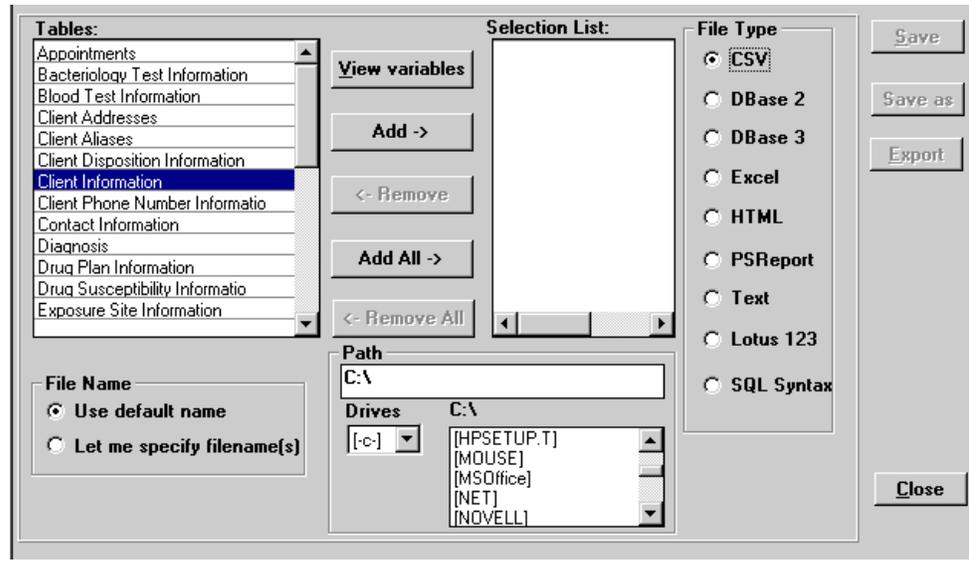
1. Open the **System** module.
2. Open the **Data Mgt** menu, select **Export**, and then select **Table** or **UDV**.

*The System – [Export Summary] screen appears.*



3. Click the **New** button.

The Export Data window is displayed.



4. Select a table from the Tables list.
  - If desired, click the **View variables** button to display the fields included in the selected table. Use the horizontal and vertical scroll bars to navigate through the report. Click **Close** to close the Variable list and return to the Export Data window.

Variable list	
Fieldname	Description
Client ID	Unique internal identifier for this client
Social Security #	Client social security number
Last Name	Client last name
First Name	Client first name
Middle Name	Client middle name
Age	Client age
Sex	Client sex
Race	Client race
Ethnic Origin	Ethnic origin of client
Country of Origin	Client country of origin
Death Certificate	Death Certificate
Speak English	Indicates if the client speaks English
Know English	Indicates whether the client understands English

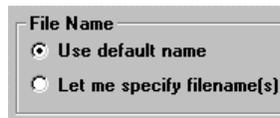
5. Click the **Add** button to move the selected table to the Selection List.  
*The Selection List displays all tables selected for export.*
6. Select and add as many additional tables as necessary. To add all the TIMS tables (export the entire TIMS database), click the **Add All** button. You can also remove tables from the selection list using the **Remove** or **Remove All** buttons.

7. Select the format for the exported file from the **File Type** group:

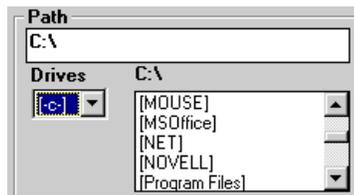
*The available formats are:*

<b>CSV</b>	Comma Separated Values
<b>DBase 2</b>	dBASE-II
<b>DBase 3</b>	dBASE-III
<b>Excel</b>	Microsoft Excel Worksheet
<b>HTML</b>	Hypertext Markup Language
<b>PSReport</b>	PowerSoft Report
<b>Text</b>	Fixed width field file (ASCII)
<b>Lotus 123</b>	Lotus 1-2-3 Worksheet
<b>SQL Syntax</b>	SQL Tables.

8. Select a method for naming the exported file:



- **Use default name** creates a file name based on the table name with an extension that reflects the file type. The user cannot alter default names.
  - **Let me specify filename(s)**, allows you to replace the default file name with a name that you enter.
9. Enter or select the **Drive** and **Path** where the exported file will be saved using one of the following methods:

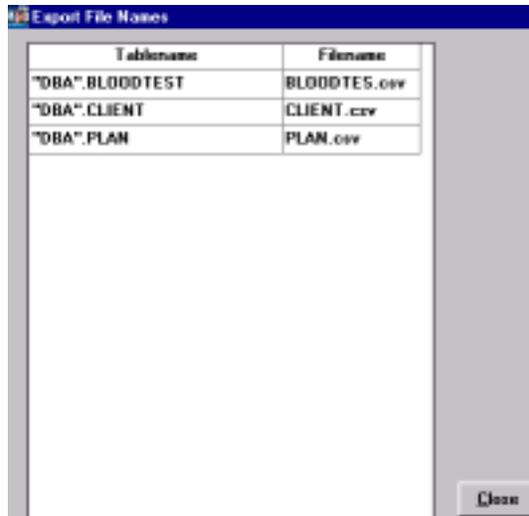


- Type the desired location into the Path box,
- Or
- Select the appropriate drive from the Drives list, then select the appropriate directory and subdirectories from the list which appears to the right. The selected location will appear in the Path box.
10. Click the **Export** button to start the export process.

*The confidentiality warning message box appears. Click **OK** to close the message box and proceed with the export process.*



11. The Export File Names window displays. Click the **C**lose button to close the Export File Names window and to begin exporting. The Export Data window is displayed again.



If you selected *Let me specify filename(s)*, change the name(s) for the exported files by selecting the existing name and typing in a new one.

12. When the export process has completed, you can save the current export configuration so that it can be run again. To save the current export configuration, click the **S**ave button.

The Export Table Name dialog box is displayed.



13. Enter a name for the export configuration.  
 14. Click the **S**ave button.  
 15. Click the **C**lose button to close the Export Data window.

### Execute a Saved Export Configuration

You can execute defined export configurations any time after they have been saved. After an Export has been defined and saved, it can be executed at a later date. The System Administrator can execute all export files.

To run an export configuration which has been defined...

1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu, select **E**xport, and then select **T**able or **U**DV.

The Export Summary window is displayed.

Export Name	Author	Path	Type	Date
RVCT TEXT EXPORT	AJA300	D:\	Text	05/27/98
RVCT FLT	AJA300	D:\	Text	05/28/98
CLIENT INFORMATION	AJA300	D:\	CSV	05/28/98
CLIENT + DIAGNOSIS	AJA300	D:\	CSV	05/28/98
RVCT/F1/F2	AJA300	C:\tb_data\dbf	D Base III	05/28/98

3. Select a saved export configuration.
4. Click the **E**xecute button.

*The confidentiality warning message box appears. Click **OK** to close the message box and proceed with the export process. The Export Summary window is displayed again.*



5. The export file will overwrite the previously saved export data.
6. Click **C**lose to exit the Export Summary window.

### Edit a Saved Export Configuration

A saved export configuration can be modified or the user can use an existing configuration as a foundation for a new one.

To modify an export...

1. Open the **S**ystem module.
2. Open the **D**ata **M**gt menu, select **E**xport, and then select **T**able or **U**DV.
3. Select the **E**xport **N**ame to be edited.
4. Click the **E**dit button.
5. Make the desired changes.
6. Click the **S**ave button to save the changes to the file or click the **S**ave **A**s button to save the modified configuration under a different name, leaving the original intact.

The confidentiality warning message box appears. Click **OK** to close the message box and proceed with the export process.



7. Click the **C**lose button to return to the Export Data Window. Click **C**lose again to return to the Export Summary Window.

### Delete a Saved Export Configuration

The author or a TIMS System Administrator can delete a previously saved export configuration.

To delete a saved export configuration...

1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu, select **E**xport, and then select **T**able or **U**DV.
3. Select the saved export configuration you want to delete.
4. Click the **D**efine button.
5. Click the **O**K button to confirm that you want to delete the export configuration. Click **C**ancel to abort the deletion process.



6. Click the **C**lose button to close the Export Summary window.

## Flat File Export

The TIMS Flat File Export feature exports only Surveillance data (Client, RVCT, Follow Up-1 and Follow Up-2) in a non-delimited ASCII file, which is suitable for importing and processing by both mainframe and PC-based applications. Comment fields are not exported. The exported file is a 255-character ASCII text file with two lines per record. The default file name is RVCTDATA.TXT, although the user may specify another name. See Appendix SUR XII for information about the export file format.

There are three options for exporting a Flat File:

1. **Automated** - Exports all records that have been added, deleted, or updated since the last automated export.
2. **Set Subset Criteria** - Allows the user to specify the subset as any one or combination of the following: Month-Year Reported date range, export from date and time, Site IDs, and to include or exclude deleted records.
3. **All Surveillance Data** - Exports all Surveillance records in the database.

### Performing an Automated Flat File Export

The Automated Flat File Export function will export all records that have been updated (new, modified, or deleted) since the last automated Flat File Export. Updated records can be created or modified locally, or can originate at one or more associated lower sites.

To perform an Automated flat file export...

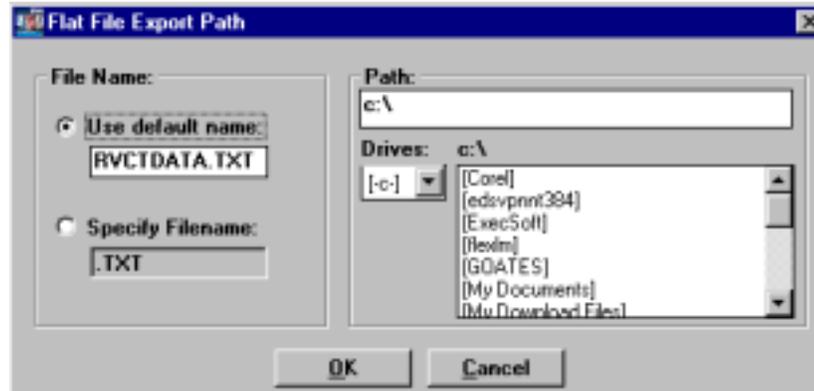
1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Export**, then **Flat File**.

