June 2022

Syphilis Case Report and Data Entry Manual

STD PROGRAM

Oregon Health Authority

PUBLIC HEALTH DIVISION

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Contents

- Contents 3
- Background information for case investigation 5
- General ORPHEUS guidance and best practices 6
- Orpheus home screen 8
- Settings 14
- Person record 18
- Demographics pane 22
- Labs tab 35
- eCR tab 42
- Clinical tab 44
- Treatment tab 48
- Risks tab 50
- Comorb tab 58
- Contacts tab 59
- Epilinks tab 69
- Docs tab 71
- Letters tab 74
- Log tab 78
- Notes tab 79

» How To 84
» Transfer a new diagnosed case or contact to another county 84
» Accept contact transfer 84
» Update an address 86
» Determine the residence of a case 86
» Remove a linked ELR and link to another case 87
» Process an ELR and find Orpheus records 89
» Link an ELR to an existing Orpheus record with different names 92
» Process an eCR and find eCR records for a patient 92
» Duplicate an ELR 93
» Reading an ELR 97
» Reach technical support 99
» Appendix 100
» CDC required and core variables 100
» Disposition codes 101
» Orpheus changes 102

Background information for case investigation

This manual is intended to introduce new disease case investigators to STDs investigation in Orpheus (The Oregon Public Health Epidemiologists' User System). Orpheus is a joint database development and integration effort co-sponsored by the Acute and Communicable Disease Prevention (ACDP) and the HIV, Sexually Transmitted Disease and Tuberculosis (HST) Programs within the Oregon Public Health Division. Orpheus is an integrated electronic disease surveillance system intended for local and state public health epidemiologists and disease investigators to efficiently manage communicable disease reports. Orpheus is a person-centered database where a person record is associated with a case record. Each case record is divided into tabs and this document is organized by the case's tabs. All data and screenshots in this document are fictitious.

Information gathered during a case investigation helps prevent new infections and helps the program understand the epidemiology of each disease. Information gathered during a disease investigation informs the work of epidemiologists and policy makers at local public health authorities (LPHAs), Oregon Health Authority (OHA) and the Centers for Disease Control and Prevention (CDC).

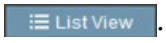
General ORPHEUS guidance and best practices

This manual provides data entry guidance and HST's recommended best practices. Local public health authorities (LPHAs) are welcome to supplement this guidance to suit local purposes. Consult local communicable diseases leaders for local policies and procedures that supplement this guidance, if applicable.

Reporting cases includes creating a case in Orpheus with complete information on the core variables. Report STDs within one local health authority working day. Information can be gathered from electronic health records or electronic lab records. If an LPHA receives a lab report that does not meet the presumptive or confirmed definition for syphilis, open a case with an under investigation status. If further documentation supports a confirmed or presumptive status, change the case status. For disease case investigations, you must complete all required fields.

Best practices

When answering questions in the Clinical tab and Risk tab, follow these best practices:

- With a few exceptions, leave any unasked questions blank. This may be necessary if your interview was interrupted and will be finished later.
- Single choice questions: Yes, No, Refused or Unknown
  - » Click "Yes" or "No" when applicable.
  - » Click "Refused" if the case declined to answer. The case does not need to use the word "refused."
  - » Click "Unknown" if the case cannot definitively answer.
- Multiple-choice questions: Select "all that apply" or "none."
  - » If a multiple-choice question has a long list of options, it will have a scroll bar. You may need to scroll to see the "None" answer.
- Answering a question will advance the questionnaire to the next question. You can also click the navigation arrow ➡ to advance to the next question.
- You can also click the "List View" button to see an alternate questionnaire interface. 

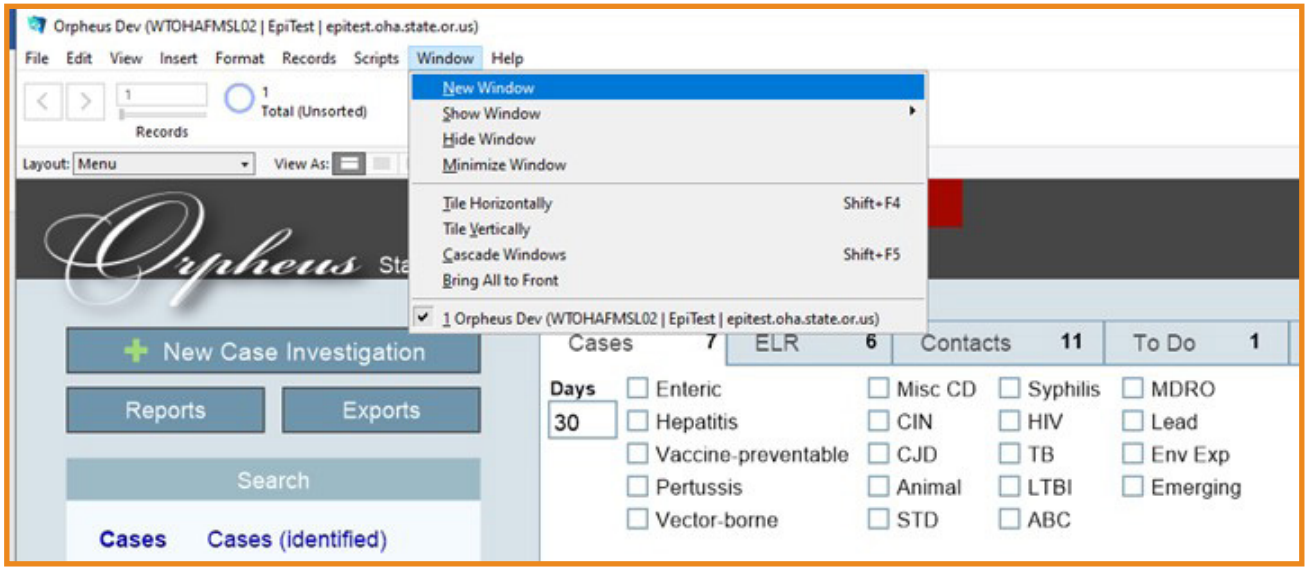
. The list view may be quicker or preferred for some users.

Copying and pasting into Orpheus

When you need to copy and paste, Orpheus is more responsive when using the keyboard shortcuts “Control+C” to copy and “Control+V” to paste. Right-clicking on the mouse is slower and less responsive than keyboard shortcuts. When pasting something from outside Orpheus, it will often use a font that is very difficult to read. After pasting, pressing “Control+Z” once will change the font to the Orpheus default. Pressing “Control+Z” a second time will remove whatever was pasted.

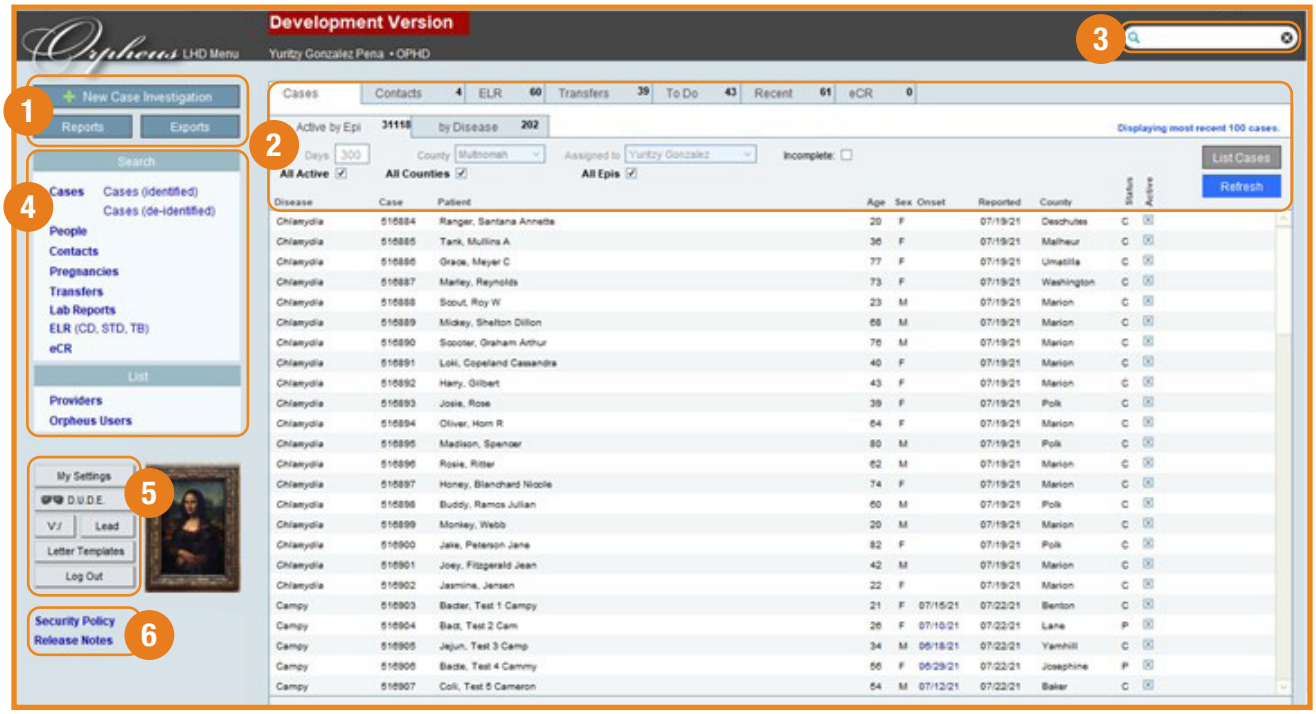
Multiple Orpheus windows

Orpheus allows you to have multiple windows open at the same time. To open a new window from any screen, open the “Window” menu in the ribbon and click “New Window.” You can also navigate between multiple windows from this menu.



Orpheus home screen

The home screen provides navigation within the Orpheus system. Below are the key features you should become familiar with before managing your cases.



1 **New Case, Reports and Exports buttons** — These buttons are at the top left of the screen.

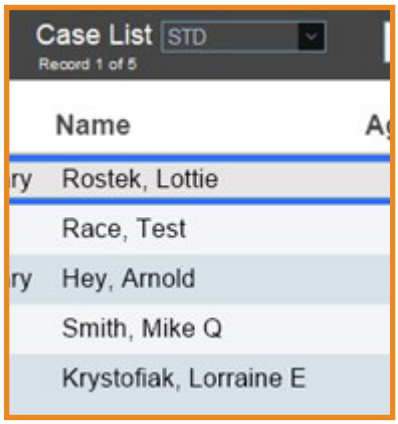
- **Reports:** Click this button to view and create reports of data.
  - » Inside the report's menu, there is a "Tableau" button. Click the "Tableau" button to browse a selection of interactive charts and visualizations using Orpheus data.
  - » The report data is updated overnight and current to yesterday. The reports use few database resources and do not contribute to systemic slowdowns.
- **Exports:** Click this button to export case and person data. This is mostly used by epidemiologists, leads and data analysts.
- **New Case Investigation:** Click this button to create a new case record for STDs, confirmed, presumptive, suspect or under investigation, from a faxed or provider phone call report.

2 **Cases, ELR, Contacts, To Do, Recent, and eCR tabs** — Click each tab to navigate between them. The order of the tabs might be different than your home screen. The order is based on your preference and can be change on settings. See the "Settings" chapter.

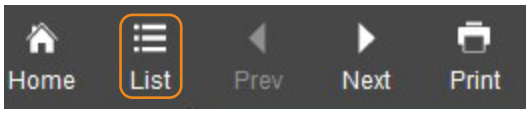
- **Cases tab:** The Cases tab shows a list of cases. Your user settings determine which cases are listed.
  - » **Active by Epi tab:** This tab shows active cases where the "Local Epi" field is assigned to you. You can also view cases assigned to a specified user or, if the "All Epis" box is checked, to all users.
  - » **By Disease tab:** This tab shows cases separated by disease, for example, STD, syphilis cases.
  - » **Refresh button:** If the content in each tab does not automatically appear or update, click the "Refresh" button to populate or update the tab's content.
  - » **List Cases button:** Click this button to open a line list of the cases shown in the cases tab.

    Choose between several different line list display formats from the drop-down menu at the top of the page. Orpheus will remember the line list in the background, so try each and see what you like:

    - STD case list allows you to see specific fields such as "Stage."
    - Standard case list is the default format for line lists.
    - Address case list includes the cases' addresses.
    - Notes case list includes the text and details of ToDo Notes.



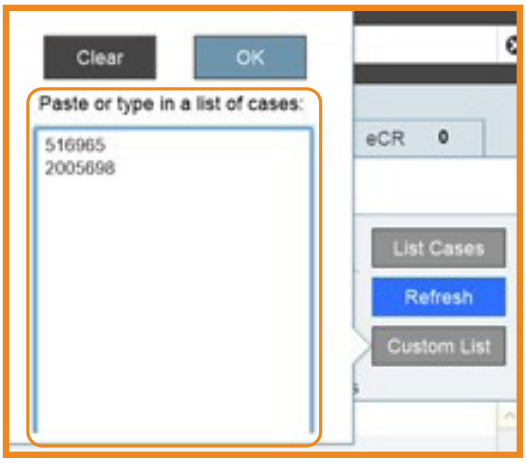
When you open a case record from the line list, Orpheus will remember the line list in the background. You can then navigate between the cases using the "Next" and "Previous" buttons. Return to the line list by clicking the case record's "List" button.



If you navigate outside of the list, such as by going into the Person record or another case for the person, the list will not be saved.

- » **Custom List button:** This button is used to customize which exact cases show up on your Cases tab. Type or paste a list of case IDs into

the "Custom List" menu. Then click "OK" to view these cases in the By Disease tab. When working on multiple cases at once, you can paste or type a list of case IDs.



- **Contacts tab:** This tab allows you to customize the way you view your contacts. You can sort contacts by days, county and assigned epi and whether they are incomplete records.
  - » **Days box:** The box allows you to select the timeframe of ELRs shown in the pane.
  - » **County:** The default is your assigned county.
  - » **Assigned Epi:** The default setting is your name.
  - » **List Contacts button:** Click this button to show contact records in a flexible contact list.
- **ELR tab:** The ELR (electronic lab record) tab allows you to view and process ELRs for your county.
  - » **Days box:** The box allows you to select the timeframe of ELRs shown in the pane.
  - » **Unprocessed:** Click this button to show only unprocessed ELRs for your county. This is the default setting.
  - » **Processed:** Click this button to show only processed ELRs for your county.
  - » **Both:** Click this button to show both unprocessed and processed.
  - » **Disease:** Click this button and unclick the box "Any disease" to show a specific disease.
  - » **County:** This box defaults to your assigned county.
  - » **List ELR:** Click this button to open a line list of the ELR shown on the ELR tab.
- **Transfers tab:** The Transfers tab allows you to view cases and contacts transferred from another jurisdiction to your LPHA.
  - » **Refresh button:** If the content in each tab does not automatically appear or update, click the "Refresh" button to populate or update the tab's content.

- **Case Transfer:** This box shows all the cases transferred to the county assigned on the "To County."
- **Contact Transfer:** This box shows all the contacts transferred to the county assigned on the "To County."

- **ToDo tab:** This tab shows incomplete to-do/notes.
  - **Incomplete Notes for:** This box defaults to your name and can be changed to another local epidemiologist (Epi). Changing the name is helpful when covering for another Epi.
  - **Just Mine:** Click this tab to see ToDo notes assigned to the Epi selected above.
  - **Unassigned:** Click this tab to see ToDo notes assigned to the local health department (LDH).
  - **Our Notes:** Click this tab to to see the ToDo notes assigned to the LHDs and to yourself.
  - **Show Future:** Click this tab to see notes that were set to a date in the future. It is useful to follow up on case's treatment or lab results. Once you click "Show Future," the tab name will change to "Hide Future."
  - **List Cases:** Click this button to open a line list of the cases shown on the Cases tab.
  - **List To Dos:** Click this button to see all the To Dos assigned to you.
- **Recent tab:** The Recent tab shows the most recent records that you have viewed in Orpheus. Person, Case and ELR records for the same person are shown as separate entries.
- **eCR tab:** The eCR tab allows you to view and process eCRs (electronic case records).
  - **Days box:** The box allows you to select the timeframe of ELRs (electronic lab records) shown in the pane.
  - **Unprocessed:** Click this button to show only unprocessed ELRs for your county.
  - **Processed:** Click this button to show only processed ELRs for your county.
  - **Both:** Click this button to show both unprocessed and processed.
  - **Unproc:** Click this button to list ELRs that have not been processed by LHDs.
  - **List eCR:** Click this button to open a line list of the eCRs shown on the eCR tab.
  - **Refresh button:** If the content in each tab does not automatically

appear or update, click the "Refresh" button to populate or update the tab's content.

3 **General search** — This bar allows users to search the entire database indiscriminately. The Quick Find Search bar is not recommended since it is more resource intensive for Orpheus than the Custom Search and Reports options.

- **Quick find search bar:** This bar is a google-like search feature. To search by specific fields, or run a faster search, click the blue magnifying glass when the quick find search bar is blank. This will open the Cases (identified) search feature.

  - » You must type at least three characters for the Quick Find Search to work.

4 **Custom search** — These search options are the preferred way to search for people or cases as it uses fewer database resources. The search bar in the upper right corner does a broader search but can contribute to system slowdowns.

- **Cases (identified):** Click this button to search for anything related to a case.
- **Cases (de-identified):** Click this button to search the de-identified report table for case details, excluding patient details.
- **People:** Click this button to search for a specific person record.
- **Contacts:** Click this button to search for a specific contact of a case. Within this function you may also search for related cases and transfers.
- **Pregnancies:** This search is based on the pregnancy table.
- **Transfers:** Click this button to search county transfers of cases or contacts. This button is not located on the state menu home screen.
- **Lab Reports:** Click this button to search for test results. This includes processed ELR and other test results that were manually entered into the Labs tab of a case record.
- **ELR Records:** Click this button to search for test results reported by electronic lab report.
  - » Negative test results are automatically processed and ignored by Orpheus. Positive test results for syphilis are manually reviewed and processed by the LPHA. To view negative test results, search for processed ELR records. Not all negative results are reported.
- **eCR Search:** Click this button to search for electronic case reports by demographics and eCR information.
- **Providers:** Click this button to search for doctors, hospitals, medical centers, laboratories and other medical contacts of cases.

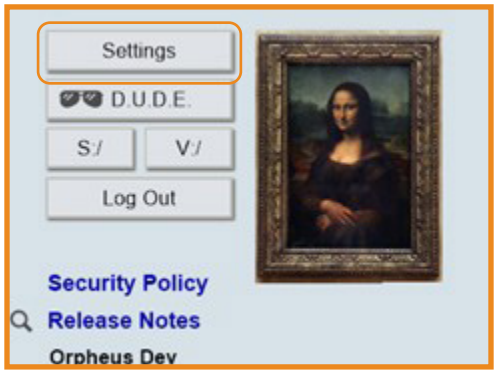
- **Orpheus Users:** Click this button to search for Orpheus Users. This is useful if you need to find a contact person at an unfamiliar jurisdiction.

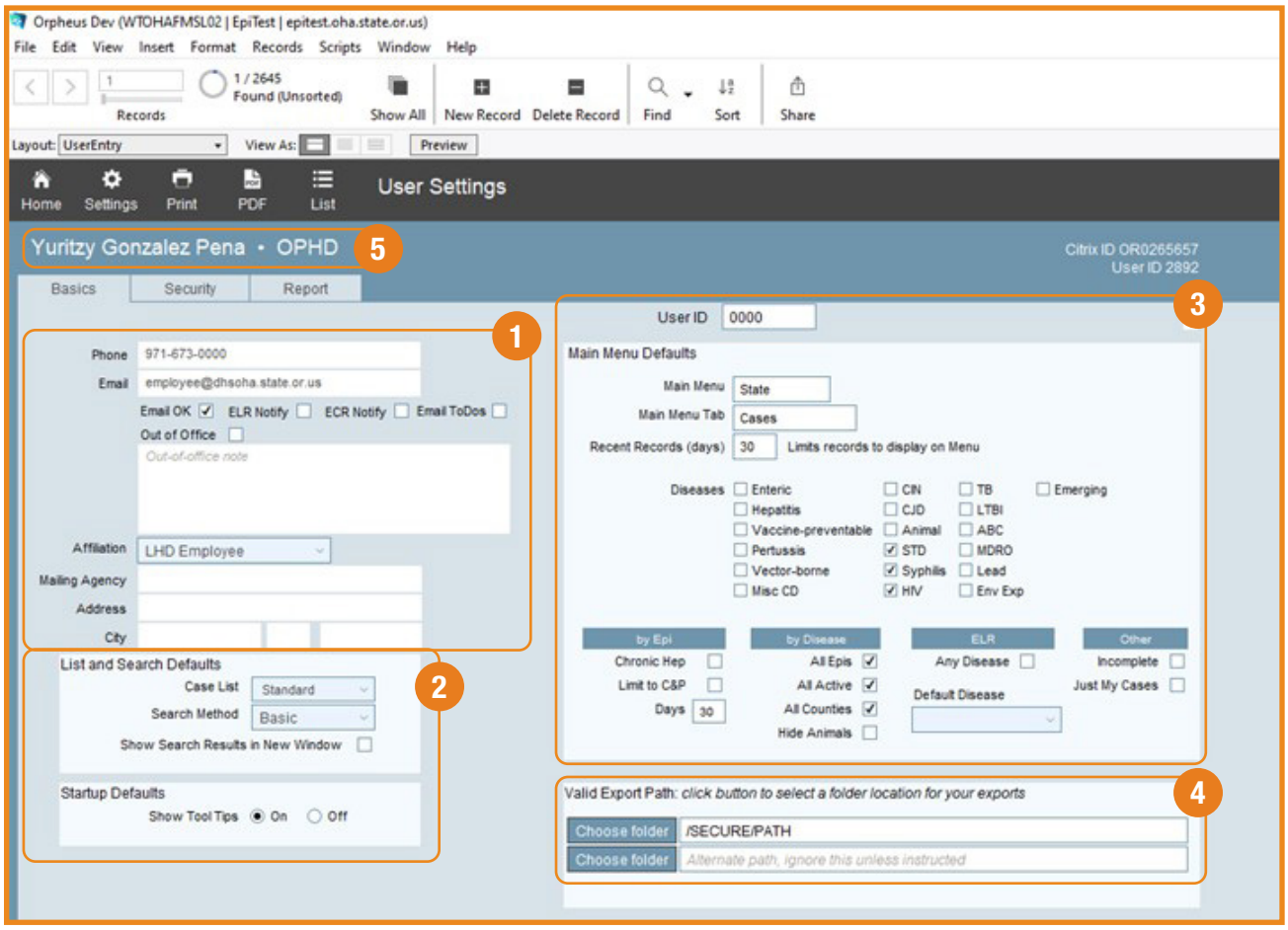
5. **Settings and DUDE** — These buttons are to the left of the masked Mona Lisa.
   - **My Settings:** Click this button to change the default settings. See the "Settings" chapter for more information.
   - **DUDE:** DUDE is the Directory of Useful Databases for Epidemiologists. Click this button to open DUDE in a separate window. DUDE is a navigation-hub between several data systems, including Orpheus, Orpheus Outbreaks, their respective training environments, and other data systems.
     - » Not every user will have access to all these environments. If you need access to a specific environment, contact user support at OPERA.Support@dhsoha.state.or.us or ORPHEUS.ODPE-TECH@dhsoha.state.or.us.
   - **V:/:** This button is for Citrix users only. Click this button to open the Citrix V: drive, which is your local C: drive.
   - **Lead:** This field is used for lead and not for syphilis.
   - **Letter Templates:** Click this button to create and view letter templates for correspondence to cases.
     - » This button is not located on the state menu home screen.
   - **Log Out:** Click this button to log out of Orpheus.

6. **Security Policy and Release Notes** — The security policy and release notes are at the bottom left of the screen.
   - **Security Policy:** Click this button to view the Orpheus Security Oath and Orpheus Security Policy in electronic form. You have the option of agreeing to the statements and electronically signing these documents.
   - **Release Notes:** Click this button to view Orpheus's most recent system updates and bug fixes.

Settings

Default settings can be updated in Orpheus to customize the interface and behavior to better suit your needs. To change the default settings, click "Settings" on the bottom left of the Orpheus home screen.





1. **Contact information and settings** — Verify your contact information and tell Orpheus how you want to be contacted.
    - **Phone:** Your phone number. You are unlikely to be called except by technical support in response to an issue or ticket that you opened.
    - **Email:** The email address where, if enabled, you will be notified of activity in Orpheus.
    - **Email OK:** Click this check box to be added to an email distribution list. You will be notified when Orpheus is inaccessible or having technical issues, for webinar training, or when changes are made to the system.
    - **ELR Notify:** Click this check box to receive an email from the ELR system when records are being delivered to Orpheus. This may be most useful to staff who process ELRs or to counties with low ELRs volume.
    - **Email ToDos:** Click this check box to receive a weekly email reminder if you have any incomplete ToDos. The email is sent every Monday morning. This is most useful for those who do not log in daily.
    - **Out of Office:** Click this check box before signing off for the weekend or planned time off. This may be most useful for those who have a non-standard weekend. You can create a custom alert for any user who assigns a note to you. However, if you do not create a custom alert, Orpheus will automatically send an alert that says, "[Your Name] is out of the office and may not be able to act on this note in a timely manner."
    - **Affiliation:** The association between your agency and yourself.
    - **Mailing Agency:** The name of your agency.
    - **Address:** The address of your agency.
2. **List and Search Defaults** — Set the default settings for your searches. Settings can be temporarily changed when searching, as needed.
    - **Case List:** This sets the view and layout of your search results. The default is "Standard," which is fine for most users. There is an STD setting that would show STD-specific fields such as syphilis stage.
    - **Search Method:** This sets the depth or power of your search. The default is *Basic*, which is fine for most users.
    - **Show Search Results in a New Window:** Click this checkbox to have your search results open in a new window.
    - **Show Tool Tips:** Choose Yes to enable tooltips in Orpheus. A tooltip is a text box that appears when you hover over an element of the database. Tooltips provide helpful descriptions and information.

3 **Main Menu Defaults** — This sets the default settings for your home page. Settings can be temporarily changed on the home screen, as needed.

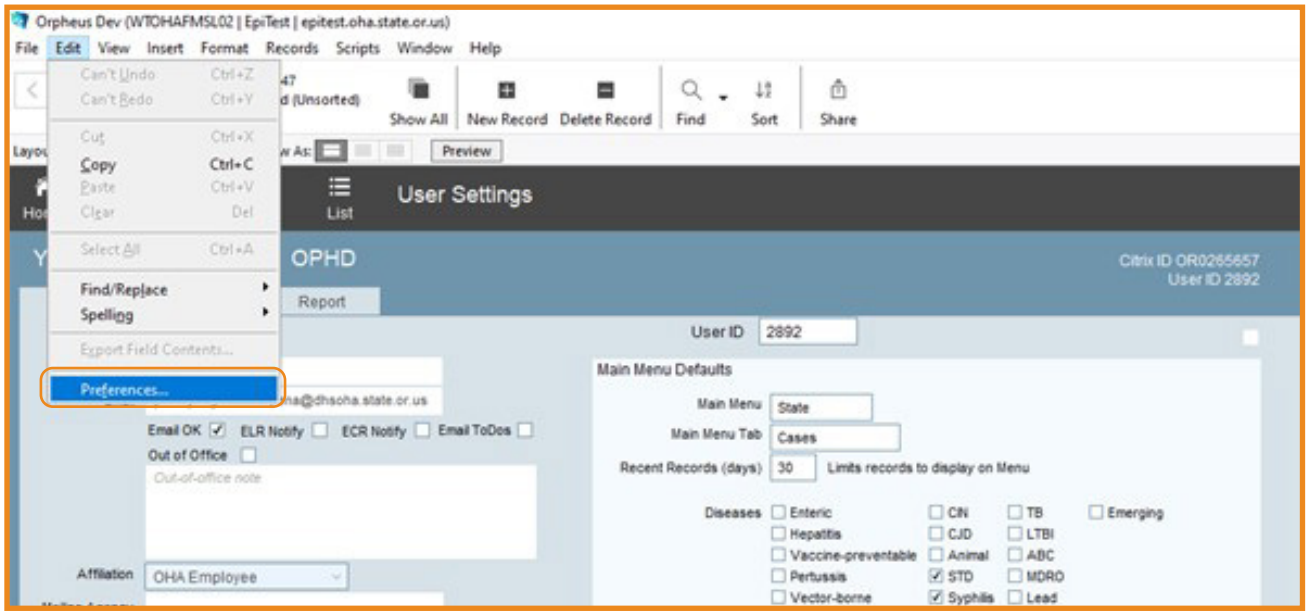
- **Main Menu:** This is not editable by users.
- **Main Menu Tab:** This sets which tab will open first on your home page, ELR, Cases, Contacts, ToDo, etc. Changing the order of the tab can be helpful for a person that only works in one tab, such as processing ELRs.
- **Recent Records (Days):** This limits how many records show on your home page.
- **Diseases:** This shows the disease groups, and it is based on your Orpheus security oath.
- **By Epi:** These options are provided in the box:
  - » **Limit to C&P:** This limits the Cases tab to only show confirmed and presumptive cases.
  - » **Days:** This limits the Cases tab to only show results within the specified number of days.
- **By Disease:** These options are provided in the box:
  - » **All Epis:** This shows results assigned to all users.
  - » **All Active:** This shows only active cases.
  - » **All Counties:** This shows results from all counties based on the user's rights.
- **ELR:** These options are provided in the box:
  - » **Any Disease:** This shows ELRs for all diseases.
  - » **Default Disease:** This can be updated to one specific disease. This is helpful if you only work in one disease.
- **Other:** These options are provided in the box:
  - » **Incomplete:** This limits the Cases tab to only show results with a blank "LHD Completion Date" field.
  - » **Just My Cases:** This limits the Cases tab to only show results assigned to you.

4 **Export Location** — This specifies where any downloads or exports will be saved. This should be a secure folder that no one else has access to.

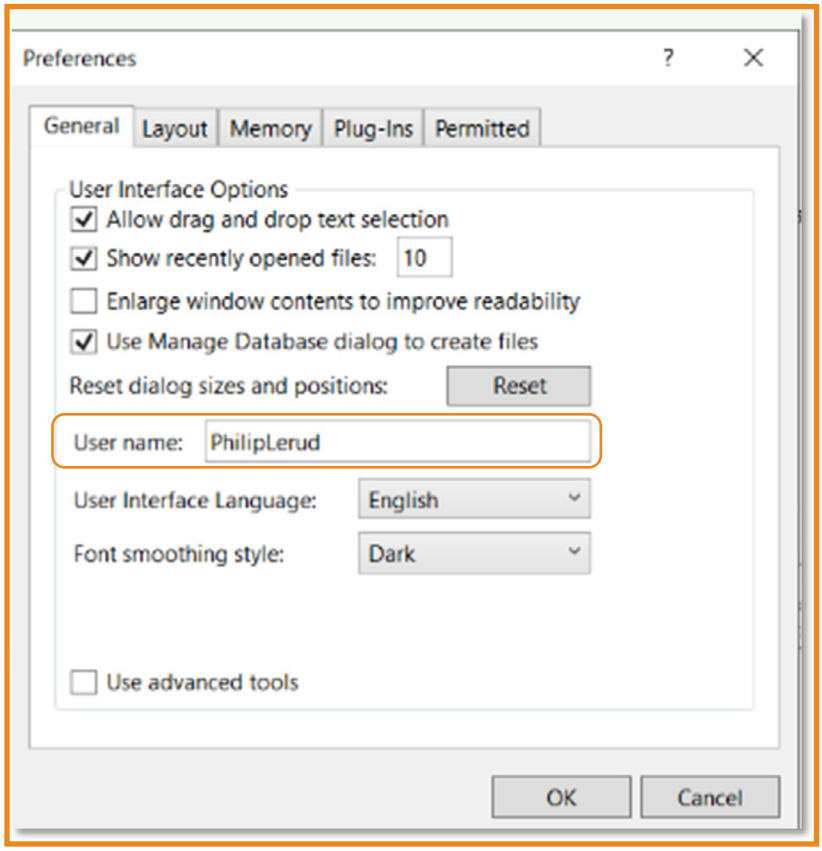
- **Choose Folder:** Click this to open a menu to select the folder on your computer or on a secured network.
  - » The top slot must have an entry. You must navigate to the secure folder by clicking the "Choose folder" button. It does not work if you copy and paste.

5 **Username** — Typically, your username will be your actual name. The option to view or change your username is not found under settings.

- To change your username, open the "Edit" menu in the ribbon. Then click "Preferences."



- This will open the "Preferences" menu in a new window. You can type your username in the provided text box.

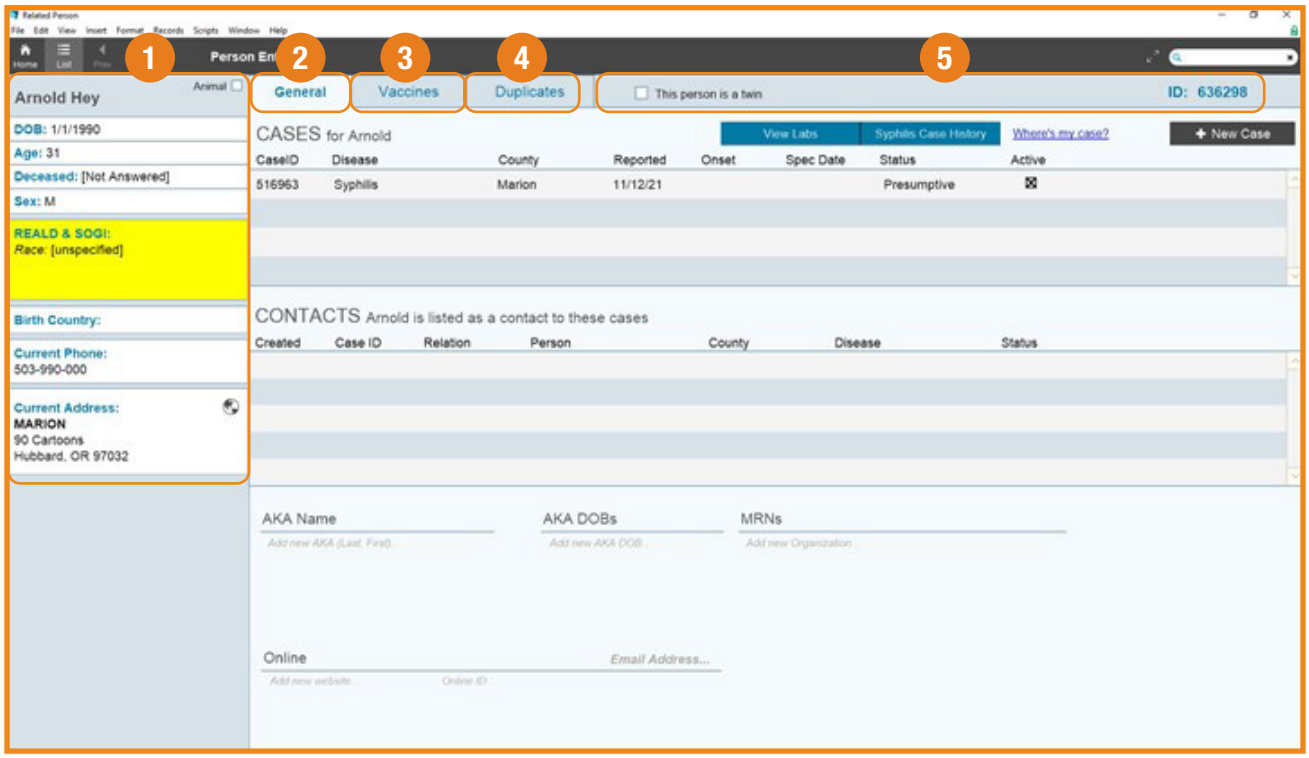


Person record

Orpheus is a person-centered database where a person record is associated with, but discrete from, a case record. Some person records have no associated case records, for example, when the person record was created for a contact. Although uncommon, some person records are associated with more than one case record. For example, a person can have a presumptive case status for syphilis and a confirmed status for gonorrhea or other communicable disease cases.

