## **Opera Case Investigation Data Entry Instructions**

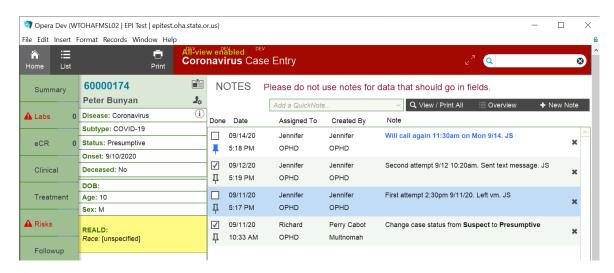
1. <u>Locate case record</u> by typing case ID or address from p1 of the case interview form into Opera search bar. *Note: An Opera search for address will report all Case records (at the top of the results) and Person records (below) that match the address. Person records can be attached to one or more Case records, and to other Person records (same HH, close contact, etc.). When you are entering data, you will be working with Case records.* 



- o In the Search Results window, review the case record(s) that appear at the top. If searching on case ID, one case should appear. Address can return multiple matches.
- Confirm that DOB matches your case interview form. If DOB does not match (this only happens rarely, with in-person paper interviews):
  - Confirm which DOB is correct by checking ELR records attached to that case: Labs → click on lab report entry → Show ELR Details at bottom of screen) If the interview form is correct and Opera is not, update DOB in Opera.
  - If DOB are significantly different, send email to team lead.
- If you find duplicate Person records (same DOB, similar spelling of name, same address, etc), send an email or Opera note to Lex Zhang (<u>alexia.y.zhang@dhsoha.state.or.us</u>) with the duplicated Person IDs.

#### IF CASE WAS NOT REACHED:

Document each call attempt by leaving a **Note** in the Opera case record **Notes** tab – example: "First attempt 3:21pm 9/9/20. Left vm. <Initials>"



ALSO: Enter 1st Attempts on Risk tab as well- see page 6 of this guidance document for instructions.

## IF CASE WAS REACHED, AND DATA IS BEING ENTERED INTO OPERA FROM DATA FORM:

A good data entry practice is to work from the Summary down through each tab in the left sidebar menu in the Opera record, OR systematically through each page and field on the data form, rather than skipping around – whichever way helps to make sure no fields are missed.

As you enter data, Opera highlights fields in yellow, or text in red, and/or with an \* next to old data to remind you to enter/update important fields. Fields that are critical or often missed are also highlighted in red text below.

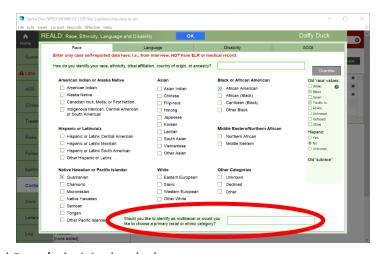
Note: if you select an incorrect radio button, Shift+Click will deselect the option.

- 2. Verify fields in the <u>MIDDLE Summary section</u> are correct and complete:
  - Disease: CoronavirusSubtype: COVID-19
  - Status refer to <u>OHA Novel Coronavirus</u> <u>Investigative Guidelines</u> in order to confirm that the interviewee meets case definitions:
    - Confirmed = presence of positive ELR, even if subsequent negative
    - Presumptive = no positive ELR, 2+ Sx from {SOB, cough, fever, new anosmia, or pneumonia Dx'd by chest X-ray} not explained by alternate Dx, and close contact with a confirmed case
    - <u>Suspect</u> if neither case definition is met. Link as close contact (10) if applicable.
  - Onset: check Clinical section of the data form (top p4) for date of symptom onset.
  - Deceased: No if case is alive, or Yes
  - Enter Sex and Pregnancy Status from bottom p5; enter expected date if Yes (for case).



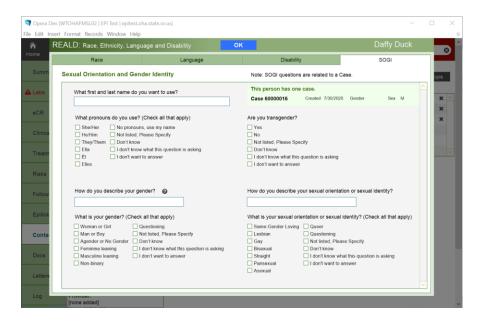
# o REALD (data form p1-3) – also refer to REALD Implementation Guide for best practices

- Click on REALD section of Summary to popup dialogue box and enter data on tabs. From left to right:
  - Race tab: from bottom of p3, enter self-report in top field.
    - Also check



