

Do you want to know the details of the Open Cases in your jurisdiction? Follow the steps outlined below and you can pull the data directly from WVEDSS. There are actually several different methods you could use to produce this same result, and if you already have your own method, that is fine. I have tried to lay out the steps below to be the most foolproof way of listing out your open cases with very little chance that you will accidentally omit any cases of interest. Yes, this may seem like a difficult process, but with a little practice you will be able to do this quickly and painlessly!

- 1) Log on to WVEDSS by typing your password into the "User Name" field of the WVEDSS login screen.
- 2) Click on "Reports" at the top of the home screen.
- 3) The last entry on the next screen is "Default Report Section." Click on the "+" beside the Default Report Section to show the entire list of reports available.
- 4) About halfway down the list you will see a report titled "Line List of Individual Cases with Program Area and Jurisdiction Security." Click the "Run" link beside this report title.
- 5) On the next page, you will see a screen that has 3 tabs above the report title. The tabs are labeled "Basic Filter," "Advanced Filter," and "Column Selection."
  - a. For the Basic Filter tab, click the "Select All" box to export all the reportable conditions.
  - b. Next, click on the Advanced Filter tab. Click on the down arrow beside the "Field" space to see a list of all the field headers available. Scroll down the list and click on "Investigation Status Code."
  - c. Click on the down arrow beside the "Logic" space. Select "Equals."
  - d. In the "Value" space, type a capital O. Click the "Insert" button below the Value space. You will now see this filter appear in the Advanced Criteria List at the bottom of the screen. These steps (b, c, and d) insert an advanced filter for your report that will produce a list of cases that are currently Open.
  - e. Go back to the "Field" space and click the down arrow again. Scroll down the list and click on "Jurisdiction."
  - f. Click on the down arrow in the "Logic" space and then select "Equals."
  - g. In the "Value" space, type the name of your county followed by ",WV" with NO SPACES. For example, "Kanawha,WV"
  - h. Click on the "Insert" button below the Value space. As before, you will now see that this Jurisdiction filter has been added to the Advanced Criteria List at the bottom of the screen. Now we need to join these two filters using a connector.
  - i. Under the "Connectors" section, click the "AND" button. The AND connector is added to the Advanced Criteria List at the bottom of the screen. Now we need to move the AND connector so that it joins the two filters, producing a list of cases that are Open AND that are from the county in which you are interested.
  - j. In the Advanced Criteria List window, click on the "AND." Click the up arrow "^" to the right of this window, and you will see the AND move up between the Investigation

Status Code Equals "O" filter and the Jurisdiction Equals "Kanawha,WV" filter. Now we are ready to move to the "Column Selection" tab near the top of the screen.

- k. For the Column Selection tab, click on the double right arrow button (>>) located between the "Available Columns" and "Selected Columns" fields. This will export all the standard WVEDSS fields to your file.
- 6) Click the "Export" button near the bottom of the page to create your data file. Be patient – the export process can take several seconds. Click on the "Open" option on the next pop-up screen.
- 7) Depending on how your computer is set up, you may see a "Windows Security" pop-up window at this point. If you do, just click the "Cancel" button on this window.
- 8) After several seconds, you should see your data file displayed in Excel. At this point, the file is in Comma Separated Variables (CSV) format. Next we will convert this to a standard Excel format. You can log off and close the WVEDSS screen at this point.
- 9) Click on the "A" label in the data file to select the first column. At the top of the screen, click on the "Data" tab. About halfway across the screen, you will see a "Text to Columns" option – click it.
- 10) You will see a pop-up wizard to guide you through the remaining steps.
  - a. For step 1, select the "Delimited" option, then click "Next" at the bottom of the window.
  - b. For Step 2, un-check the "Tab" box, and then check the "Comma" box.
  - c. You can ignore Step 3 and just click the "Finish" button at the bottom of the window.
- 11) Click on cell A2 in your data set, then click "View" at the top of the screen. About halfway across the screen you will see a "Freeze Panes" option – click it. Select the middle option (Freeze Top Row). This keeps the column headers visible even if you scroll down through your data set.
- 12) At this point you should save the file. Under the "File" tab at the top of the screen, click "Save As." Again, depending on your computer set-up, you may see another "Windows Security" pop-up screen. As before, just click "Cancel" at the bottom of the window. You may see this pop-up more than once, so just click "Cancel" until you see the normal Excel Save As screen.
  - a. Enter a file name in the "File name" field. I usually use the MMWR Week as the file name.
  - b. Next, you need to change the file type. Currently, the file is a text file, but you want to change it to a standard Excel file format. Click on the "Save as type" button and you will see a drop-down menu. Select the top item in the menu (Excel Workbook), and then click the "Save" button at the bottom of the window.

The list you have produced contains all of the Open cases for your county. However, there are some cases which we normally exclude from the Open Cases Report. These next steps describe how to remove those cases.

- 1) In your Excel file, click on the button at the far upper left of your data (above the 1 row and to the left of the "A" column). This selects your entire data set for sorting.
- 2) Go to the "Home" tab at the top of the screen.
- 3) Click on the "Sort and Filter" icon near the right of the screen, and select "Custom Sort."

- 4) In the pop-up screen, make sure the “My data has headers” box is checked, then click on the down arrow in the “Sort by” field to see a list of the column headers in your data file.
- 5) Select “Condition” and then click “OK.” This will sort your entire data file, putting the Conditions in alphabetical order.
- 6) Next, select the rows you would like to delete from the file. We do not include **animal bites, CRE, Hep B chronic, Hep C chronic, or rabies (animal)** cases when evaluating Open cases. Scroll down through your list, select these conditions, right click the mouse and select “Delete.”
- 7) Finally, on occasion there will be Open cases that have been determined to be “Not a Case.” This sometimes happens when a Local Health Department has investigated a case, determined that it does not meet the case definition, and passed that information along to the state health department. The state health department has simply not yet closed the case, so you do not need to worry about Open, Not a Case records. Either you can just ignore those cases, or you can remove them using the following procedure.
- 8) Repeat steps 1-4 above. (Select the entire data set, Home tab, Sort and Filter, Custom Sort.) Then select “Case Status” from the drop down list and click “OK.”
- 9) Select all rows with “N” in the Case Status field, right click, and select “Delete.”
- 10) Save your file again now. This is your final data set showing all of your current Open cases.

#### **Special instructions for Regional Epidemiologists.**

If you are a Regional Epi, you may want to pull the Open cases for all the counties in your region at one time. To do this, all you need to do is to add additional jurisdictions to your Advanced Filter. After you have completed Step 5J on Page 2, do the following:

- 1) On the Advanced Filter tab, click on the down arrow in the “Field” space again and select “Jurisdiction.” In the “Logic” space, select “Equals.” In the “Value” space, type the name of another county in your region, followed by “,WV” with NO SPACES.
- 2) Click the “Insert” button below the Value space.
- 3) Next, click the “OR” button under the “Connectors” heading. You will see the OR connector appear in the Advanced Criteria List window.
- 4) Click on the OR in this window, and click the up arrow “^” to move the OR up between the two jurisdictions.
- 5) Repeat this process for all of the counties in your region.
- 6) Continue with Step 5K on Page 2 and you will have a list of all the Open cases in your region. Following Step 10 on this page, you can sort this file by Jurisdiction to group the cases by county for convenience.