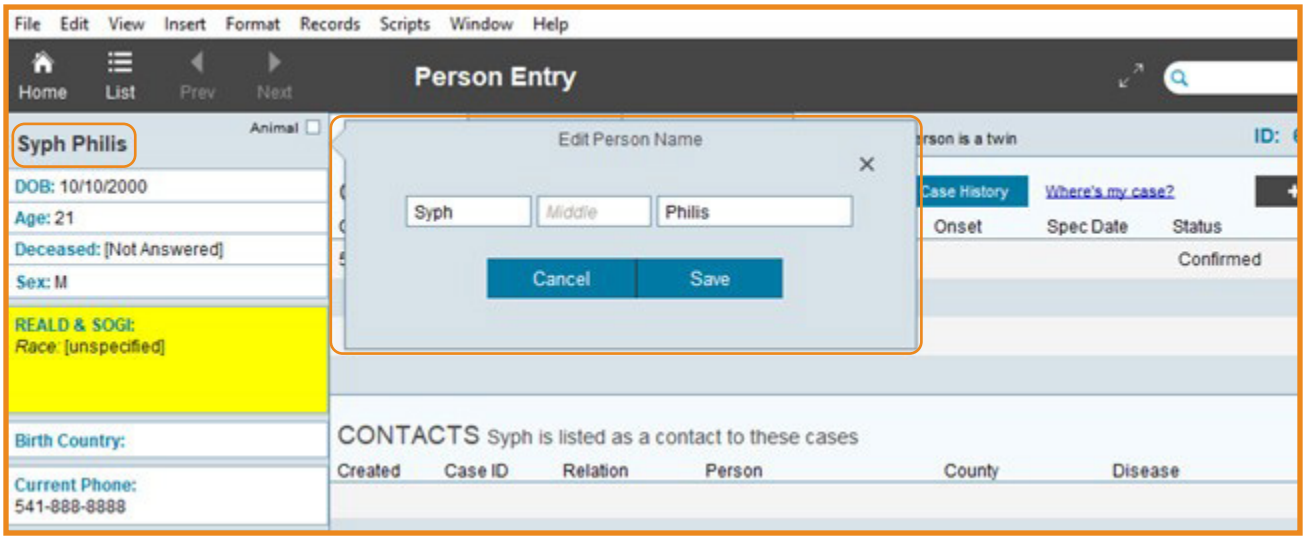
New person records are created when a new case or contact is created unless it can be linked to an already existing person record. When creating a new case or contact, Orpheus will perform a search to identify if any existing person records match your new case or contact. This search is based on the exact spelling of the name as entered or alternate spellings in the "AKA Names" field. This limitation can cause the creation of duplicate person records unless you manually search for existing person records prior to creating a new case or contact. Manual searches for persons are a best practice when a person's name has multiple surnames, either with space or with hyphenation.

Work with your lead or supervisor or contact the state to merge or otherwise resolve any duplicate person records you discover or create.



1 **Identity and basic information** — The person's identity and contact information are listed along the left side. The same information is available in the case record. Updating the information in one location will update it in both locations, except the "Current Address" field. Update the address from the person record instead of the case record to avoid changing morbidity status. See the "Demographics pane" chapter for more information.

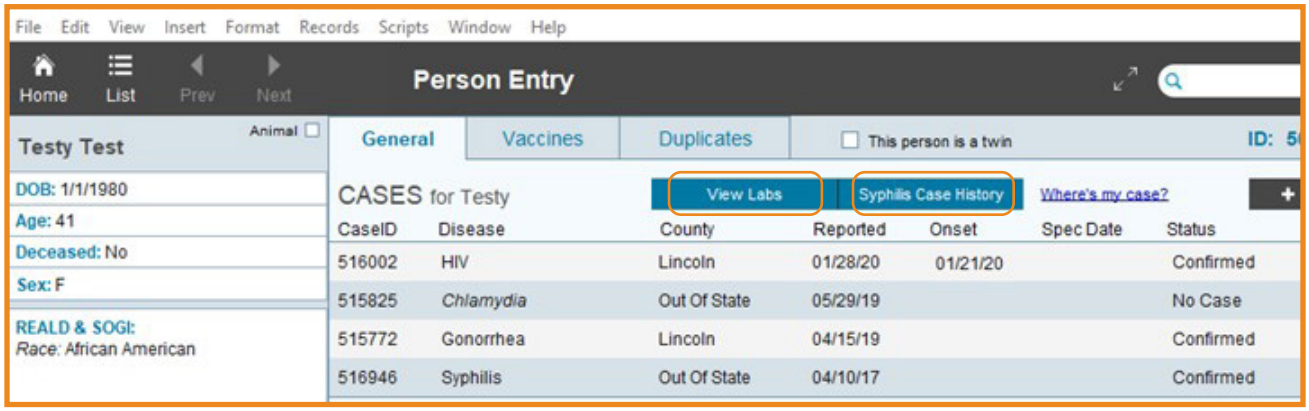
- **Name:** Ask the case how they spell their name, especially how the name is spelled in medical records. It is common for people to have multiple surnames or last names; these are sometimes spaced apart, hyphenated or ordered differently depending on the person's preference and their cultural norms. It is a best practice to respect how the person wants their name written.
  - » If a person record was created as a contact to a case and some or all of their name was not known at the time, then Orpheus will insert "Unknown" with filler text into the "First Name" and "Last Name" fields. The filler text is a number unique to that person record. If the real name is later discovered, then the Person Name should be updated in the person record.
  - » To edit the Person Name, click their name in the person record to open the "Edit Person Name" pop out menu.



  - » Type in the first, middle and last names as the case spells them in medical records, then click "Save."
  - » If you modify the Person Name already in the person record, enter the original name as an alias in the "AKA Name" field.
    - This helps in case a new lab comes through with the same misspelling, so a new duplicate record is not created.

- The Animal checkbox is not used for STD and can be ignored.

2 General tab — The General tab has information on cases, contacts and aliases.



- Click the "View Labs" button to see all labs related to syphilis. This button would show all lab records for this person.
- Click the "Syphilis Case History" button to see all the syphilis cases for this person in the state of Oregon. This button is helpful to find out if a person has previous syphilis cases in other counties and avoid creating duplicate cases.
- **Cases:** If the person has an STD case, their associated case record(s) are listed here. Orpheus would only show the syphilis cases for your county and the counties where you have cross-jurisdictional access. To find out if a person has a history in Oregon, click the "Syphilis Case History" button. Click anywhere on the row to view that case record.
  - » If a person has a new infection, click the "+ New Case" button to create a new case for this person.
  - » **Where's my case?** This is not used for STD. This button reports a bug when a case was created and cannot be found. If you think a person has a previous case, click "Syphilis Case History."
- **Contacts:** If the person is listed as a contact to one or more cases in Orpheus, those cases are listed here. Click anywhere on the row to view that case record.
- **Aliases:** Entering aliases helps prevent the creation of duplicate person records. Orpheus reviews the AKA Names and AKA DOBs as part of its search for possible person matches when adding contacts or creating new cases.
  - » **AKA Name:** Enter alternate spellings, hyphenated and spaced versions of surnames, maiden names, or any other kind of variation that may be used to refer to the person. If you modify the "Person Name" field, enter the previous name as an AKA Name in their person record.

» **AKA DOB:** If you correct a person's DOB, enter the previous DOB as an AKA DOB in their person record.

» Aliases are automatically created when duplicate person records are merged. If the names or DOB are different between the records, they are automatically added as aliases. Also, if either person's record had existing aliases, those are retained in the merged person record.

3 **Vaccines tab** — STD records do not use the Vaccines tab. This tab shows vaccine records when applicable.

4 **Duplicates tab** — Duplicate person records (person IDs or PIDs) are generated when new records are reported with different names or DOB for a person that has an existing record in Orpheus. If you find out that a person has two-person records, send an email to ORPHEUS.ODPE-TECH@dhsoha.state.or.us requesting to merge the person records. After merging the PID, all cases would show under the Comorb tab.

Example email/note:
Please merge PID 2001589 with PID 2001574. Keep PID 2001589

Duplicate cases are created for different reasons. One of the most common reasons is when counties created a new case without checking Syphilis Case History for the person. If you find out that a person has two cases, and one does not meet a case definition, send an email to yuritzy.a.gonzalez-pena@dhsoha.state.or.us requesting to merge the case records. When both cases have Clinical and Risk tab information, it is important to identify which case should be kept.

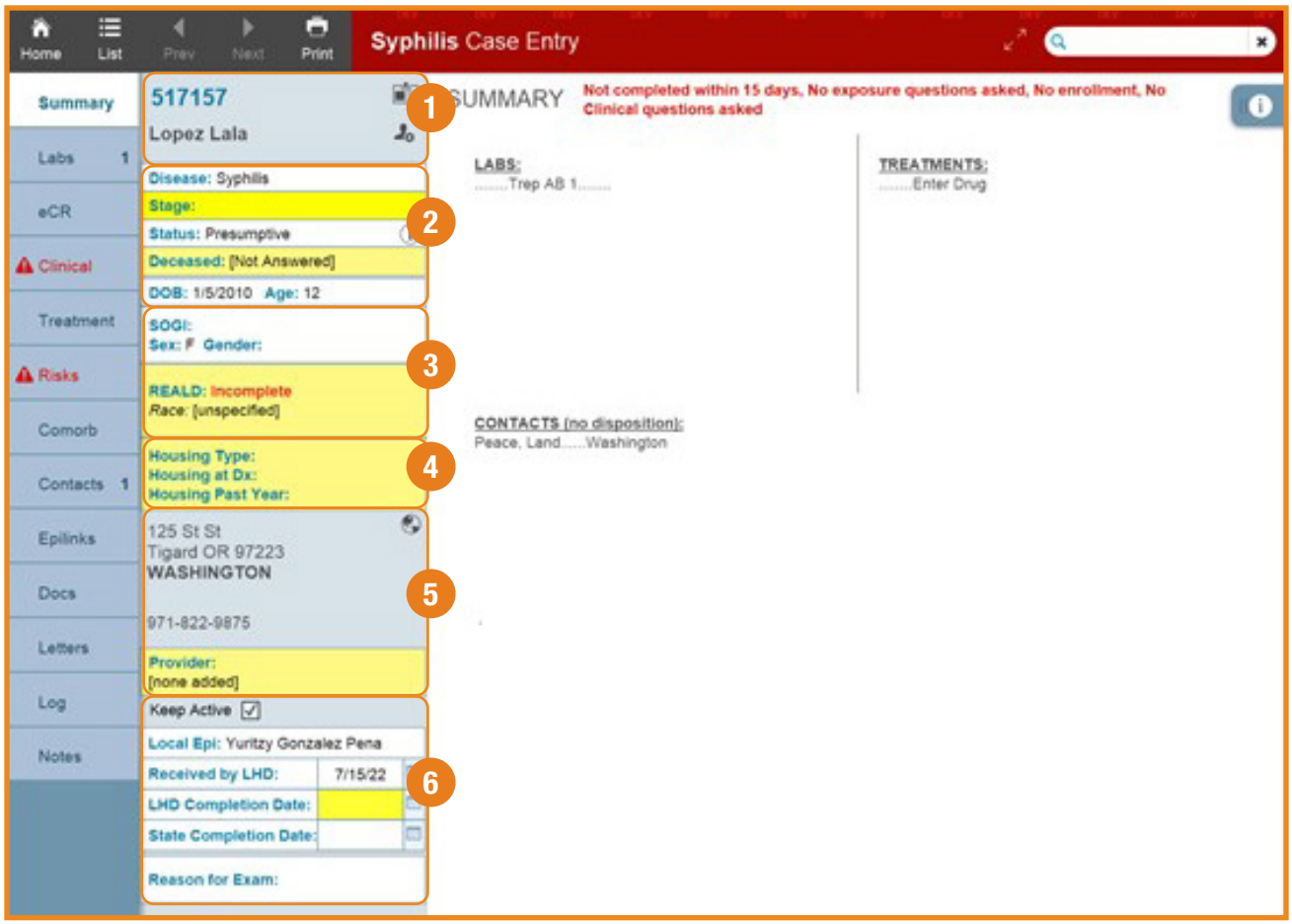
Example email/note:
Please merge CaseID 200101 with CaseID 798001. Keep CaseID 200101

5 **PersonID and Twin checkbox** — These options are listed to the right of the tabs.

- The person ID number is unique to each person's record and autogenerated when the person record is created.
- Click the "This person is a twin" checkbox if the person was part of multiple births (twins, triplets, etc.). Marking this box is helpful because Orpheus searches on name and DOB, which are fields shared by twins.

Demographics pane

The demographics pane contains basic case investigation information. Some of the fields will be prefilled with data from when the case was created. Review this information and update or input new information. It's best practice to start data entry from this demographics pane, then systematically work through the tabs in the left column from the top down. Each tab of the case record is covered in subsequent chapters of this guide.

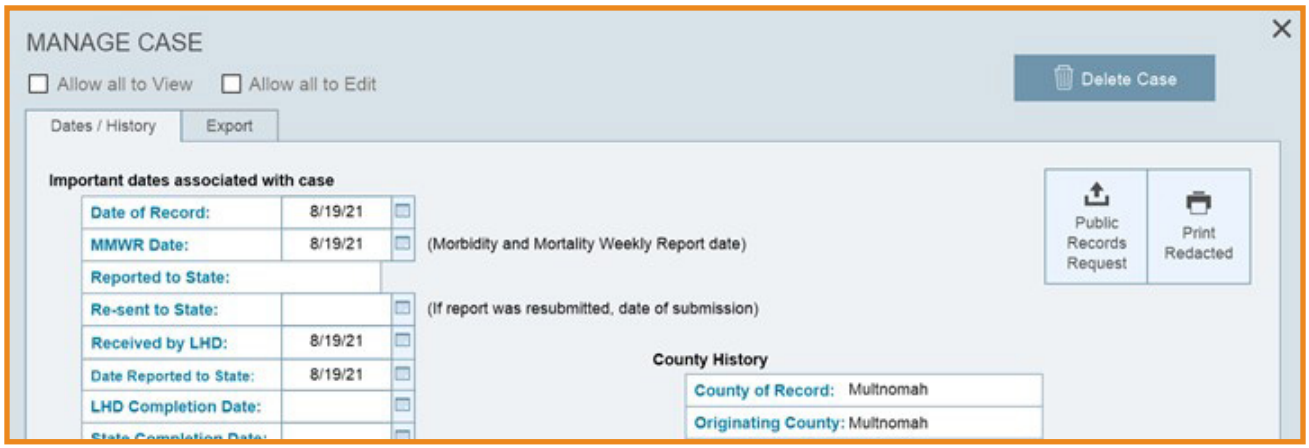


1 **Case ID and name** — At the top of the demographics pane is the case ID number and the name of the person.

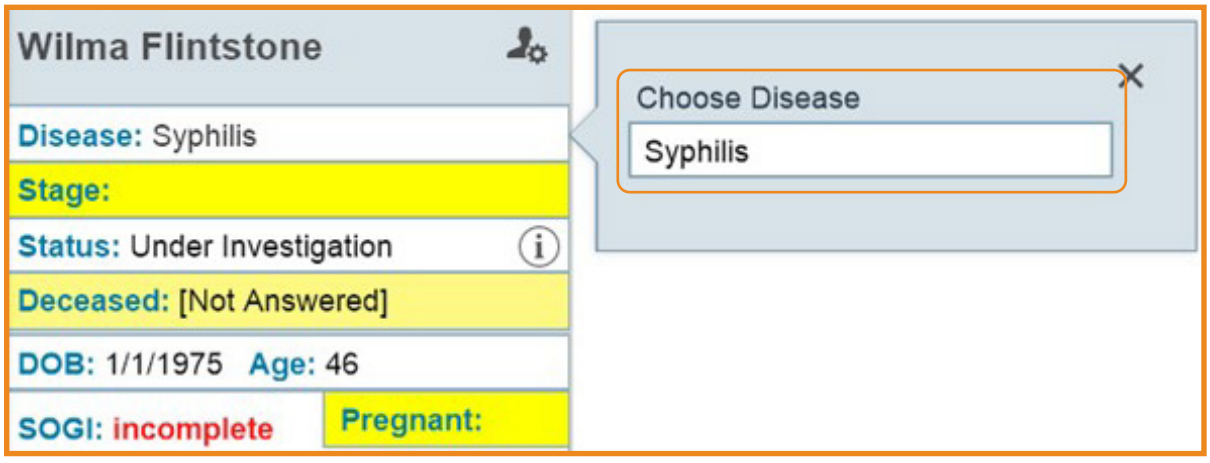
- **Case ID:** The case ID number is also called the Orpheus ID number. It is unique to each case record.
  - » Click the case ID number to copy it. case IDs can't be highlighted, so right clicking and keyboard shortcuts will not work to copy the case ID from Orpheus.

- **Name:** If the name needs to be updated, click the name or the person icon to open the Person Record in a new window.

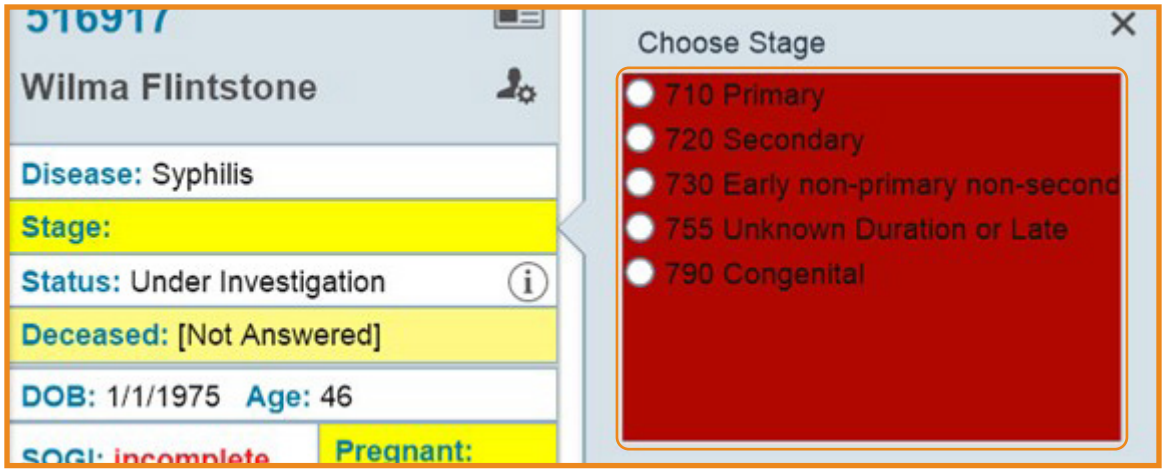
  - » See the "Person Record" chapter for more information, including instructions for editing a name or adding an alias.
- **Rolodex:** Click the "Rolodex" icon to open a "Manage Case Record" menu in a pop-up window.
  - » From the "Manage Case Record" menu, the Dates/History and Export tab show the county history and important dates associate with case.



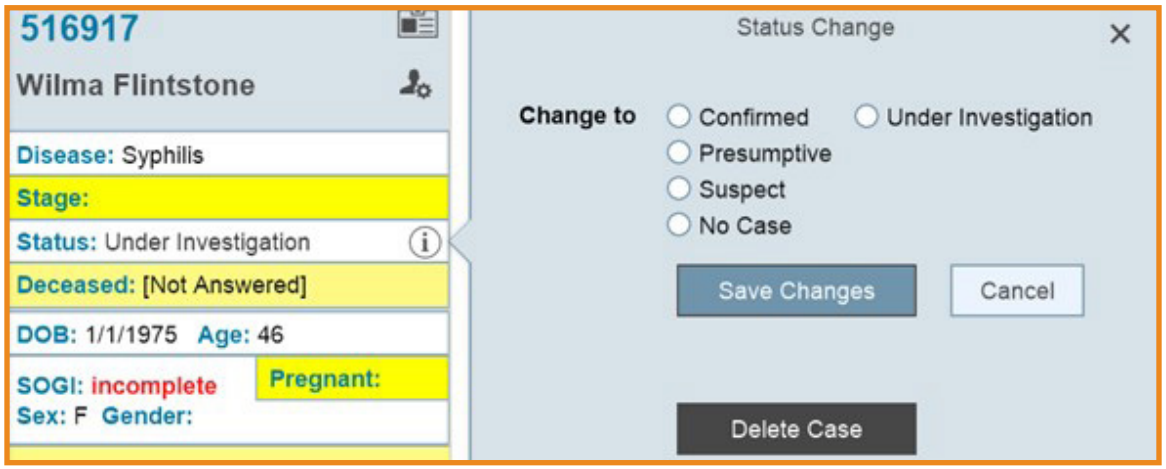
2 **Identity and basic information** — Verify that these fields are complete and accurate. Most should already be filled in for new cases. Stage, Deceased and Pregnant will be blank. Stage and Pregnant are required fields.



- **Disease:** For syphilis and congenital syphilis, the disease will be syphilis. Changing the disease will change the layout and questions. The data entry chapters of this guide are based on syphilis disease.



- **Stage:** The stage refers to the syphilis stage: Primary, secondary, early non-primary non-secondary, unknown duration or late, or congenital syphilis. The stage depends on symptoms, prior syphilis history or previous labs. Adequate treatment is dependent on the stage. Refer to the "Syphilis Investigative Guidelines" for more details. This field is CDC required and must be completed for the syphilis reimbursement program.



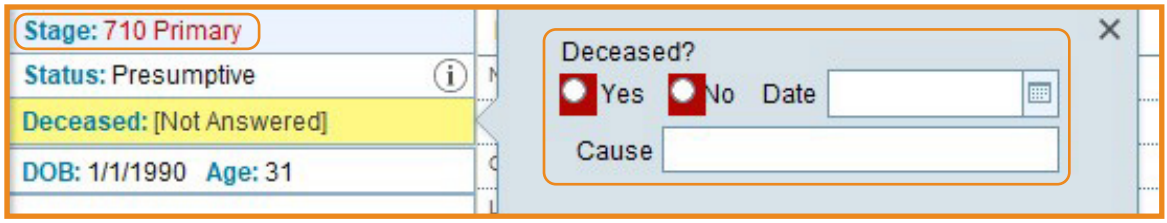
- **Status:** The status will vary between confirmed, presumptive, no case or under investigation. The best practice is to start a case with the under investigation status.
  - » Click the ⓘ Info icon to open the "Syphilis Investigative Guidelines" and Syphilis Case Report and Data Entry Manual in a pop-up window.
  - » See the "Syphilis Investigative Guidelines" for definitions of confirmed and presumptive. Confirmed and presumptive definitions are in section 3.
  - » **Suspect:** There is no suspect definition for syphilis.
  - » **No Case:** Select "No Case" if the case is not an Oregon resident or if their test results do not indicate a new infection.

- Send a ToDo note to Jenn Li to transfer the case to another case.
- Check with your county lead or supervisor if you have questions about using No Case or contact Yuritzy.a.gonzalez-pena@dhsoha.state.or.us.

» **Delete Case:** Click the "Delete Case" button to mark the case for deletion by OHA at a later date. This may be necessary for cases that were accidentally created or for duplicate cases that do not need the case information merged.

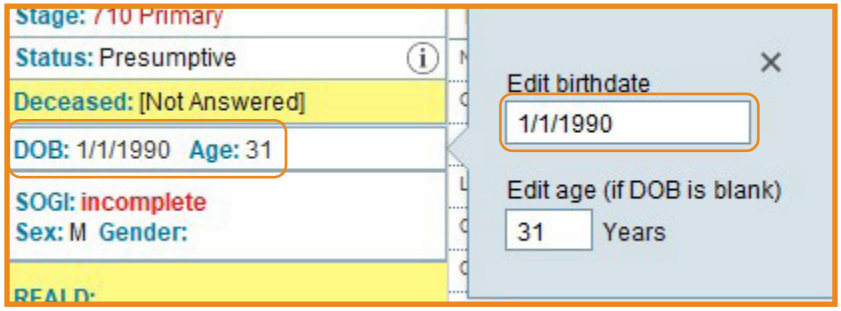
- Check with your county lead or supervisor if you consider deleting a case or contact the STD state epidemiologist.

- **Deceased:** This is highlighted yellow until "Yes" or "No" is selected. The "Deceased" field is not a required field for syphilis cases, except for congenital syphilis, but it is useful information before to dialing the case. A new window will open when clicking on the field. This window includes when and where the case died and the cause of death. Most of the deceased syphilis cases would be "unrelated to disease."



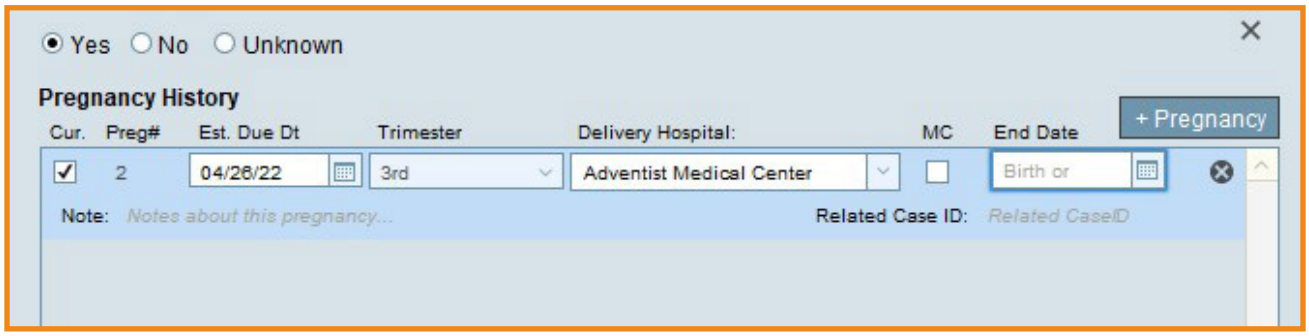
- **Date of birth:** Verify the case's date of birth (DOB) and update if needed, although it is uncommon.

» If you do need to update the DOB, it is best practice to add the incorrect DOB as an alias in the Person record and keep the Orpheus DOB the same as DOB in medical records.



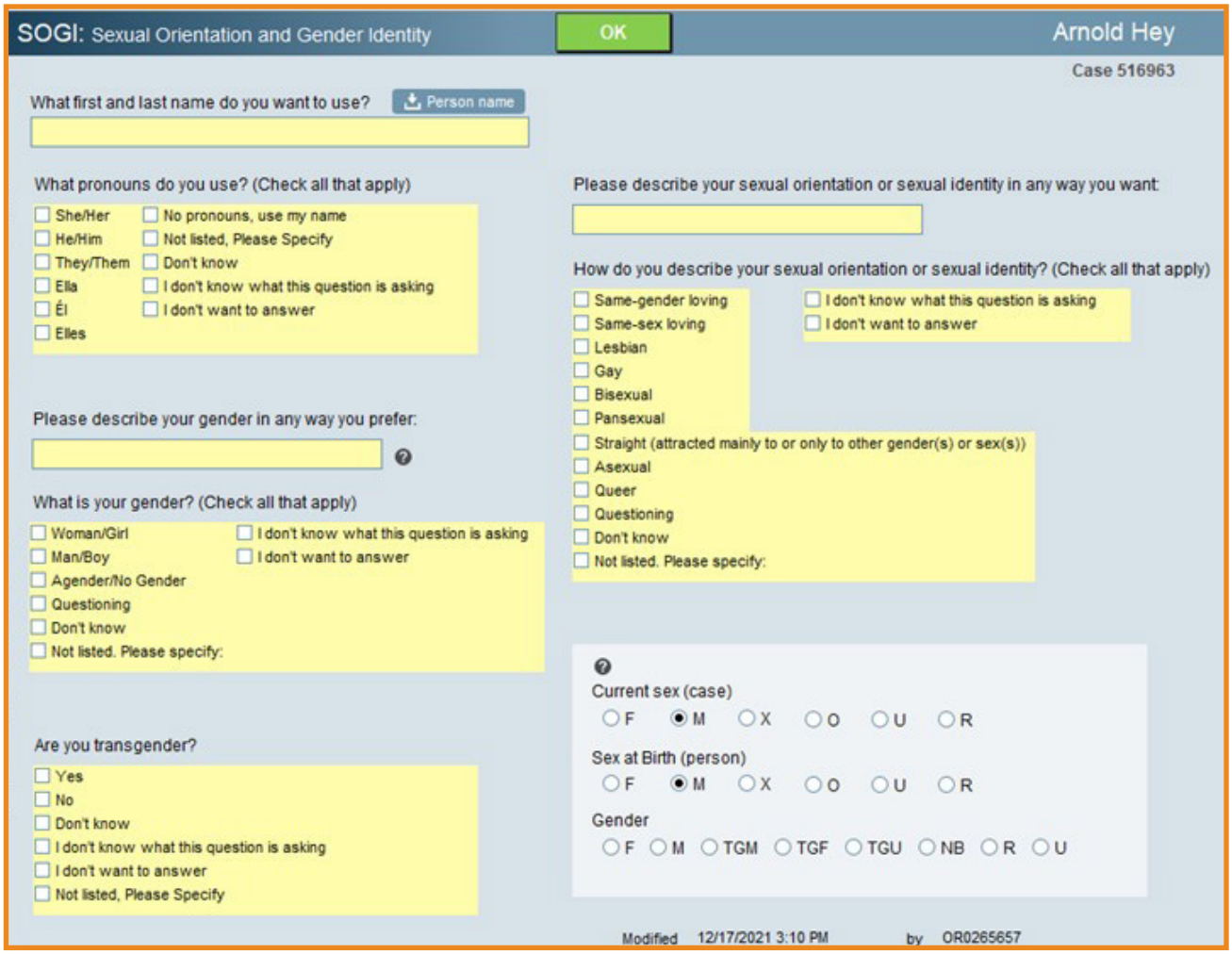
- **Age:** Age at onset. This is a calculated field based on the date of birth. If the date of birth is blank, age should be entered manually. When the date of birth is updated, then the age will be recalculated and will overwrite a manually entered age.

- **Pregnancy:** This question will only appear if the "Sex at Birth" field is not set to "Male" and the age is between 13 and 49.
  - » If the case is pregnant, click "Yes" and "+Pregnancy" to record the estimated due date, trimester at diagnosis and delivery hospital.
  - » Click "Unknown" if you are unable to reach a case and there is not pregnancy test at the time of diagnosis.
  - » Pregnancy Yes/No is a CDC required field. The details below "Pregnancy History" are helpful to track the case during the pregnancy.



3 Demographic information

SOGI: Click the SOGI box to open a pop-up window to record the Sexual Orientation and Gender Identity (SOGI) information. SOGI questions would need to be complete at least annually. For more info visit OHA SOGI.



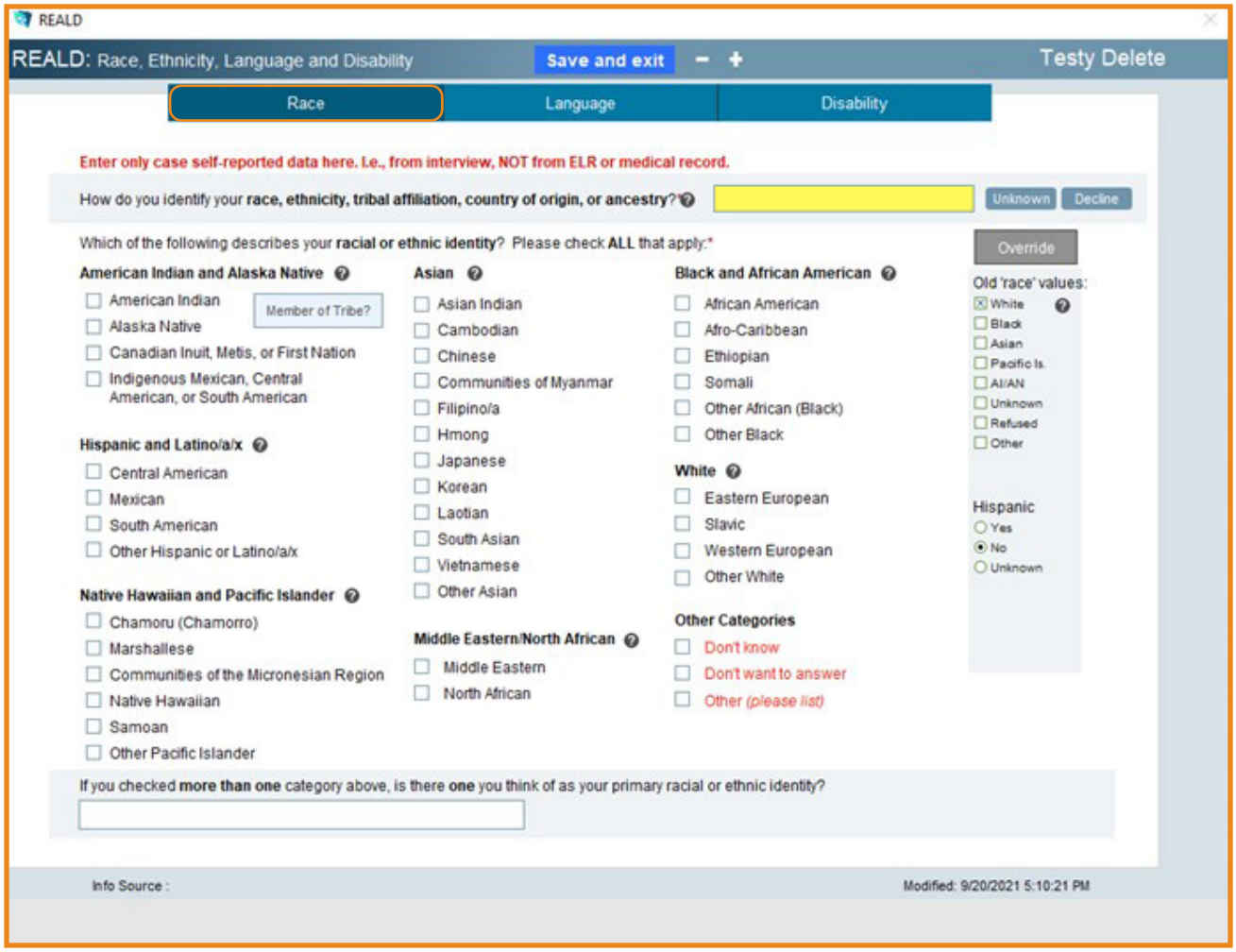
- **Sex:** There are two fields to track the sex of the case. "Current sex (case)" is the sex of the case at the time of diagnosis. Selecting "Female" as the "Sex at Birth (person)" will add the question of Pregnancy. Updating the sex fields will not update the READLD information or vice-versa; but, updating the "Sex at Birth (Person)" field will update the sex in the person record and vice-versa. When creating a case, both fields will be populated. If you find out the case's current sex is not the same as sex at birth, please update.
  - » **F:** female, **M:** male, **X:** non-binary, **O:** other, **U:** unknown, **R:** refused
  - » **Gender:** is CDC required and core field for syphilis. We realize completing SOGI and Gender fields is redundant. One of the reasons is because CDC and SOGI gender fields do not perfectly align.

READLD: Click the READLD box to open a pop-up window to record self-reported demographic information. This includes information about race, ethnicity, language and disability (READLD).

Note: For additional guidance how to ask these questions, see the "Quick guide to asking READLD questions" and/or "READLD Response Matrix" and this video

about REALD. The REALD Workday Training is comprehensive and has multiple modules. You will need a Workday account created using your P# to access the training. Find instruction for creating a Workday account here. Reach out to Molly Norris at MOLLY.NORRIS@dhsoha.state.or.us if you have problems creating a Workday account.

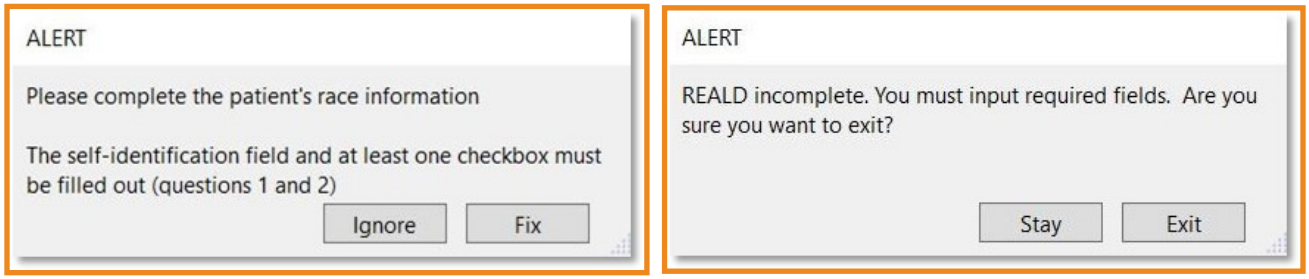
- **Race:** Race and ethnicity are CDC required fields. These two fields are under the Race subtab. There is a plus options (+) button to view/update REALD responses for each case.