- categorical Race/ethnicity box(es)

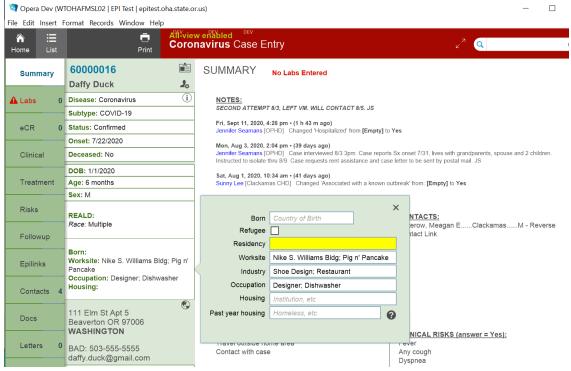
  If multiple self-reported race/ethnicities. a
- If multiple self-reported race/ethnicities, also complete the multiracial or primary race/ethnicity field (red circle above).
- Enter Language preferences from p1 in second tab.
- Enter Disability questions from p2 in third tab.
- SOGI tab: Enter data from p1-2 in right most tab.



 If REALD is missing and other data sources (such as ELR) are available, use "Old Race/Ethnicity" fields.

## Worksite section (data form p7)

- Copy Country of Birth from REALD p3, if volunteered.
- Enter Worksite name WITH location descriptor if there are multiple sites.



- If case has multiple jobs: separate by semicolon. E.g. ABC LTCF; DEF nursing
- Industry and Occupation: first click will give a drop-down menu. Double clicking or hitting Backspace after one click will allow you to type over the field for values not included in drop down menu.
- If multiple industries/occupations, separate by semicolon. E.g site manager; home health nurse
- Verify home address with information from data form (p3). If either is incorrect, or the case gave an alternate mailing address, type <u>over</u> the existing fields and select the appropriate radio button for address type.
  - Entering the zip code will automatically populate city and county.
  - Copies of old addresses and corresponding dates are saved in the Person record, so don't worry about losing existing data.
  - If case is unstably housed, enter in Summary section below REALD.
- Verify phone and enter email address (data form top of p3) by clicking on the phone section and updating as needed.

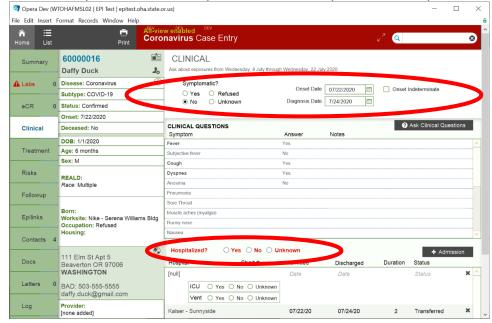
## Continuing down each tab on the LEFT sidebar:

- 3. **Labs** normally updated during ELR processing. Helpful for case investigator to double check.
  - Review ELR to see if data fields make sense.
    - If No: Click on each ELR entry to update Specimen Type, Test Type, and Result per <u>ELR data entry</u> guidance document. (see addl document)
  - If no ELR details are present at the bottom of the lab report details, check the Docs section for uploaded fax of lab report.
  - Note: as of September, ELRs include addl data collection fields (pregnancy status, LTCF residence, healthcare worker, etc.) – these are entered as separate records and <u>can be used to</u> <u>verify case interview data</u>.
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  Followup

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- 4. **eCR** rarely used, mostly for hospitalizations
- 5. Clinical data (data form p4)
  - See example next page
  - Check appropriate **Symptomatic** Yes/No status, and enter **Onset** and **Diagnosis** dates (top red circle below). Avoid checking **Onset Indeterminate** if possible.
  - Important: Make sure to enter Hospitalized status in lower section Clinical page. If case was hospitalized, add an Opera note to County to obtain hospital records.

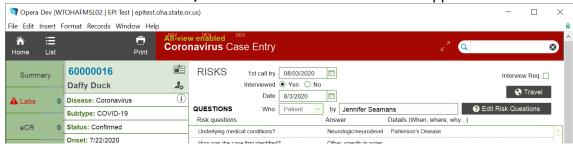


- Click "Ask Clinical Questions" button to pop up dialogue box where you'll enter data for each symptom.
- Record "yes" or "no" from data form p4. Neither box checked = unknown.
- Enter "Other diagnosis/co-infections" as "Other diagnosis/etiology" note under symptoms.