*The Flat File Export Criteria window is displayed.*

3. Select **Automated** in the Export Mode group.
4. Select whether you want to export deleted records.

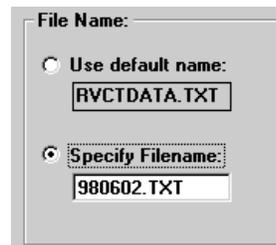
5. Click the **Browse** button to specify the filename and path.

The Flat File Export Path dialog box is displayed.

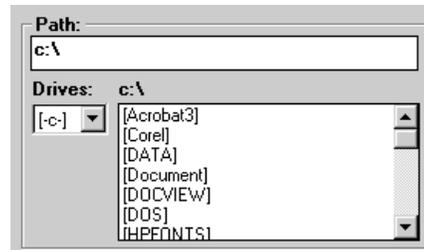


Click **C**ancel to return to the Flat File Export Criteria window.

6. To use the default file name, select **Use default name**. To define a name for the file, select **Specify Filename** and type in new name.



7. Enter or select a path for the exported file using one of the following methods:



- Type the desired location into the Path box,
- Or
- Select the appropriate drive from the Drives list, then select the appropriate directory and subdirectories from the list which appears to the right. The selected location will appear in the Path box.
8. Click the **OK** button on the Flat File Export Path dialog box to return to the Flat File Export Criteria window. The Path and File Name will automatically be entered into the Path block.
  9. Click the **OK** button on the Flat File Export Criteria window to begin the export. To discontinue the export, click **C**lose to exit the Flat File Export Criteria window.

10. The confidentiality warning message box appears. Click **OK** to close the message box and proceed with the export process.

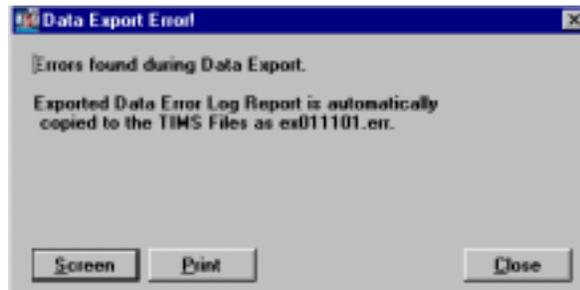


The Flat File Export in Progress dialog box appears and enables you to follow the progress of the export procedure. Once the export has begun, you cannot stop or interrupt the Flat File Export.

In the example below, a total of 58 records were processed. Of those, 26 met the specified criteria and were scanned for two types of data errors: Verified cases that were alive at diagnosis and have no initial drug regimen, and invalid drug combination in initial drug regimen. All 26 records were exported. Click **C**lose to close this dialog box.



11. If errors were found during the Data Export, the Data Export Error window will appear. The Exported Data Error Log report is automatically created and saved to the directory specified previously for the export file. You may view this report by clicking the **S**creen button, or print it by clicking the **P**rint button. Click the **C**lose button to return to the Flat File Export Criteria window.



12. Click the **C**lose button when the export is complete.

### Specify Criteria for a Flat File Export

The Flat File Export function can be customized to export a subset of surveillance data. The subset criteria can be any one or combination of the following: Site ID, Month-Year Reported date range, export date and time, and include or exclude deleted records.

To specify criteria for a flat file export...

1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **E**xport, then select **F**lat File.

The Flat File Export Criteria window is displayed.

3. Select **Set Subset Criteria** in the Export Mode group.
4. If you want the data from all sites to be included in the export, choose **No** in the Select Sites group. If you want to limit the sites of origin for the exported source data, select **Yes** in the Select Sites group, then choose the sites whose data you want to include on the Site List dialog box. When Yes is clicked, the list of available sites automatically appears.

Sites	Code
CALIFORNIA	CA0000
CA LEVEL 1	CA0100
CA LEVEL2	CA0111
CA LEVEL 3A	CA0122
CALIFORNIA LEVEL ONE BEE	CA0200

- To include all sites, click on **Include All Levels** and a check mark will appear in the box. To deselect all sites, click to remove the check mark.
  - To select multiple sites, hold down the **Ctrl** key while clicking on the individual sites. To deselect multiple sites, hold down the **Ctrl** key while clicking on the individual sites.
  - To select a range of sites, select the site which represents the start of the range, then select the end of the range while holding down the **Shift** key.
5. Click the **OK** button to return to the Flat File Export Criteria window, or click **Cancel** to abandon the site selection operation and return to the Flat File Export Criteria window.

6. Select whether you want to export deleted records.



Export Deleted Records?  
 Yes     No

7. Specify the **Month-Year Reported** date range of the records you want to export.

*The default beginning date is not specified, and the default ending date is the current month and year. If the default dates are not changed, all records will be exported.*



Date criteria on Month-Year Reported:  
 Beginning: 00/0000  
 Ending: 06/1998

- If no Beginning date is specified, all records with Month-Year Reported on or prior to the Ending date will be exported.
  - If no Ending date is specified, all records with Month-Year Reported on or after the Beginning date will be exported.
  - If both the Beginning and Ending dates are not specified, all records will be exported.
8. Enter the start **Date** and **Time** of the range of updated records (added, modified, or deleted) you want to export in the **Export From** group. All records with an eventstamp value (date and time the record was last updated) on or after the Date and Time specified will be included in the export.

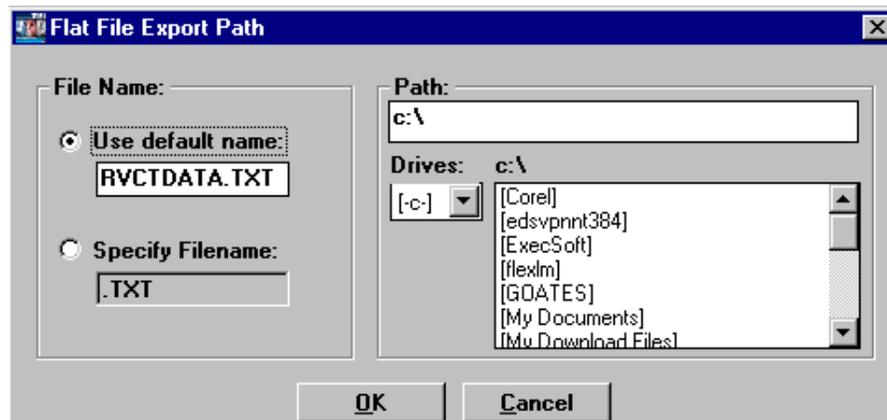
*This is similar to Automated Export, but allows you to specify start date and time.*



Export From:  
 Date: 00/00/0000  
 Time: 00:00 AM

9. Click the **Browse** button to specify the filename and path.

*The Flat File Export Path dialog box is displayed.*



Flat File Export Path

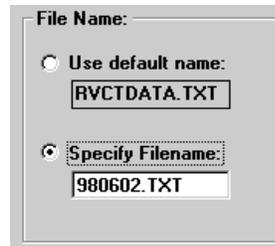
File Name:  
 Use default name:  
 RVCTDATA.TXT  
 Specify Filename:  
 .TXT

Path:  
 c:\

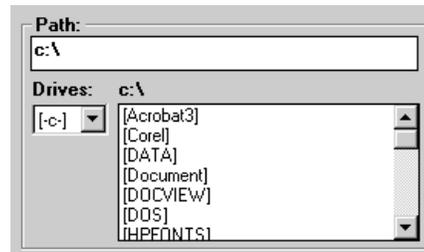
Drives: c:\  
 [-c-] [Corel]  
 [edsvpnt384]  
 [ExecSoft]  
 [flexlm]  
 [GOATES]  
 [My Documents]  
 [My Download Files]

OK Cancel

10. To use the default file name, select **Use default name**. To define a name for the file, select **Specify Filename** and type in new name.



11. Enter or select a path for the exported file, using one of the following methods:



- Type the desired location into the Path box,
- Or
- Select the appropriate drive from the Drives list, then select the appropriate directory and subdirectories from the list which appears to the right. The selected location will appear in the Path box.
12. Click the **OK** button on the Flat File Export Path dialog box to return to the Flat File Export Criteria window. The Path and File Name will automatically be entered into the Path block.
13. Click the **OK** button on the Flat File Export Criteria window to begin the export. To discontinue the export, click **Close** to exit the Flat File Export Criteria window.
14. The confidentiality warning message box appears. Click **OK** to close the message box and proceed with the export process.



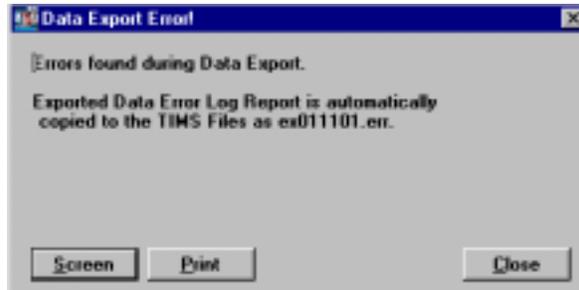
The File Export in Progress dialog box enables you to follow the progress of the export procedure.

You cannot interrupt the Flat File Export once it has begun.

In the example below, a total of 58 records were processed. Of those, 26 met the specified criteria and were scanned for two types of data errors: Verified cases that were alive at diagnosis and have no initial drug regimen, and invalid drug combination in initial drug regimen. All 26 records were exported.