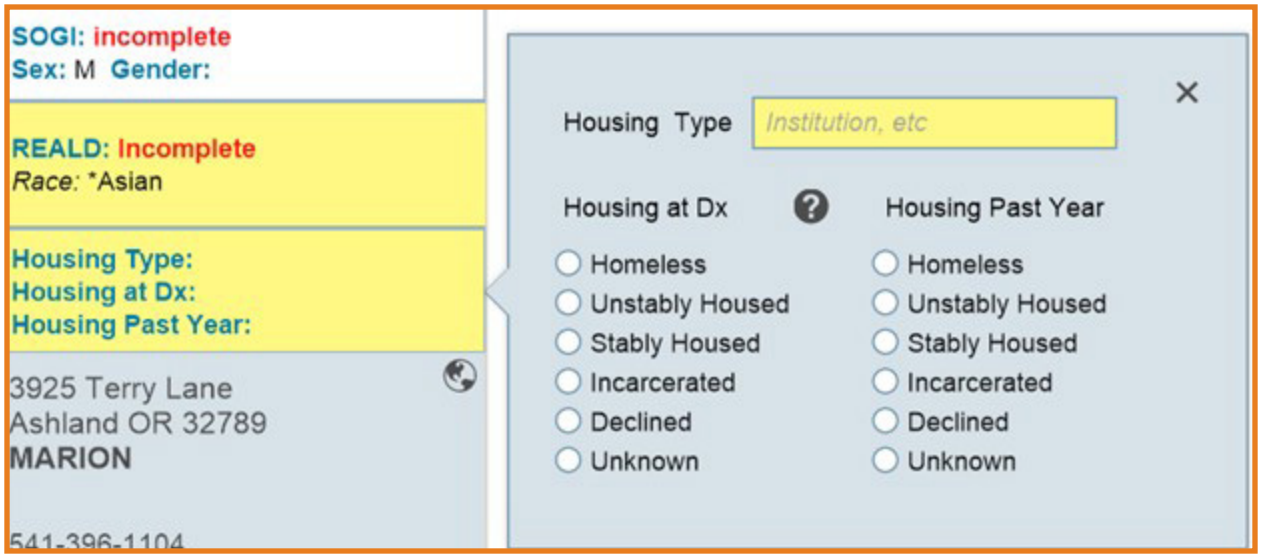
» The REALD box will be highlighted yellow in the demographics pane until a racial or ethnic identity is recorded, then it will turn white.

- It will change from **REALD:** *Race:* [unspecified] **Incompleted** to **REALD:** *Language:* English *Race:* I identify as Biracial or Multiracial **Completed**

Note: Required fields must be filled out, otherwise you will receive these error messages when moving to Language or Disability tabs or clicking "Save and exit" button.



4 **Housing and Housing at Dx** — Click the "Housing Type, Housing at Dx, and HousingPastYear" to open a menu.

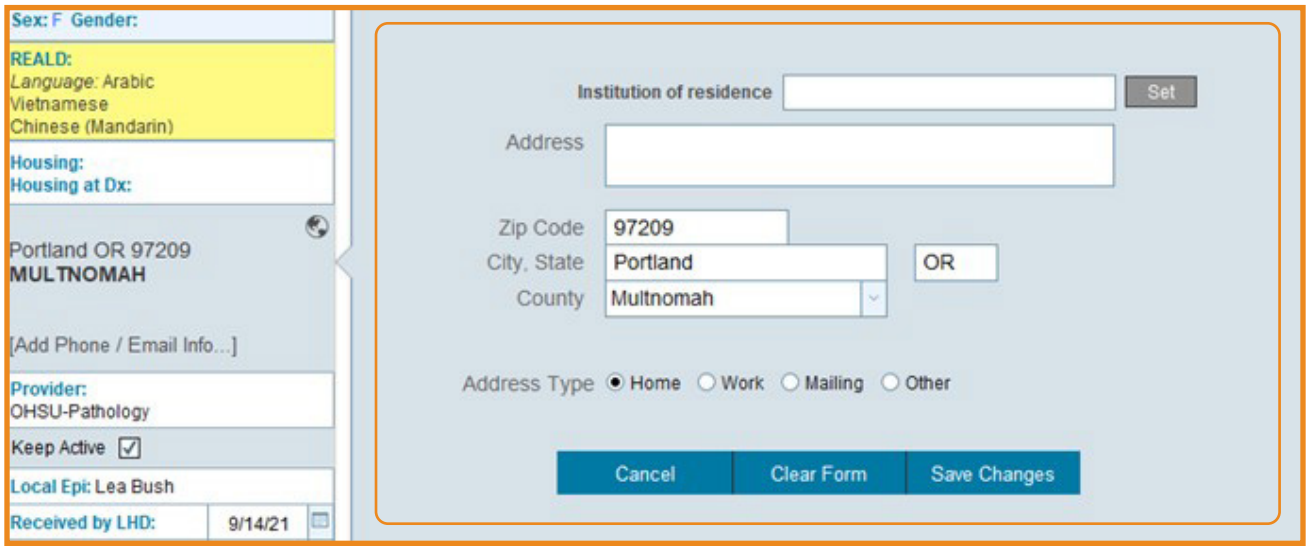


- **Housing type:** Record if the case lives in a congregate setting or institutional housing by selecting an option from the drop-down menu.
- **Housing at Dx:** Record the housing situation of the case at the time of diagnosis. This field can be answered without interviewing the case, e.g. if case could not be reached because it is incarcerated, click incarcerated. This field is use to provide services.
  - » **Literally homeless:** Case has lived in places not designed nor typically used as a regular sleeping accommodation for human beings or lives in a shelter or emergency shelter that provides temporary living arrangements.
  - » **Unstably housed:** Case has experienced economic hardship resulting in frequent moves or recent eviction or is at imminent risk of being evicted.
  - » **Stably housed:** Case has lived in a consistent housing facility meant for human habitation and is not at risk of losing housing.

- » **Incarcerated:** Person living in confined facility such as jail, penitentiary, correctional or detention facilities. The term includes those who have been sentenced as well as those held for pre-trial or civil purpose.
- » **Declined to answer:** Case declined to report housing status.
- » **Unknown:** Question was not asked.

- **Housing past year:** Record the most severe housing situation the case has experience in the last year. This field should be answered by the case. This field is used for surveillance purpose and public health metrics.
  - » **Literally homeless:** Case has lived in places not designed nor typically used as a regular sleeping accommodation for human beings or lives in a shelter or emergency shelter that provides temporary living arrangements.
  - » **Unstably housed:** Case has experienced economic hardship resulting in frequent moves or recent eviction or is at imminent risk of being evicted.
  - » **Stably housed:** Case has lived in a consistent housing facility meant for human habitation and is not at risk of losing housing.
  - » **Incarcerated:** Person living in confined facility such as jail, penitentiary, correctional or detention facilities. The term includes those who have been sentenced as well as those held for pre-trial or civil purpose.
  - » **Declined to answer:** Case declined to report housing status.
  - » **Unknown:** Question was not asked.

5 **Contact information** — Review contact information and update if changed.



- **Address:** When a case is created, the address window will be auto-filled from

the ELR information. Updating the Address will not delete or overwrite a previous Address. Instead, it will create a new Address record with the date of the change. Old and alternate Address records can be viewed in the person record. It is best practice to update the address from the person record instead of changing the address. For example, if a new lab result is reported (and the result do not indicate a new infection) and the address is different than the current address, change the address from the person record and not from the case.

  - When a case is created and it is later found that the case lives in a different county, transfer the case by changing the address. Work with your lead or supervisor or send a note in Orpheus to Yuritzy Gonzalez if it is not clear to which county case belongs.

» The address is the one field where you must click "Save." Every other field is autosaved when you finish entering data.

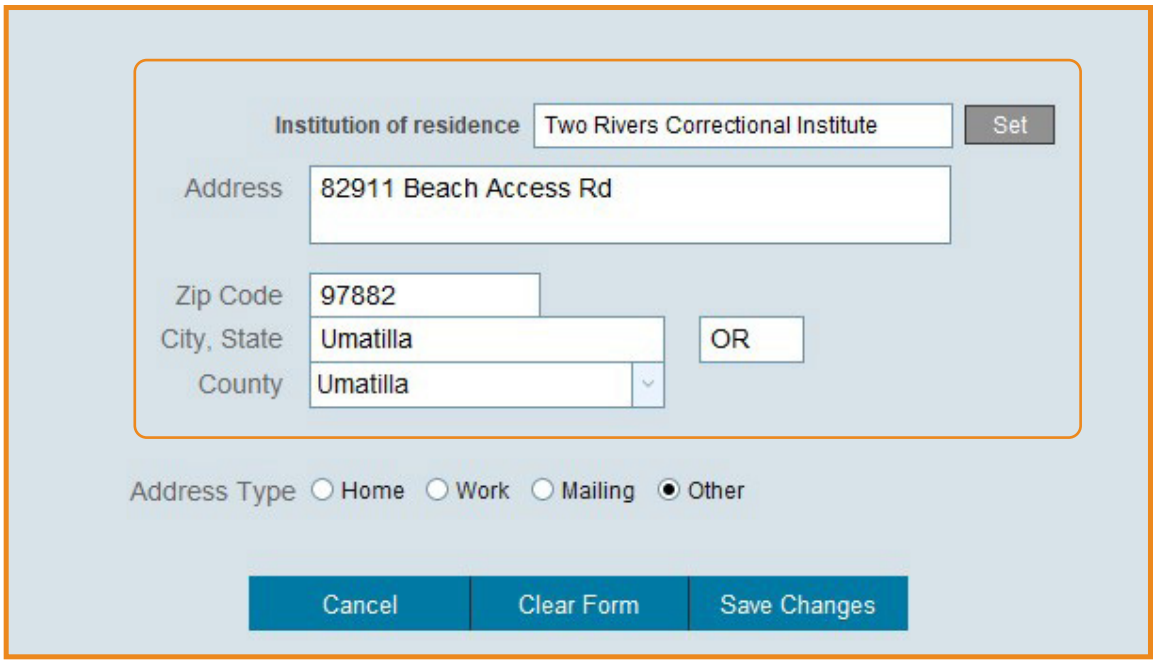
» Review the ELR Details and eCR Details in the associated tabs for potential other phone numbers or addresses.

» When entering a new address, entering the ZIP code first will auto-populate the city, state and county.

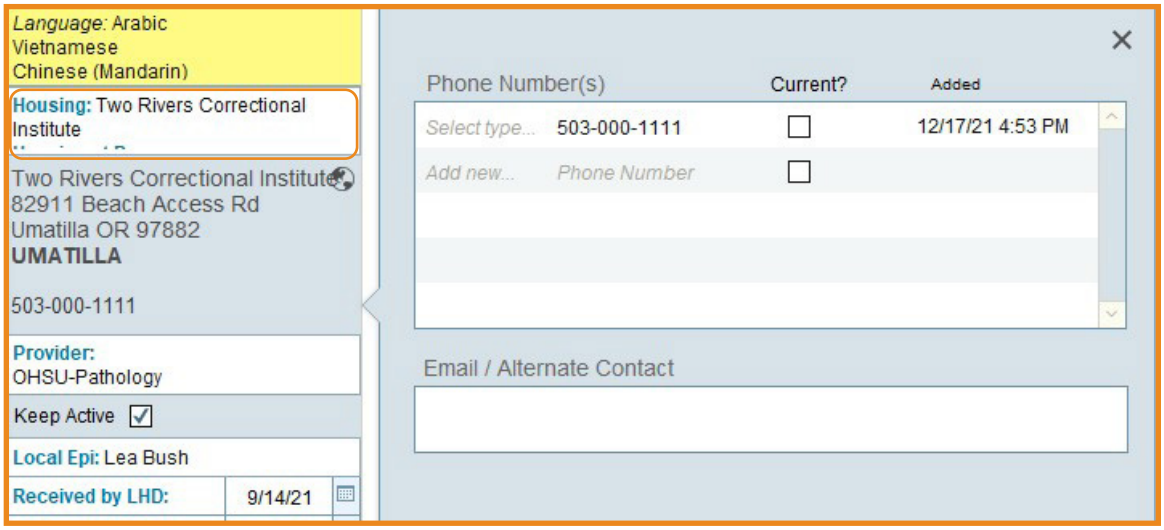
» If the case lives in a corrections facility, long-term care facility or otherwise lives in a similar congregate residential facility, then click the "Set" button to the right of the Institution of Residence field.

» This will open a new pop-up window to search for the institution. By selecting the institution, the address field will be replaced with the institution address.

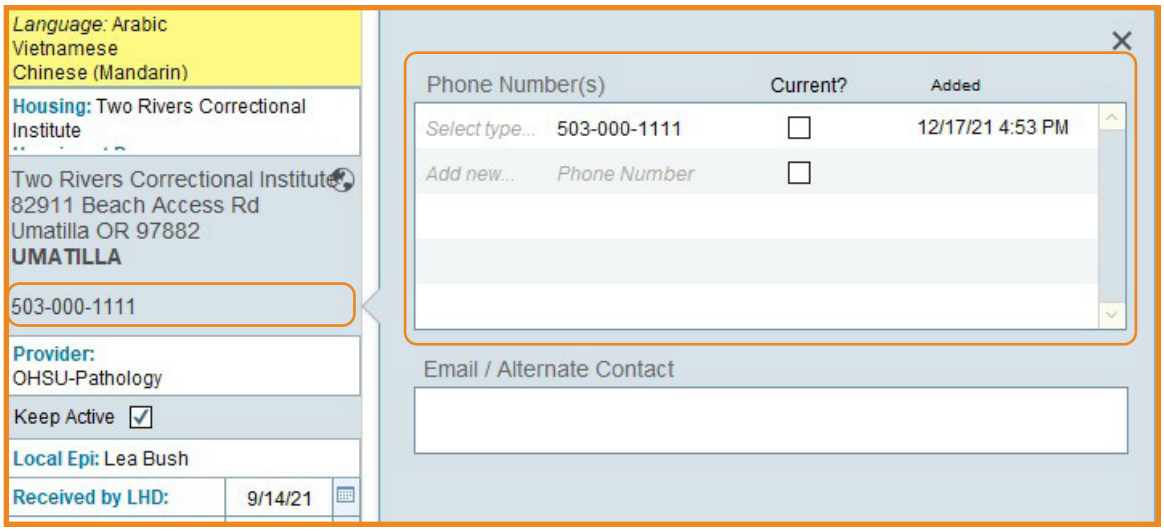
» Search for and then click the institution to fill in the address information for that institution. Then click the "Save Changes" button.



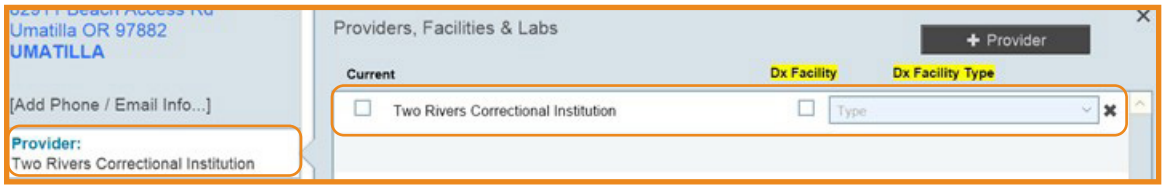
» If an institution is indicated in the "Address" field, it will automatically be added to the "Housing" field.



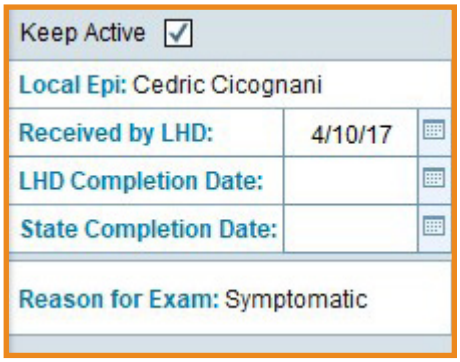
- **Phone and email:** Updating the phone number will overwrite the old information. Instead, add the new phone number in an empty row below and update the "Current?" check box.



- **Provider:** This may be prefilled if the case was created from an ELR. Click the Provider and a new window will open. Select the best option for the Dx Facility Type and make sure to check the "Dx Facility" box. Check with your county lead or supervisor if unsure which option to choose from the drop-down menu. The Dx Facility Type is a CDC-required field. The "Dx Facility" box must be checked for the Dx Facility Type to be transferred via HL7 code to CDC.



6 **Local Health Department Fields** — At the bottom of the Demographics Pane are a few additional fields.



- **Keep Active:** This checkbox is checked by default. While checked, the case will be listed on the home page of the Local Epi.
  - » Unchecking the "Keep Active" checkbox will remove the case from the case list on the home page of the Local Epi.
- **Local Epi:** This is the case investigator who is in charge of assuring that the case interview is done, contacts are entered correctly, treatment is provided and the LHD Completion Date is entered.
- **Received by LHD:** This is the date when the LPHA was first notified of the

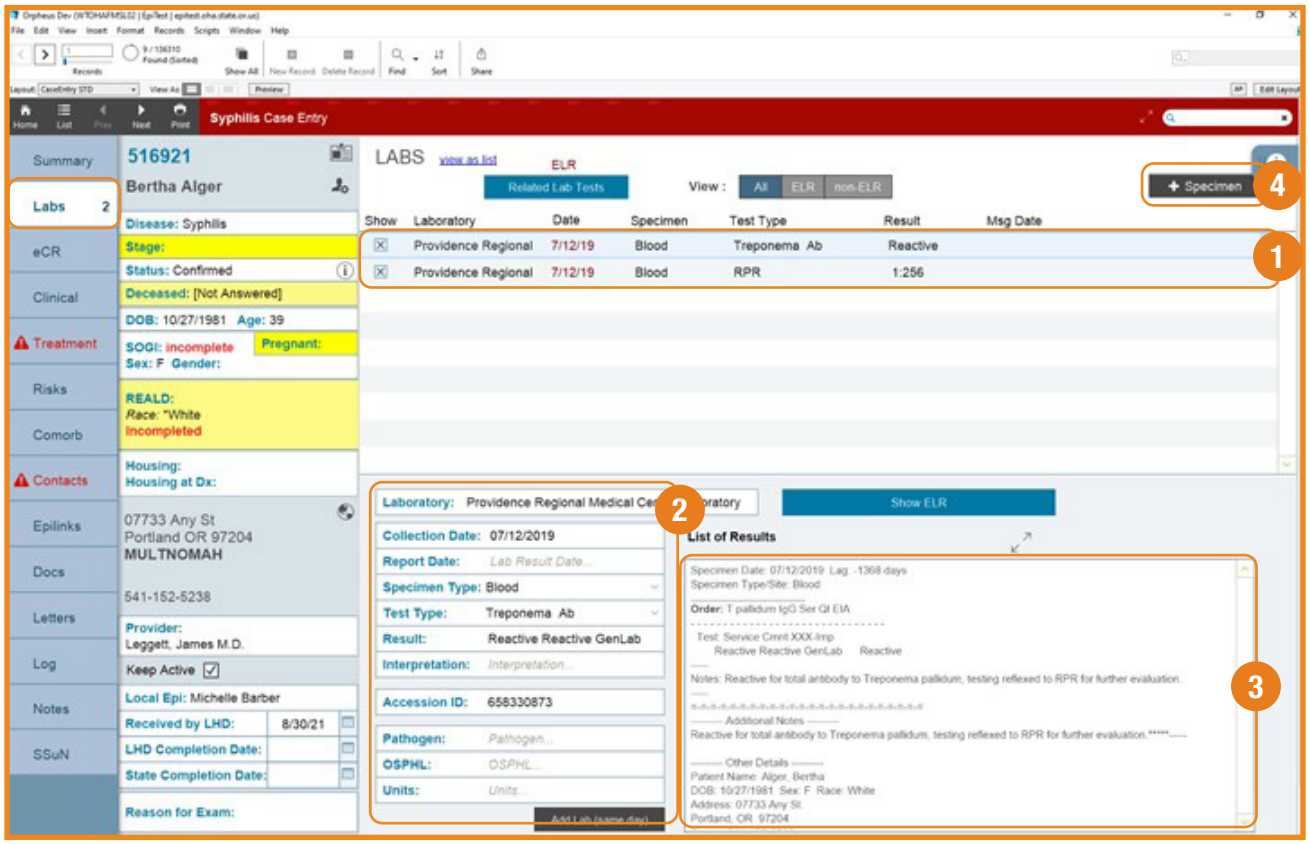
case.

  - » This date is pre-filled when the case is created. It should not be updated unless specified otherwise. Send a note to Yuritzy Gonzalez if you have questions.

- **LHD Completion Date:** This is the date when the initial case investigation is completed. This includes when the case interview is complete, the contacts are entered correctly, the letter is sent, and one last check that all sections are completed is done. Check with your local lead or supervisor for local preferences.
- **State Completion Date:** This is the date when OHA has completed their part of the case investigation, after the LPHA has completed the case investigation.

Labs tab

The Labs tab is the record of laboratory test results for the case. Confirmed and presumptive cases will have at least one lab with a positive test result. Test results submitted through an Electronic Lab Report (ELR) will automatically populate in the Labs tab, but test results can also be submitted outside of the ELR system. Any positive test results outside of the ELR system should be manually entered into the Labs tab and the document should be attached to the Docs tab.



1 **Labs** — ELR results will appear in this section along with any manually recorded labs. There will be a lab record (row) for each test result if lab results are individually reported. ELRs can have more than one lab results. When the laboratory reports all the lab results in the same ELR, it is best practice to have a record for a treponemal and non-treponemal lab result in the ELR tab. Click a lab to view the lab information in the lower half of the screen.

- There are treponemal (CIA, EIA, FTA-ABS, TP-PA) and non-treponemal tests (RPR and VDRL).

- Syphilis testing has two algorithms, traditional or reverse algorithm. Depending on the algorithm performed, cases can have two or three lab results. See the OHA STD Prevention website for information on serologic screening Traditional and Reverse Algorithms.

2 **Lab Info** — Review the information here for the selected lab. For ELRs, these fields are automatically populated from the data provided by the laboratory; however, it sometimes may be mapped incorrectly. See "Process an ELR and find Orpheus records" for best practices. For manually created labs, these fields will need to be entered. The required fields are "Laboratory," "Collection Date," "Report Date," "Specimen Type," "Test Type" and "Result."

- **Laboratory:** The location where the sample was processed.

- **Collection Date:** The date when the sample was collected.

- **Report Date:** The date the result was reported by the lab to OHA and LPHA.

- **Specimen Type:** How the sample was collected. Most of the specimen types are blood. When an ELR is missing the specimen type, the field would auto-populate with "unknown."

  a. Blood
  b. CSF (neurosyphilis and congenital syphilis evaluations)
  c. Lesion (rare — only Multnomah Co. has a darkfield microscope)

The screenshots below for Type and Result show specific information when specimen type is set to blood. If the specimen type is CSF or Lesion the Test Type and Result options are different.

- **Test Type:** The testing method used to process the sample.

Test types listed in the drop-down menu include:

- Treponemal test. It is important to get familiar with the top reporting facilities and the test performed. These tests are specific to the treponemal pallidum bacterium.
- Non-treponemal test. Most common tests in Oregon are RPR or VDRL. These tests are not specific to the treponemal pallidum bacterium
  - Blood: Test Types (different test names)
    - **RPR** (**lab report test names:** RPR Ser Ql, RPR Ser Titr, RPR Titer)
    - **VDRL** (**lab report test names:** VDRL Ser Ql, VDRL Quantitative)
    - **FTA** (**lab report test names:** FTA-ABS, T pallidum Ab Ser Ql IF)
    - **TPPA** (**lab report test names:** TPPA, T pallidum Ab Ser Ql Aggl
    - **Trep AB 1 and Trep AB 2** (**lab report test names:** Syphilis TP, T pallidum Ab Ser Ql, T pallidum Ab Ser Ql IA, T pallidum IgG+IgM Ser Ql IA)
      - If only one of these test names is on a lab report, code this test as Trep AB 1.
      - If lab report has two of the treponemal test (names must be different), code these as Trep AB 1 and Trep AB 2. Two different tests of this type are often done when the reverse algorithm is used and the RPR is non-reactive.
      - DBS (dried blood spot) and rapid syphilis tests are treponemal tests. A DBS or rapid test result on a lab report should be coded as Trep AB 1.
      - CSF: Test Types and Results
    - VDRL
      - Reactive, Non-reactive
      - 1:1, 1:2, 1:4, 1:8, 1:16, 1:32, 1:64, 1:128; 1:256: 1:512, 1:1024, >1:1024
    - FTA
      - Reactive, Non-reactive
    - Protein
      - Number
    - WBC
      - Number
    - Lesion: Test Types and

        - Results
    - Darkfield
        - Positive, Negative

- **Result:** The result of the lab depends on the type of test, treponemal vs. non-treponemal. Non-treponemal tests can be reported as qualitative (reactive vs. non-reactive) and/or quantitative with a titer number.
    - Result for a treponemal test are usually qualitative.
        - Reactive, Weakly/minimally reactive, Non-reactive

    - Result for a non-treponemal test can be qualitative or quantitative. Test results for a non-treponemal test listed in the drop-down menu include:
        - Reactive, Weakly/minimally reactive, Non-reactive
        - 1:1, 1:2, 1:4, 1:8, 1:16, 1:32, 1:64, 1:128; 1:256: 1:512, 1:1024, 1:2048, >1:2048

- **Interpretation:** The result of the test. May be left blank.

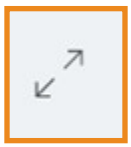
- **Accession ID:** The lab specific ID number. May be left blank. ID that a lab uses to identify an isolate or sample.

- **OSPHL ID:** An ID number given to all isolates that are processed and resulted at the Oregon State Public Health Laboratory (OSPHL). If manually entering a lab, you should not need to enter this.
- **Pathogen and Units:** This is not used for syphilis. If not auto populated from the ELR, leave the fields blank.

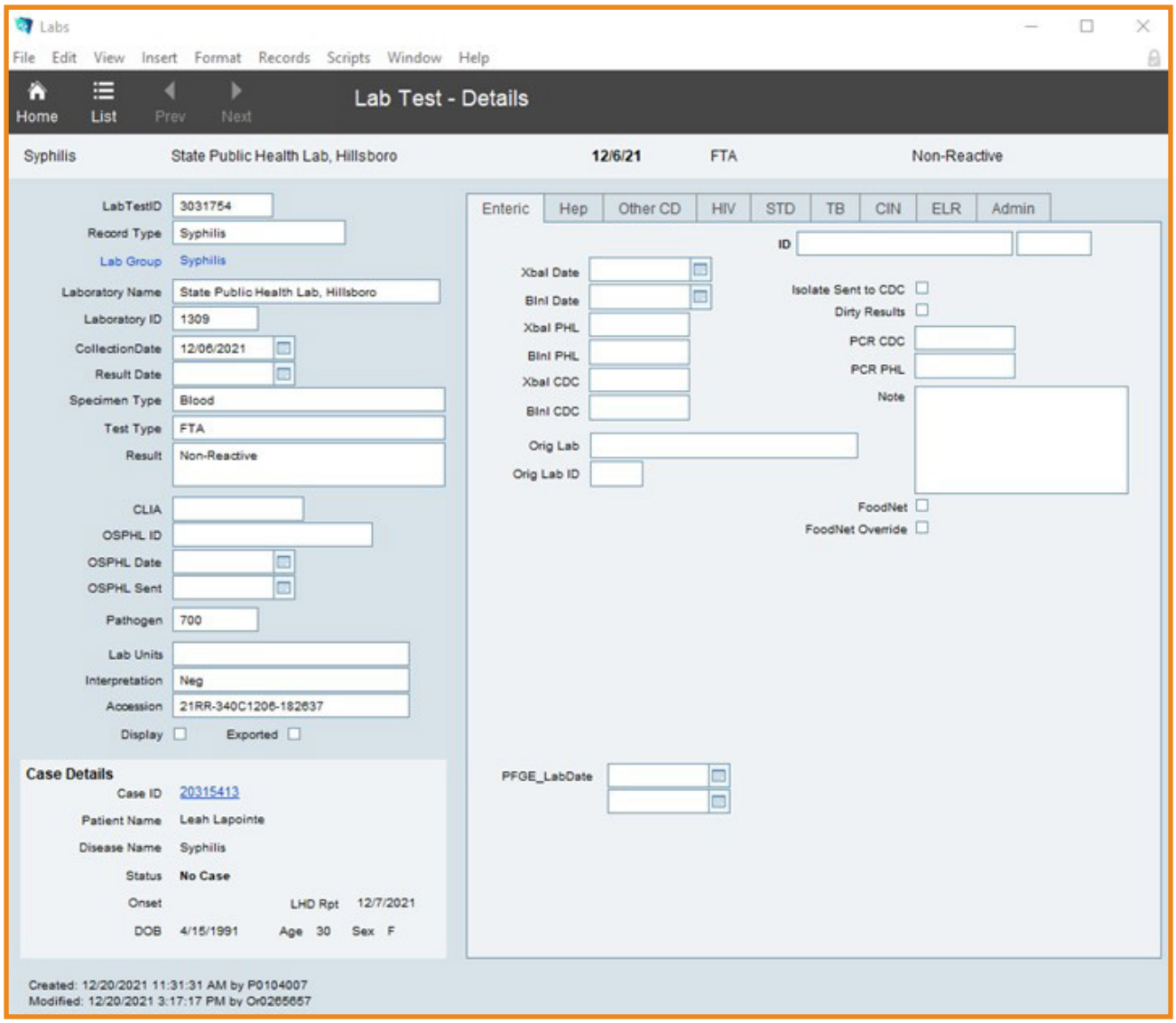
- **Comments box:** For manually created labs, attached the lab results into the Docs tab when possible (for example, faxed lab, provider report, electronic health records,, etc.).
- In an ELR, several fields may be populated with unclear data or left blank. To assist with consistent data reporting, case investigators may update the Specimen Type, Test Type and Result of an ELR to an appropriate option in the drop-down menu. It is best practice to review the ELR and make sure the result field match appropriately before processing the ELR. Click "<<Update" to find the best option. See "Process and ELR and find Orpheus records."

- **Add Lab (same day):** When a lab facility reports all syphilis results in single ELR, click "Add Lab (same day)" to duplicate the information on the ELR and change the Specimen Type, Test Type and Result.

3 **Show ELR Details** — Click the "Show ELR Details" button at the bottom of an ELR to see the full text of the ELR as it was submitted by the lab. Content will vary, but this may have additional information such as an alternate phone number or additional context for the case. Manually created labs will not have a "Show ELR Details" button.



- Click the arrows button to view the ELR details in the Lab Test – Details screen.

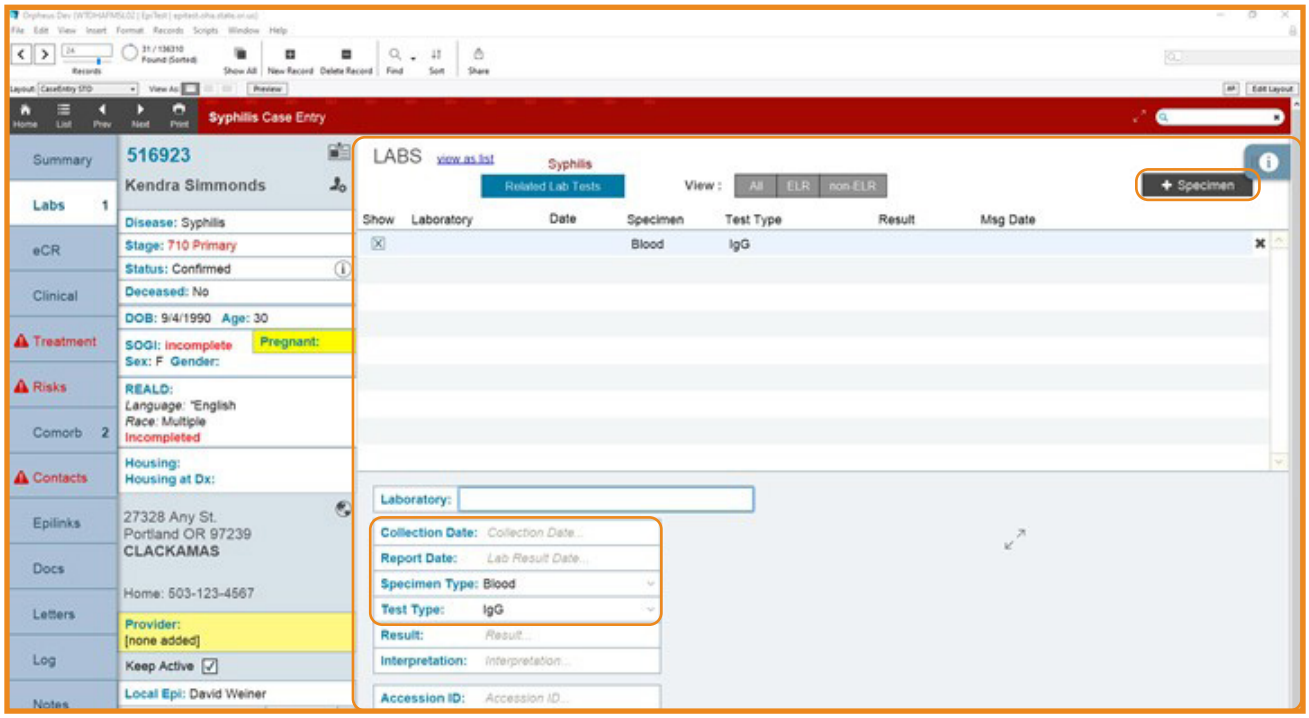


4 **Manually enter test results** — Click the "+Specimen" button to manually enter a test result. This will add a new row where you can enter the lab information. By default, the Specimen Type will be "Blood" and the Test Type will be "RPR." All other values will be blank until you enter the data.

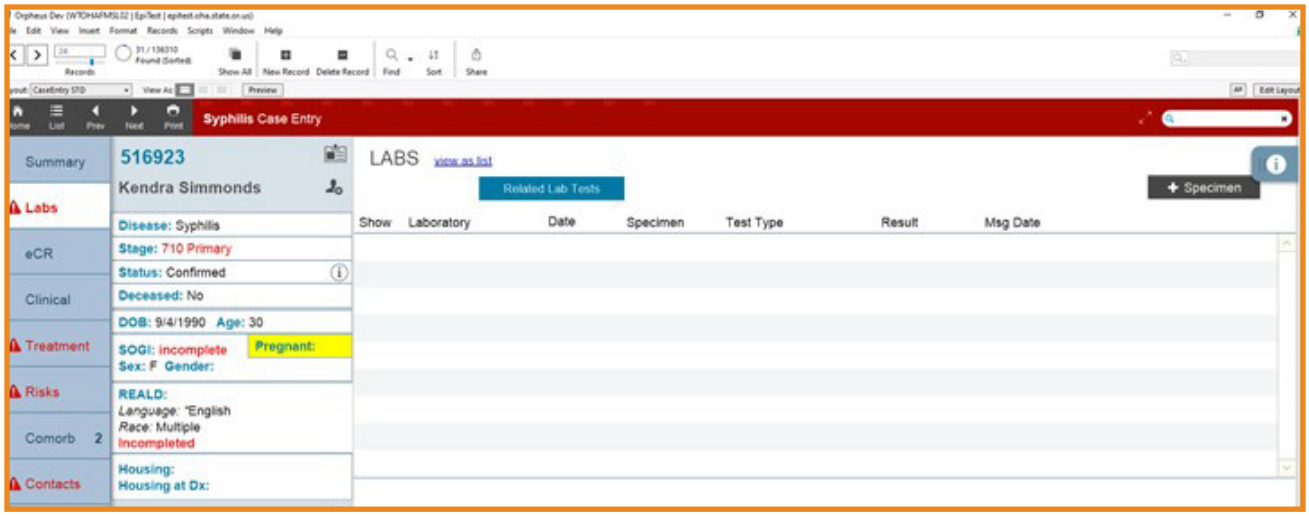
- Manually entering test results is only necessary if a test result is received outside the ELR system. Test results may be received by:
  - » Fax
  - » Electronic case report (eCR)
  - » Cluster/Outbreak investigation
  - » Early notification prior to the ELR being submitted or processed
  - » Dried blood test

- Positive dried blood spot (DBS) should be encouraged to seek laboratory-based confirmatory testing.

- If a test result is faxed, a PDF copy of the faxed lab should be uploaded into the Docs tab.



- If no labs are recorded, the Labs tab will be highlighted red with an exclamation icon. When the first lab is entered, the tab will turn to normal black text. You may need to click a different tab before the icon will refresh.