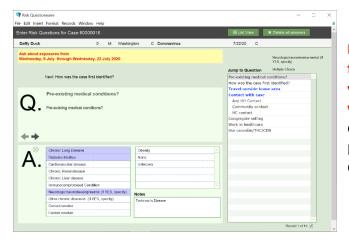
- 6. **Treatment**: leave blank, unlikely to use this section of Opera for COVID.
- 7. Risk tab (data form p5-6)
  - CRITICAL: Make sure to enter date of 1st Attempt at top of page LPHA metric field.



• Click Interviewed = Yes. Date, "Who" and Interviewer fields will appear:



- Fill in **Date** interview completed
- "Who" field = source of interview. Usually Patient if information comes from case, even if case provides the information to a family member or interpreter; occasionally Parent (if minor) or spouse/family member if case is unavailable/unable to communicate.
- Select name of Interviewer. Click twice to enter a name that is not in drop-down menu.
- Click on "Ask Risk Questions" button to open popup & enter information. Make sure to check "None" if none apply, leave blank if blank on interview form.



Double check that timing of risk factor responses falls within the yellow highlighted exposure window (2 weeks prior to onset/test date) at the top of the pop-up. Include notes for each question if details are available.

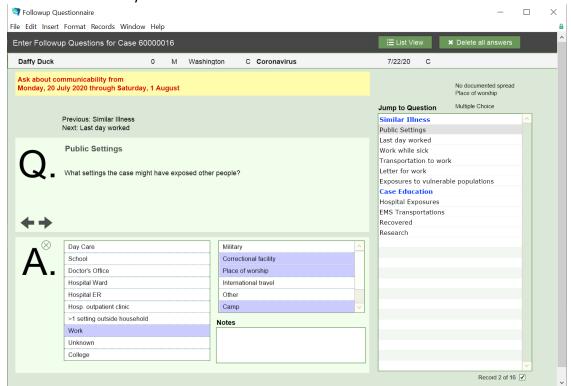
Sources of Risk question responses to enter into pop-up:

Field	Data Form location	Notes
Underlying medical	p5	Select all that apply. Enter
conditions		specifics or additional
		conditions in <b>Notes</b> field. <b>Do</b>
		not include non-chronic
		conditions such as seasonal
		allergies.
Case first identified	top p5	
Travel	top p6	If Travel = Yes, click on Travel
		button above to open Travel
		pop up.
Contact with case	bottom p5	
Congregate setting	p3 <b>lives</b>	Select all that apply
	p7 works/volunteers	
	in congregate setting	
Work in Healthcare	middle p7	
Cannabis	middle p5	If yes, also enter forms.
Gatherings	middle p6	Enter details in Notes field
Attend/work in	middle p7	Enter name of daycare/school
daycare/school		in <b>Worksite</b> field & "student"
		in Occupation field above.

If **Travel** button is clicked, this pop-up appears:

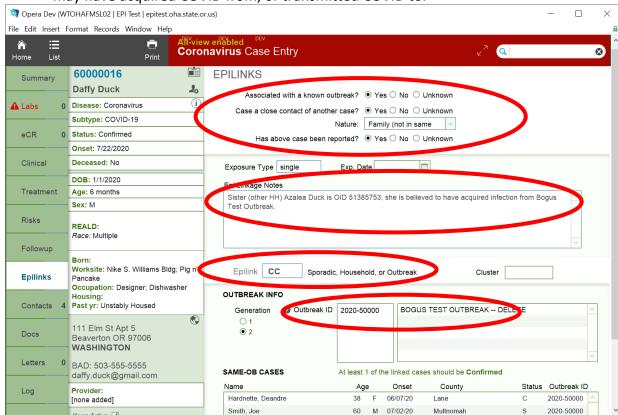


- 8. Follow up tab (data form p2, 4, 6-8) note that this data pertains to infectious period, 2 days prior to symptom onset (or positive test collection date) to present (or end of isolation).
  - Click on "Follow Up Questions" button to open popup & enter information. Check table below for data entry notes and where to find in the data form.