15. If errors were found during the Data Export, the Data Export Error window will appear. The Exported Data Error Log report is automatically created and saved to the directory specified previously for the export file. You may view this report by clicking the **S**creen button, or print it by clicking the **P**rint button. Click the **C**lose button to return to the Flat File Export Criteria window.



16. Click the **C**lose button when the export is complete.

### Performing a Flat File Export for All Surveillance Data

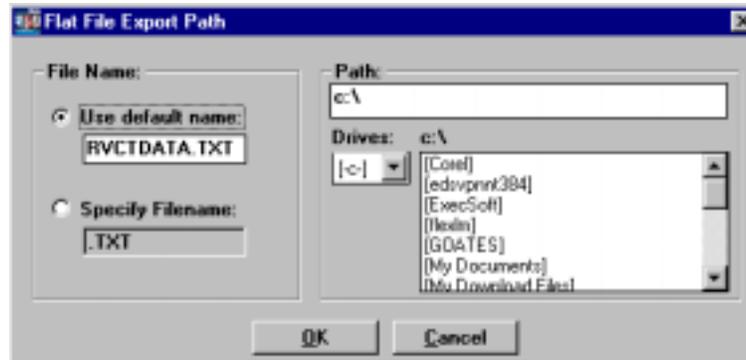
TIMS enables you to export all surveillance data in the flat file format, regardless of the record's update status.

To export all surveillance data in the flat file format...

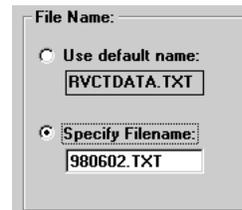
1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **E**xport, then select **F**lat File.  
*The Flat File Export Criteria window is displayed.*

3. Select **A**ll Surveillance Data in the Export Mode group.
4. Select whether you want to export deleted records.

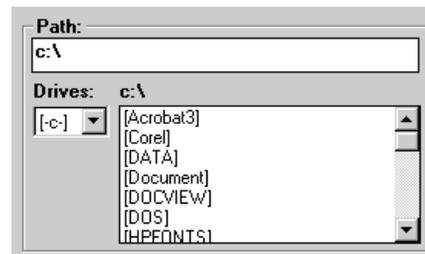
5. Click the **B**rowse button to specify the filename and path.  
*The Flat File Export Path dialog box is displayed.*



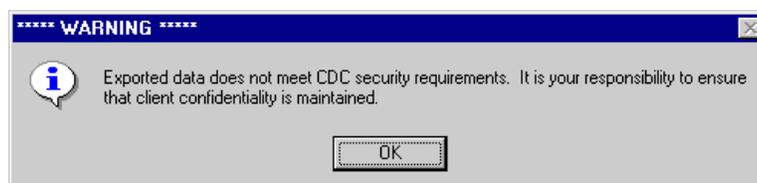
6. To use the default file name, select **Use default name**. To define a name for the file, select **Specify Filename** and type in new name.



7. Enter or select a path for the exported file using one of the following methods:



- Type the desired location into the Path box,
- Or
- Select the appropriate drive from the Drives list, then select the appropriate directory and subdirectories from the list which appears to the right. The selected location will appear in the Path box.
8. Click the **OK** button on the Flat File Export Path dialog box to return to the Flat File Export Criteria window. The Path and File Name will automatically be entered into the Path block.
9. Click the **OK** button on the Flat File Export Criteria window to begin the export process. To discontinue the export, click **Close** to exit the Flat File Export Criteria window.
10. The confidentiality warning message box appears. Click **OK** to close the message box and proceed with the export process.

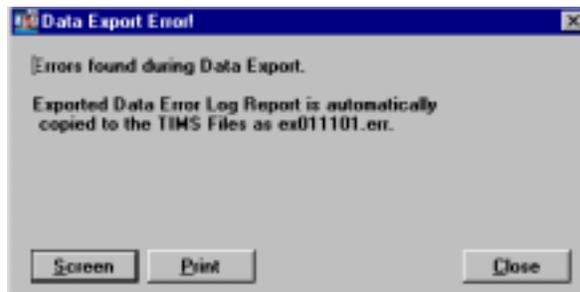


*The File Export in Progress dialog box enables you to follow the progress of the export procedure. Once the export has begun, you cannot stop or interrupt the Flat File Export.*

*In this example, a total of 123 records are processed. Because this is a flat file export of all surveillance records, all 123 records are scanned for data errors and all 123 records are exported. In this type of export, all three numbers should be the same, unless the user chooses not to export deleted records.*



11. If errors were found during the Data Export, the Data Export Error window will appear. The Exported Data Error Log report is automatically created and saved to the directory specified previously for the export file. You may view this report by clicking the **S**creen button, or print it by clicking the **P**rint button. Click the **C**lose button to return to the Flat File Export Criteria window.



12. Click the **C**lose button when the export is complete.

## ***User-Defined Variables***

The User-Defined Variable (UDV) feature allows Reporting Areas and individual sites to collect and store TB-related information that is not part of the standard TIMS application. There are two types of user-defined variables:

**Global UDVs** are defined by the reporting area and apply to all sites within that reporting area's jurisdiction. Information entered in Global UDVs is transmitted to the Reporting Area, but is not transmitted to the CDC. Global UDVs must be defined before Spin-Off diskettes are created for lower sites (see the Spin-Off Disk section later in this chapter for additional details). Global UDVs can be defined for the Client Addresses, Client Information, Follow Up Report - 1, Follow Up Report - 2, and RVCT tables.

**Local UDVs** are created by individual sites to collect and store site-specific data. The information entered into Local UDVs is not transmitted to any other site. Local UDVs can be defined for the following tables: Bacteriology Test Information, Blood Test Information, Client Addresses, Client Aliases, Client Information, Contact Information, Medications, Follow-Up 1, Follow-Up 2, History Information, Hospital Information, Prescription Information, Referrals, RVCT, Skin Test Information, Therapy Event Information, Worker Information, and X-Ray Information.

The User-Defined Field windows are displayed automatically if a UDV on that window is marked **Entry is Required**. Users can also display the window by clicking the **User-Defined Variable** button on the TIMS window.



**Note:** Only a TIMS System Administrator can create and modify User-Defined Variables. UDV definitions cannot be removed once data has been entered into them.

### Add a User-Defined Variable

To define a User-Defined Variable...

1. Open the **System** module.
2. Open the **Data Mgt** menu and select **User-Defined Variables**, then select **Global** or **Local**.

*The User-Defined Variables window is displayed.*

Prompt	Type	Size	Active	Required
			No	No

Field Name:   Active

Prompt:   Entry is Required

Description:

Type:  ▼

Size:

Variable Name:

3. Select the window where you want to place the UDV from the Subject list.
4. Click the **New** button.
5. Enter the information requested:
  - **Field Name** - The actual name of the field that will be created in the TIMS database.
  - **Prompt** - The text that will appear on the User-Defined Fields window instructing what type of information should be entered.
  - **Description** - A description of the UDV.
  - **Type** - Select one of the following data types for the variable:
    - Character**: Will accept any alphanumeric characters.
    - Number**: Entry must be a number.
    - Date**: Data must be a date entered using the MM/DD/YYYY format.
    - Yes/No/Unk**: The answer to the prompted question must be either Yes, No, or Unknown (Y/N/U). This variable type is also known as Boolean.
  - **Size** - Allows you to limit the size of the entered value (not available for all data types).

- **Variable Name** - A descriptive, detailed name for the field that will be used when directly querying the database (not available in the current version of TIMS).
  - **Active** - UDV's that are not marked Active will not be displayed in the User-Defined Field window.
  - **Entry is Required** - Indicates that the UDV must contain data when the associated window is opened.
6. Click the **S**ave button.
  7. Click the **C**lose button to close the UDV window.

### **Edit a User-Defined Variable**

To edit a User-Defined Variable...

1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **U**ser-Defined Variables; select **G**lobal or **L**ocal.
3. Select the window that contains the UDV you want to change from the Subject list.
4. Select the UDV you want to change.
5. Click the **E**dit button.
6. Make the necessary changes.  
*The Type cannot be changed.*
7. Click the **S**ave button.
8. Click the **C**lose button to close the UDV window.

### **Delete a User-Defined Variable**

**Note:** A UDV cannot be deleted once data has been entered.

To delete a User-Defined Variable...

1. Open the **S**ystem module.
2. Open the **D**ata Mgt menu and select **U**ser-Defined Variables; select **G**lobal or **L**ocal.
3. Select the window that contains the UDV you want to delete from the Subject list.
4. Select the UDV you want to delete.
5. Click the **D**efine button.
6. Click the **Y**es button to confirm that you want to delete the selected UDV.
7. Click the **C**lose button.

## Database Backup

Database Backup and Recovery are features that work together. The TIMS Help Desk must be called prior to any restoration, whether from a tape backup, a TIMS backup, or any other form of backup. The TIMS Help Desk will determine the appropriate backup, transmissions to and from that site, and the data prior to any restoration. This will help eliminate the need for prolonged investigation and correction of the data after problems occur.

The TIMS System Administrator should copy (backup) the TIMS database to CD or diskette(s) at regular intervals and store the copies in a separate and secured (locked) location. The TIMS backup is the primary backup supported by TIMS and the TIMS Help Desk. Please note that automated tape backups will not backup the TIMS database if it is not unloaded. It is not recommended that automated tape backups be the sole backup mechanism for TIMS. This will help ensure that data are not lost should a problem develop with the main TIMS database. Users do not have to exit TIMS to complete the backup.