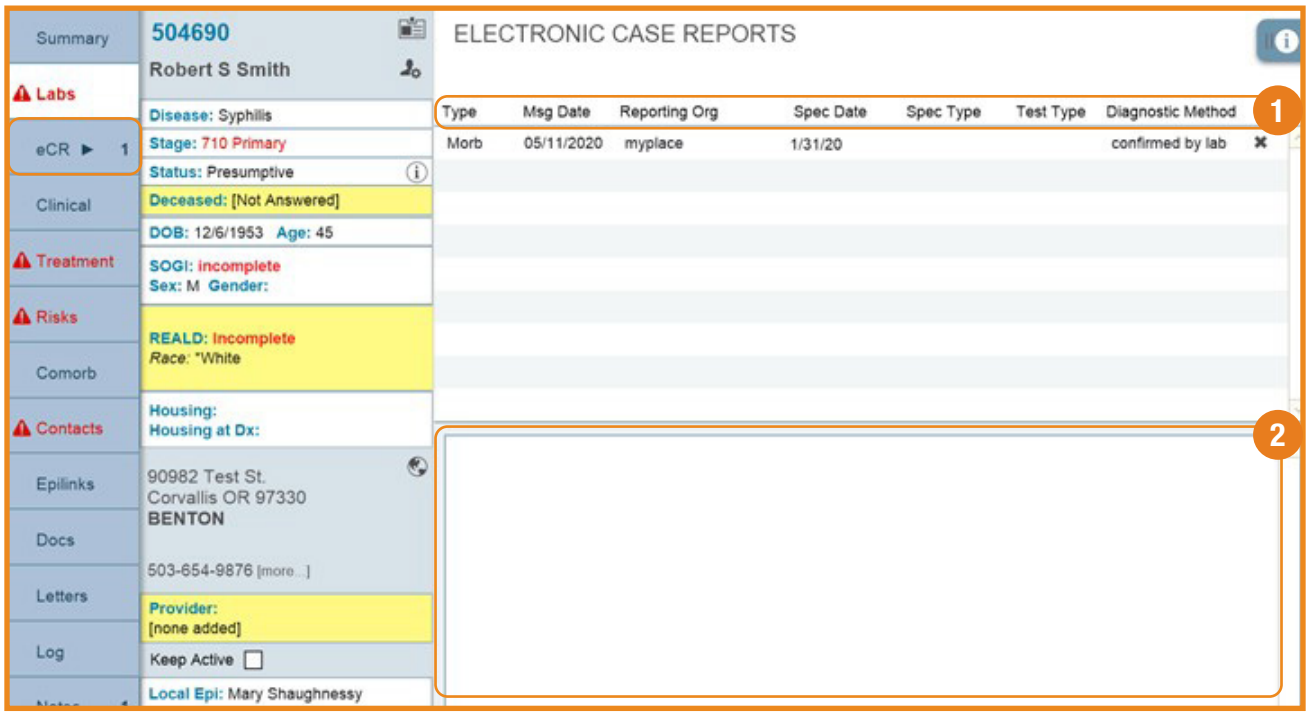


- The tab will change from

to

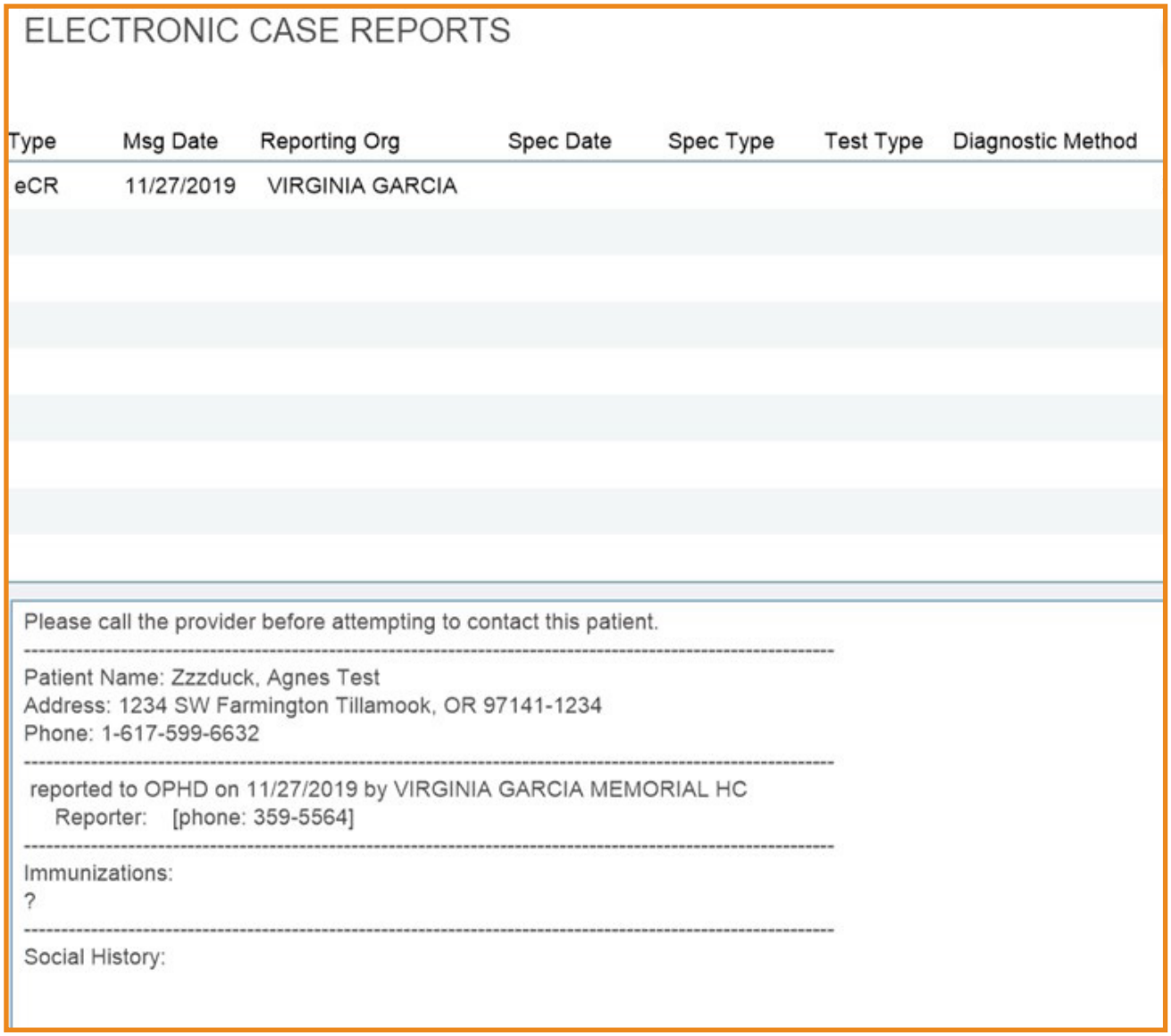
eCR tab

The electronic case reports (eCR) tab contains electronic health records submitted by health care providers and facilities to provide information about reportable diseases. Cases can be created based on eCRs that indicate positive lab results based on the case classification. If so, those positive test results should be manually entered into the Labs tab. Most cases do not have eCR data. Ask your county lead or supervisor for local processes regarding eCRs.



1 **Electronic case reports (eCR)** — There are two types of eCRs: Morb and eCRs. Click an eCR/Morb to view details in the lower half of the screen. The types of eCR include:

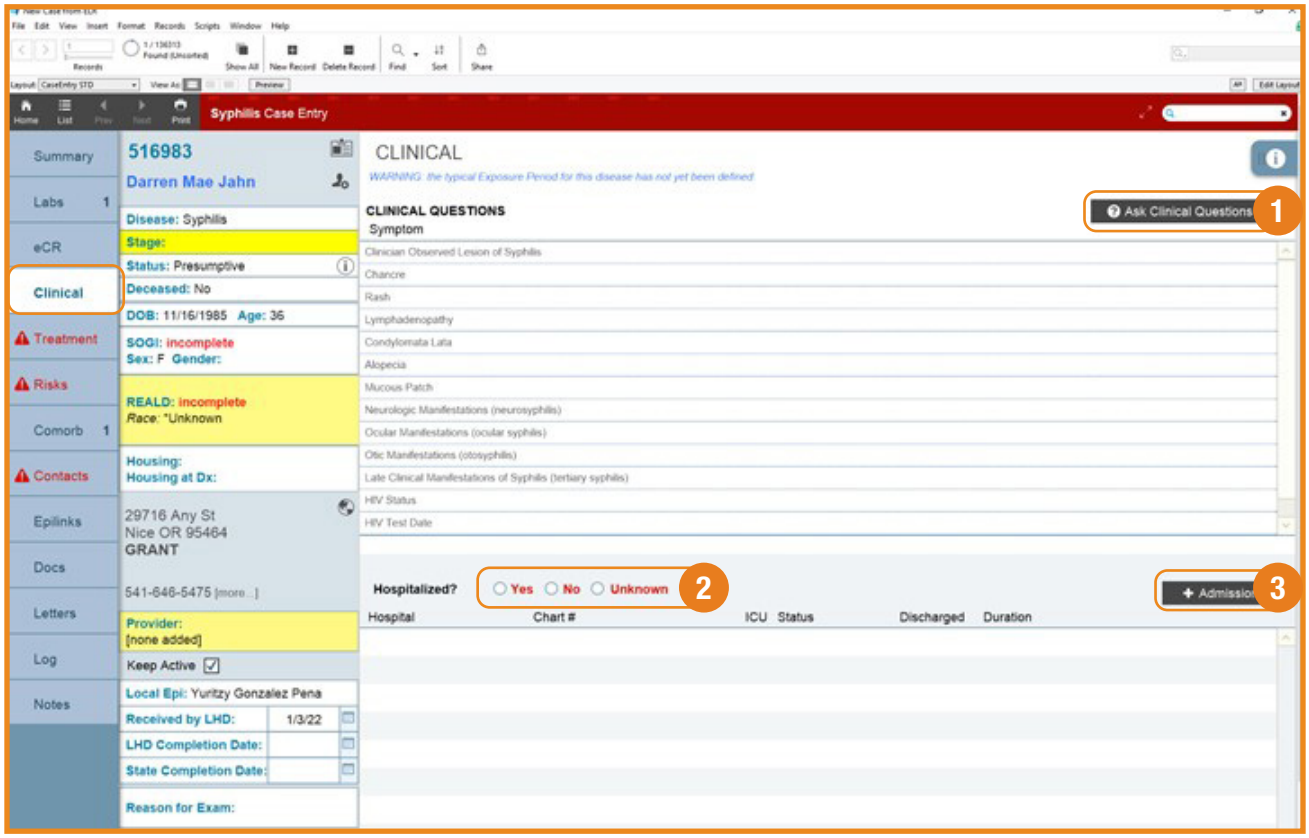
- **Morb:** eCRs are submitted by healthcare providers via the OHA portal at https://www.oregon.gov/oha/ph/DISEASESCONDITIONS/COMMUNICABLEDISEASE/REPORTINGCOMMUNICABLEDISEASE/Pages/counties.aspx.
- **eCR:** Electronic case reports submitted by healthcare providers and facilities with full medical histories, including doctor's notes and detailed treatment information. These records often have information for other disease or information unrelated to syphilis diagnosis.



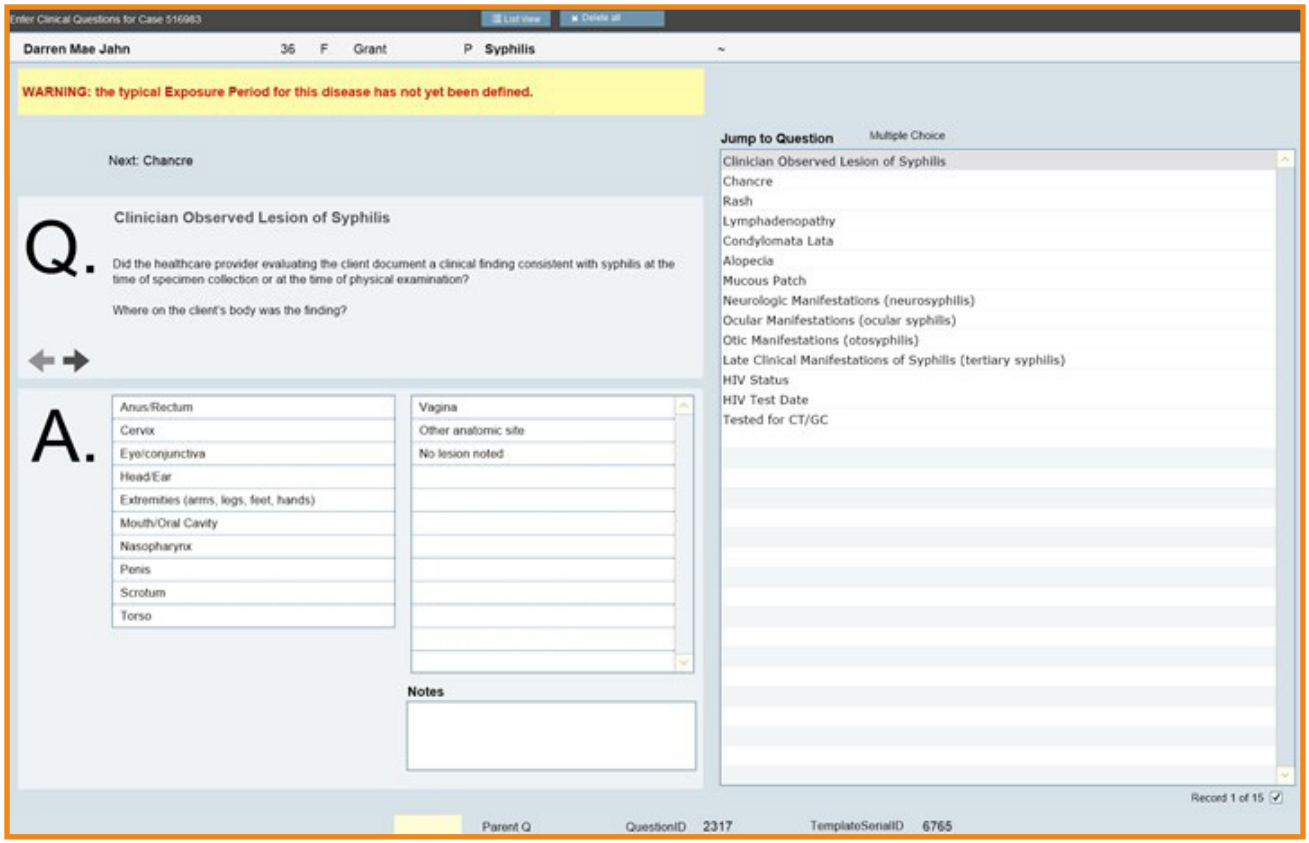
2 **GoTo eCR** — Click the eCR/Morb to display the information on the bottom of the screen.

Clinical tab

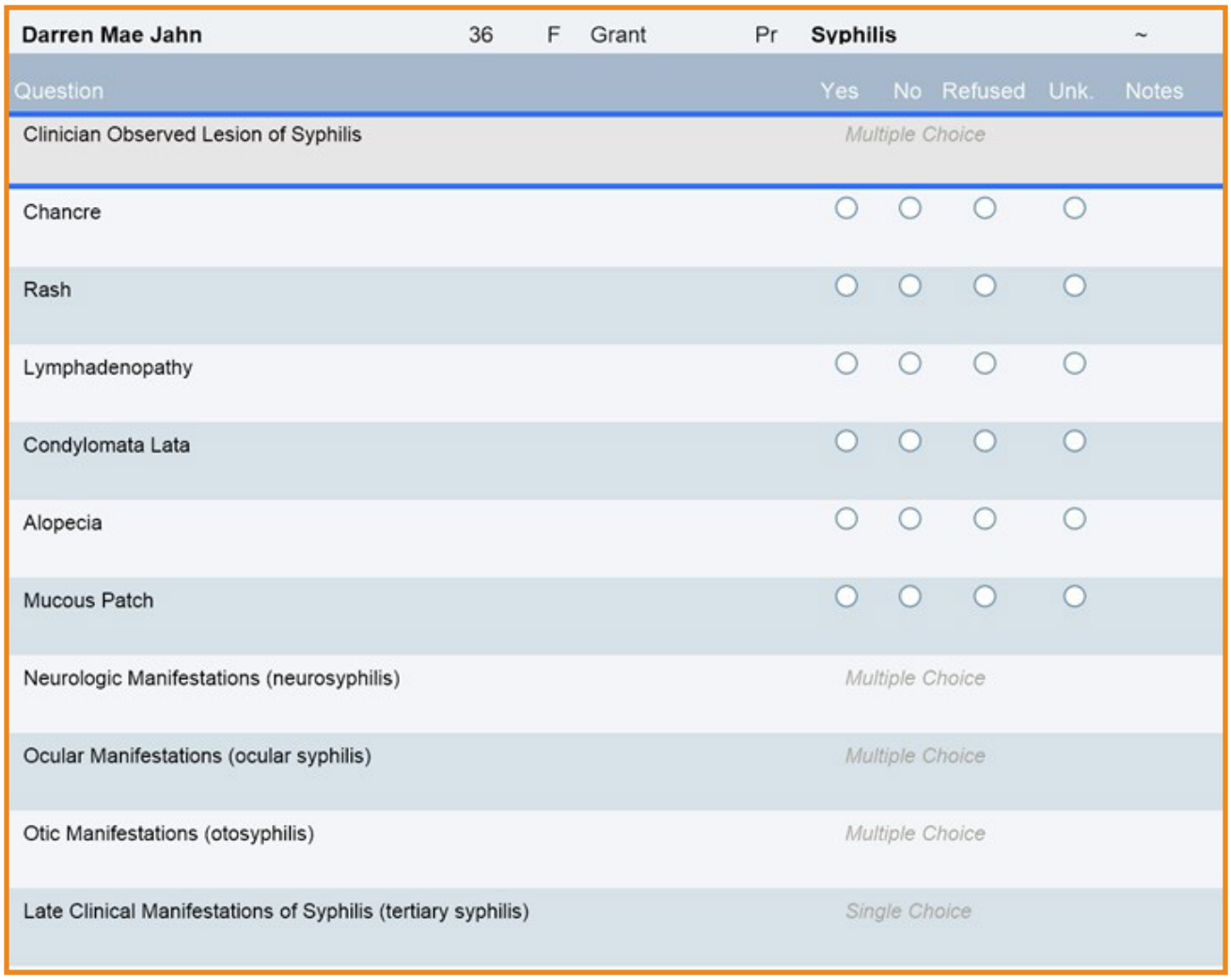
The Clinical tab contains information about syphilis symptoms. The exposure period for syphilis has not yet been defined.



1 **Clinical Questionnaire** — Click this button to open the Clinical Questionnaire in a pop-up window. Orpheus can move to the next question by answering the first question, using the arrows ⇦⇨ or by clicking on the actual question on the "Jump to Question" box on the right.



Questions can also be answered from a list view. Click the "List View" button to view all the questions in a list layout. The List View allows you to see all the questions at once and the single choice answers, but not the options to multiple-choice questions. To see the options for the multiple-choice questions, click the questions and a new window will pop up with the options.



- All questions can be asked to the case or answered from a chart review. Check with your county lead or supervisor for the local process.
- Optionally, use the free "Notes" field under each symptom to record any additional information the case shares with you or useful information found during the chart review.
- The "Delete All" option will erase all the answers to the clinical questions.

2 **Hospitalized** — This will be highlighted in red text until "Yes," "No" or "Unknown" is selected. Hospitalization is not a required field, but it can be helpful during an investigation. Ask your county lead or supervisor for local preferences.

- Click "Yes" if the case has been admitted to the hospital for a syphilis infection.
- If the case was not interviewed and there is no information on EHR, click "Unknown."
- A case would be considered Hospitalized if:
  - » Admitted to an acute care facility following an emergency department (ED) or outpatient visit, or

» Admitted for 24 hours or more in an observation unit or ED.

- A case would not be considered Hospitalized if:
  - » Admitted for less than 24 hours in an observation unit or ED.

3

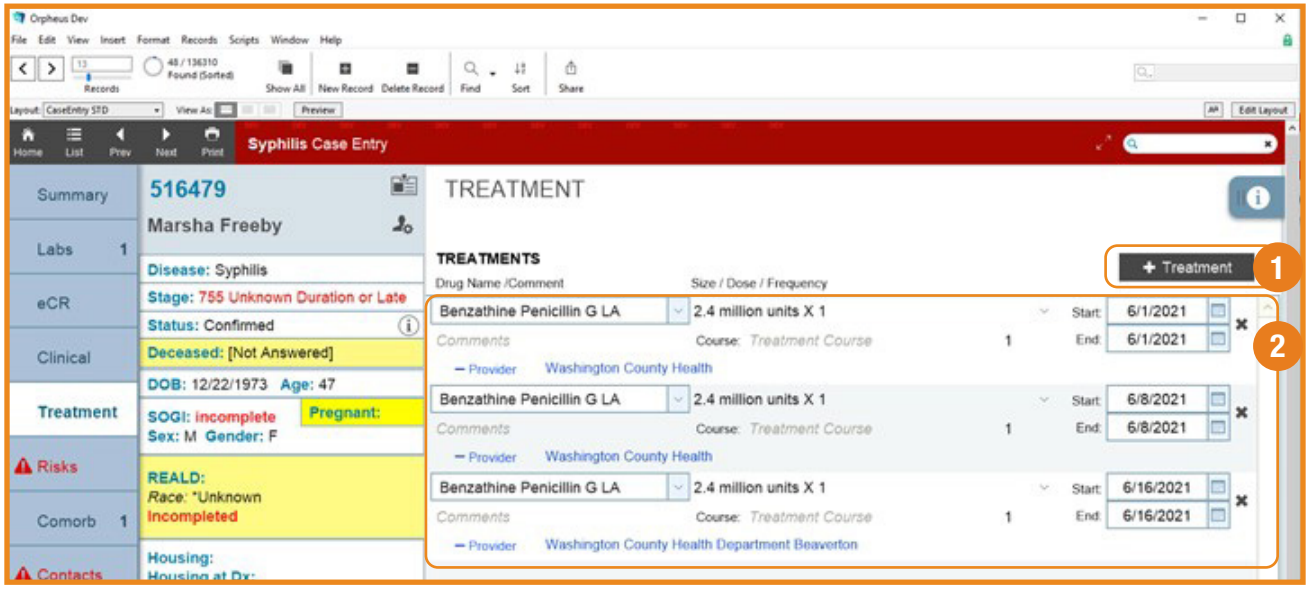
Admission — Click the "+Admission" button to record the admission information. Admission is not required for syphilis investigations, but some counties might find it helpful.

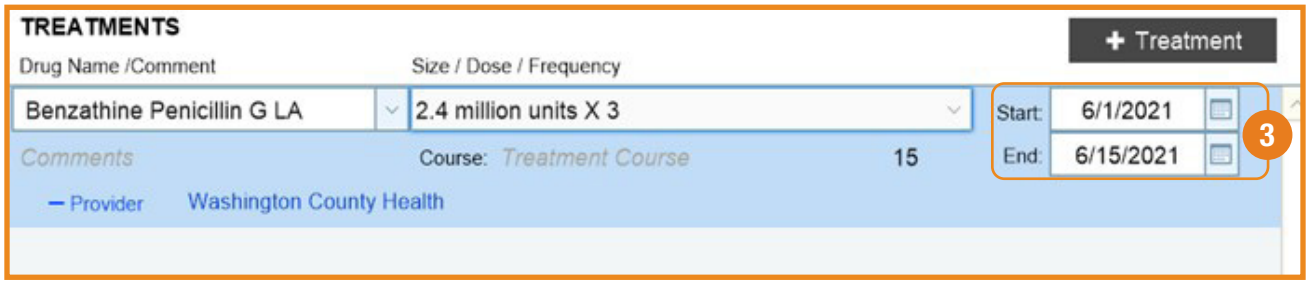
Some best practices are listed below.

- Record the hospital name, date admitted, date discharged and case status.
  - » If the case was transferred to another hospital, enter admission information for both hospitals.
  - » If the case is still in the hospital at the time of interview, leave the discharge date and Status blank.
  - » If the hospital is not in the drop-down menu, you can manually enter the hospital by clicking twice in the "Hospital" field; otherwise, the hospital name will remain null.

Treatment tab

The Treatment tab contains information about syphilis-related treatments. See the "Syphilis Investigative Guidelines" for types of treatment that should be recorded. Treatment information is unlikely to be obtained during a case interview; it may instead be obtained during a provider interview or other medical record review.





1 **Treatment** — Click the "+Treatment" button to record the treatment information.

- For each treatment, record the:
  - » Drug Name (example: Benzathine Penicillin G LA)
  - » Size/Dose/Frequency (example: 2.4 million units X1)
  - » Provider (example: Washington County Health)
  - » Course (example: 1 day or 15 days)
  - » Start Date (example: 6/1/2021)

2 and 3

- » End Date (example: 6/15/2021)

Treatment records — Treatment depends on the stage. The screenshot above shows treatment for a 755 Unknown Duration or Late which requires three doses. The treatment doses can be recorded by single doses or all three doses in one record. Ask your county lead or supervisor for local preferences.

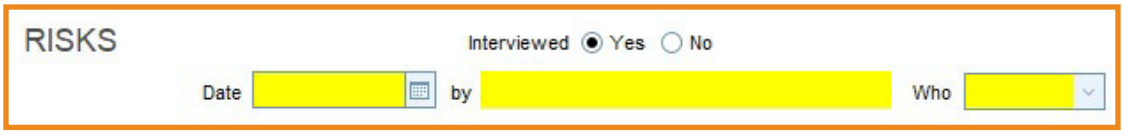
- **Drug Name/Comment:** The treatments in the drop-down menu include:
  - » Aqueous crystalline Penicillin G
  - » Azithromycin
  - » Benzathine Penicillin G LA
  - » Ceftriaxone
  - » Doxycycline
- **Size / Dose / Frequency:** The options on the menu depend on the drug name selected. For example, if Benzathine Penicillin G LA is chosen one of the options is 2.4 million units X1 or other. If Doxycycline is chosen, one of the options is 100 mg twice a day X 14 days.
- **Start and End Date:** Enter the first date of treatment and the last day. The last day of treatment is as important as the start date because it is necessary to know if the case finishes treatment.
- **+Provider:** Click to add the provider or the facility. If the case received treatment in two locations, record each dose and add the facility name.

Risks tab

The Risks tab contains information about possible sources of exposure for the case. The exposure period for syphilis has not been defined yet. The modes of transmission are sexual and vertical with an incubation of 10 to 90 days. Syphilis infections are communicable to sex partners during the primary and secondary stages.

1 **Interview Details** — Record the date when you first attempted to contact the case and if/when the interview was completed.

- **Interviewed:** Record if you partially or fully completed the interview by selecting "Yes" or "No."



  - » **Yes:** Select "Yes" if you interviewed the case, verbally or on paper (syphilis case report form), and asked the Risk questions. A medical chart review does not count as an interview. If you select "Yes," three additional fields will appear.
    - **Date**: The date that the interview was completed.
    - **By:** Click once to find the interviewer's name in the user window.
      - » **Search:** The name of the DIS.

- **Who:** Who was interviewed.
  - **Patient:** Interviewed the case directly.
  - **Provider:** This is not used in syphilis case investigations.
  - **Parent:** This is not used in syphilis case investigations.
  - **Other:** This is not used in syphilis case investigations.
- **No:** Select "No" if you have not spoken with or received written answers from the case. If you select "No," the "Reason" fields will appear.

- **Reason:** Select the reason the case was not interviewed from the drop-down menu.
  - **Complete:** This is not used for syphilis case investigation.
  - **Not Indicated:** Use not indicated for cases in which patient interviews are expected but the interview cannot be completed due to other priorities. An interview may be "not indicated" if the patient is experiencing higher priority physical, mental or social needs. For example, an interview may not be indicated if the STD is diagnosed:
    1. While the patient is hospitalized with a non-STD-related life-threatening condition
    2. Following a sexual assault exam in an adult, or
    3. When child abuse is suspected.

    In such cases, please consult a supervisor to determine whether an interview is needed and, when appropriate, to review your role as a mandatory reporter.
  - **Unable to Reach:** Case does not answer phone, voicemail or text and is lost to follow up.
  - **Out of Jurisdiction:** Case is out state. Send a note to Jenn Li.
  - **Deceased:** Case is deceased and no appropriate proxy could be identified or interviewed. Check with your county lead or supervisor to determine whether an interview is needed and the local process.
  - **Refused:** Case is reached but declines interview and does not answer any questions.
  - **No (Medical Record Review):** Case is not interviewed, but their medical chart or other written documentation is reviewed to answer

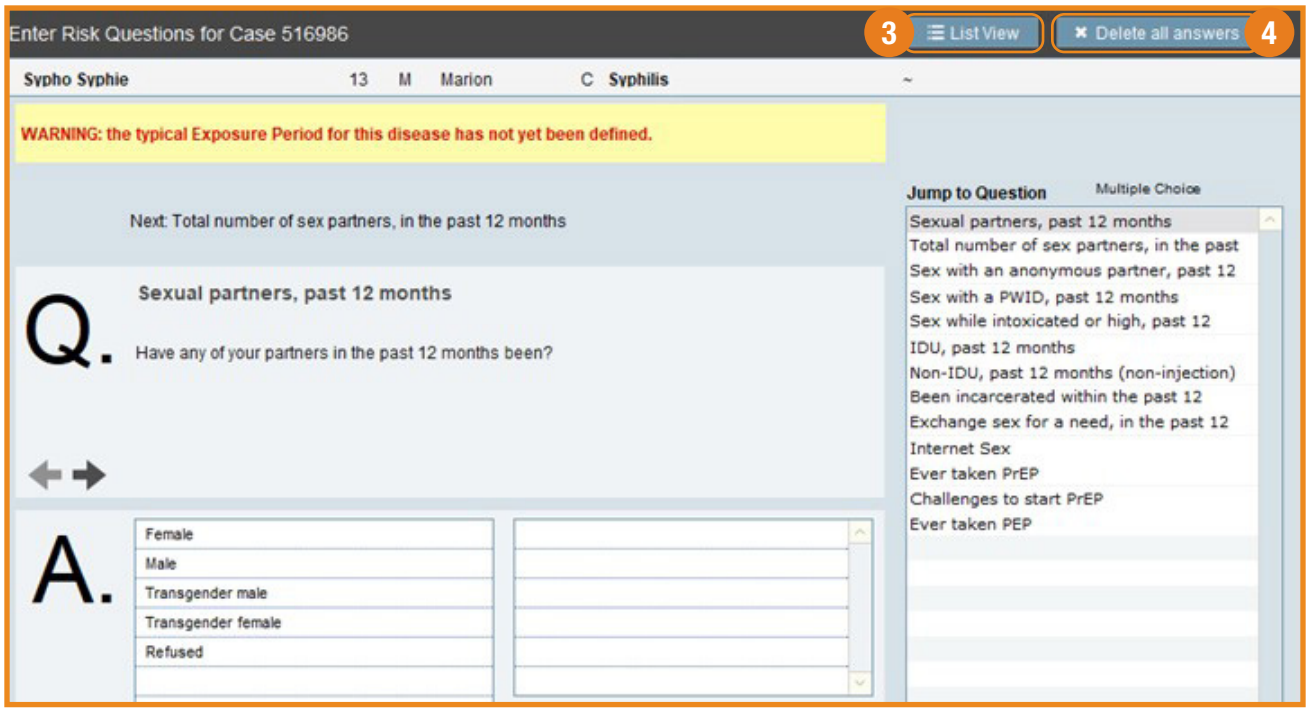
limited case questions.

- » **No (Physician/ICP Interview):** Care provider is interviewed.
- » **Kaiser/OHSU/MCHD:** This is not used for syphilis case investigations.
- » **Selected for interview (Mult Only):** This is not used for syphilis case investigations.

2 **Risk Questionnaire** — Click this button to open the Risk Questionnaire in a pop-up window.

The syphilis risk questionnaire has questions with a single, multiple-choice, date or numeric response options. All questions have a box to write additional notes. Notes are not required but can be useful.

- Single choice questions have the following answer values:
  - » Yes — Case reports practicing the risk behavior within the timeframe specified in the question.
  - » No — Case reports not practicing the risk behavior within the timeframe specified in the question.
  - » Refused — Case refuses or ignores the questions. If you think the case is refusing the question but is not verbalizing, remind case that they can refuse any question.
  - » Unknown — Case cannot provide an answer after explaining the question.
- Multiple-choice questions have values related to the question and can be answered with more than one option.
- Numeric question — These have a box that can only take a numbers as values.
- Date questions — These have a box that can only take a date value. Click on the calendar to navigate to the date.



- If no Risk Questionnaire answers are recorded, the Risks tab will be highlighted red with an exclamation icon. When at least one risk question is answered, the Risks tab will turn to black text. You may need to click a different tab before the icon will refresh.
  - » The tab will change from to

- **Sexual partners, past 12 months:** Indicate the best option for the case's sexual partner(s). Select all that apply. This field is CDC required and must be completed for the syphilis reimbursement program.
- **Total number of sex partners, in the past 12 months:** Enter a number adding all sexual partners, regardless of sex and gender. It could be an approximate number if the case cannot recall an exact number. This field is CDC required.
  - » Enter a number.
  - » If the case report 0 partners in the past 12 months, enter the number 0.
  - » If the case cannot provide an exact number, enter an approximate number.
  - » If the case refuses to answer the question, leave it blank.
- **Sex with anonymous partner, in the past 12 months:** Anonymous partner is defined as having sex with someone whose full name or information to locate is not available. Answer Yes if the case reports having sex with someone whose full name or contact information is not available. This field is CDC required.
- **Sex with PWID, past 12 months:** Indicate if the case had sex with a person who injects drugs. This field is CDC required.

    - » **Drug choice:** Indicate the drug name (injection only). If you indicate "other," write details in the notes.
        - Methamphetamine
        - Cocaine
        - Heroin
        - Crack
        - Nitrates
        - Viagra
        - Sedatives/Tranquilizers (added in 2022)
        - Non-heroin opioid including prescription painkillers (added in 2022)
        - Other
        - Refused
- **Non-IDU, past 12 months:** Indicate if the case engaged in non-injection (recreational) drug use within the past 12 months? Non-injection includes smoking, inhalation, ingestion, etc. Answering Yes will create one question with drug choices. This field is CDC required.
    - » **Drug choice:** Indicate the drug name of drug used (non-injection only). If you indicate "other," write details in the notes.
        - Methamphetamine
        - Cocaine
        - Heroin
        - Crack
        - Nitrates
        - Viagra
        - Sedatives/Tranquilizers (added in 2022)
        - Non-heroin opioid including prescription painkillers (added in 2022)
        - Other
        - Refused
- **Been incarcerated within the past 12 months:** Indicate if the case was incarcerated within the past 12 months in a jail, prison or correctional facility, etc. This field is CDC required.
- **Exchange sex for a need, past 12 months:** Indicate if the case has exchange sex for a need in the past 12 months. A Yes answer will create a new questions with a list of different needs. This field is CDC required.
- **Needs exchanged for sex, past 12 months:** Select the option(s) for which

the case exchanged sex. This field is CDC required.

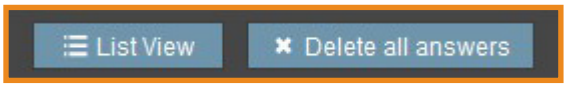
- Money
- Drugs
- Paid bills
- Material goods
- Place to stay/sleep
- Food
- Vehicle/transportation
- Dependent care
- Security/protection
- Other – write on notes
- No

- **Internet Sex:** Indicate if the case used social/internet apps to find sexual partners in the last 12 months. Answering Yes will create one question with social/internet apps options. This field is CDC required.
  - » **Internet sex site names:** Indicate the name of social/internet app used to find sex partners.
    - Manhunt
    - Adam4Adam
    - Bareback RT
    - CraigsList
    - Grindr
    - Scruff
    - Jack'd
    - Growler
    - Dude's Nude
    - Tinder
    - Match
    - eHarmony
    - Sniffies
    - Facebook
    - Snapchat
    - Instagram
    - Other

- **Ever taken PrEP** Indicate if the case has taken PrEP for HIV prevention ever. Answering Yes will create one question with the most recent PrEP use. This question is intended to open conversation about PrEP use. This field is not CDC required.
  - » **Most recent PrEP use:** Indicate the date of the last time case used PrEP. If the case cannot remember the last time, use an approximate date
  - » **Challenge to continue PrEP:** If the case reported using PrEP and is no longer using PrEP, ask the case what the challenges are to continue PrEP. This question provides some broad categories. Select all the options that apply. If there are other reasons, write them on the notes.
    - Knowledge
    - Personal
    - Insurance
    - Social support
    - Access
    - Stigma
    - Side effects
    - Affordability
    - Change of risk perception or relationship status
- **Challenges to start PrEP.** If the case reports not using PrEP ever, ask the case what the challenges are to starting PrEP. This question provides some broad categories. Select all the options that apply. If there are other reasons, write them on the notes.
    - Knowledge
    - Personal
    - Insurance
    - Social support
    - Access
    - Stigma
    - Side effects
    - Affordability
    - Change of risk perception or relationship status changed
- **Ever taken PEP** Indicate if the case has taken PEP for HIV prevention ever. Answering Yes will create one question about PEP in the last 12 months.

- » **PEP in the last 12 months:** Indicate if the case used PEP in the past 12 months before the syphilis specimen collection date.
- » This field is not CDC required.