Field	Data Form Location	Notes
Similar Illness	p6	Specify who/relationship in Notes
Public Settings	bottom p6	Select all that apply (above)
Last day worked	p8	
Worked while sick	p8	Click <b>Yes</b> if last day worked is <i>after</i>
		two days prior to onset date, AND
		case was at worksite, otherwise <b>No</b>
		or <b>Unknown</b> . If worksite is <u>not</u> a
		known OB, send Opera note to
		County staff to flag case.
Work transportation	middle p8	Select all that apply.
Letter for work	p7	
Wraparound services	bottom p2	
Exp to vulnerable pop	middle p3 AND	Select all that apply. Assign note,
	bottom p7	**Notify County or team lead**
Case received	р9	Yes if post interview script was
education		completed
Hospital Exp	bottom p4	
EMS	bottom p4	
Recovered	middle p4	

- 9. Epilinks tab also refer to OHA Novel Coronavirus Investigative Guidelines
  - Critical fields circled in red below.
  - Record responses to known outbreak, close contact of case, exposure type/date.
  - Describe in notes any relevant details including **case IDs of known contacts** whom case may have acquired COVID from, or transmitted COVID to.



\*\*IMPORTANT\*\* Epilink code=how case most likely acquired COVID - data form p9)

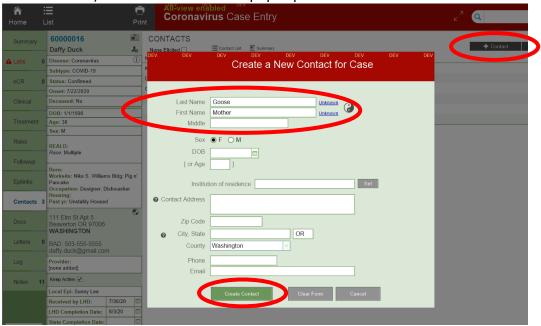
<b>Epilink Code</b>	Acquired from	
НН	Household member(s)	
CC	Close contact(s) not in HH	
ОВ	Workplace, mass gathering, or identified OB - *enter OB #	
SP	Community acquired (no known or possible source)	
CL	No longer used	

#### **NOTES:**

- Expected infection <u>source</u> (other case IDs listed in Notes, or outbreak site) should have earlier symptom onset or test date.
- Prioritize closest contacts in determining code. If case had both HH and CC contacts, prioritize HH.
- If case acquired COVID directly from an outbreak: enter OB Epilink, OB ID and Gen 1.
- If case acquired from a HH or CC, who acquired it from an OB: enter OB ID and Gen 2.
- When OB ID is entered, Opera will auto populate OB name and line list of OB cases.

#### 10. Contacts tab: enter Household, Work, other Close Contacts (data form p8-9)

• Click "+ Contact" button in upper right. Enter contact's information (at minimum first and last name) in search window that pops up:



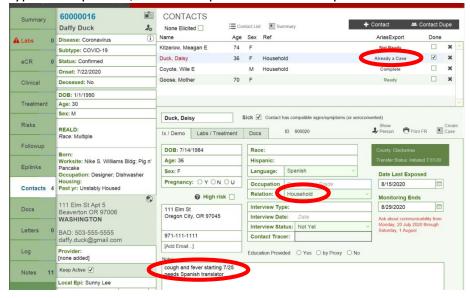
If Opera has record(s) with similar results (including those that differ slightly), they will appear in the next window. Click on the green Details button to examine records. Click Use this Contact to link contact if found, otherwise Ignore Match, Create New Person.



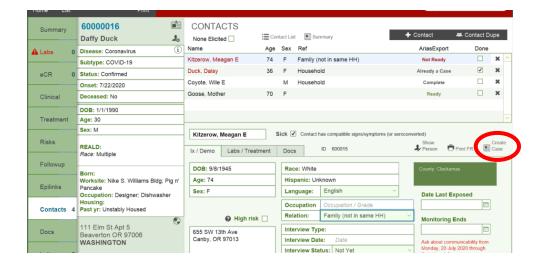
- Auto-populate addl HH members (see next page for screenshot)
  - Double clicking on linked HH member in Contacts list → brings up their contacts
  - Click on "Contact Dupe" button
  - Select interviewee case record in the TO field
  - Checking boxes of contacts to be duplicated, then "Duplicate Contacts"
  - Might create duplicate contact in interviewee record. Click X to delete.

Click on each linked Contact to update record:

• Close contact who is already a case: Make sure "Already a Case" appears in the AriasExport field of the Contact line list. In the Contact details below, enter Relationship type as drop down, with description of relationship and linked case ID in Notes field.