*Suggested backup times:*

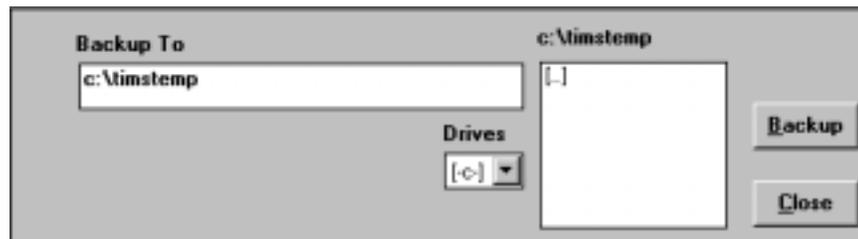
- After a data entry session
- Before a data transmission
- At the end of each month
- Before performing an upgrade

The TIMS backup compresses the entire TIMS database, including patient identifiers and confidential information, into a zip (.zip) file. The file is not encrypted, so users should ensure that CDs or diskettes containing the backup file(s) are securely stored. Refer to the *TIMS User's Guide Introductory Chapter* for more information about confidentiality.

To backup the TIMS database...

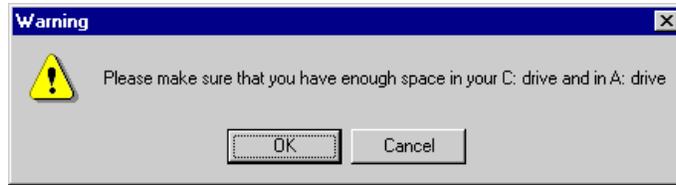
1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Database Backup**.

*The Database Backup window is displayed.*



3. Enter or select the location where the backup file will be stored.  
*You can type the full drive and directory or select the Drive and then the directory.*
4. Click the **Backup** button to begin the backup process.
5. Click **OK** to close the Warning message box. Click **Cancel** to return to the Database Backup window.

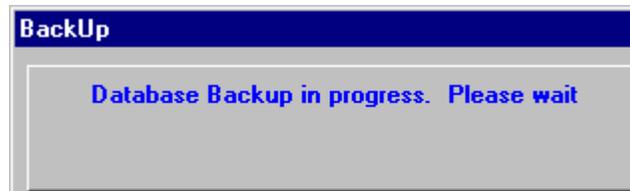
*When saving to the A: drive, the backup function requires space on the C: drive to write temporary files.*



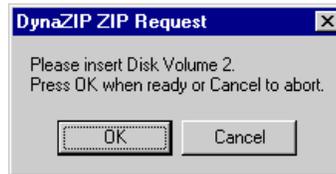
6. If you selected a CD or diskette drive as your backup location (highly recommended), insert a CD or blank, formatted diskette in the specified drive and click the **OK** button.



*The "please wait" window is displayed as the backup is processing.*

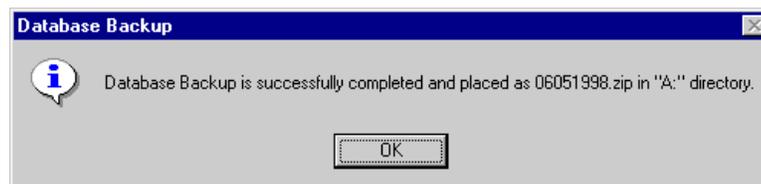


7. If you selected a diskette drive as your backup location, insert additional diskettes when prompted. Be sure to properly label the order of the diskettes.



8. When the backup is finished, the Database Backup dialog box will appear. Click **OK** to return to the Database Backup window.

*The filename is the date the backup was completed.*



9. Click the **C**lose button to exit the Database Backup window.

## Database Recovery

You can restore a TIMS database backup using the Database Recovery function. To help ensure that data integrity is maintained throughout the reporting hierarchy, you must contact the TIMS Help Desk at (404) 639-8155 to receive a Database Recovery password. The Help Desk team will provide you with the database recovery password and help you ensure that no data are lost when the current version of the TIMS database is replaced by the backup version.

The Restore feature does not actually update the existing database with a previously backed up copy. Instead, the database is restored to a temporary directory (c:\timstemp) where it can be moved into the default TIMS database directory once all TIMS related applications are closed.

**Note:** All data entered since the backup that is restored will be lost.

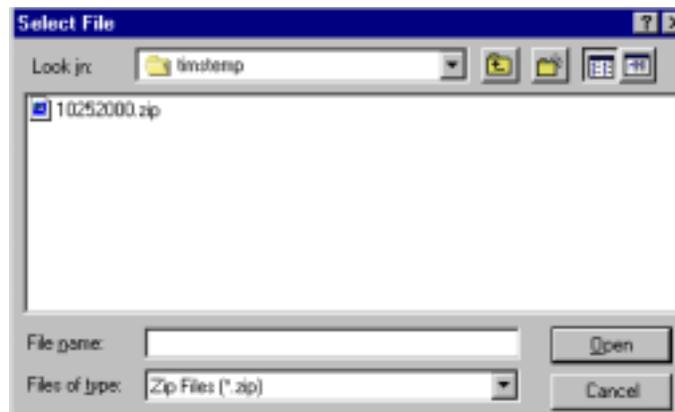
To restore the TIMS database...

1. Open the **System** module.
2. Open the **Data Mgt** menu and select **Database Recovery**.

*The Database Recovery window is displayed.*



3. Enter the location where the backup file was placed in the Restore from box or click the **Browse** button to find the file. Select the file and click the **Open** button.



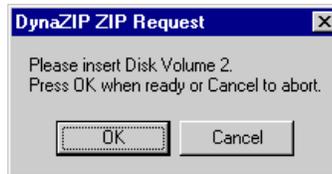
4. Click the **Restore** button to begin the Database Recovery procedure. Click the **Close** button to cancel the operation.
5. Call the TIMS Help Desk at (404) 639-8155 to receive your password.

*To help save time, please have your Site ID and License Number available when you call. These were provided to your site when TIMS was first installed.*

6. Enter the password exactly as the TIMS Help Desk provided it to you and click the **OK** button. Click the **Cancel** button to return to the Database Recovery window.



7. If you are restoring from diskettes, TIMS will prompt you to insert a new diskette when necessary. Insert the diskette and click **OK**.



8. Once the backup database files have been restored on your PC, you must move the restored files to the TIMS database directory. The procedure differs slightly between LAN and Stand Alone installations. Follow the instructions on the Database Restore message box to complete the Restore operation:

#### LAN

*The following message box is displayed when the LAN database restore procedure is complete.*



#### Stand Alone

*The following message box is displayed when the Stand Alone database restore procedure is complete.*



9. Click the **OK** button to close the Database Restore message box.  
10. Click the **Close** button on the Database Recovery window.

## Purge Records by Site

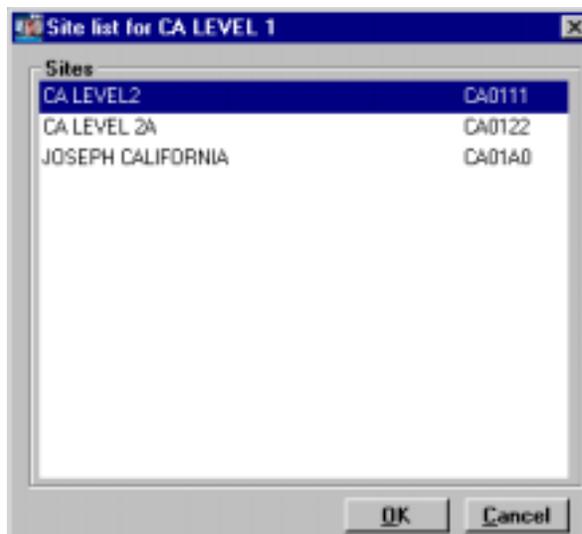
The Purge Records by Site function allows you to delete all the records in your database that were transmitted from a lower site. For example, a Reporting Area site could delete all the records from a particular Level 1 site. Furthermore, you have the option of specifying whether to include lower sites under the selected site or just delete the records from the selected site.

To purge records by site...

1. Call the TIMS Help Desk at (404) 639-8155 for a Purge Records password.
2. Open the **System** module.
3. Open the **Data Mgt** menu and select the **Database Backup** command to make a backup copy of your database.
4. Open the **Data Mgt** menu and select **Purge Records by Site**.
5. Click the **OK** button to close the Warning dialog box



6. Select the site whose records you want to purge and click the **OK** button.  
Click **Cancel** to exit the Purge Records by Site function.



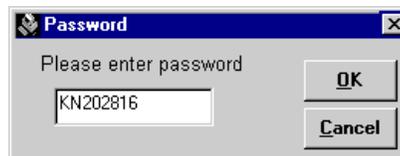
7. Choose whether you want to include or exclude the records from lower sites. Click **Cancel** to return to the Site List window.



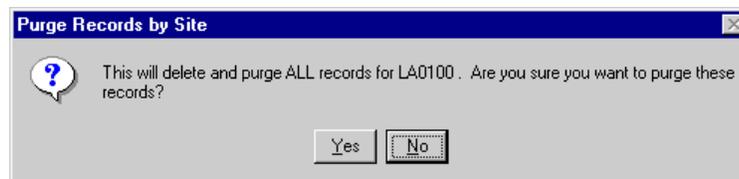
8. If you select **Exclude Lower Site(s)**, only the records created at the selected site will be purged. If you select **Include Lower Site(s)**, all the records from that branch of the surveillance hierarchy would be purged. See the chart below for an example of a Level 1 site with two Level 2 sites reporting to it. When **Include Lower Site(s)** is selected, the records from all three sites are purged.

	Exclude Lower Site(s)	Include Lower Site(s)
<b>Purged</b>	LA0100	LA0100 LA0101 LA0102
<b>Not Purged</b>	LA0101 LA0102	

9. Enter the Purge Records password exactly as the TIMS Help Desk provided it and click the **OK** button. Click **Cancel** to return to the Site List window.