- The risk questionnaire, same as the clinical questionnaire, allows you to ask the questions in a List View

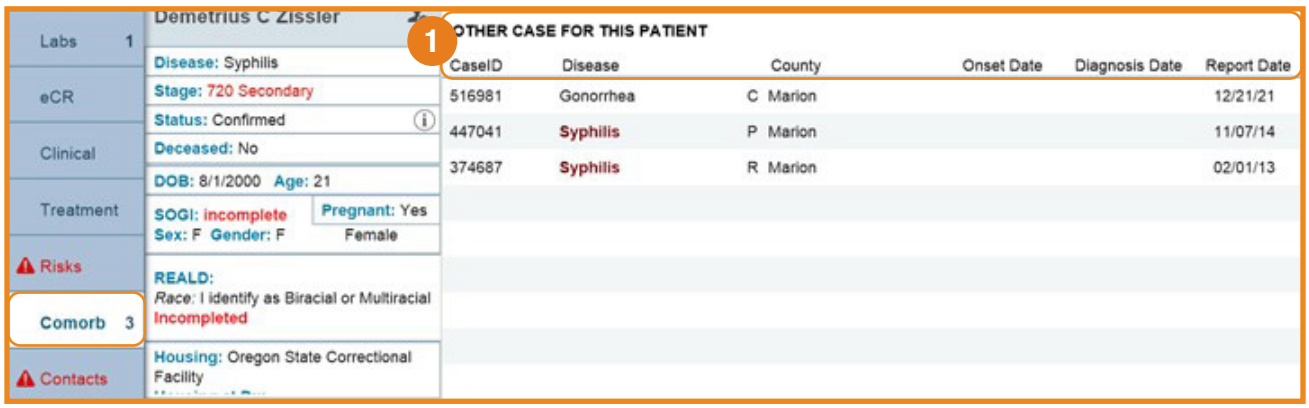


3. **List View** — Click the "List View" button to open a new screen to record the answers.

4. **Delete all answers** — This option will delete all the answers to the risk question. It will not delete the answers to the clinical questions.

Comorb tab

The Comorb tab contains information about other reported cases for the same person. The ability to see other syphilis cases or other communicable disease cases depends on the access rights and cross-jurisdictional agreements. If the case does not have a syphilis history or other communicable diseases cases, this tab would be blank. It is possible the case has a syphilis history, but this tab would still be shown as blank. It is best practice to use the "Syphilis History – All" button to find syphilis records in the whole state before linking the ELR. See "Process an ELR" in the "How to" chapter for more information. Syphilis cases created prior to 2018 have a record called "Reactor." The reactor case was used as a placeholder for all labs. Reactor case can be accessed to understand the syphilis history but do not modify the Reactor case.



1 **Other cases for this patient:** Other syphilis cases or other communicable diseases cases for the same person are shown here. If the case has a syphilis history or other communicable the fields "CaseID," "Disease," "Count" and "Report Date" would have information.

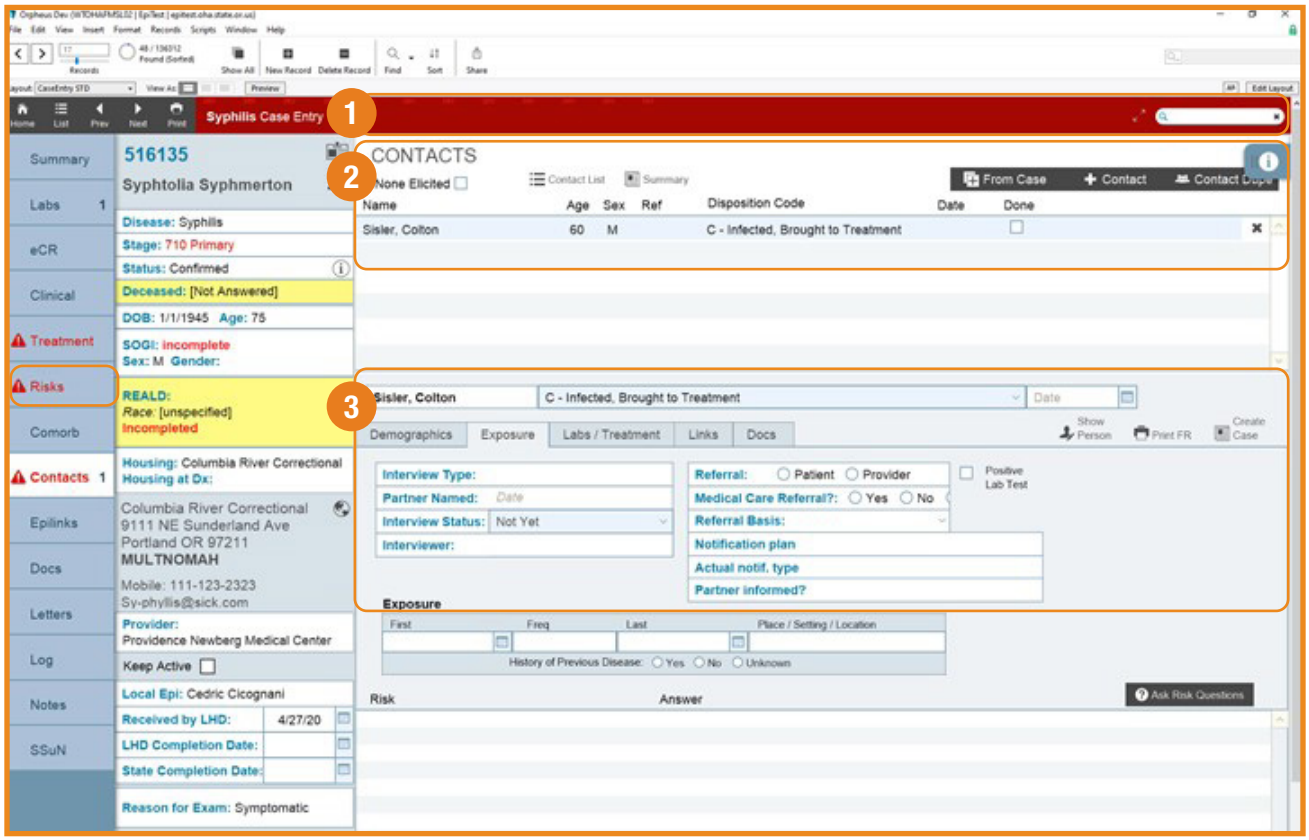
Cross-jurisdictional agreements: Check with your local lead or supervisor to find out if your current county has cross-jurisdictional agreements.

Contacts tab

The Contacts tab contains information about the case's sexual partners.

See the "Syphilis Investigative Guidelines" for managing sexual partners. The primary intention of the Contacts tab is to identify who the case may have exposed or who exposed the case. This list should include all named contacts within the appropriate interview period, including those from whom the client might have acquired infection and others whom the client might have exposed.

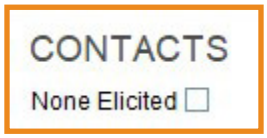
Secondary use of the Contacts tab is to offer partner services (notification, testing and treatment). If the case prefers to notify and refer the sexual contact, when possible LHDs should verify that the partner has been examined or treated. Record information about contacts directly into the Contacts tab and related sub-tabs.



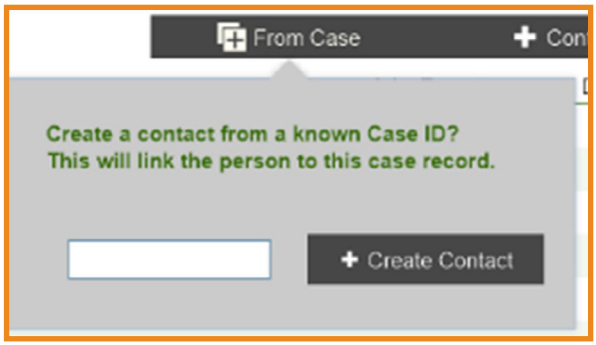
1 **Adding contacts and linking cases** — This area has tools to record new contacts or create links to existing cases.

- None Elicited: Check for specific local guidance for the "None Elicited"

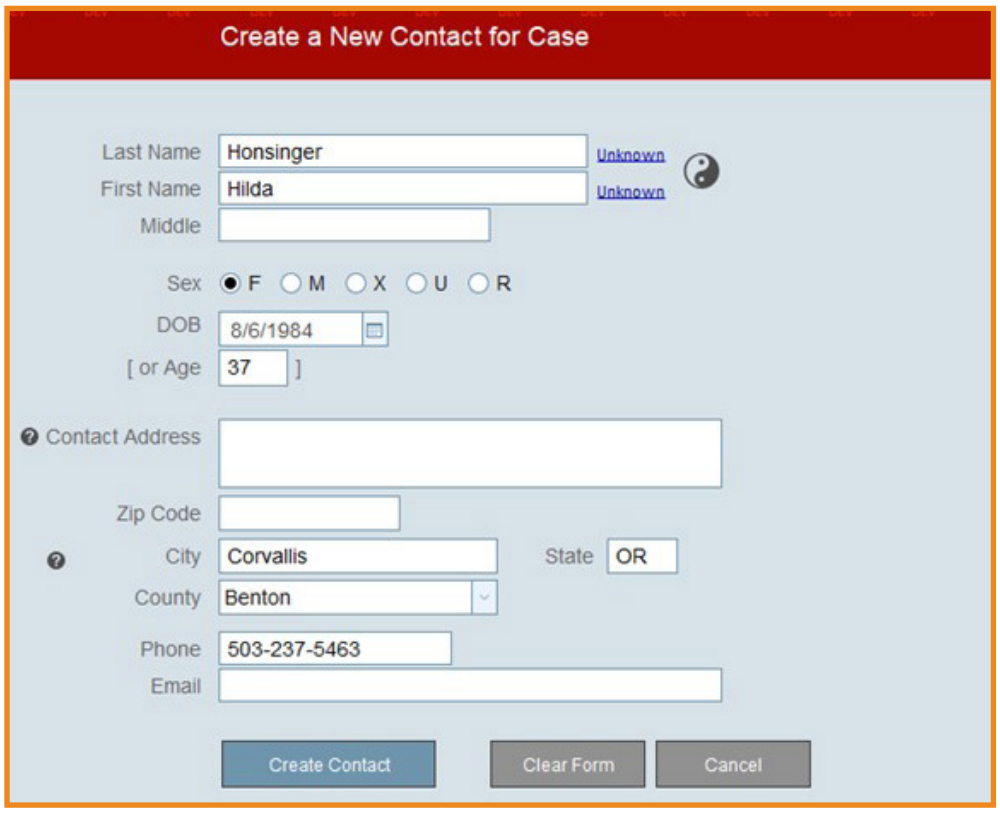
checkbox. In general, check the "None Elicited" checkbox if the case did not disclose any contacts. This may include either if the case claims not to have exposed anyone else or if the case refused to answer the question. Once checked, move on to the next tab.



- **+ From Case:** Click to link a known case as a contact, a pop-out menu will open up. Enter the case ID number of the case to be added as a contact. Make sure the case ID is correct before adding it to the box. Then click the "+Create Contact" button to complete the process.



- **+ Contact:** Click this to record a new individual contact. It will open the "Create a New Contact for Case" menu.



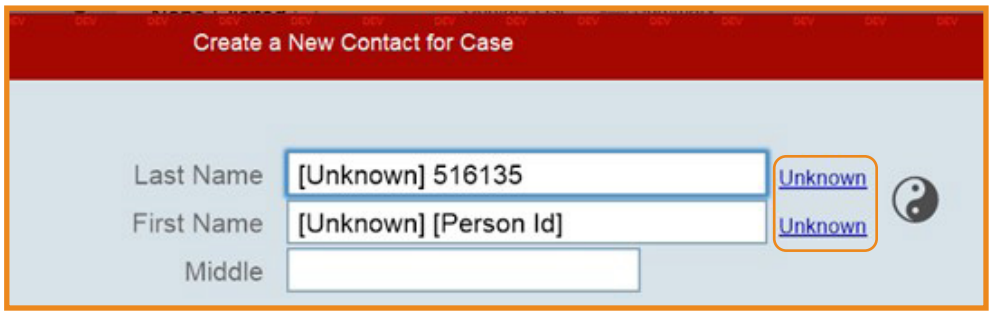
» When creating contacts, Orpheus will perform a search of person records already in Orpheus to find possible matches. This search is based on the exact spelling of the name as entered, but not similar names or alternate spellings that can cause the creation of duplicate person records.

  - To avoid creating duplicate person records, it is best practice to open another Orpheus window and complete a manual person search before clicking the "Create Contact" button for each contact. Review any matches to ensure a person record does not already exist for the contact.

» Enter any known information about the contact into the "Create a New Contact for Case" screen.

  - If the contact's first or last name is not known, click the "Unknown" button to the right of the text box only if you can find the last and first names later.

  - The "Unknown" buttons will add filler text to the name fields.



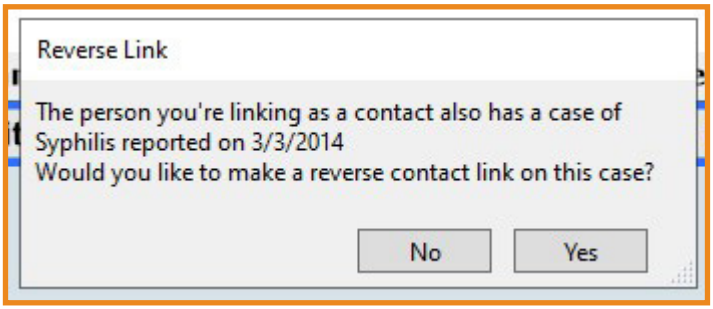
  - Enter age, if known, when the contact's date of birth is not known.

» Once information is entered, click "Create Contact." This will initiate a person search in Orpheus.

  - If the contact does not match any known person in Orpheus, the contact record will be created and will show up in the List of Contacts section.
  - If the contact is a possible match of another person in Orpheus (for example, already a contact or case), Orpheus will prompt you to review the possible match.

» Click "Details" to review the person record of the possible match in the Possible Match Found window.

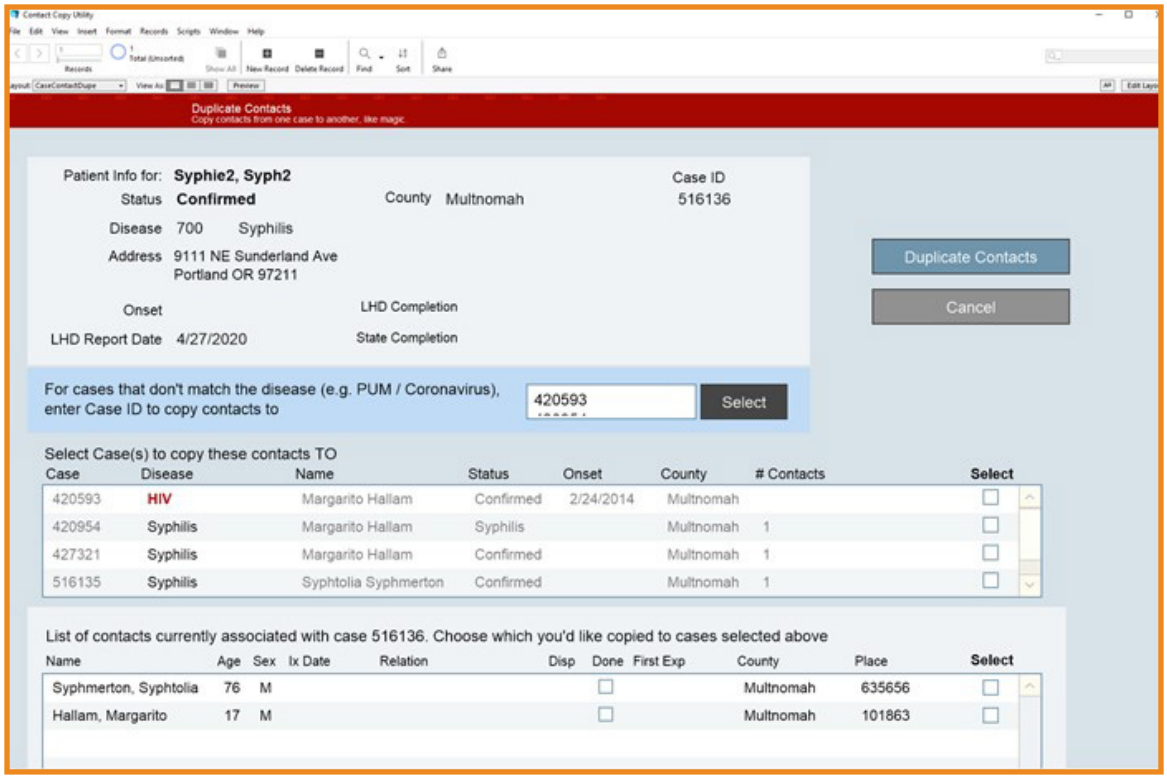
» If the possible match is the correct person, click the "Link This Contact" button to link the person as a contact.



- Additionally, if the possible match is an existing case, you may be prompted to create a Reverse Contact Link.
  - ☐ Click "Yes" to link both cases as Contacts to each other.
  - ☐ Click "No" to only link the contact one way.

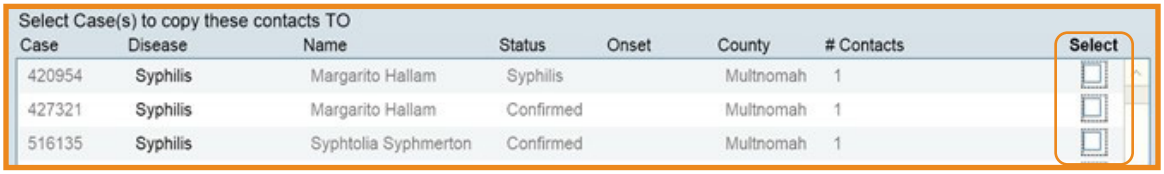
» If the possible match is not the same person, click the "Ignore Match, Create New Person" button to create a new contact record.

- **Contact Dupe:** This button only works when at least one contact has been added to the case. Contact Dupe is helpful when cases share multiple contacts. Click the "Contact Dupe" button to open the "Contact Copy Utility" menu in a new window. In the "Contact Copy Utility" menu, you can copy one or more contacts from this donor case and link them to one or more recipient cases.

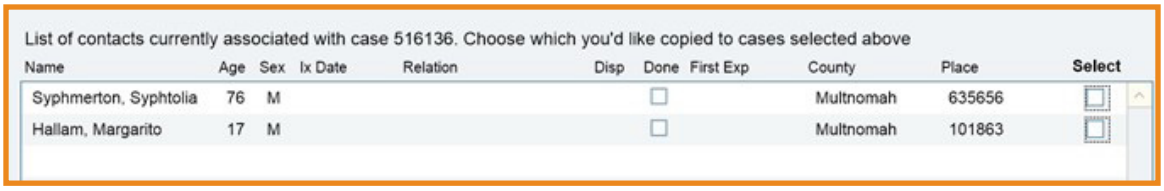


- The donor case's information will be listed at the top of the screen.

- In the middle of the screen, select the case ID of the recipient case in the "Select Case(s) to copy these contacts TO" box. Then click the "Select" button. The recipient case will be listed below. Make sure the "Select" checkbox is checked for the recipient case.

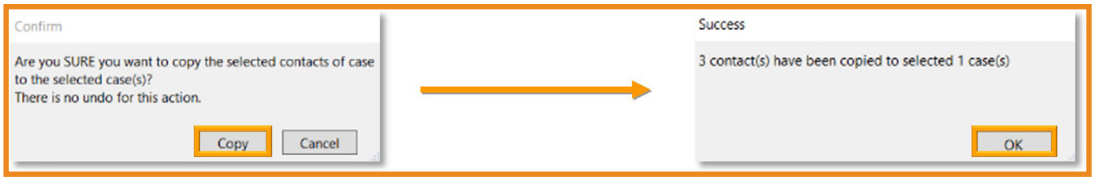


Contacts associated with the donor case are listed at the bottom of the screen. Check the "Select" checkbox to the right of each contact that should be copied from the donor case to the recipient case.

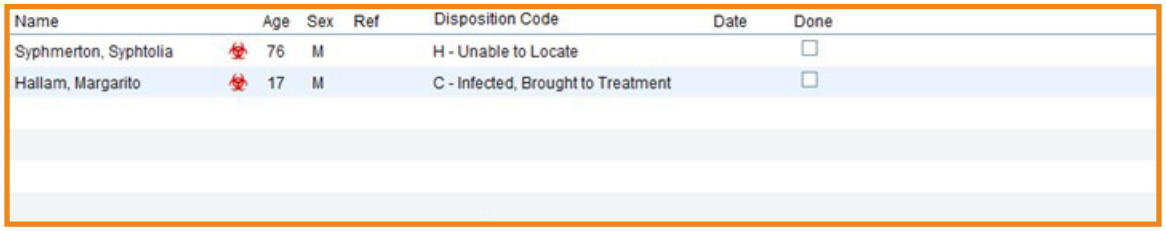


- Then click the "Duplicate Contacts" button to finish the process.

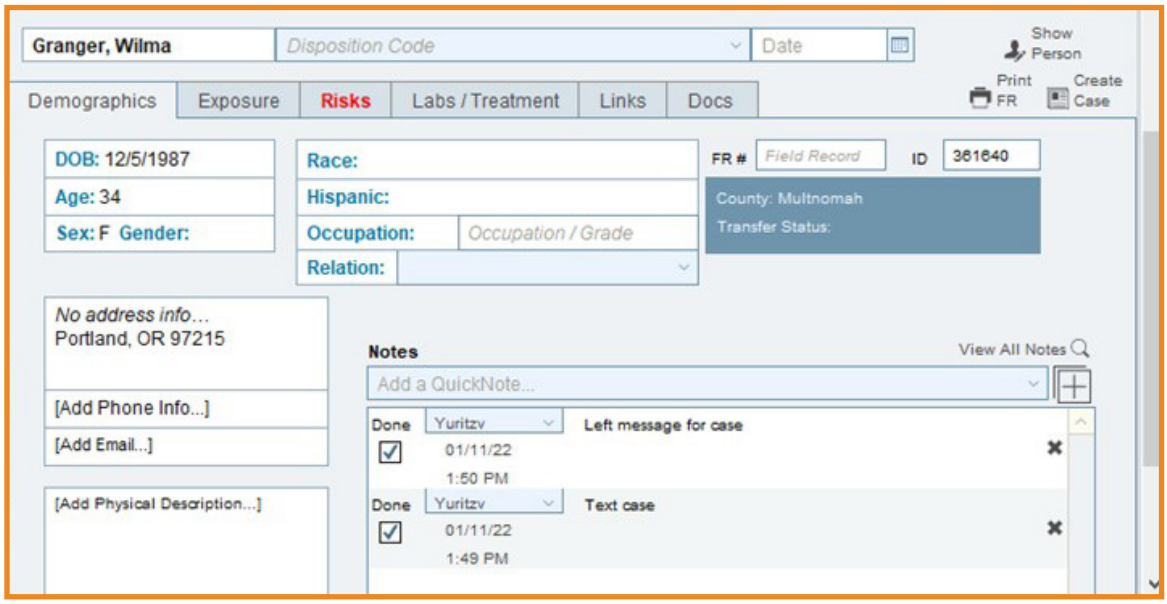
- A Confirm popup window will appear. Click "Copy."
- A Success popup will let you know the process was successful. Click "OK" to close the window.



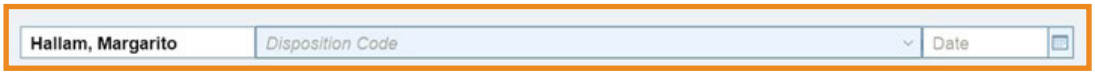
2 **List of contacts** — Contacts will be listed here once they are created or linked to the case. Click a contact to view the contact details in the bottom section of the screen.



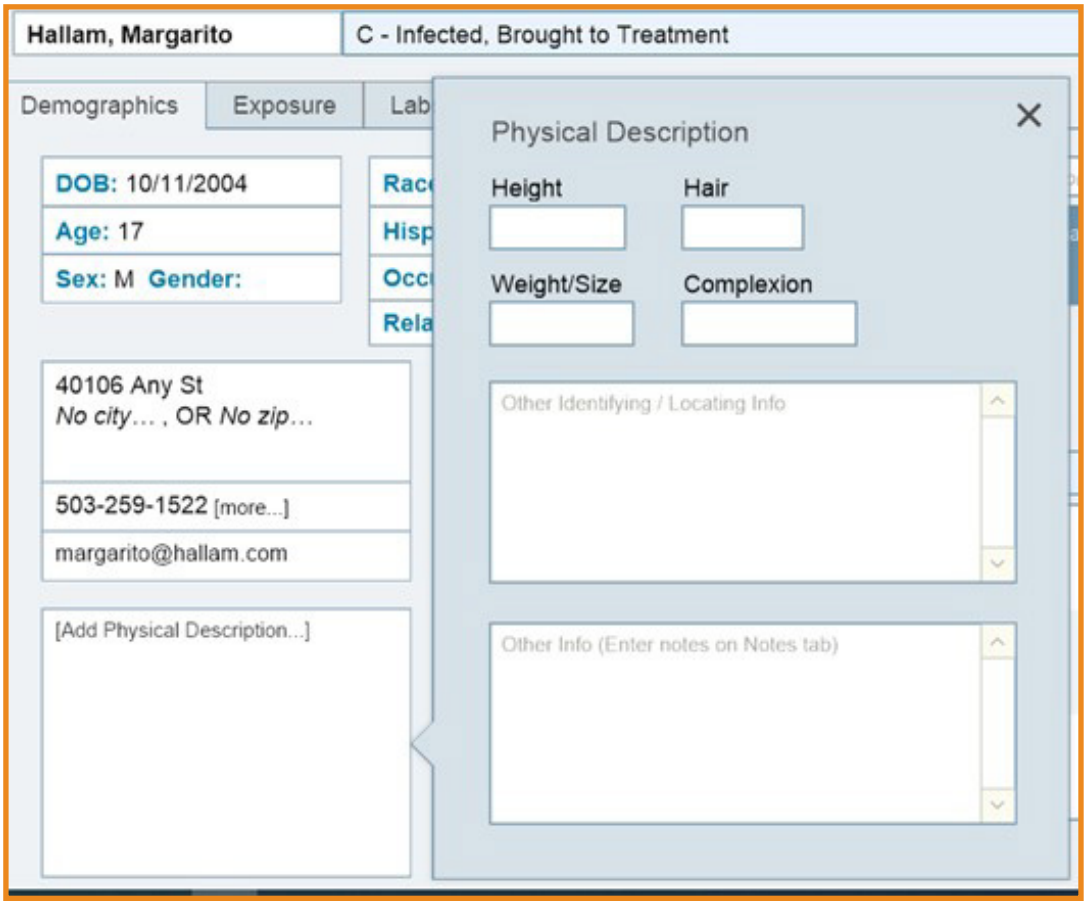
3 **Contact details** — When a contact is selected, their details will appear in the bottom section of the screen. Each contact has Demographics, Exposure, Labs/ Treatment, Links and Docs information.



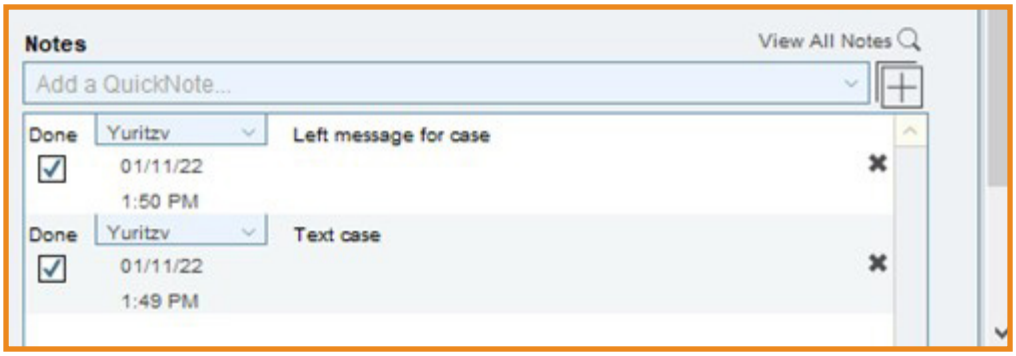
- **Disposition Code and Date:** When partner notification and treatment have been completed, the date and outcome (disposition) of the efforts should be documented. See "Syphilis Investigative Guidelines" Appendix B for Disposition Code. The Disposition Code and Date are CDC required fields.



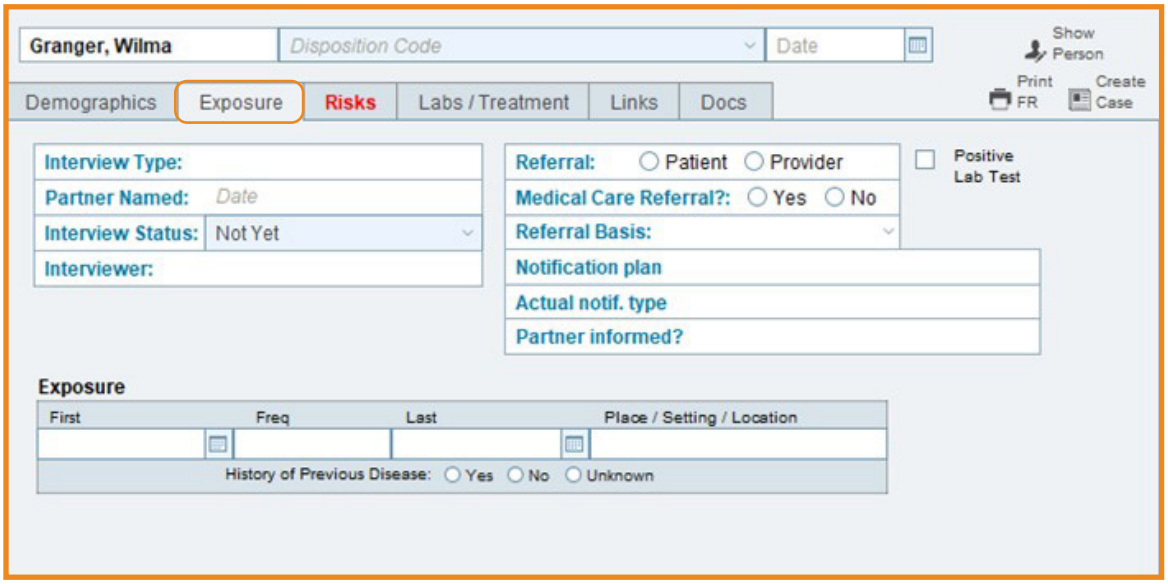
- **Demographics:** Enter as much information as possible to contact the sex partner. If case has limited information for sex partners, it is possible to add a physical description.
  - » Click the "Add Physical Description" box and the Physical Description window appears. Enter as much information possible to locate the case.



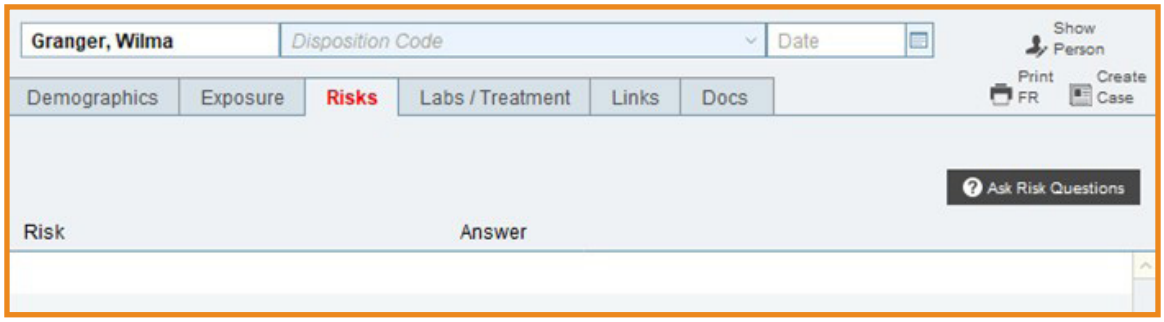
Notes: Record the date and outcome of each attempt to interview each partner and record this information in the "Notes" sub-tab, along with any other useful information. Notes have QuickNotes; Click on the drop-down menu to see the QuickNotes. Contact Notes may also include other context or supplemental information that would be helpful for a Disease Intervention Specialist (DIS) to know before their initial call.



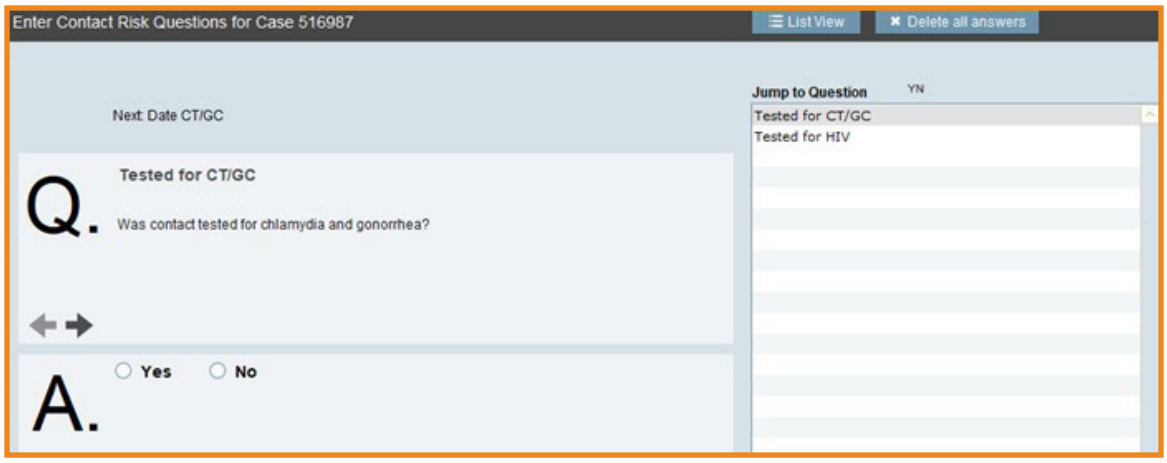
- **Exposure:** Record the date of the first and the most recent sexual encounter between this partner and the case. Record the outcome of efforts to contact the partner in the exposure. This field is useful when transferring cases out of state.



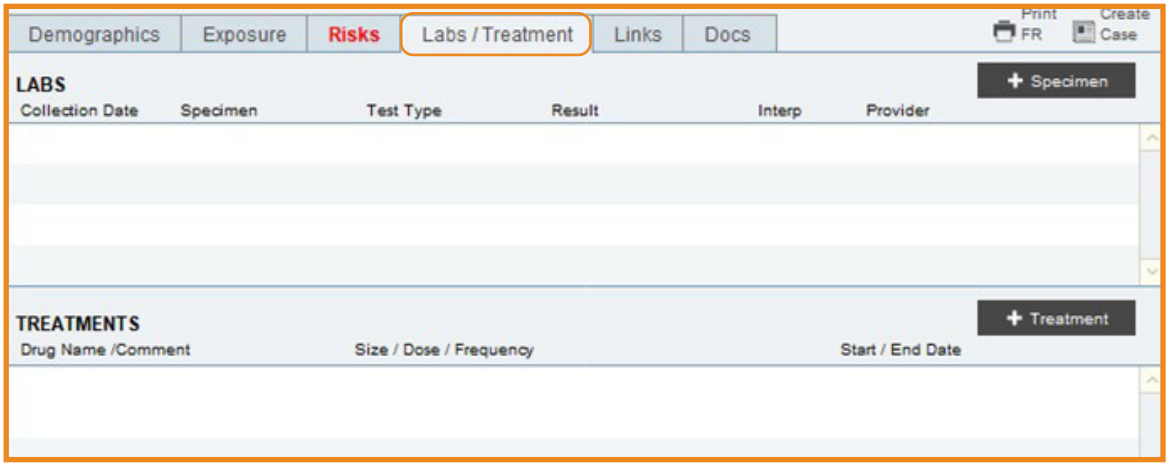
- Risks: Record the risk questions for the contact. Click "Ask Risk Questions" to open a window.



  - » *Ask Risk Questions* opens a window like the case risk questions but with only two risk questions for the contact. These two questions are CDC required fields.

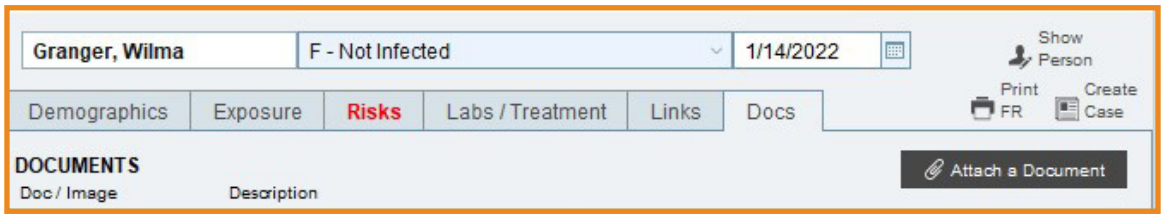


- **Labs / Treatment:** Record the dates and results of any laboratory test conducted and the dates and details of any treatment. If contact is a case, lab information and treatment would be populated. If the contact tested negative or received preventive treatment, add information by clicking "+Specimen" and "+Treatment."



- **Links:** This sub-tab shows the case record for the case's sexual partners and the list of other cases to whom the sexual partner is listed as a contact.

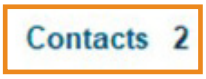
- **Docs:** This sub-tab allows for a document to be attached to each case's contact.



- **Out-of-jurisdiction contacts:** When the case identifies a contact who lives outside of the local health jurisdiction, the contact may be transferred to the appropriate jurisdiction through Orpheus by entering the contact's address.
- **Out-of-state contacts:** For contacts residing out of state, LPHAs should provide the state STD Program with the relevant information for necessary follow-up.