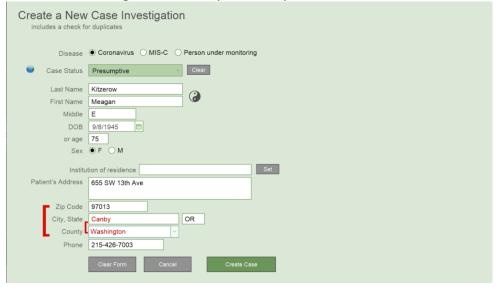


- Close contact who is already being monitored: In the Contact details below, make sure
  ARIAS Export Ready is <u>unchecked</u>, and Not Ready appears in the AriasExport field
  above. Update Relationship and Date Last Exposed fields. Enter relationship and linked
  case ID in Contact Notes. <u>Assign Opera Note to County staff to manually update the</u>
  Monitoring End Date in ARIAS.
- Close contact who meets the presumptive case definition: \*\*Ensure that case meets
   Investigative Guidelines (confirmed to have 2 symptoms from the list of 5, and close
   contact with <u>Confirmed</u> case) before creating new Presumptive case.\*\*
   After entering/linking the person information, click on "Create Case" on right of Contact
   Details section:

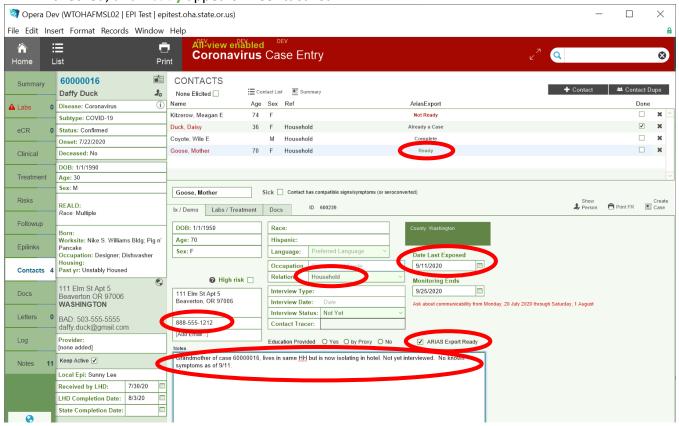


#### In the Create Case pop-up window:

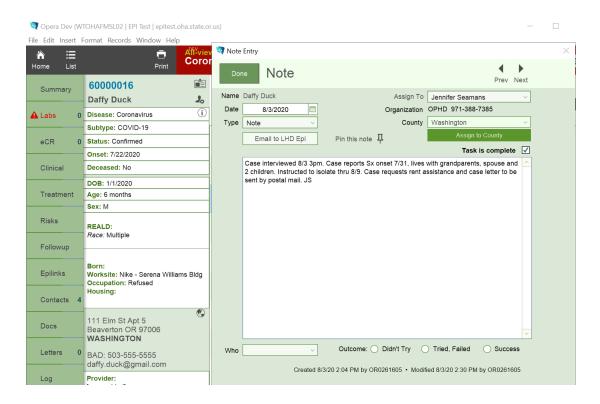
Disease = Coronavirus, Case Status = Presumptive. County defaults to same as case – in the example below, case actually resides in a different county, and the red bar appears to highlight the discrepancy. Once County is corrected, red bar will disappear. Once case is created, assign to correct Epi – add Opera note if interview is needed.



Close contact who is not a confirmed or presumptive case (new PUM): Enter
 Relationship drop-down. Date last exposed = last contact with case - if same HH, case's isolation end date. Enter/confirm phone number. Make sure Arias Export Ready is checked, and Ready appears in Contact list.



- For new PUM entry, also add in Contact Notes section:
  - Date, relationship to case, and case ID
  - Any information about symptoms
  - Whether any interview or education has been relayed or mailed
  - Any special circumstances for the contact tracer to be aware of (high risk group, worksite if known, language preference/interpreter needs, etc.)
  - Initials
- 11. **Docs** tab (optional upload electronic copy of data form): Upload PDF  $\rightarrow$  Case Interview.
- 12. Create new **Note** summarizing the case. Suggested wording:
  - Case interview completed by <interviewer> on <Interview date>, data entered on
     <today's date>. [Include key details such as outbreaks, high risk/vulnerable contacts, number of PUMs.] Sent \*CHD case letter via postal mail. <Initials>



Assign additional follow-up needs as notes to team lead or County staff as indicated on the SOP. Make sure to include **separate notes to County staff** (in addition to the summary note above) about any urgent situations such as congregate setting, exposure to vulnerable populations, pregnancy, etc. – in addition to contacting County or team lead by phone. For example:

- Case worked while sick 9/9-9/10- at ABC skilled nursing facility, patient care. <Initials>
- Case is MSFW, requests assistance accessing Worker Relief Fund for rent. <Initials>
- Case LTFU please send Unable to Reach letter. <Initials>
- Please send case letter via email to <email address>. <Initials>