*The Purge Records by Site dialog box appears.*



10. Click the **Yes** button if you are sure you want to continue with the purge operation. Click **No** to abort the Purge Records by Site operation.

*The Purge Records by Site Summary for window appears.*

*In the following example, 48 Client records were eligible to be purged (# Pre-Purge), 48 were purged (# Purged), and 0 were remaining to be purged (# Remaining) after completion of the Purge Records by Site operation. All record types (Address, RVCT, etc.) are similarly summarized on this window.*

Record Type	# Pre-Purge	# Purged	# Remaining
Client	48	48	0
Address	16	16	0
RVCT	47	47	0
FU1	8	8	0
FU2	8	8	0

- 11.** Review the Purge Records by Site Summary. Click the **Print** button to print a copy of the summary.
- 12.** Click the **OK** button when finished.
- 13.** Repeat steps 6 through 11 for additional sites, if necessary.
- 14.** Click the **Cancel** button when finished.

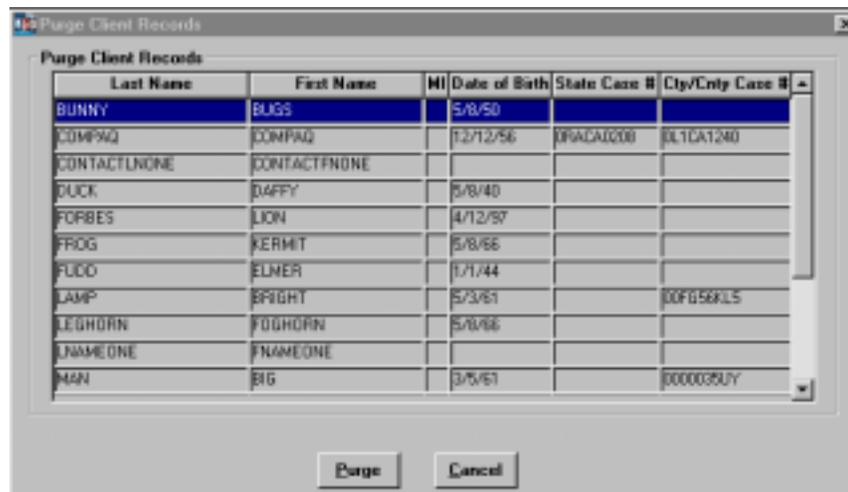
## Purge Client Records

The Purge Client Records function allows you to delete selected client records that have only client, address, and patient management information. If Client records still have Surveillance data attached, they will not be eligible to be purged until the Surveillance data are removed (refer to *Surveillance Record Deletion* in Chapter 4 of this manual for more information).

To purge client records...

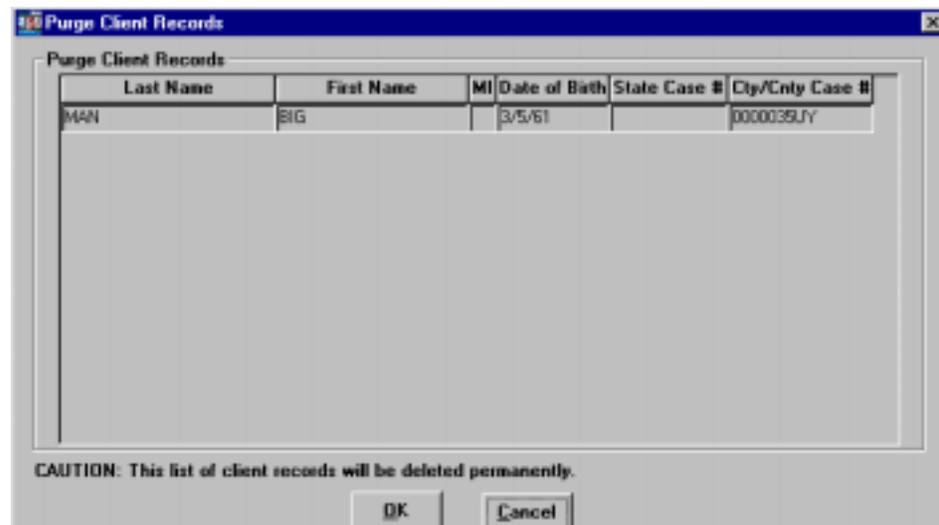
1. Open the **System** module
2. Under the **Data Mgt** menu, select the **Database Backup** command to make a copy of your database.
3. Open the **Data Mgt** menu and select **Purge Client Records**.

*The Purge Client Records window appears.*

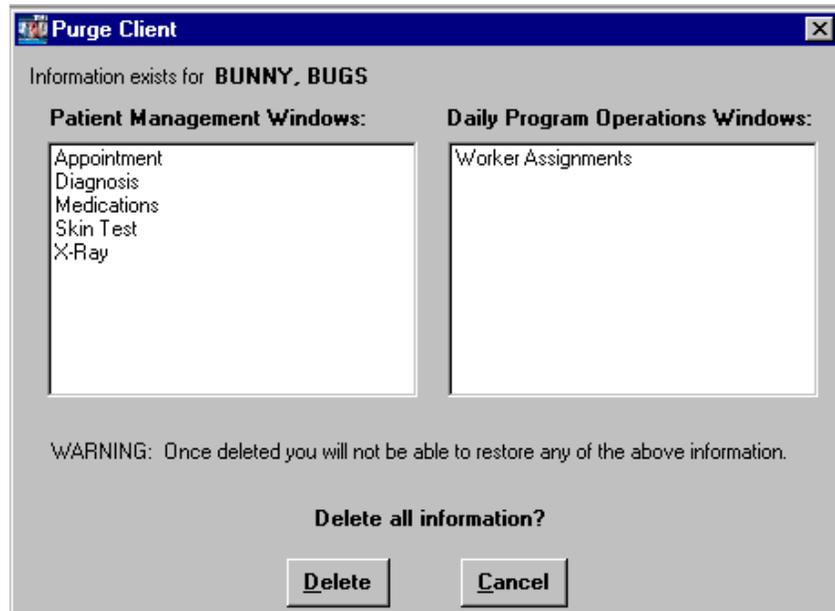


4. Select a client or multiple clients to purge. To select multiple non-contiguous clients, hold down the **Ctrl** key while clicking the mouse button. To select a range of clients, click on the first client in the range, then hold down the **Shift** key while selecting the last client in the range. Click **Cancel** to exit the Purge Client Records operation.
5. Click the **Purge** button.

*The Purge Client Records Caution message box appears.*

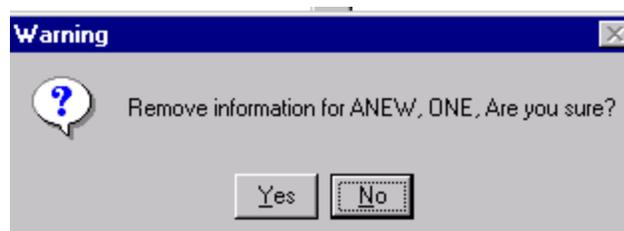


6. Click **OK** to permanently remove these clients from your database. Click **Cancel** to return to the Purge Client Records window.
7. If Patient Management or Daily Program Operations Information exists for any of the clients you selected to purge, a window will appear to let you know which patient Management and Daily Program Operations windows still contain information for each client. Click **Delete** if you wish to delete the Patient Management and/or Daily Program Operations information for the client. Click **Cancel** to return to the Purge Client Records window.



**Note:** *Once deleted, you will not be able to restore any of this information.*

8. A Warning Box will appear. Click **Yes** if you are sure you want to delete this information. Click **No** to cancel.



9. The Purge Client Records Report will appear. This report lists the Client ID, Last Name, First Name, State Case Number, City/County Case Number, and the number of Address, Alias and Phone records which existed for all records purged from the database. Use the horizontal and vertical scroll bars to view the report.



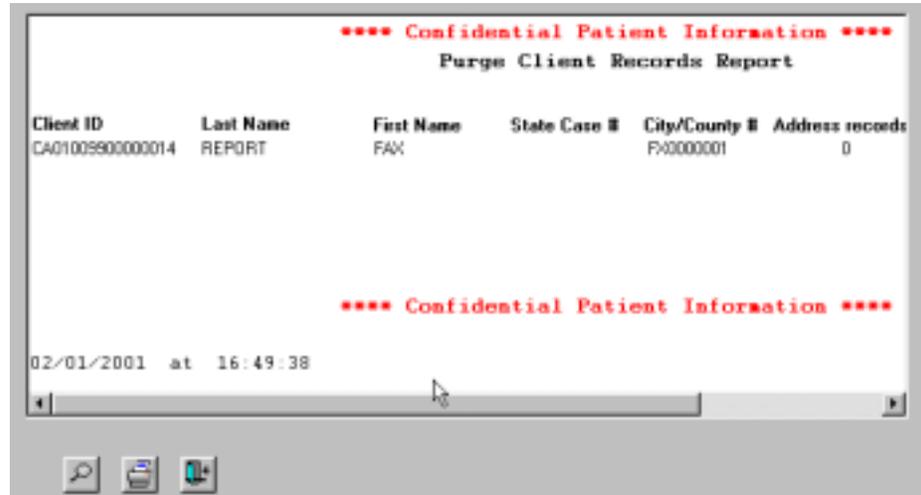
Click the **Magnification** button to modify the magnification of the preview. Select magnification or show rulers and click **OK**.



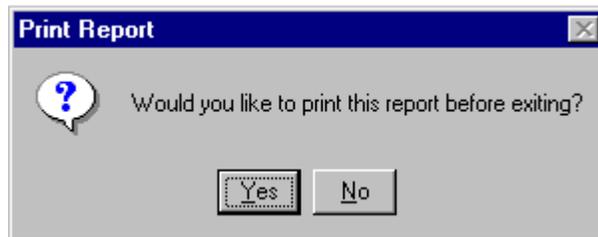
Click the **Print** icon to print the report.