  If no contacts are recorded, the Contacts tab will be highlighted red with an exclamation icon. When the first contact is entered or when "None Elicited" is checked, the tab will turn to normal black text. You may need to click a different tab before the icon will refresh.

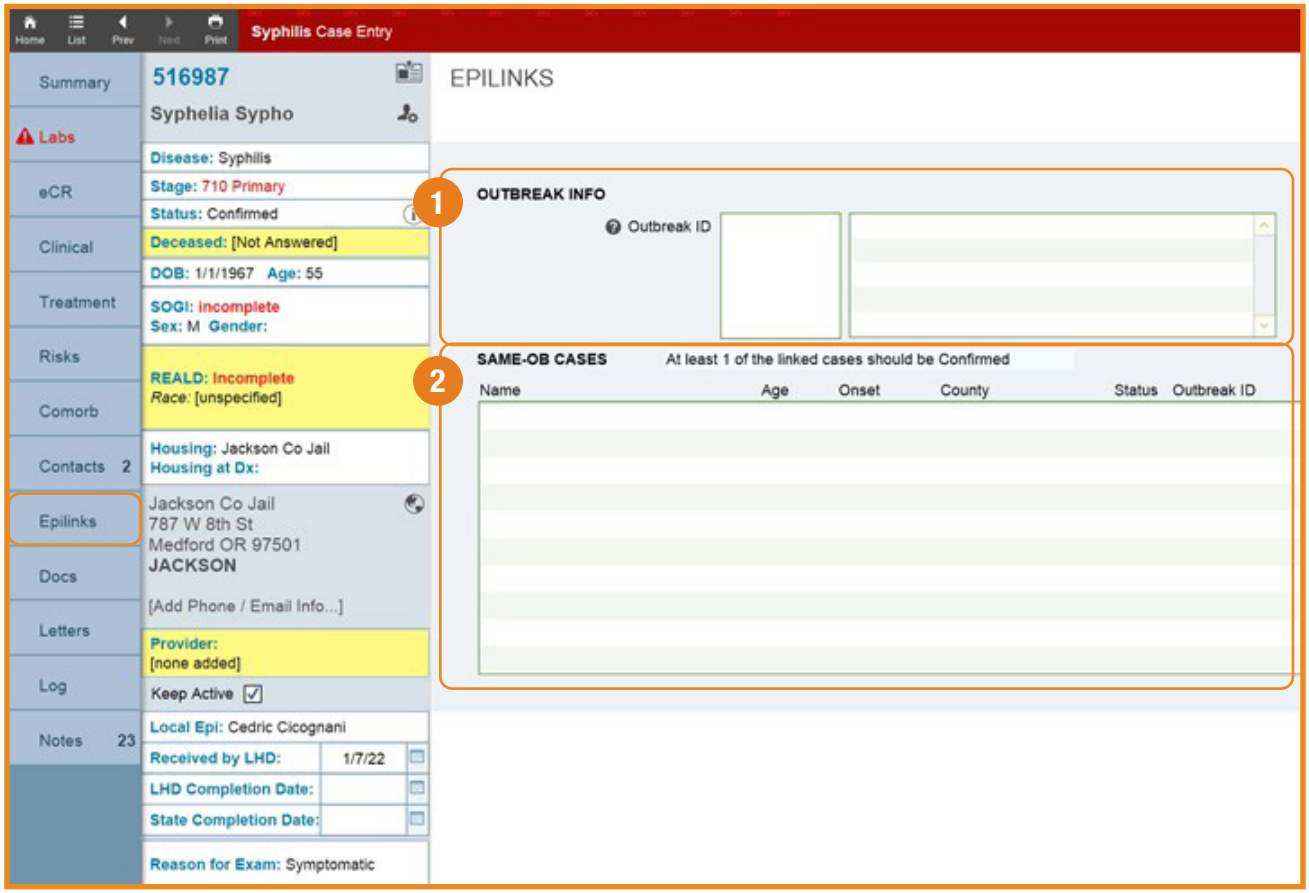
  » The tab will change from

to 

Epilinks tab

The Epilinks tab still under develop for syphilis outbreaks. Until further noticed there is no need to enter any information at this tab.

In general, the Epilinks tab contains your best assessment of where the case likely contracted syphilis. This may be simple if the case only has one known exposure or may be complicated if multiple exposures are plausible. The Epilinks tab requires analysis after the interview is over. Answers may change as new information is learned, particularly regarding outbreaks. Depending on your county's practices, you may need to ask for help from your local leadership or outbreaks team to complete the outbreak information.



1 **Outbreak Info** — When you expect a cluster or outbreak, notify the state. Outbreak IDs are generated by the state staff.

- **Outbreak ID:** Every reported outbreak is given an Outbreak ID number. Cases are linked to an outbreak when the Outbreak ID number is entered in

this field. Enter the Outbreak ID generated by the state staff to link case to the Outbreak.

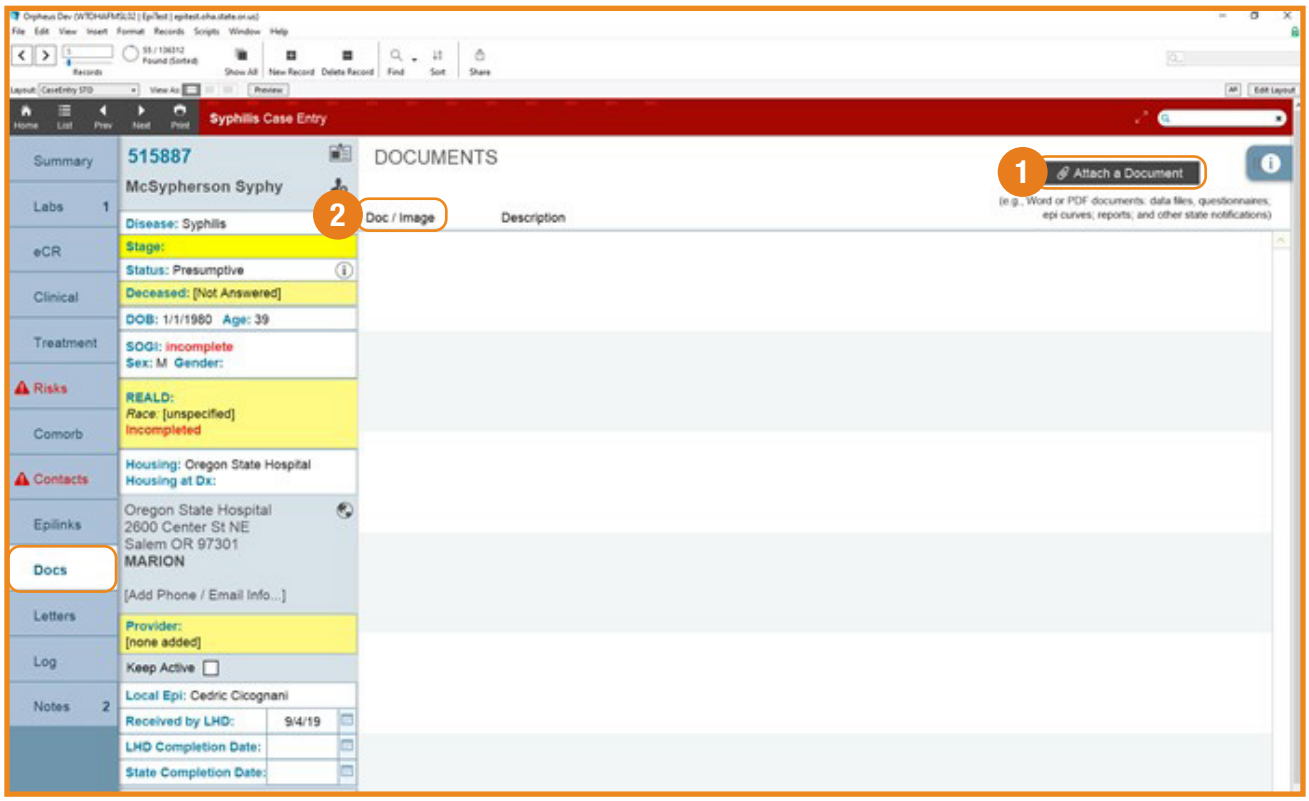
2 **Same-OB Cases** — All cases associated with the outbreaks listed in the Outbreak ID field will be listed here.

- The case's name will appear in red text.
- If the case belongs to multiple outbreaks, click an Outbreak Name to filter Same Outbreak Cases to just that one outbreak. Click "Show all" to remove the filter.
- If the case belongs to multiple outbreaks, enter each Outbreak ID on a new line as a vertical list. The list will automatically sort numerically.
- An Outbreak ID can be found by searching for locations and addresses in the Orpheus Outbreaks Database.

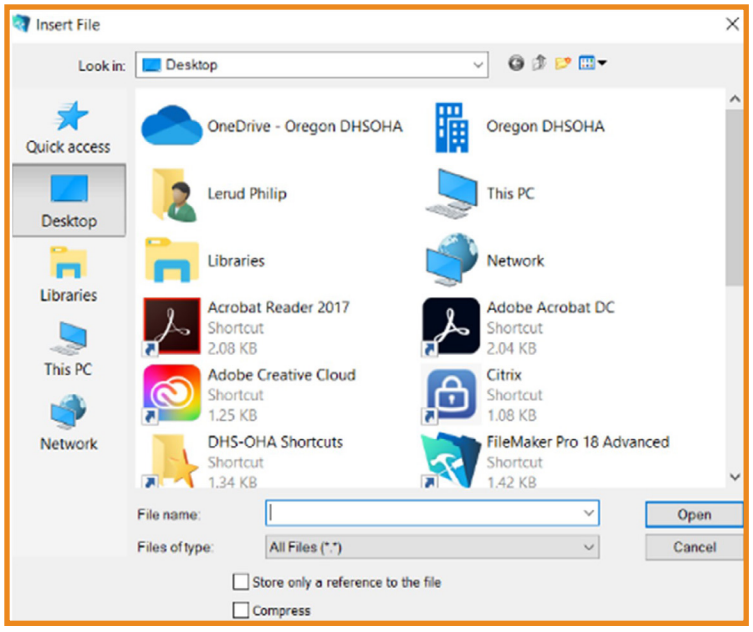
Docs tab

The Docs tab contains any uploaded documents, which can later be securely accessed and viewed by others. Some cases may not have any documents uploaded. Documents commonly attached for cases include:

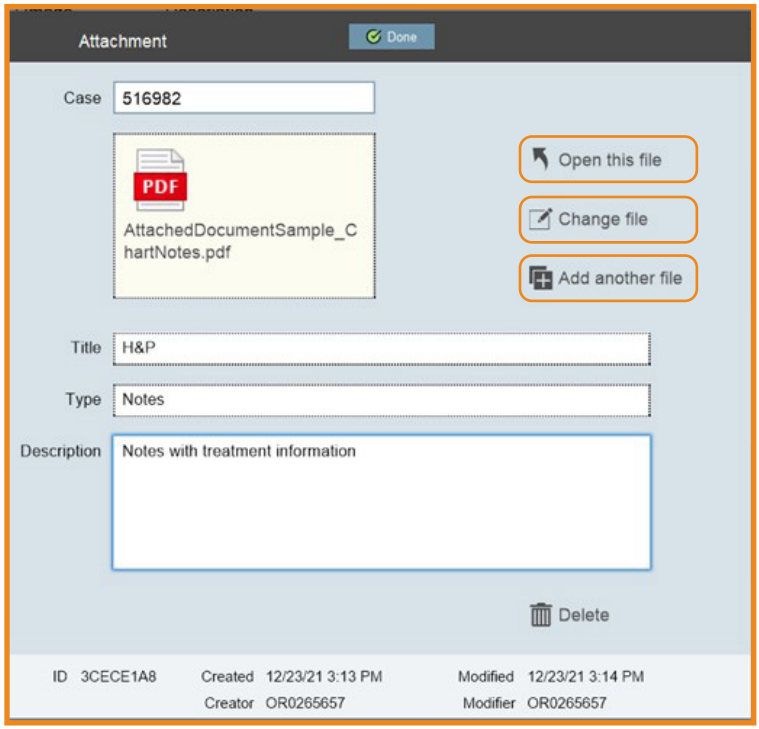
- Faxed lab results
- Medical records
- Letters, if created outside of Orpheus
- Interview notes



1 **Attach a Document** — Click the "Attach a Document" button to upload a file. This will open a pop-up window to select the file from your computer.

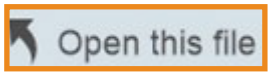


Choose the file and click "Open." This will open the "Attachment" screen. The best practice is to add a Title, Type and Description for the document; these fields let others know what the uploaded document is without having to open it. Then click "Done."

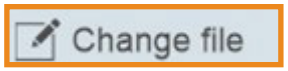


2 **View documents** — Once documents are uploaded, they will be visible in the middle of the screen. Click the "View/Edit" button on a document to open the "Attachment" menu.

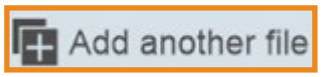
- Click "Open this File" to view the document.



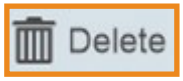
- Click "Change File" to re-upload and replace the uploaded file.



- Click "Add Another File" to upload another file as a new document.

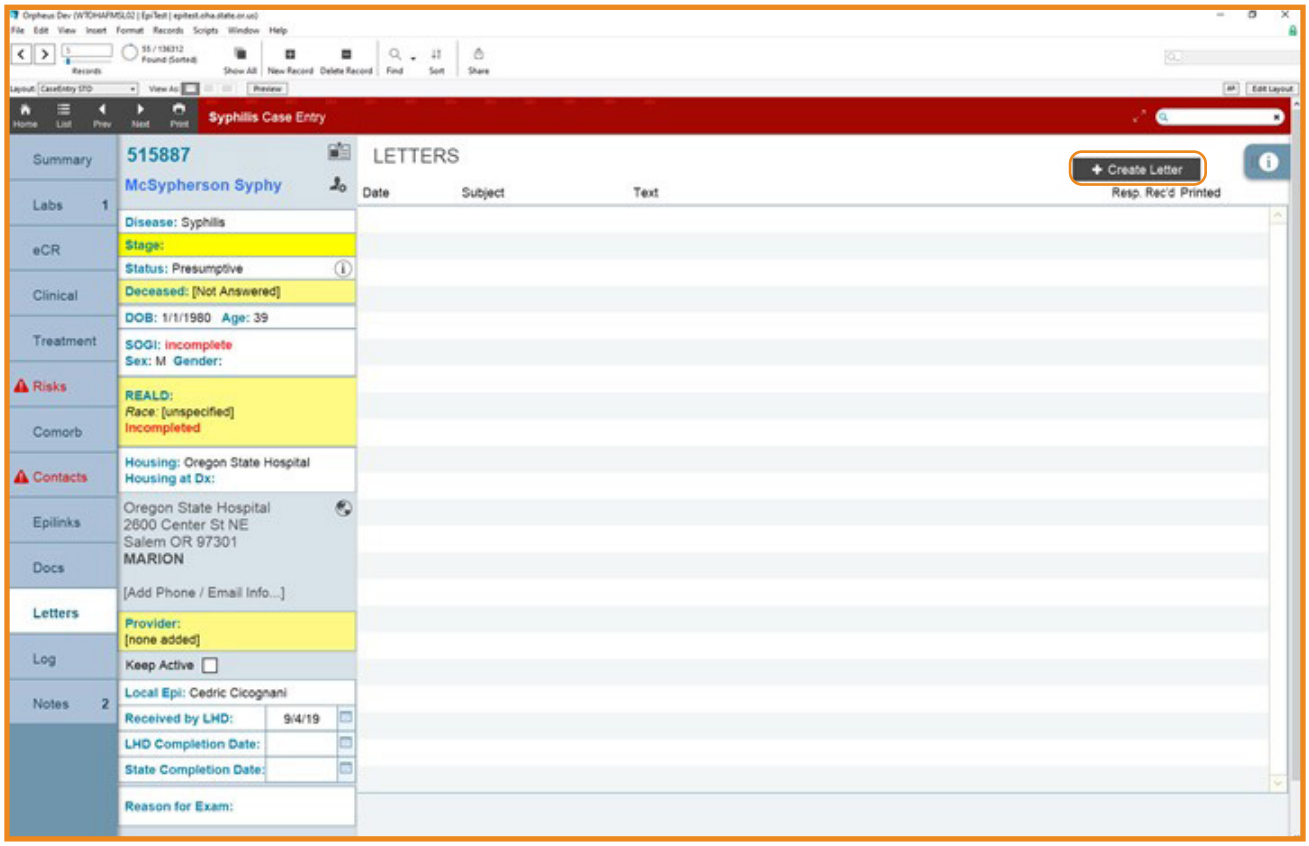


- Click "Delete" to remove the document.



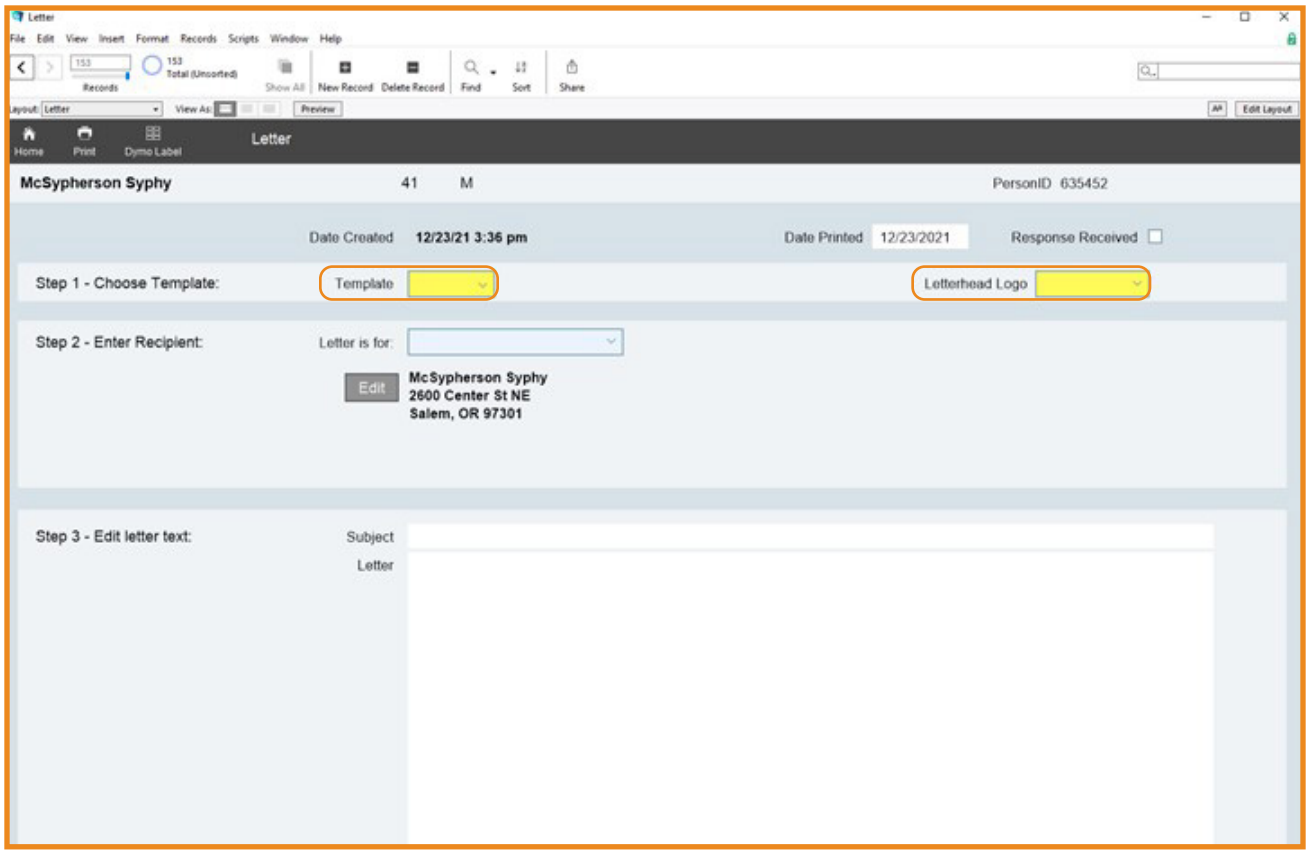
Letters tab

The Letters tab contains any case letters created in Orpheus. Some LPHAs uses the Letters tab to generate letters, but other LPHA do not. Some cases may not have any letters in Orpheus. Follow your local process to create and send letters.



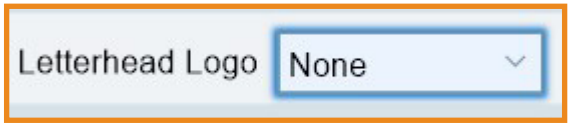
1 **+ Create Letter** — Click "+ Create Letter to create a letter." This will open the "Letter" screen in a new window.

1. Choose a template by opening the "Template" drop-down menu. This includes many templates from the Orpheus system, including letter templates unrelated to syphilis.



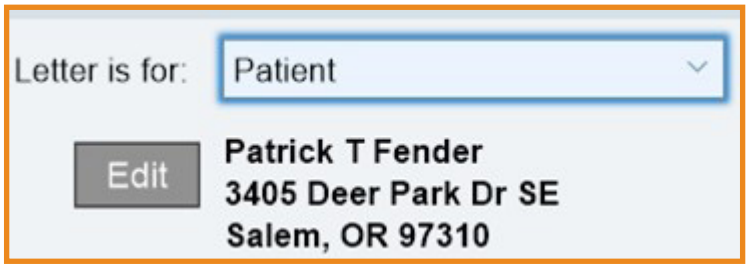
2. Choose a letter head from the "Letterhead Logo" drop-down menu.

   » Not all jurisdictions have a logo available. Chose "None" if your jurisdiction isn't listed.

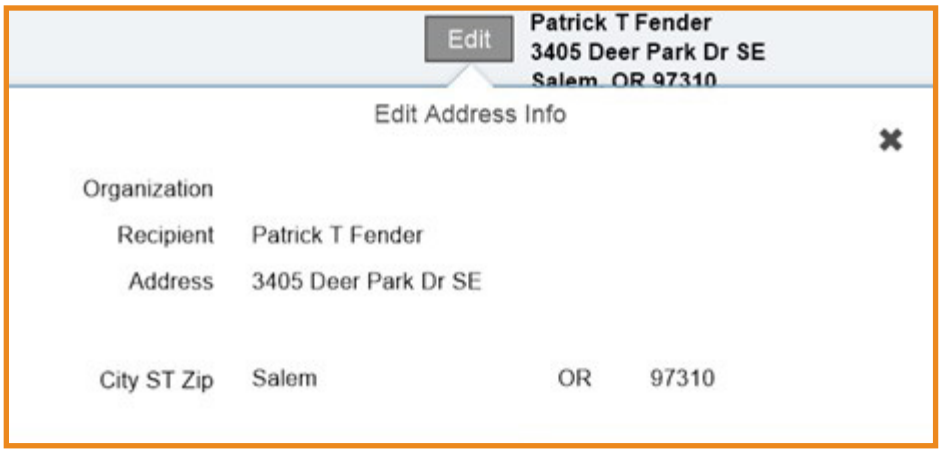


3. Choose who the letter is for from the "Letter is for" drop-down menu.

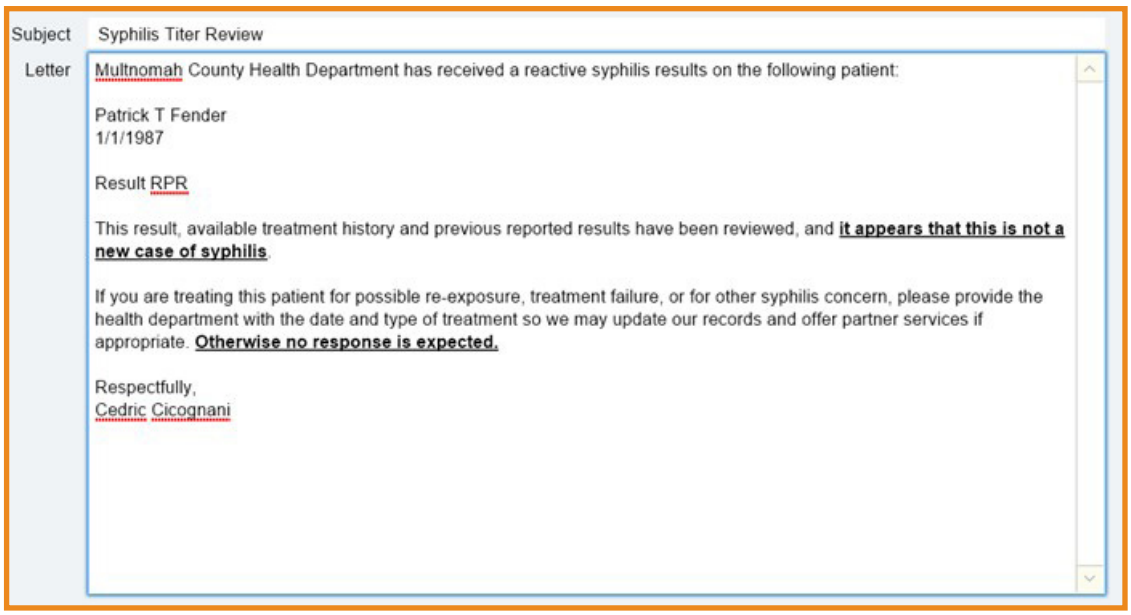
   » This will determine the name and address at the top of the letter.



   » To change the address, click "Edit." This will open the "Edit Address Info" screen to overwrite the recipient's name and address.

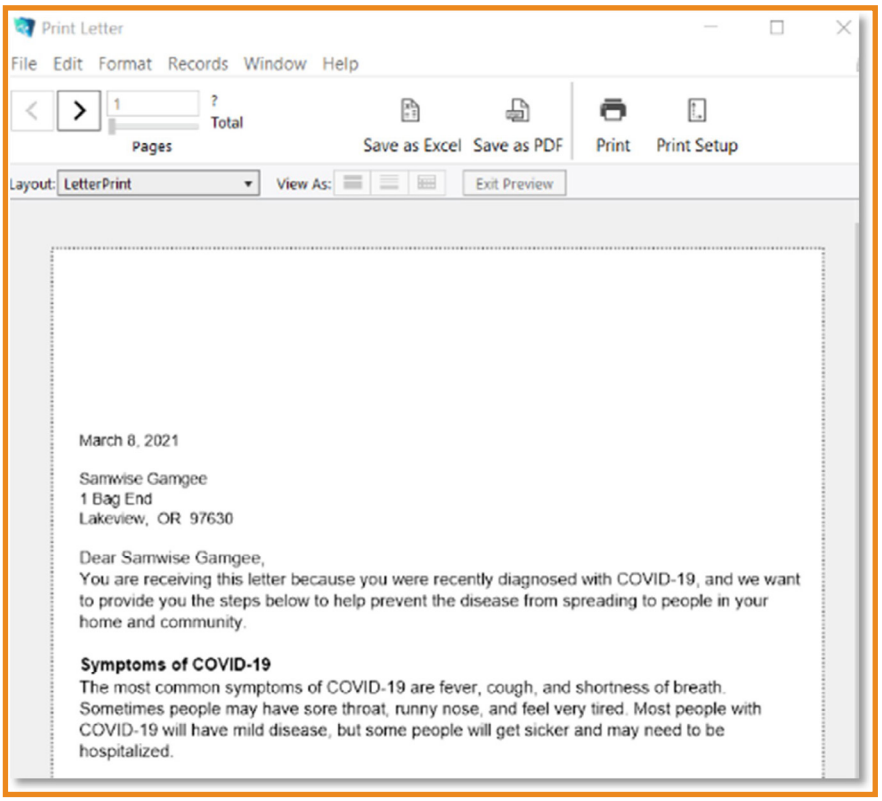


4. The letter text will populate at the bottom middle of the "Letter" screen. Review and edit the letter in this screen before printing.



5. Once the letter is finalized, click "Print" at the top of the "Letter" screen.

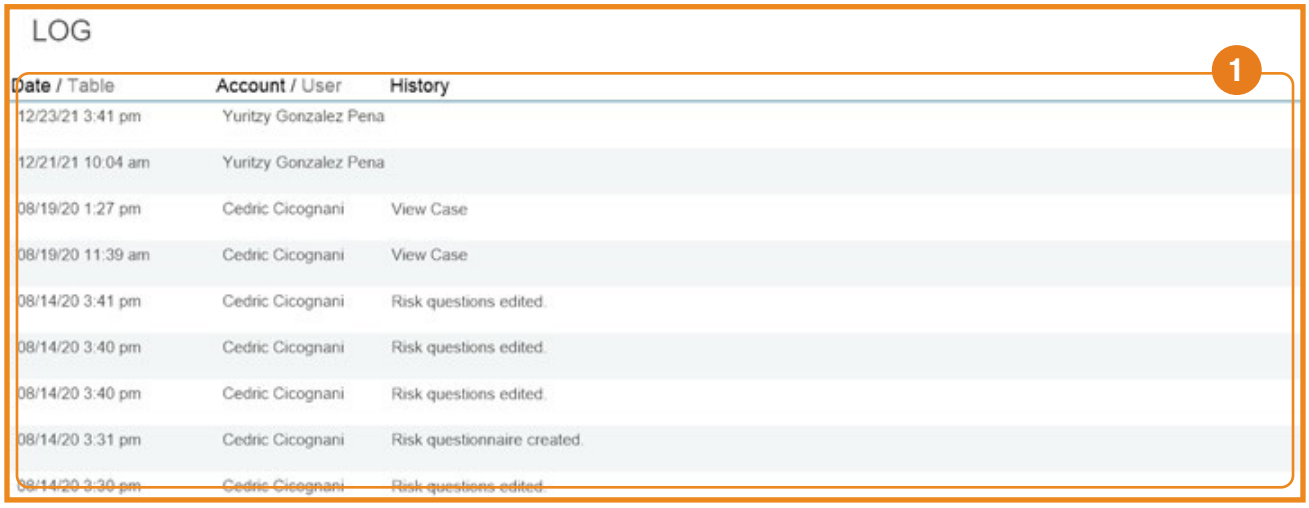
6. This will open the "Print Letter" menu in a new window.



- If the letter will be emailed to the case, click the "Save as PDF" button.
  - Choose a save location and file name, then click "Save."
  - Once saved, you can attach the letter PDF to a secure email and send it to the case following your local process.
- If the letter will be mailed to the case using postal mail, click the "Print" button.
  - Choose a printer connected to your computer then click "OK" to print the letter.
  - Once printed, you can place the letter in a stamped envelope and mail it to the case following your local process.

Log tab

The Log tab contains a record of users who have viewed the case, selected changes and interactions with the case record. It will open in a new window.

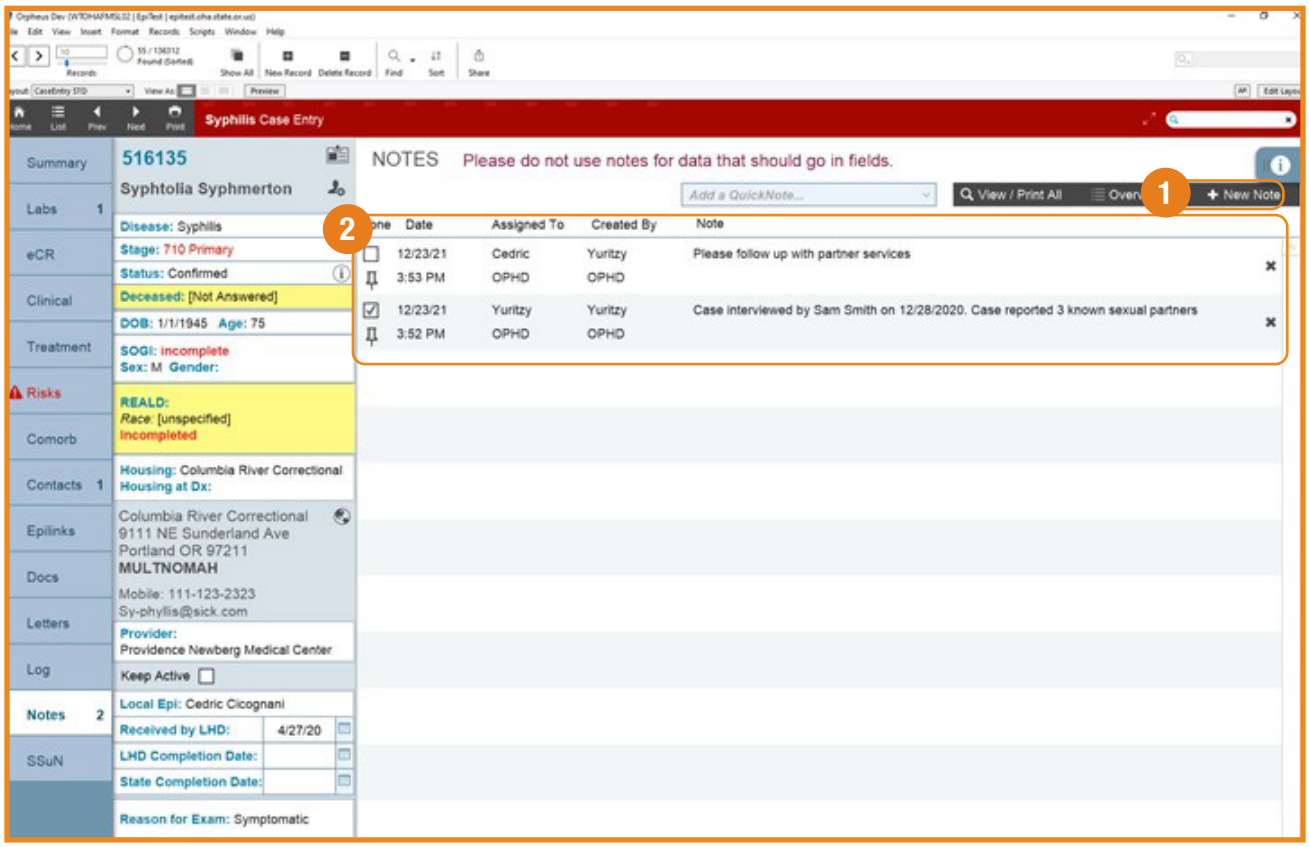


1 **Case log entries** — Some actions in a case record will generate a new record in the Case Log. This records the date and time of the action, who took the action and a description of the action.

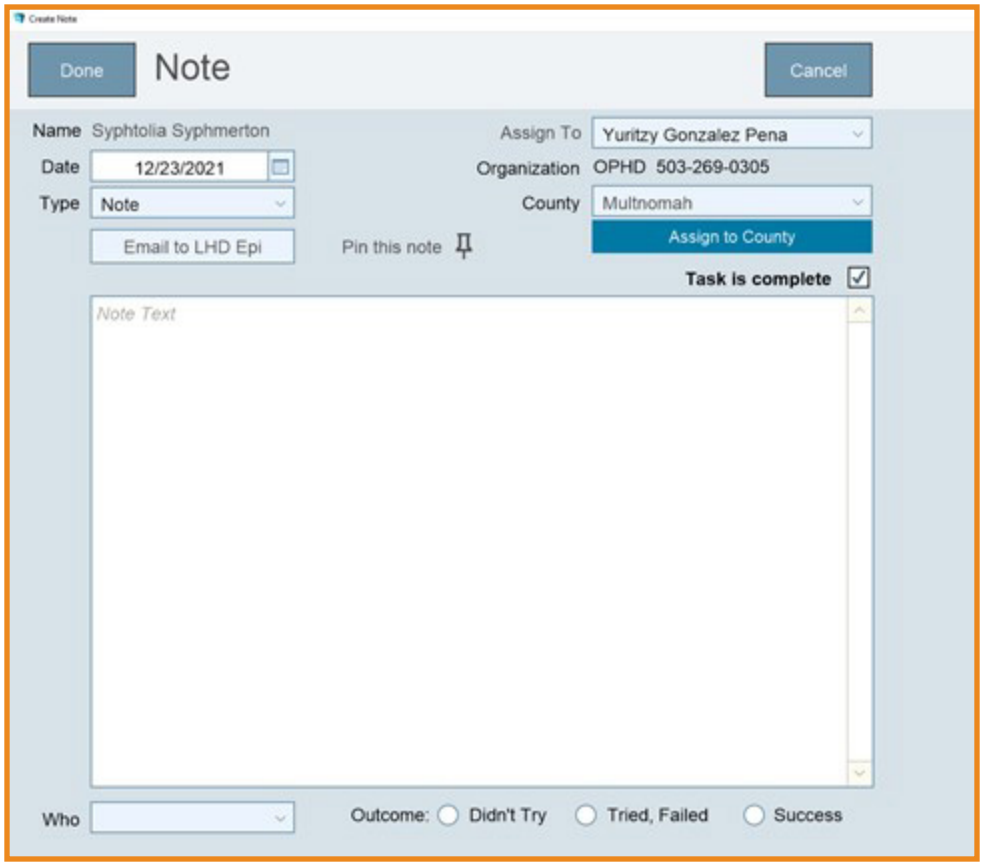
- You can review the log entries to determine who to reach out to if the case was transferred from another LPHA and you have questions.