Click the **C**lose icon to close the report window and exit the Purge Client Records function.



10. The Print Report dialog box appears. Click **Y**es to print the report. Click **N**o to exit the Purge Client Records function.



## Preferences

A TIMS System Administrator can use the Preferences section to set options that influence how TIMS operates and manages data.

The options include:

**Client Matching Sensitivity.** Determines the sensitivity of the algorithm used when a search is performed. *Always Search for Matching Client* determines whether or not search is made for Clients with similar names.

**Consecutive days medications missed considered to be non-adherent** (the flag on the Focus Line will become red when a client is non-adherent). This information is site-specific and not used for any Performance Reports.

**Percentage of prescribed doses missed until considered to be non-adherent** (the flag on the Focus Line will become red when a client is non-adherent). This information is site-specific and not used for any Performance Reports.

**Number of appointments missed or canceled until considered non-adherent** (the flag on the Focus Line will become red when a client is non-adherent). This information is site-specific and not used for any Performance Reports.

**Validate surveillance data before saving.** Not available in the current version of TIMS.

**Confirm appointments for tests automatically.** If this is selected, appointments are automatically documented and confirmed when test data is entered.

**Screen timeout.** The number of seconds of system inactivity before TIMS automatically locks up, preventing unauthorized access to sensitive client data. Usually referred to as the TIMS Screen Saver.

**Minimum Memory.** Not available in the current version of TIMS.

The TIMS System Administrator can also use the Preferences section to establish the location of TIMS files such as Data files, Application files, InBox files, OutBox files, Help files, and NETSS files.

**Note:** The TIMS System Administrator has full access to the System Preferences feature. Users with High and Medium security access can view the System Preferences.

### Set System Preferences

To set the System Preferences...

1. Open the **System** module.
2. Open the **System Mgt** menu and select **P**references

Or

- Click the **Preferences** button on the toolbar.



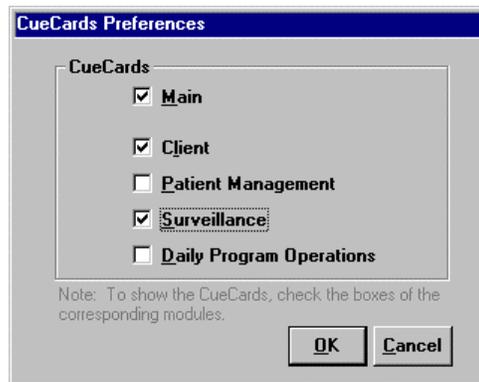
*The System Preferences window is displayed*

3. Select the desired Client Matching Sensitivity.
4. Check the **Always Search for Matching Clients** box if you want TIMS to automatically look for clients with similar names, case numbers, etc. prior to adding a new client.
5. Enter a number of missed medications and appointments to indicate when a client is considered Non-Adherent. This information is used only at the TIMS site.
6. Check the **Confirm Appointments** box if tests should be confirmed automatically.
7. Enter or select the amount of time before the TIMS screen saver should initiate in the Screen Timeout (seconds) field.
8. Click the **F**iles button to input the directory for TIMS files.

*The Location of Files window is displayed.*

9. Enter the directories where the TIMS files are found.  
Most of the file locations will be entered automatically during installation.
10. Click the **S**ave button.
11. Click the **C**lose button to return to the Preferences window.
12. Click the **C**ueCards button.

*The Cue Cards Preferences dialog box is displayed.*



- 13.** Check the boxes beside the module names to indicate when CueCards should appear.
- 14.** Click the **OK** button.
- 15.** Click the **Save** button on the initial Preference screen to save changes on the Files and CueCards windows.
- 16.** Click the **Close** button to exit the System Preferences window.

## Security

TIMS provides the Security option to allow you to change your password and the TIMS System Administrator at the site to enter, modify, view, and delete user security information. Security information consists of the following information:

- User name
- User ID
- Access level
- Password expiration date
- Access to viewing HIV information
- Active or inactive status
- Phone number and site location

Initially, TIMS sets the password equal to the user ID (which is six alphanumeric characters). It is recommended that the user change the password when they login for the first time. The Password screen is available to all users for the purpose of changing their password.

The TIMS Security feature allows the TIMS System Administrator to restrict TIMS usage for certain individuals, as well as define each individual's rights. The rights are defined as System Administrator, High, Medium, and Low. The TIMS System Administrator has access to everything in TIMS. Only one System Administrator can be logged into a TIMS site at a given time.

You can keep a history of all users by making a user inactive rather than deleting the user.

*See Appendix SYS I for more information on security levels.*

**Note:** TIMS System Administrators have full access to the Security feature. Users with High, Medium, and Low security access can change their own password.

### Change Individual User Passwords

This feature enables non-System Administrator users to change their personal passwords.

To change a password...

1. Open the **System** module.
2. Open the **System Mgt** menu and select **Security**.

*The Modify Password dialog box is displayed.*

3. Type your current password in the Old Password box.
4. Type your new password in the New Password box.
5. Re-type your new password in the Type Again To Confirm box.
6. Click the **S**ave button followed by the **C**lose button.

### Changing the System Administrator Password

This feature enables TIMS System Administrators to reset their password.

To change a password...

1. Open the **S**ystem module.
2. Open the **S**ystem Mgt menu and select **S**ecurity.
3. Select the System Administrator User ID that you are currently logged in as from the Security browse list.
4. Click the **E**dit button.
5. Click the **P**assword button.

*The Modify Password dialog box is displayed.*



6. Type your current password in the Old Password box.
7. Type your new password in the New Password box.
8. Re-type your new password in the Type Again To Confirm box.
9. Click the **S**ave button followed by the **C**lose button.

### Add a TIMS User

Only TIMS System Administrators can add a TIMS user.

To add a TIMS user...

1. Open the **S**ystem module.
2. Open the **S**ystem Mgt menu and select **S**ecurity.

The Security window is displayed.

User Name	User Id	Access Rights	View HIV
AMELIA AMAZON	AJA300	System Administrator	Yes
BENJAMIN BRAZOS	BOB399	High	Yes
BARTHOLOMEW HORVATH	BTH001	System Administrator	Yes
ELAINE EAST	EEE000	Low	No
IRENE INDUS	IKI000	System Administrator	No

Show Active Users  
 Show Inactive Users  
 Show All Users

User Name:     User ID:

Access Level:     Yes  No     View HIV Information?

Password Expires:     Is User Active?

Phone:     Location:

3. Click the **N**ew button.
4. Enter the following information:
  - **User Name** (The user's real name, e.g., John Smith, Mary Johnson, etc.)
  - **User ID** (Must be between six and ten characters)
  - **Access Level** (System Administrator, High, Medium, and Low. See *Appendix SYS I* for details.)
  - **Password Expiration Date** (The user will get three grace logins after password expiration to allow them to change their password.)
  - **HIV Information Access Rights**
  - **Active User Status**
  - **Phone Number**
  - **Users Current Location**
5. Click the **S**ave button.

*The new user's password is the same as the user's ID; to maintain security, the password should be changed the first time they log into TIMS.*
6. Add additional users, if necessary. When finished, click the **C**lose button.

### Edit a User's Security or Reset a User's Password

Only TIMS System Administrators can use this feature.

To modify user rights...

1. Open the **S**ystem module.
2. Open the **S**ystem Mgt menu and select **S**ecurity.
3. Select the user from the Security browse list.
4. Click the **E**dit button.
5. Modify the information. If a user has forgotten their password, click the **P**assword button and the password will be reset to the User ID.

*The user's password is reset to the user's ID; to maintain security, the password should be changed the first time they are in TIMS.*

6. Click the **S**ave button.
7. Click the **O**K button.

### Deleting a TIMS User

Only TIMS System Administrators can use this feature.

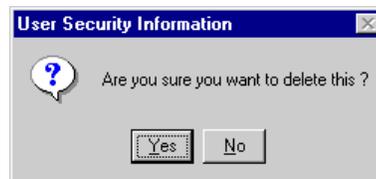
**Note:** To retain a record of the user, remove the worker from Active status. This will prevent the user from logging on to TIMS, but will retain the worker's previous TIMS activity.

To delete a user...

1. Open the **S**ystem module.
2. Open the **S**ystem Mgt menu and select **S**ecurity.
3. Select the user from the Security browse list.
4. Click the **D**efine button.
5. Click the **O**K button on the Warning message box to confirm that you want to delete the selected user. Click the **N**o button to abandon the delete user operation.



6. Click the **Y**es button on the User Security Information message to confirm that you want to delete the selected user. Click the **N**o button to abandon the delete user operation.



## **Spin-Off Diskettes**

**Note:** The Reporting Area should finalize defining any Global UDVs prior to creating the first Spin-Off Diskette. After the first Spin-Off Diskette is created, Global UDVs cannot be created or edited.

**Note:** Call the TIMS Help Desk at (404) 639-8155 prior to starting this procedure.

The Spin-Off Diskette feature is used to create a new Level 1 or Level 2 site and to deliver state and site specific information from the Reporting Area to Level 1 and Level 2 sites. If a Reporting Area wants to establish a new lower level site, they should call the TIMS Help Desk at (404) 639-8155 to exchange information. It is required that CDC know the name, address, phone number, type of installation, and modem numbers of the new site; the Reporting Area will need the license number and the Site ID from CDC. Once this information is exchanged, CDC will mail TIMS installation software to the Reporting Area to be distributed to the appropriate site.

If a Reporting Area wishes to establish a new surveillance site, they first must contact the Division of Tuberculosis Elimination, Surveillance and Epidemiology Branch (SEB) at (404) 639-8117. SEB will determine the readiness of the site to perform surveillance activities. A surveillance site is defined as a TIMS site that will collect, enter, and transmit surveillance data through TIMS. SEB will contact the Reporting Area to discuss surveillance-related activities and personnel at the newly requested site. No license number will be distributed by the TIMS Help Desk until SEB approves the new site.

When TIMS is started for this first time, a message is displayed asking you to enter your Site ID. You are then asked to insert the first Spin-Off Diskette. The registration window will be displayed for confirmation and corrections. Once registration is completed, the site will automatically, via modem, call CDC to register. After the registration process, the TIMS Login screen appears with the User ID entered as SYSADMIN. SYSADMIN is also the password.

Once the initialization of the Spin-Off diskettes is complete, the TIMS System Administrator should update the Preferences, enter User IDs, enter Local UDVs, and enter Workers.

### **Site ID Naming Conventions**

The TIMS Site ID contains a total of six characters. The Reporting Area abbreviation is the first two characters followed by four numbers. The Reporting Area will always contain four zeros (GA0000 for the Georgia Reporting Area). The Level 1 sites use the first two numbers and are 01 through 99 (GA0100 through GA9900). The Level 2 sites use the last two numbers and are 01 through 99 depending on the Level 1 site they belong to (GA0101 through GA9999).

The Site ID is validated to insure the following:

- It is consistent with the Reporting Area; if Georgia, all sites must begin with GA.
- The levels are appropriate; to have a Level 2 site, there must be a corresponding Level 1 site.

## Create Spin-Off Diskettes

The Reporting Area will create Spin-Off Diskettes for all local sites (Level 1 and Level 2).

To create Spin-Off Diskettes...

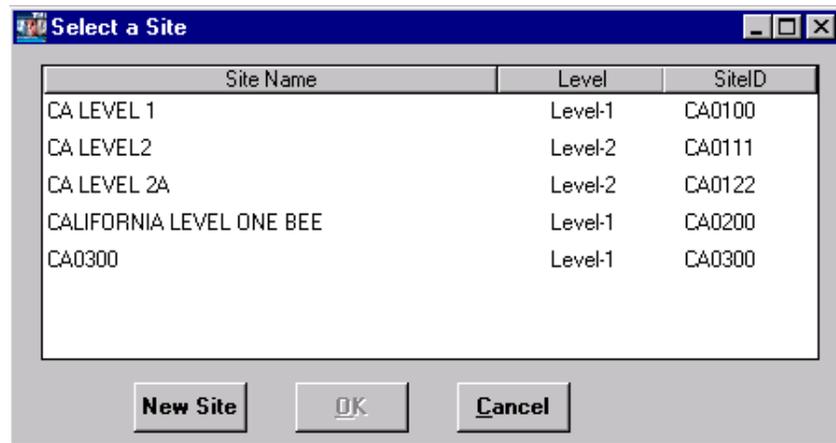
1. Open the **System** module.
2. Open the **Administration** menu and select **Spin-Off Diskettes**.

Or

- Click the **Spin-Off Diskettes** button on the toolbar.



The *Select a Site* window is displayed.



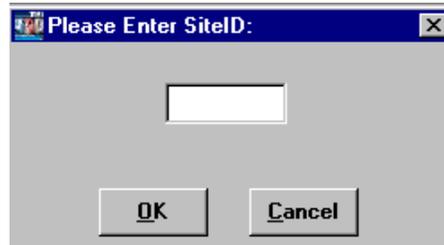
3. If the Site ID is on the list, select it and click the **OK** button, then proceed to step 6. If the site is not on the list, click the **New Site** button.

The *New Site List* is displayed.



4. Click the **New** button.

The Please Enter SiteID dialog box is displayed.



5. Enter the Site ID and click the **OK** button.

The Site Information window is displayed.

<b>Name:</b> <input type="text"/>	SiteID: <input type="text" value="LA0101"/>	Level:
<b>Address:</b> <input type="text"/>	<input type="radio"/> LAN Installation	<input type="radio"/> Rep. Area
<b>Phone:</b> <input type="text" value="( ) -"/>	<input checked="" type="radio"/> Stand-Alone Installation	<input type="radio"/> Level-1
<b>Contact Persons:</b>	<b>Number of Workstations:</b> <input type="text"/>	<input checked="" type="radio"/> Level-2
(1) <input type="text"/>	<b>Number of Users:</b> <input type="text"/>	<b>License Number:</b> <input type="text"/>
(2) <input type="text"/>		

Modem Phone Numbers:		
Number	Description	
		<input type="button" value="Add"/>
		<input type="button" value="Remove"/>

6. Enter the site name, address, phone number, and contact persons. Also select either Stand Alone Installation or LAN Installation. If a LAN installation, enter the number of workstations, number of users, and license number.

Contact the TIMS Help Desk at (404) 639-8155 (if you have not already done so) and give them this information. They will then provide you with a license number and the TIMS installation software.

7. Click the **Add** button in the lower portion of the window.
8. Enter the site's modem phone number in the number column of the Modem Phone Numbers list.
9. Enter a description (usually the site name) in the Description column.

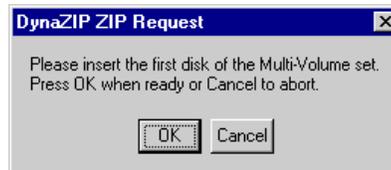
Modem Phone Numbers:	
Number	Description
(404)555-1004	Black Bayou Health Center

10. Click the **Save** button
11. Click the **Spin-Off** button.

12. Click the appropriate drive letter button for the drive you intend to use to create the spin-off diskettes.



13. Insert the first diskette and click the **OK** button



14. If prompted to insert additional diskettes, follow the on-screen instructions.

*When more than one diskette is used, the sequence in which the files are copied must be used by the receiving site to process the diskettes. Label all diskettes in the correct sequence.*

15. When the spin-off process is complete, click the **OK** button.



16. If necessary, repeat the spin-off process for additional sites. Click the **Close** button on the Site Information window when finished.

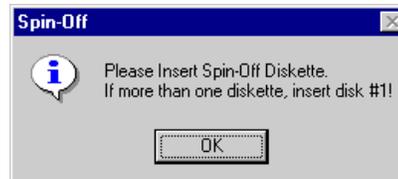
### Register a TIMS Site using Spin-Off Diskettes

TIMS must be installed prior to installing the Spin-Off Diskette(s).

To initiate the Spin-Off Diskette(s)...

1. Start TIMS.

*A message box will be displayed prompting you to insert the first Spin-Off Diskette.*



2. Insert the Spin-Off Diskette.

*If there is more than one diskette, be sure to insert in the order marked.*

A message will appear asking for the Site ID.



3. Enter the **Site ID** and click the **OK** button.

The TIMS Site Registration screen appears.

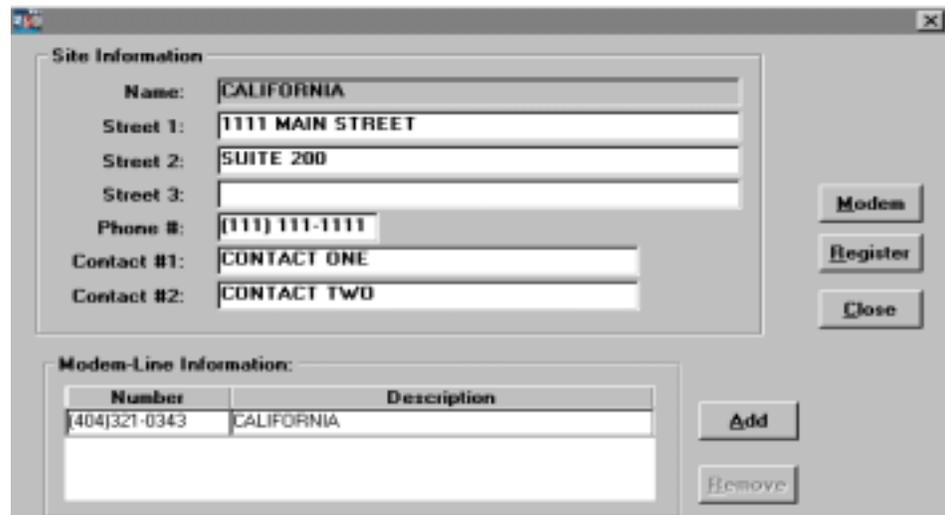


4. Enter the **License Number**.

Call the TIMS Help Desk at (404) 639-8155 if you do not have this number.

5. Click the **Register** button.

The Site Information window is displayed.

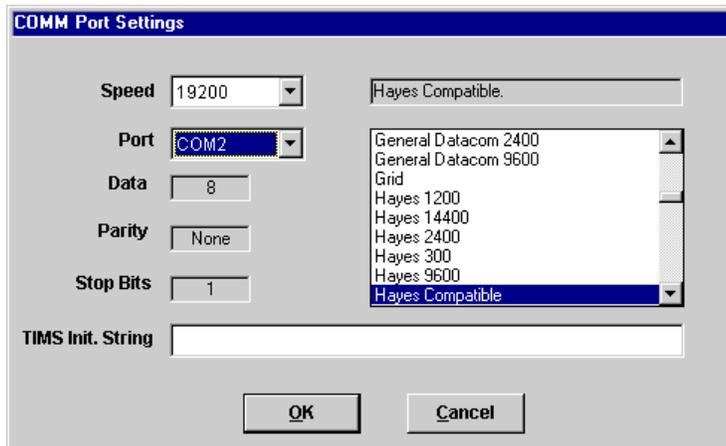


6. Make corrections to the information, if necessary.

You must have at least one modem number listed and the modem must be connected.

7. Click the **Modem** button.

The *COMM Port Settings* dialog box is displayed.