Notes tab

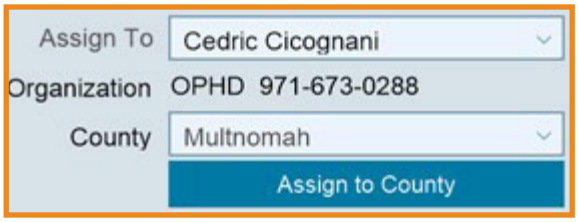
The Notes tab contains a list of all notes associated with a case. Notes can be used to summarize information about the case or to create ToDo tasks for yourself or other Orpheus users. Specific note formats and templates will vary between LPHA; however, the gold standard of notes is universal: by reviewing your notes, any epidemiologist or other DIS should know exactly where the case stands in terms of interviews, treatment and partner services.



1 **New Note** — To create a new note, click "+ New Note." This will open the "Create Note" pop-up window.



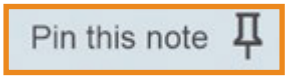
- **Assign To:** By default, new notes will be assigned to yourself.



  - » To assign the note to another user, click your name and select the person from the "Assign To" drop-down menu.
    - Do not manually enter a name by typing into the "Assign To" field as a free text box. The note won't be assigned to anyone.
  - » To assign the note to a county instead of a specific person, click the green "Assign to County" button.
    - By default, the county of residence will be selected. You can change to another county by opening the "County" drop-down menu.
- **Date:** By default, the note will be dated with today's date.

- **Future Note/ToDo Task:** You can change the date to a future date and uncheck the "Task is Complete" checkbox to schedule a Future Note/ ToDo Task.
  - The ToDo will not show up on the home screen until that date.
  - Future Note/ToDo Tasks may be helpful when an interview is interrupted and you need to call back on another day or need to follow up with titer decrease.

- **Pin this note:** A pinned note will always appear at the top of the list of notes and, if the task is incomplete, also at the top of the assigned person's ToDo list.



  - Unpin the note if the content is no longer relevant or has already been dealt with.

- **Task is complete:** If the "Task is complete" check box is checked, the note

  will be recorded to the case record but will not notify anyone.

  - The "Task is complete" checkbox is checked by default for tasks assigned to yourself. Leave the "Task is complete" box checked for summary notes or if no further action is needed.
  - The "Task is Complete" checkbox is automatically unchecked when a note is assigned to another user or county.
    - If the "Task is complete" box is unchecked, then the note will be recorded to the case record and will trigger a ToDo task in the queue of whoever the note was assigned.

- **Note content:** There are several kinds of notes that should be recorded. Some LPHAs prefer lengthy, detailed notes while others prefer brief notes. Check with your LPHA for specific local guidance or precise templates. Notes are not a replacement or alternative to entering information into Orpheus fields.
  - **Summary note:** Always leave a summary note anytime anything is done to work on a case. A good summary note is a concise overview of the relevant information. It may include highlights of a case interview, important information that cannot be entered into existing Orpheus fields or documentation of an attempt to reach the case, etc.
  - **ToDo note:** In addition to the summary note, create separate notes for any follow-up tasks that someone needs to act on.

- *ToDo notes* may be assigned to a designated user or to the county, depending on the task and local procedure.
- Urgent situations may also require an email and/or phone call to the county or team lead for immediate action. Check with your county lead or supervisor.

» **Notes to OHA:** If the case has any out-of-state component, make a ToDo note with the relevant information and assign it to Jennifer Li at OHA. Jenn will notify our partners at the other state or states.

- **Request for out-of-state records:** When requesting out-of-state records, notes should be assigned to Jennifer Li and include the name of the state or states and other names used by the case. Example request for out-of-state records:
  - Case has a syphilis history in Alaska and Colorado. Previous names include first and last names.
- **Request to transfer case out of state:** When a case is tested in Oregon and lives outside of Oregon, assigned a note to Jennifer Li and include as much information as possible. Example:
  - Case lives in 159 Main St. Meza Arizona, please transfer the case to Arizona.
- **Case has out-of-state contacts:** Out-of-state contact notes should be assigned to Jennifer Li and include:
  - First and last name
  - Date of birth
  - Phone number
  - Exposure date
  - County of current residence, and
  - Address, if known.

  Example out-of-state contact note:
  - Case reports a Contact is an Idaho resident, named Mr. Sam Smith. Approximate age of 75. Phone number 208-867-5309. Last exposed on 3/11/2021. Lives in Adams county, but exact address is unknown.
- **Merge person records or cases:** When requesting to merge two person records or two cases, identify the person IDs and case IDs. Identify which person ID or case ID should be kept.
- **Automatic Notes:** If you assigned a note to another local Epi and get an automatic response of "[Person's Name] is out of the office

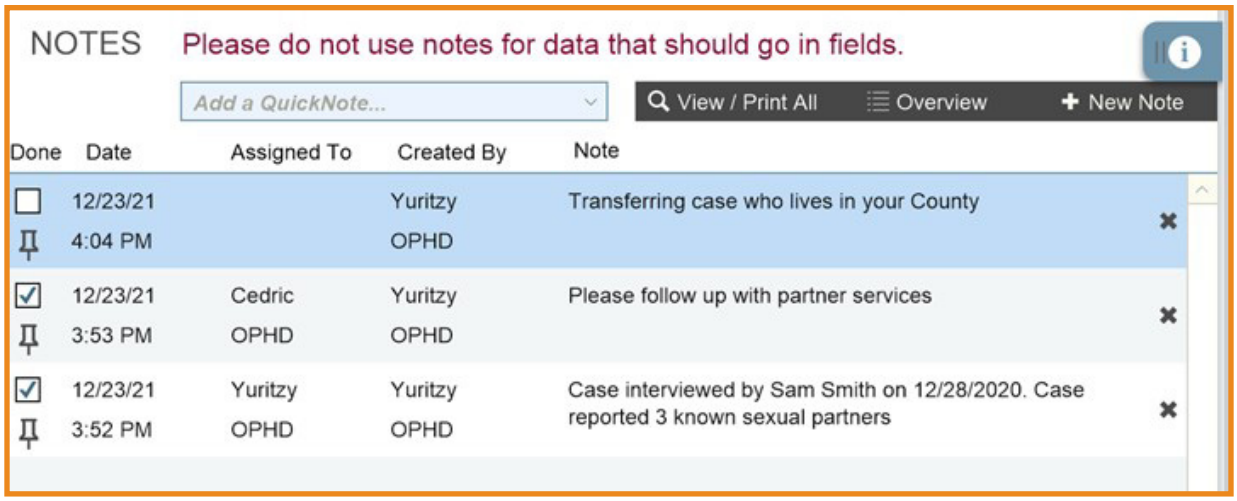
and may not be able to act on this note in a timely manner," consider

assigning the note to someone else.

2

- **Done:** When you've finished entering the note, click "Done" to save it.

List of Notes — The "List of Notes" section shows a record of every note on the case. Notes are sorted by date with the most recent near the top, although pinned notes always appear at the top. Notes assigned to a county will have a blank in the



"Assigned To" column. Only the first two lines of the note show up in this view. Click a note to view the full text and details of the note.

These notes will be reviewed by the next Orpheus user who reviews or interacts with the case. Always leave a note when you add or update information in a case, so the next user knows where the case stands.

How To

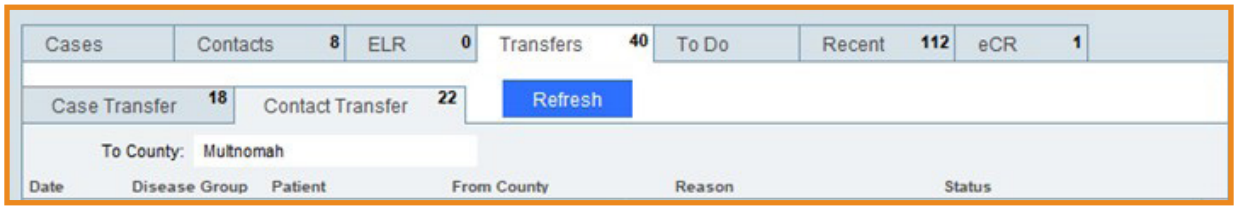
Transfer a new diagnosed case or contact to another county

Transfer a newly diagnosed case to another county: To transfer a new case to another county, change the address of the case.

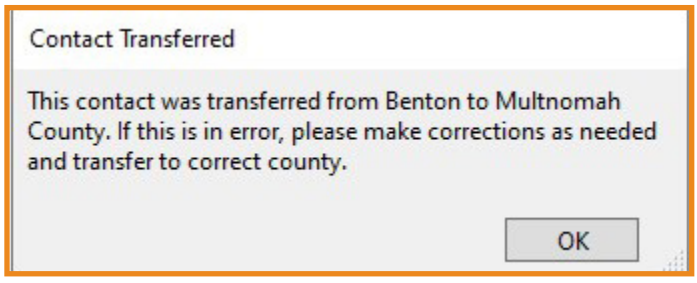
Transfer a contact to another county: To transfer the contact to another county, add the address to the contact information. If the full address is unknown, add the ZIP code and it should add the county automatically.

Accept contact transfer

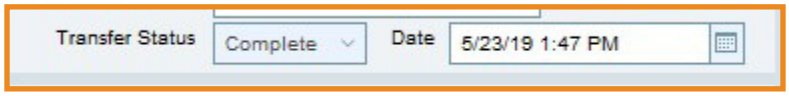
All contacts transferred to the county show up on the Transfer tab. There is a sub-tab for cases and contacts; make sure you are on the Contact Transfer sub-tab. If you have access to several diseases, all contact transfers will show in this subtab. Click "Refresh" if no contacts or cases are showing up.



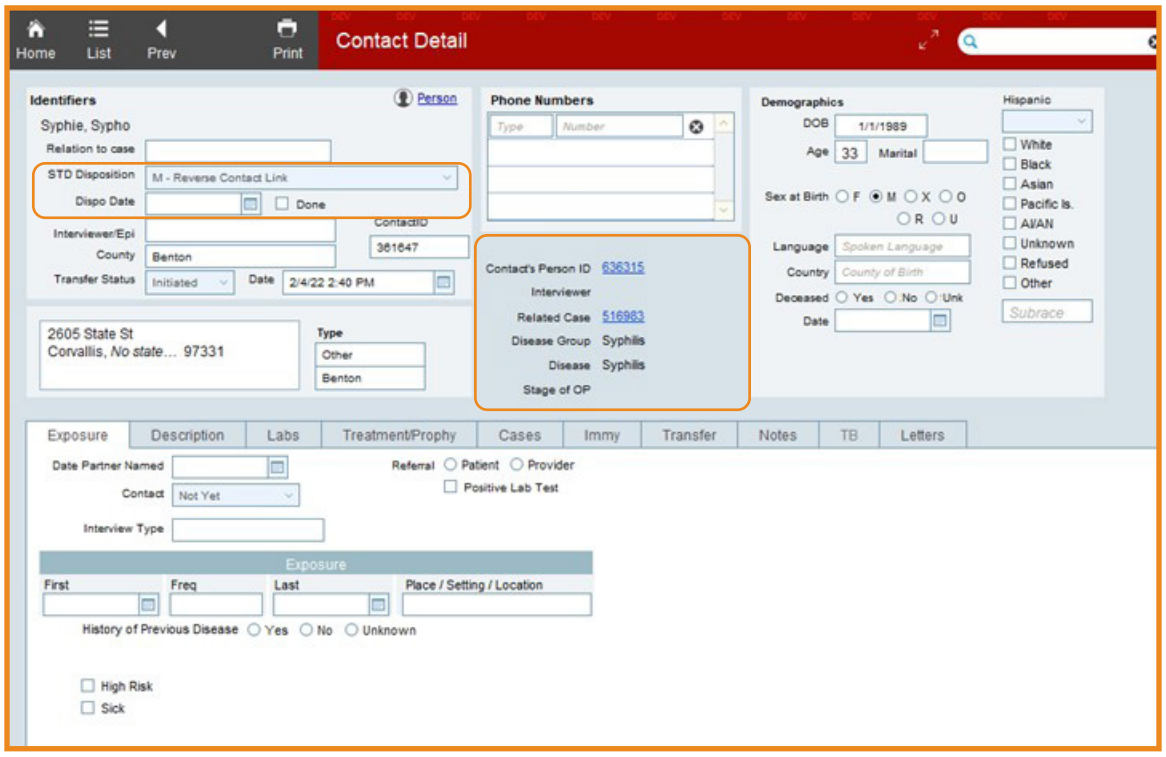
Select the record you want to accept. A new window will pop-up. Click "OK" to accept the record.



When the contact is accepted, the Transfer Status in the "Contact Detail" window changes automatically to complete.

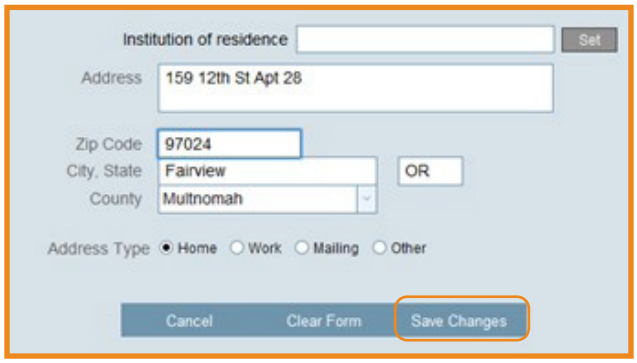


The "Contact Detail" window has all the contact information gathered by the DIS in the case's county. In the middle of the window, the case ID and person ID are available; depending on cross-jurisdictional agreements, the case might or might not be visible. If you need more information, you can call the case's county or contact the case's DIS using the Notes tab. The "STD Disposition" and "Dispo Date" are CDC required fields.



Update an address

Update an address for a person who does meet a new case surveillance. To update the address of a person, go to the person record and click on "Current Address." Type the new address and click "Save Changes." Orpheus keeps a chronological order of all address.



Determine the residence of a case

Determine the residence of a case: Cases are notified based on place of residence. Determining the residence of the case is important to avoid duplicate notification of cases with ambiguous residency. There are some scenarios below to help you determine the residence of a case. For complete guidance, visit Revised Guidelines for Determining Residency of Disease Notification Purpose.

In general, cases are notified based on the place of residence where the case lives and sleeps most of the time. Below are different scenarios that help identify the case's residency.

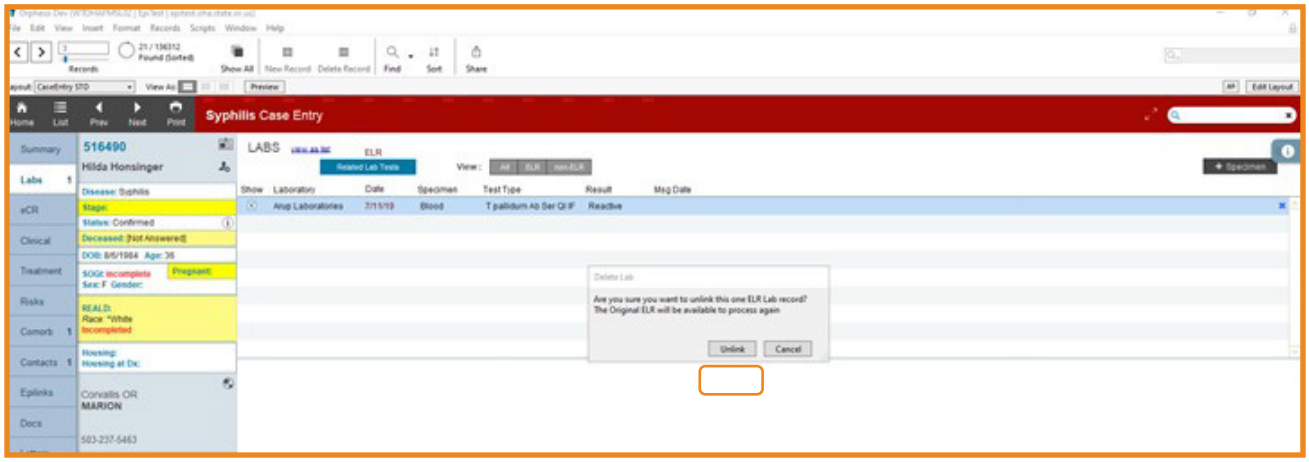
- An individual takes up a new residence for an indefinite period without intending to return to the previous residence. The jurisdiction of the new residence will be the recommended reporting authority.
- An individual who is an intermittent or part-time student without a regular cycle for moving between parental and school residences. The jurisdiction where they were living at the time of disease onset should make the notification.

- For an individual who is a patient in general hospitals or wards at the time of symptom onset, the notification should be made by the jurisdiction of the patient's usual residence (the place where they live and sleep most of the time when they are not hospitalized).
- For an individual who is institutionalized (jails, detention centers, prisons, hospices, etc.) for an indefinite or long-term stay, notification should be made by the jurisdiction of the facility where they are staying at the time of disease onset.
- When residence is not obvious (for example, migrant workers, military personnel, houseless people, etc.), it is necessary to define a fixed reference point in time for establishing "usual residence." The reference point is the date of symptom onset, date of diagnosis, lab results or first case reported to the local health department, in that order.
- Congenital syphilis – The morbidity of the congenital syphilis case belongs to the location of the birth parent's residence or "place of usual residence during pregnancy."

Please reach out to Yuritzy Gonzalez Pena via Orpheus or email at Yuritzy.a.gonzalez-pena@dhsoha.state.or.u when residence is not clear.

Remove a linked ELR and link to another case

Remove an ELR and link to another case to remove an ELR from a case, click the "x" located at the end of the lab record. A "Delete Lab" box will show up confirming the unlinking of the box. Click "Unlink." The lab record would be available under the ELR tab to process again.

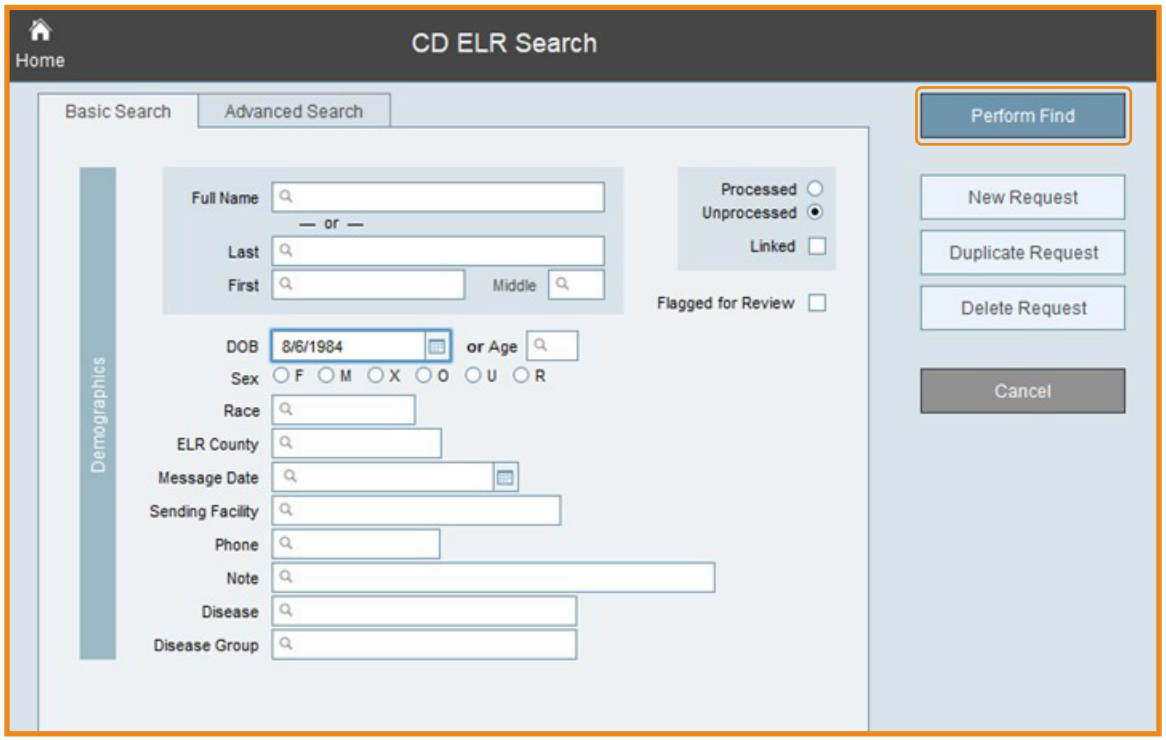


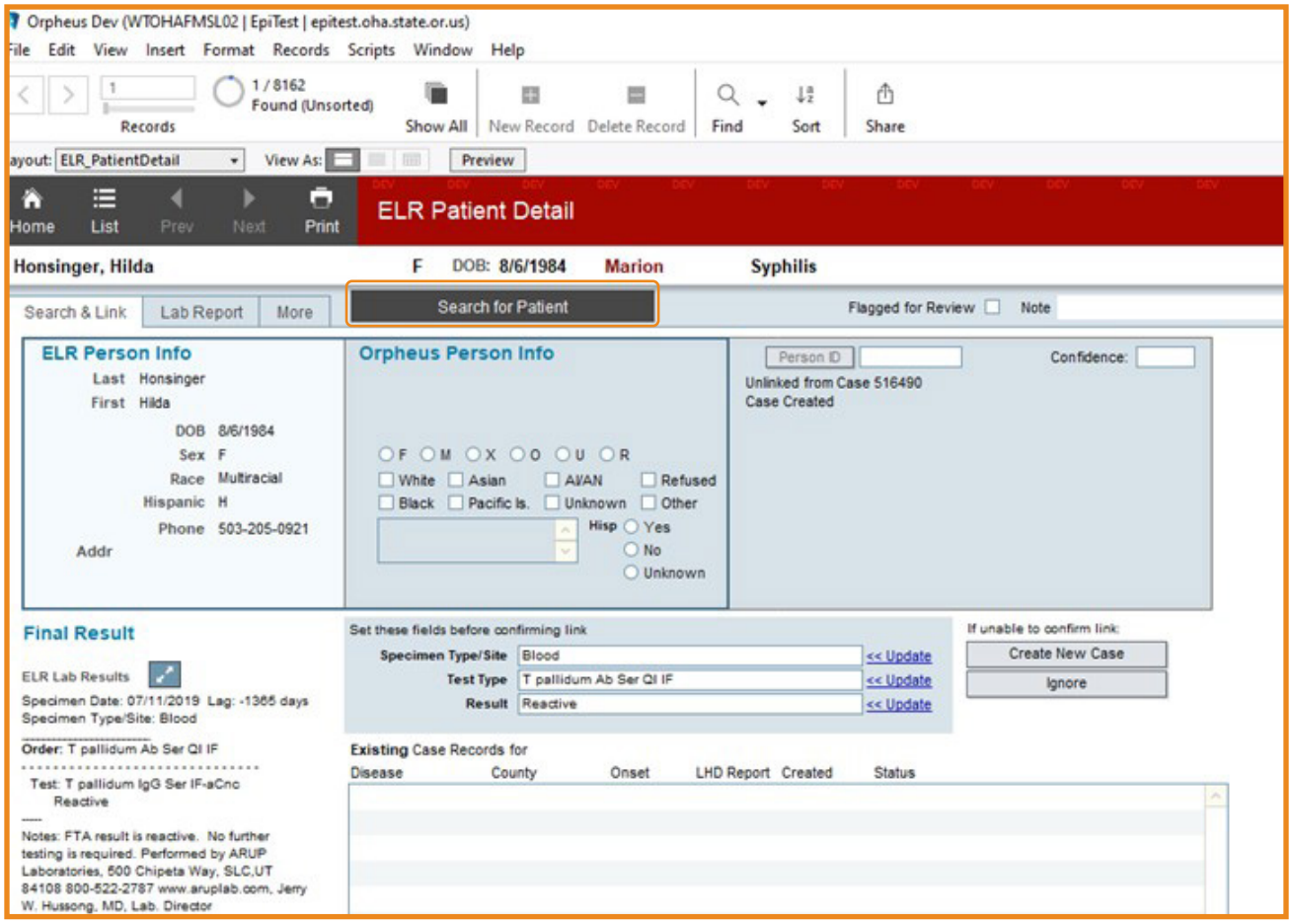
- If the unlinked lab is not showing up on the ELR tab, go to the Search box

and click "CD ELR Records."

- Type the information of the person on the ELR (DOB and first and last

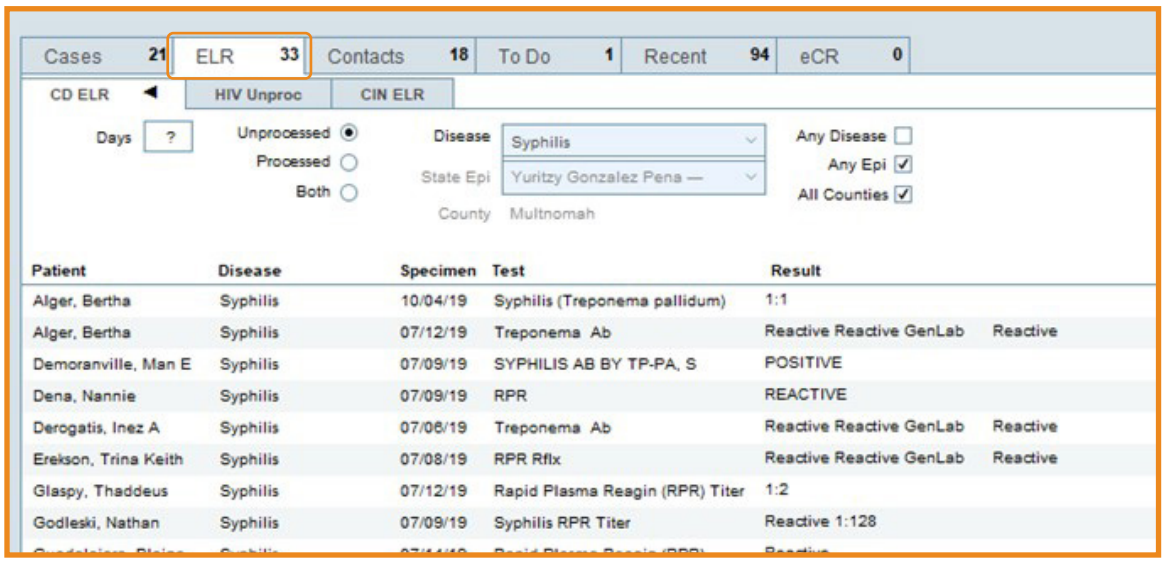
name), and click "Performed Find." The ELR would show allowing you to process the ELR again.



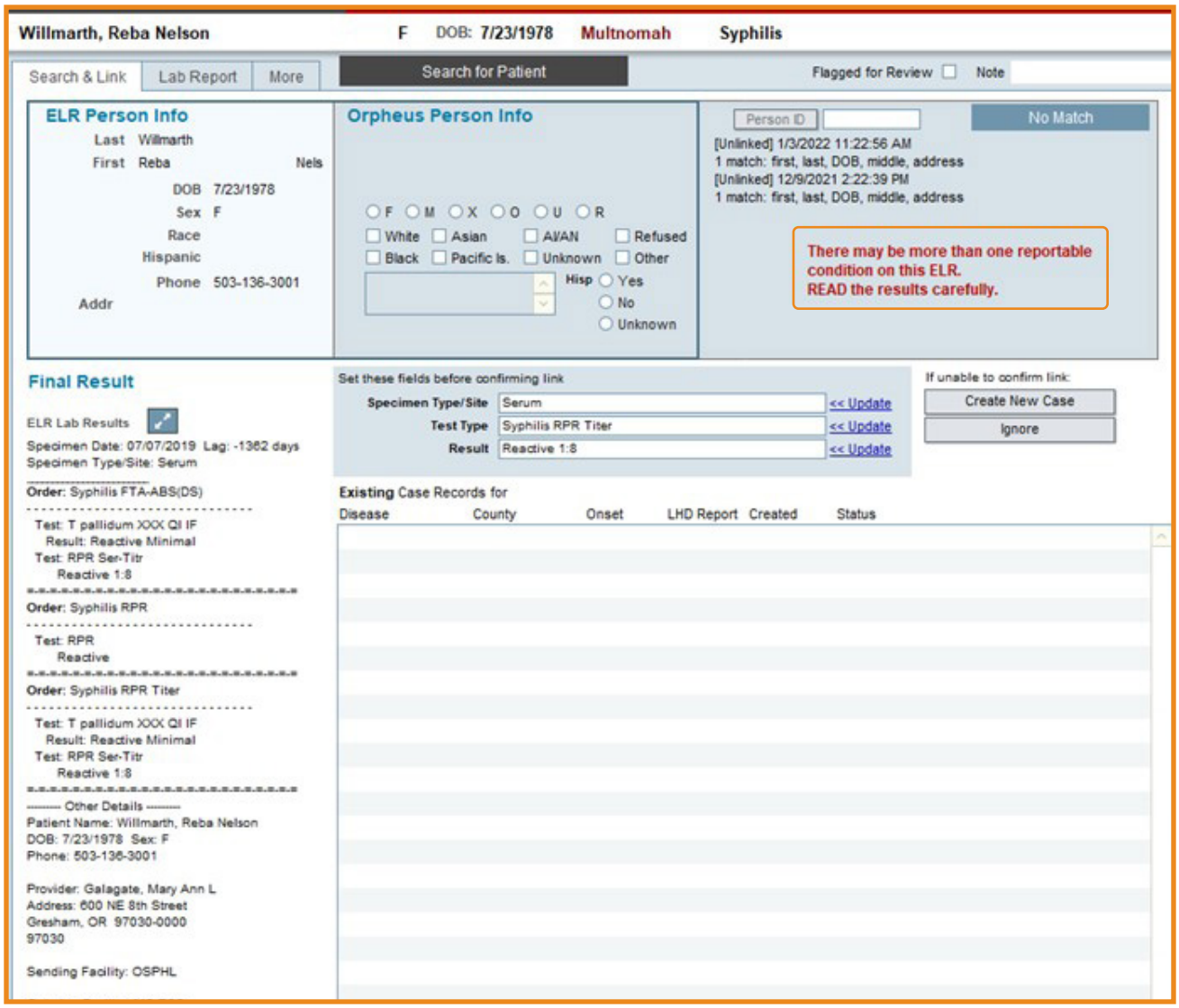


Process an ELR and find Orpheus records

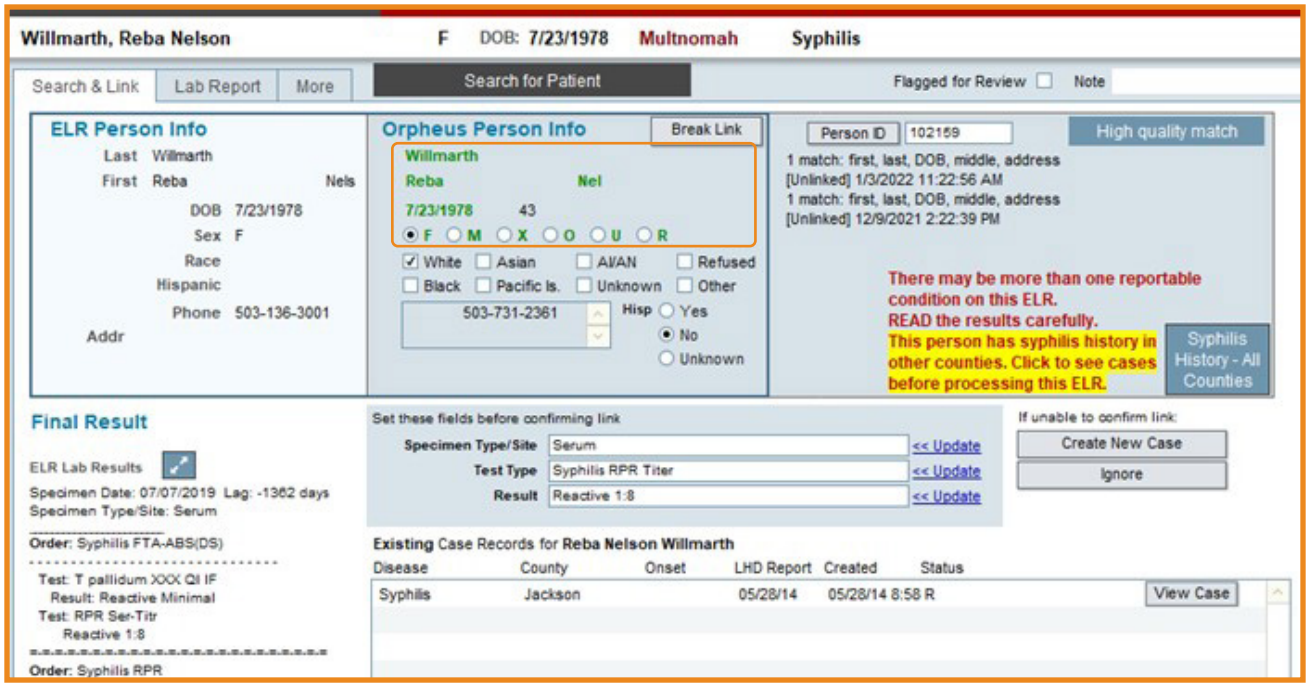
Process an ELR and find Orpheus records for the patient. The ELR tab shows all the unprocessed ELRs. The number of ELRs changes based on the number in the "Days" box. The default is 30 days, but it can be changed based on the user preferences.



- Click an ELR and "Search for Patient" in Orpheus. Orpheus will give you a hint in red color if the ELR contains more than one result. It reads "There may be more than one reportable condition on this ELR. READ the result carefully." This sentence shows up when ELR has more than one syphilis results, such as a treponemal and non-treponemal test results, or with syphilis test results and another disease such as CT/GC. It is best practice to review the ELR regardless of the message. The display of the ELR depends on the reporting laboratory. Become familiar with the top reporting laboratories in your county and familiarize yourself with all the different treponemal and non-treponemal tests.
    - » When there is more than one result in the ELR, you can duplicate the ELR from the More tab (see "Duplicate an ELR" in the "How to" section) or from the Lab tab using the "Add Lab (same day)" button. It is best practice to have one treponemal and one non-treponemal lab record for each case.



- After clicking "Search for Patient," Orpheus searches for all records within your county and counties with shared agreements. If Orpheus finds a matching record, it will highlight the name of the person with a green color. Click "Syphilis History – All Counties" to find out if patient has a record in any Oregon county.



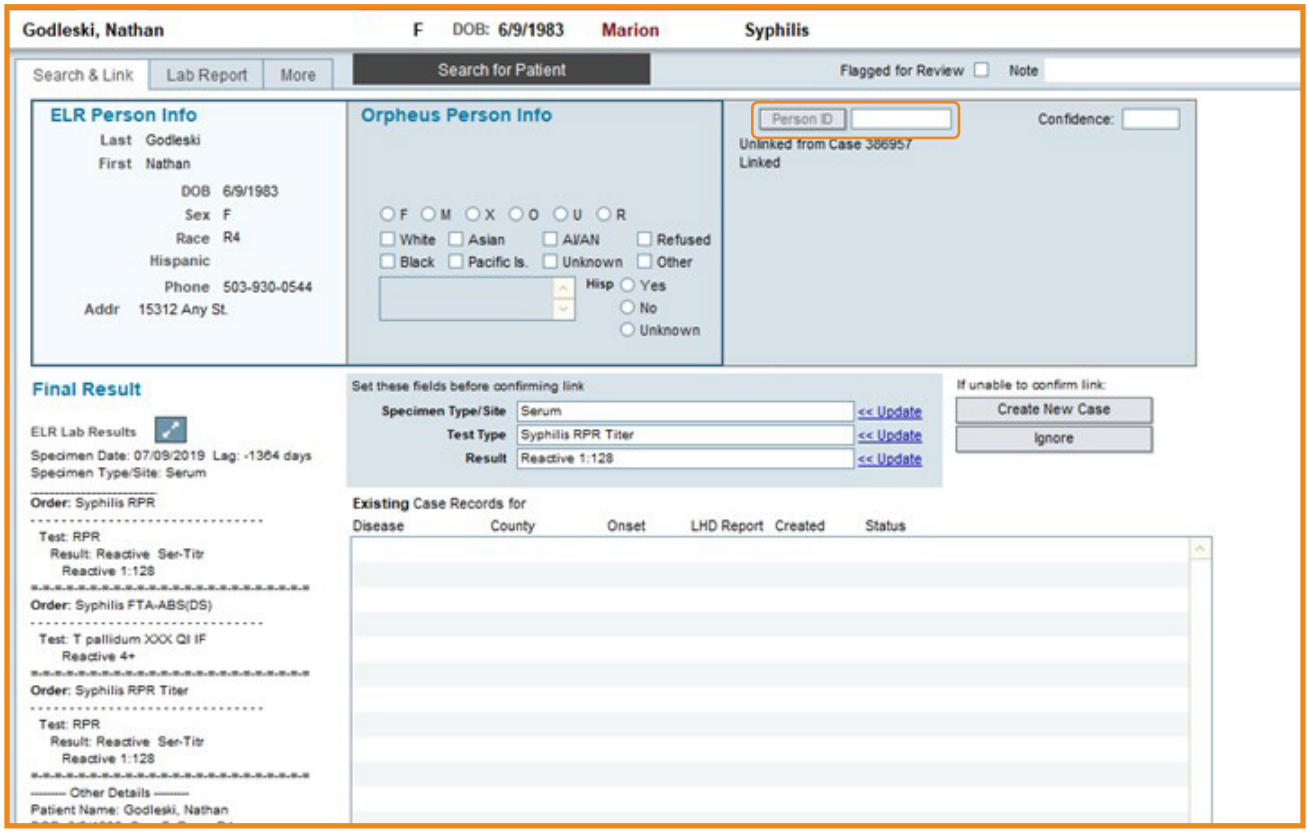
- There are several scenarios after searching for a patient in Orpheus:
  - » Patient is new to Orpheus — Create a new syphilis case with the appropriate status. If all information is not available at the time of processing the first ELR, create a case with status set as "under investigation."
  - » Patient has a syphilis history. Orpheus will give you a hint in red color if the person on the ELR has a history in Orpheus. It reads, "This person has syphilis history in other counties. Click to see cases before processing this ELR". Click "Syphilis History – All Counties" button to review all records and determined if new results meet the criteria for a new case.
    - Patient has a syphilis history and the RPR results meet the definition for a new infection — Create a new case.
    - Patient has a syphilis history and the RPR results do not meet the definition for a new infection – link ELR to the correct case
  - » Patient is not new to Orpheus but does not have a syphilis history
    - Patient has a case(s) for other reportable diseases
    - Patient is in Orpheus as a contact

See "Syphilis Investigative Guidelines" Table 2 for more information and other scenarios.

Link an ELR to an existing Orpheus record with different names

Link an ELR to an existing Orpheus record whose names do not match by entering the person ID in the ELR window.

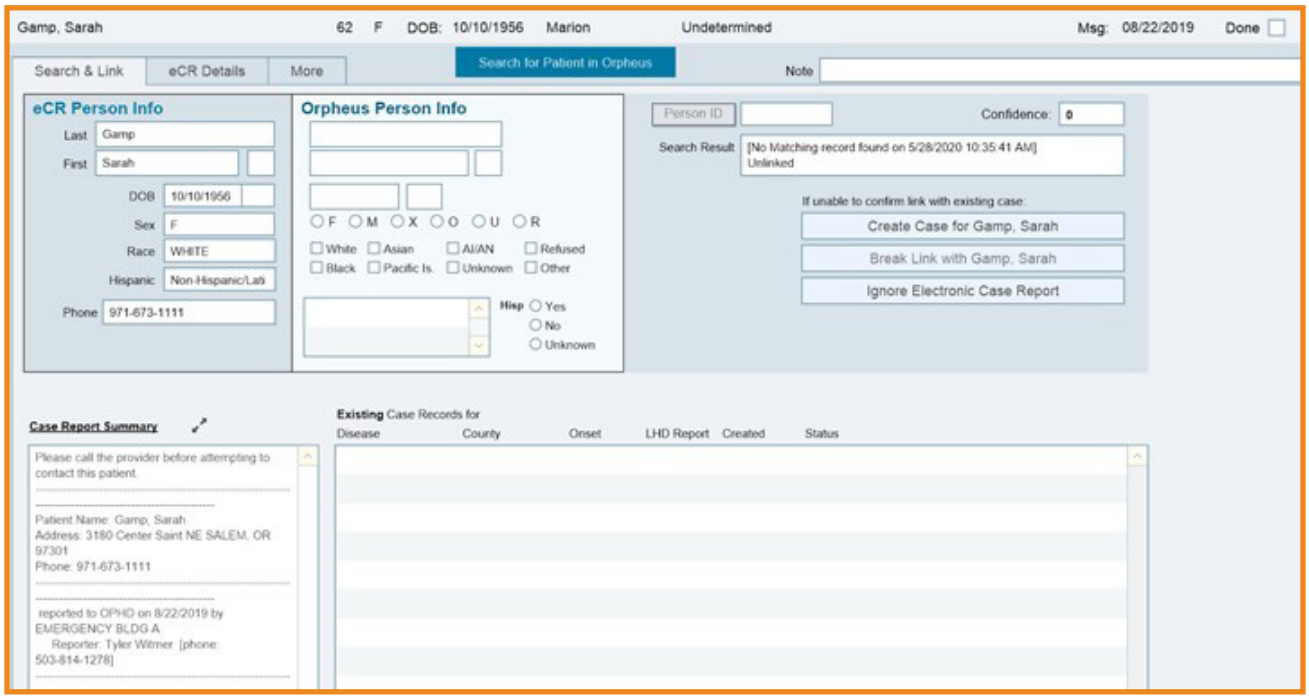
This scenario is unusual, but it can happen with people who have changed their legal name. The most common scenarios are getting married or being adopted (for a congenital syphilis case). Make sure you have done your research and feel confident it is the same person before linking the ELR.



Process an eCR and find eCR records for a patient

Processing an eCR and finding eCR records for a patient is like processing an ELR and finding ELRs. The options from the eCR tab are Confirmed Link (link an eCR to an existing case), Create Case, Break Link or Ignore. eCRs

usually do not have all the information required to create a syphilis case with presumptive or confirmed status.

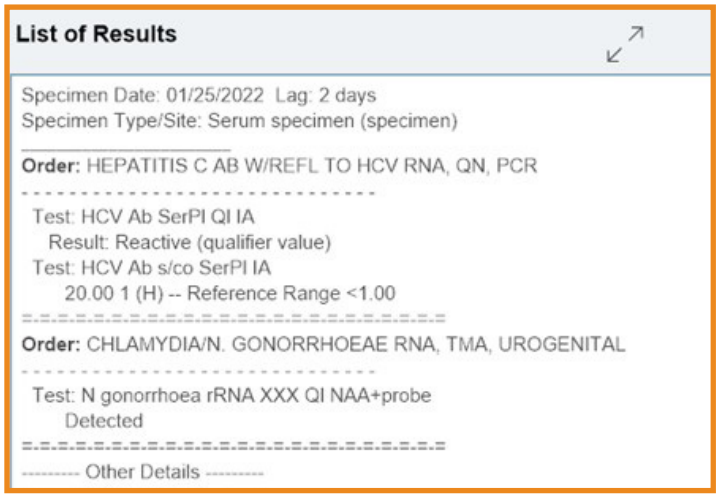


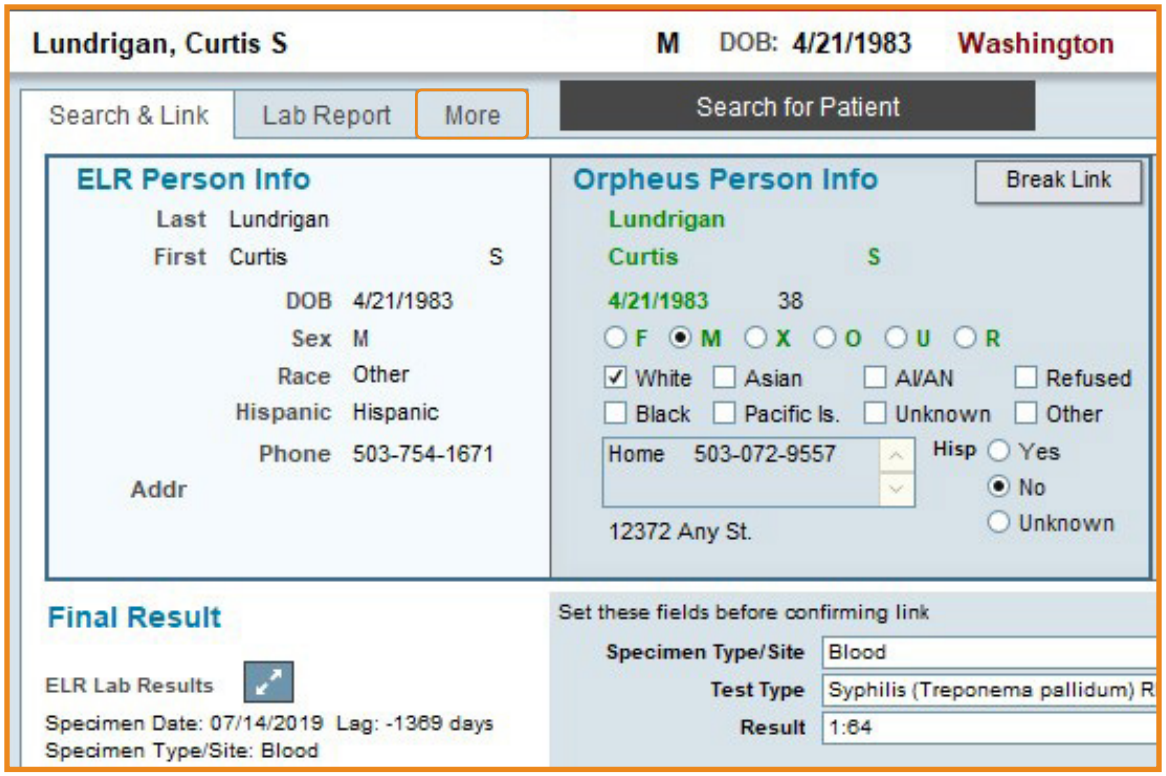
Duplicate an ELR

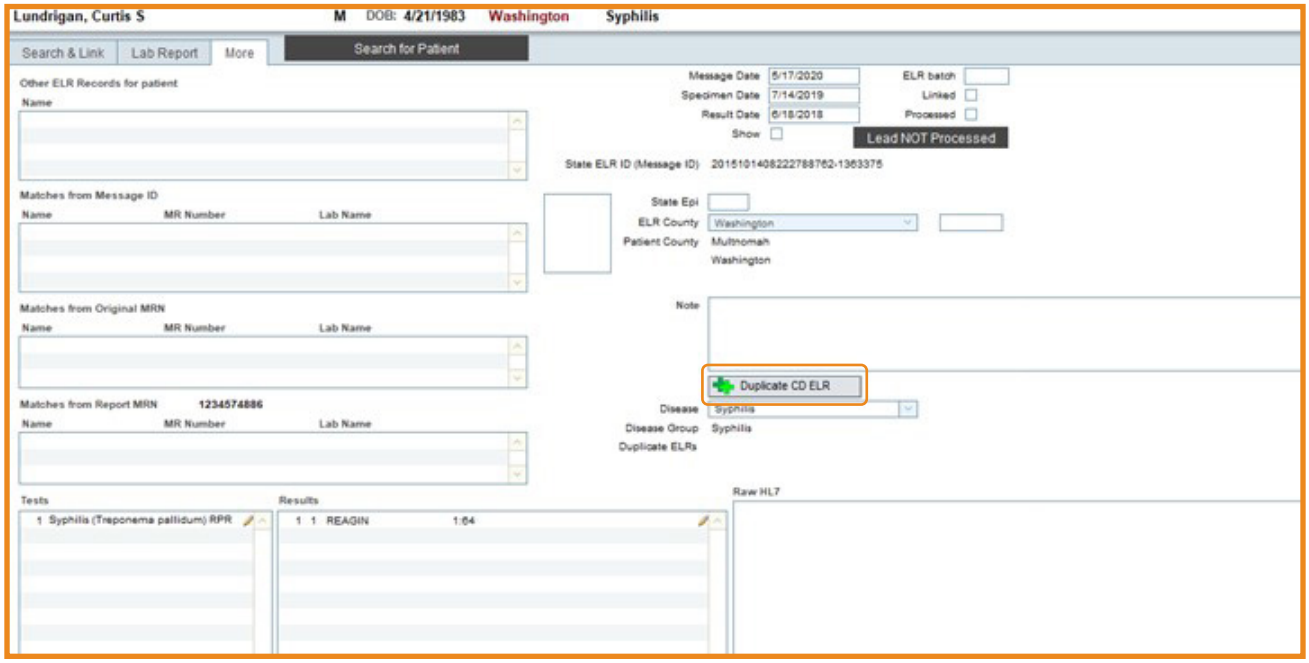
There are two ways to duplicate an ELR:

- From the More tab before linking the ELR, or
- From the Lab tab after linking the ELR.

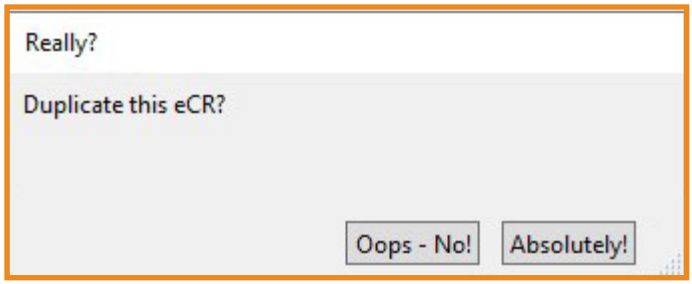
Duplicating an ELR from the More tab. This option is best when more than one disease is reported in the same ELR, for example, syphilis, chlamydia and gonorrhea. Click the "More" tab and click the "Duplicate CD ELR" button.



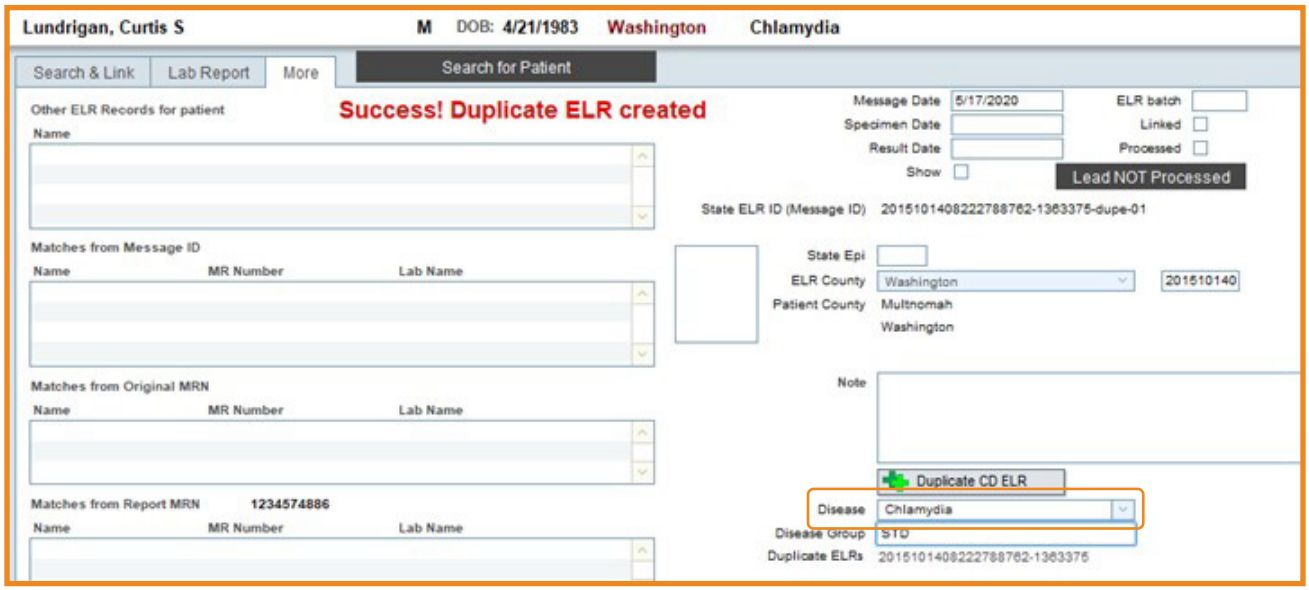




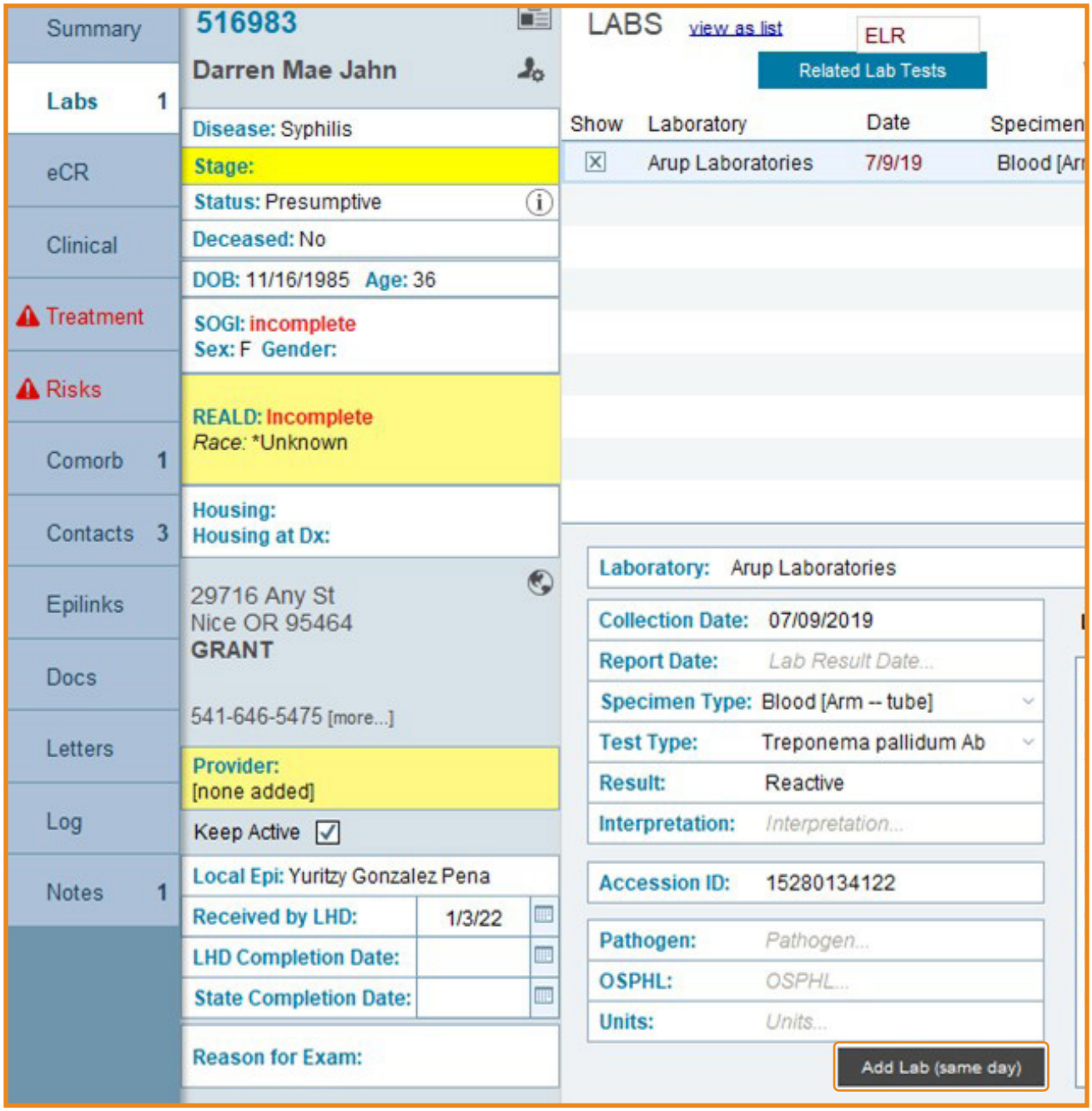
A new window shows up confirming that you want to duplicate the ELR.

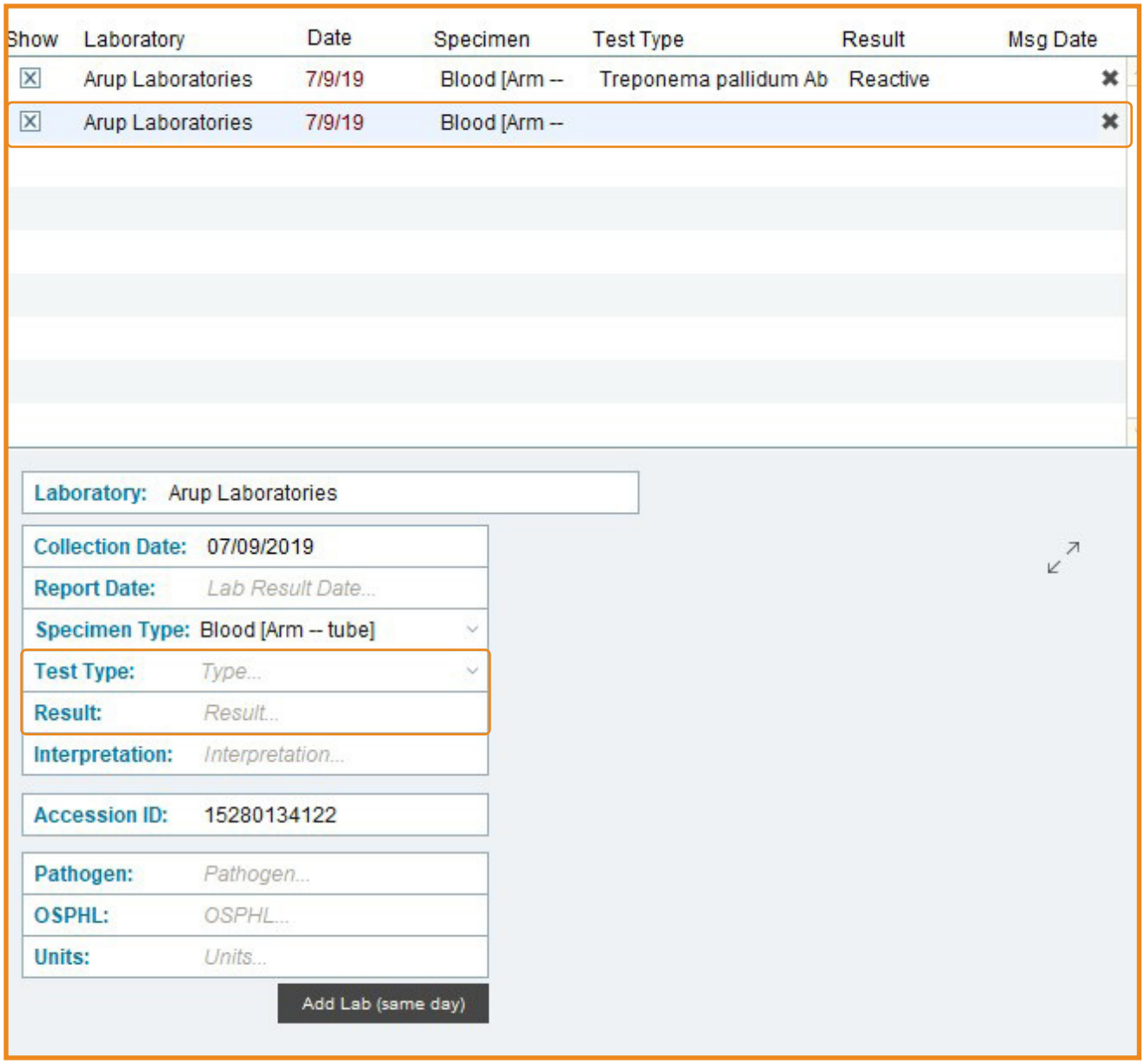


Change the disease to one of the diseases reported in the ELR.



Duplicating an ELR from the Lab tab. This option is best when treponemal and non-treponemal tests are reported in the same ELR. Click the ELR record to highlight it in blue and then click the "Add Lab (same day)" button. A new lab record will be added with most of the information from the other lab record. Add the Test Type and Result to complete all the lab required fields.


Summary
Labs 1
eCR
Clinical
Treatment
Risks
Comorb 1
Contacts 3
Epilinks
Docs
Letters
Log
Notes 1
516983
Darren Mae Jahn
Disease: Syphilis
Stage:
Status: Presumptive
Deceased: No
DOB: 11/16/1985 Age: 36
SOGI: incomplete
Sex: F Gender:
REALD: Incomplete
Race: *Unknown
Housing:
Housing at Dx:
29716 Any St
Nice OR 95464
GRANT
541-646-5475 [more...]
Provider:
[none added]
Keep Active
Local Epi: Yuritzy Gonzalez Pena
Received by LHD: 1/3/22
LHD Completion Date:
State Completion Date:
Reason for Exam:
LABS view as list
ELR
Related Lab Tests
Show Laboratory Date Specimen
Arup Laboratories 7/9/19 Blood [Ar
Laboratory: Arup Laboratories
Collection Date: 07/09/2019
Report Date: Lab Result Date...
Specimen Type: Blood [Arm -- tube]
Test Type: Treponema pallidum Ab
Result: Reactive
Interpretation: Interpretation...
Accession ID: 15280134122
Pathogen: Pathogen...
OSPHL: OSPHL...
Units: Units...
Add Lab (same day)



Reading an ELR

Some reporting laboratories report the treponemal and non-treponemal test in one ELR and other laboratories report one ELR for each test.

From the ELR tab, click the expanding arrows to expand the ELR result.

ELR Report Summary

Specimen Date: 07/13/2019 Lag: -1369 days
Specimen Type/Site: Blood

Order: T pallidum Ab Ser Ql Aggl

Test: T pallidum Ab Ser Ql Aggl
Reactive

Notes: Performed by ARUP Laboratories, 500 Chipeta Way, SLC,UT 84108 800-522-2787 www.aruplab.com, Jerry W. Hussong, MD, Lab. Director

--------- Additional Notes ---------
Performed by ARUP Laboratories,
500 Chipeta Way, SLC,UT 84108 800-522-2787
www.aruplab.com, Jerry W. Hussong, MD, Lab. Director*****-----

--------- Other Details ---------
Patient Name: Taglauer, Lorene G
DOB: 7/10/1984 Sex: M Race: White
Vancouver, WA 98661
Phone: 503-389-0522
Note: Performed by ARUP Laboratories,
500 Chipeta Way, SLC,UT 84108 800-522-2787
www.aruplab.com, Jerry W. Hussong, MD, Lab. Director

Provider: Joslin Md, Timothy A
Address: 3303 SW BOND AVE
PORTLAND, OR 97239-4501
MULTNOMAH
Phone: 503-494-8573

Sending Facility: Arup Laboratories

Ordering Facility: Oregon Health Science Univ
3181 SW SAM JACKSON PARK ROAD
PORTLAND PORTLAND 97239-3011
Phone: 503-494-8311
Accession: 15AR-282R0018
Message ID: DDFF4_1C50_0_F95D-1360943
Report MRN: 1234568550

- **Specimen Date:** This is the date the specimen was collected. The lag day is the days between the collection date and the report date to the local health department. An acceptable range is between 0 to 7 days. If you notice ELR with a wider range, please reach out to the Orpheus tech team by email and provide the sending facility, accession and message ID.
- **Specimen Type:** This is the specimen sample. It could be blood, CSF, serum, eye or ear fluid. The most common specimen type is blood. The specimen type is a required field, and it is reported to CDC. If you notice sending facilities not sending the specimen type, please notify the Orpheus tech team by email.
- **Order:** The order is the test type ordered by the provider. There are two broad categories, treponemal and non-treponemal tests.
- **Results:** This is the result of the order test. The sending facilities report the

results in a qualitative or quantitative way. Qualitative results have the words positive, detected or reactive. Quantitative results have a number 4+ 1:8 or 8. Get familiar with the syphilis results and the methods of reporting for each sending facility.

- **Notes:** These notes are created by Orpheus when processing the ELRs
- **Additional Notes:** These notes have additional information about the sending facility.
- **Other Details:** This information about the patient, provider, sending facility and ordering facility
  - » **Patient name and contact information:** This includes the full name, DOB and contact information for the patient. ELRs are assigned to each county based on the patient's county. If the contact information is missing, reach out to the ordering provider, search on EHR or search in Accurint.
  - » **Provider name and contact information:** This is the information about the provider who ordered the test. It does not always mean the case saw this provider.
  - » **Sending facility:** This is the facility that processed the order and sent the result to public health. The most common sending facilities are ARUP, LabCorp and OSPHL.
  - » **Ordering facility:** This is the facility that made the order. The ordering provider works for this facility. Some ordering facilities use national laboratories like ARUP, LabCorp, etc.

Reach technical support

For password resets, call the OHA Service Desk at **503-945-5623**.

For all other technical support, call the User Support Team at **(971) 673-1111, option 2**.

The Orpheus Tech Team is available for Orpheus users. It is available from 8:00 a.m. to 5:00 p.m., Monday to Friday.

You can also submit questions or comments through email. Questions about training or support sessions for syphilis or STD can be sent to Yuritzy.a.gonzalez-pena@dhsoha.state.or.us or jillian.d.garai@dhsoha.state.or.us.

Appendix

CDC required and core variables

- **Core variables:** Core variables are variables that are essential for counting and/or investigating reported cases and for describing trends in reported cases in key populations at the local and state level. Some of these core variables are not transmitted via STD MMG.

Core variables	Syphilis (all stages)	All P&S syphilis
Age	✓	✓
Sex	✓	✓
County	✓	✓
Diagnosing facility type	✓	✓
Specimen collection date	✓	✓
Race/ethnicity		✓
Gender identity		✓
Sexual orientation		✓
Sex of sex partners		✓
Pregnancy status		✓
Clinical signs/symptoms		✓
HIV status		✓
Substance use		✓
Treatment received		✓
Date of treatment		✓
History of syphilis		✓

- **Required variables:** Required variables are variables that are necessary to identify a case's demographics, residency and surveillance definition. Most of these variables are transmitted via STD MMG.
  - » STD v1.1.1 Message Mapping Guide and Test Case Scenarios (07/21/2021)

Disposition codes

Contact type and disposition codes

Table 1. Contact type codes

Contact type	Disposition code	Use
Partners	P-1	Sex partner
	P-2	Needle partner
	P-3	Sex and needle partner
Social contacts	S-1	Named by this case patient; has symptoms suggestive of disease
	S-2	Named by this case patient; is a sex partner of another person who is known to be infected
	S-3	Named by this case patient; needs exam; not S-2 or S-3
Associates	A-1	Named by someone who is not infected; has symptoms sug-gestive of disease
	A-2	Named by someone who is not infected; is a sex partner of someone who is infected
	A-3	Named by someone who is not infected; could benefit from exam; not A-2 or A3

Contact type and disposition codes

Table 2. Disposition codes for partners and associates

Disposition code	Use
A - Preventive therapy	Sex partner or associate of case, treated, no trepo-nemal or nontreponemal test available
B - Refused preventive therapy	Sex partner or associate of case, refused treat-ment, no treponemal or nontreponemal test availa-ble
C - Infected, brought to treatment	Sex partner or associate meets probable or con-firmed case definition (any stage), treated
D - Infected, not treated	Sex partner or associate meets probable or con-firmed case definition (any stage), not treated (e.g. refused, lost to follow-up)
E - Previously treated for this infection	Sex partner or associate meets probable or con-firmed case definition (any stage), treated by an-other healthcare provider prior to interview

Disposition code	Use
F - Not infected	Serologic tests results available for sex partner or associate and not consistent with probable or con-firmed case definition (any stage)
G - Insufficient information to begin investiga-tion	Named suspect or associate without sufficient available information (such as telephone, address, or email) to attempt to contact
H - Unable to locate	Attempted but unable to locate sex partner or as-sociate
J - Located, refused examination	Successfully located sex partner or associate, but refused testing or treatment
K - Out of jurisdiction	Sex partner or associate resides in another state, country or county.
L - Other	Outcome of attempt to locate other than listed elsewhere in table.
M - Reverse contact link	Sex partner or associate also meets probable or confirmed case definition (any stage) and is likely source to current case. In this circumstance labora-tory and treatment outcome is stored with the sex partner or associate's case information. This code is used to avoid "double counting" partners who are "reciprocally listed" on cases for which they were the source.

Orpheus changes

Each clinical and risk question has a question ID that can be helpful for analysis. The table below shows the questions ID and an approximate time when questions became active in Orpheus.

Syphilis Risk tab

(P) – Parent Question (c) child question (M) question for male case (F) question for female case

QID	Deprecated QID 01/04/2022	Label	Reasoning	Use	Notes
3030	If female-> 2329 If male -> 2328	Sexual partners, past 12 months (F) (M)	The intention of the question is to capture the sexual orientation	CDC	Prior to 2022, there were one single choice question for female and one for male partners.

3040	If female-> 635 If male -> 497	Total number of sex partners, in the past 12 months	Total partners equal the sum of all males, female, and transgender partners. Leave blank if unknown	CDC	Prior to 2022, there were one single choice question for female and one for male partners. CDC does not required number of sex partners by sex.
2333	790 duplicate with 2333	Sex with MSM, past 12 months (F)	Had sex with a person who is known to her to be an MSM within past 12 months?	CDC	Single choice YNRU
2330	2330	Sex with an anonymous partner, past 12 months (c)	Had sex with an anonymous partner whose full name case doesn't know and whom case wouldn't know how to contact except by chance in the past 12 months?	CDC	Single choice YNRU
2334	2334	IDU, past 12 months (c)	Engaged in injection (recreational) drug use within past 12 months?	CDC	Prior to 2022, there was one questions capturing IDU without timeframe. QID 110
3027		Drug Choice (IDU)	Specify drugs used (IDU only) check all that apply	CDC	Prior to 2022, there was not an IDU specific for drug choice. QID 855 capture drug choice IDU and non IDU. New choices were added. • Sedatives/ Tranquilizers • Non-heroin opioid including prescription painkillers • Hallucinogenic/ psychoactive agent • Marijuana (cannabis) • Other Refused

2602		Non-IDU, past 12 months (non-injection) (c)	Engaged in non-injection (recreational) drug use within past 12 months?	CDC	Prior to 2022, there was only an IDU question.
3028		Drug Choice (non-IDU)	Specify drug used (non-IDU only)	CDC	Prior to 2022, there was not an IDU specific for drug choice. QID 855 capture drug choice IDU and non IDU. • Multiple choice • Methamphetamine • Cocaine • Heroin • Crack • Nitrates • Viagra • Sedatives/ Tranquilizers • Non-heroin opioid including prescription painkillers • Hallucinogenic/ psychoactive agent • Marijuana (cannabis) • Other Refused
2331	789 dupli-cate with 2331	Sex with a PWID, past 12 months	Had sex with a person known to him/her to inject drugs (PWID) within the past 12 months?	CDC	Prior to 2022, there was a duplicate question, “Sex partner of IDU” QID 789
2332		Sex while intoxicated or high, past 12 months	Had sex while intoxicated and/ or high on drugs within the past 12 months?	CDC	Single choice YNRU
3050		Exchange sex for a need, in the past 12 months	Have you exchange sex for a need within the past 12 months? If yes, a new question will show up	CDC	Single choice YNRU

3032	570	Needs exchanged for sex, past 12 months	If yes to previous ques-tions, read all the options to the case and have case answer from the list	CDC	Prior to 2022, QID570 was a single choice questions asking for exchange sex for money or drug. QID 3032 is a multiple choice and includes options based on • Money (CDC required) • Drugs (CDC required) • Paid bills • Material goods • Place to stay/sleep • Food • Vehicle/transportation • Dependent care • Security/protection • Other
2336	857 duplicate with 2336	Internet Sex (P)	Find partners through the internet, past 12 months. Answer yes, if case uses social apps to find sex partners in the last 12 months	CDC	Prior 2022, there were two similar questions. One questions asking “Find partners” vs. “Met partners.” QID 2336 stayed as it reflect the CDC vocabulary.
1450		If yes to 2336 Internet sex site names (c)	Select the social media(s) used for the purpose to find sex partners and not for social purposes such as following friends, artists or news. The intention of the question if for outreach purposes.		Multiple choice Add to the list • Sniffies • Facebook • Snapchat • Instagram
3034		Been incarcerated with the past 12 months?	Has this person been incarcerated within the past 12 months?	CDC	Single choice YNRU
2147		Ever taken PrEP (P)	Have you taken PrEP for HIV prevention?		Single choice YNRU

New 3035		Challenges to start PrEP (c)	The intention is to identify what is preventing case for enrolling into PrEP		Multiple choice • Knowledge • Personal • Insurance • Social support • Access • Stigma • Side effects • Affordability • Change of risk perception or relationship status
New 3036		If Yes to above Most recent PrEP use	When was the last time you took PrEP for HIV?		Date
New 3035		If no to above questions What are the challenges to continue taking PrEP (c)	What are challenges to continue PrEP? Select all the options that apply. If other reason, write them on the notes		Multiple choice • Knowledge • Personal • Insurance • Social support • Access • Stigma • Side effects • Affordability • Change of risk perception or relationship status
New		Ever taken PEP (P)	Have you taken PEP for HIV prevention? Answer yes if case has used PEP before or at syphilis specimen collection		Single choice YNRU
New		PEP in the last 12 months (c)	Have you taken PEP for HIV prevention in the last 12 months? Answer yes if case has used PEP 12 months prior to syphilis specimen collection date		

Oregon Health Authority

PUBLIC HEALTH DIVISION

OHA 4212 (8/2022)