8. Select your COMM Port settings and click the **OK** button.
9. Click the **Register** button.

The *Modem Number* dialog box appears, enabling you to dial CDC and register your site. This is the only time a Level 1 or Level 2 site will connect to CDC.

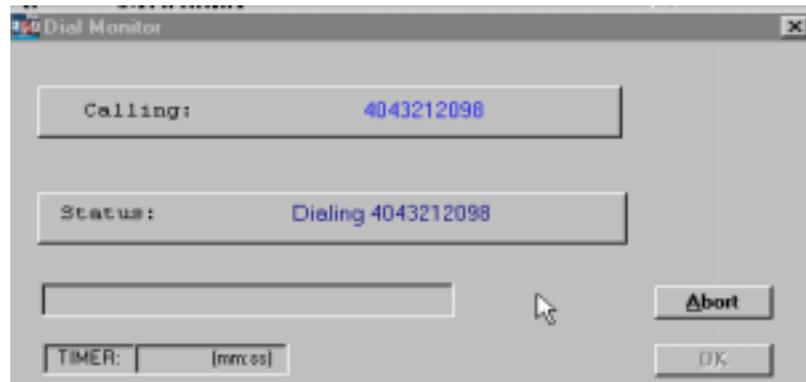


10. Indicate if this is a Long Distance call, and whether you need to include the Area Code. Enter a Dial Prefix or Suffix if needed.

The *Dial Prefix* is used if a number must be dialed from your site before dialing the actual modem number (i.e. 9-555-1212). The *Dial Suffix* is used if a number such as an authorization number needs to be used to access a long distance service.

11. Click the **OK** button.

The dial monitor window will appear.



12. TIMS will initialize the modem to dial CDC and complete the registration process. While connected with the CDC computer, your copy of TIMS will send its Site ID, receive and verify the CDC's Site ID, and transfer a registration file to the CDC site. No user actions are required during the communication session.
13. Click the **OK** button when the registration is complete.



14. The TIMS Login window is displayed. To Login, type your User Id in the User Id field.
15. Type your password in the Password field.  
*Passwords are not case-sensitive: PASSWORD=password = PassWord*
16. Click the **OK** button.

---

## Table Maintenance

TIMS data lists are maintained by the TIMS System Administrator. The Table Names are included with TIMS software and cannot be modified. Some Table Items are initially blank and will need to be created with current, site-specific information.

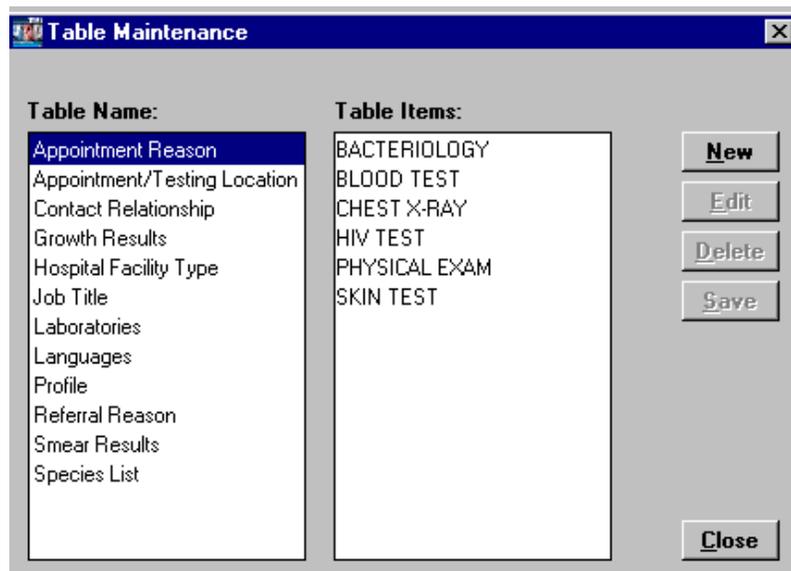
**Note:** Only TIMS System Administrators have access to the Table Maintenance feature.

### Adding Table Items

To add table items...

1. Open the **System** module.
2. Open the **Administration** menu and select **Table Maintenance**.

*The Table Maintenance dialog box is displayed.*

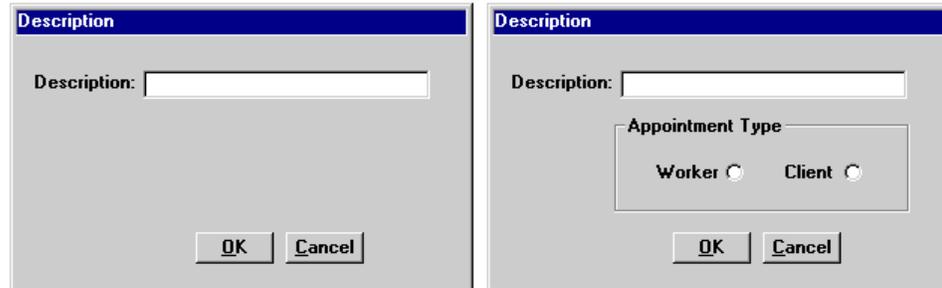


3. Select a Table Name from the list.

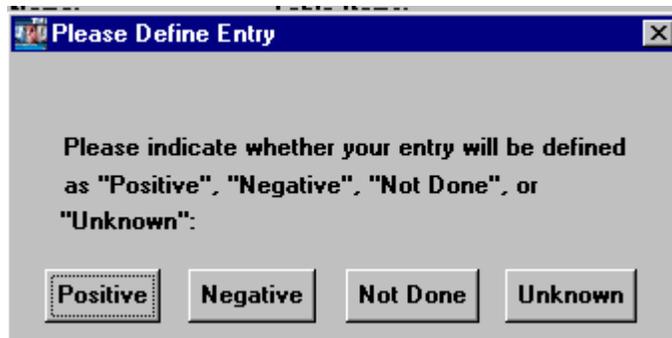
*The available items appear in the Table Items list.*

4. Click the **N**ew button.
5. Enter the Description for the new item.

*If you are adding an Appointment Reason, you must specify whether the appointment is for clients or workers.*



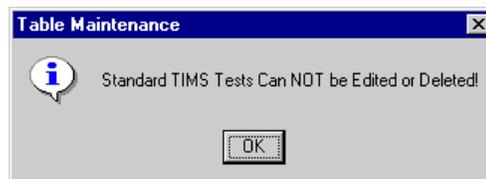
6. Click the **O**K button.
7. If asked to define entry, specify the meaning of the entry by clicking the appropriate button.



8. Click the **S**ave button on the Table Maintenance window.
9. Repeat the process for additional items, if necessary. When finished, click the **C**lose button.

### Editing Table Items

You can change the characteristics of table items that were added at the local site. Standard table items that were part of the original TIMS distribution cannot be modified. In most cases, the Edit button will not be enabled when a standard TIMS table value is selected. In other cases, a message box will appear.

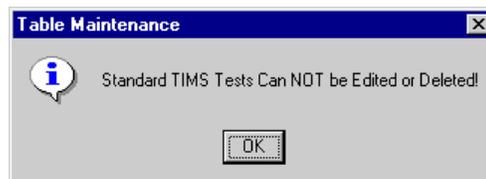


To modify table items...

1. Open the **System** module.
2. Open the **A** Administration menu and select **T** Table Maintenance.
3. Select a Table Name from the list.  
*The available items appear in the Table Items list.*
4. Select the Table Item to be edited.  
*Table Names cannot be edited.*
5. Click the **E** dit button.  
*If the Edit button is not enabled, you cannot change the selected item.*
6. Edit the item.  
*This will change the item wherever it has been selected.*
7. Click the **O** K button.
8. Click the **S** ave button.
9. When you have finished editing table items, click the **C** lose button.

### Deleting a Table Item

You can delete table items that have been added at your site as long as they are not used to store TIMS data. You must remove all references to the item before you can remove it. Standard table items that were part of the original TIMS distribution cannot be deleted. In most cases, the Delete button will not be enabled when a standard TIMS table value is selected. In other cases, a message box will appear.

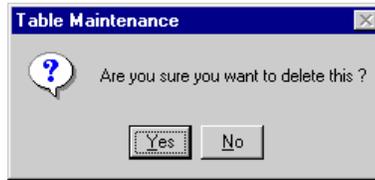


To remove a table item...

1. Open the **System** module.
2. Open the **A** Administration menu and select **T** Table Maintenance.
3. Select a Table Name from the list.  
*The available items appear in the Table Items list.*
4. Select the Table Item to be deleted.  
*Table Names cannot be deleted.*
5. Click the **D** elete button.  
*Note: If the Table Item is currently used in TIMS, it cannot be deleted until all references to the Table Item are removed.*



6. Click the **Y**es button on the Table Maintenance message box.



7. When you have finished deleting table items, click the **C**lose button.

## **Reports**

The System Reports are defined in Appendix RPT SYS with a sample of each report. The reports include Activity Log, Transmission Log, User-Defined Data Dictionary - Global and Local, Unacknowledged Transfer File Reports, Unacknowledged Records Reports, and Users Rights/Access.

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## **Uninstalling TIMS**

To Uninstall the TIMS application...

1. Shut down all applications, including the applications you want to remove.
2. Using the File Manager or Explorer for Windows 95 and NT, open the following file: Windows/Psuninst/setup.exe or Windows/Psuninst/setflop.exe.  
*The Uninstall Programs window will be displayed with all the PowerSoft products listed.*
3. Be sure that only TIMS is checked to be uninstalled. Uncheck the programs you do not want to remove.
4. Click the **Next** button.
5. Continue with the uninstall program. If you have any questions, call the TIMS Help Desk at (404) 639-8155.

### **Caution:**

The Uninstall program lists all the available PowerSoft products installed. If you have other PowerSoft applications or Utilities installed in your system, be very careful to check only the products you want to uninstall.

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