

# Wisconsin Strategic National Stockpile



# *User Manual*

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DEPARTMENT OF HEALTH AND FAMILY SERVICES  
DIVISION OF PUBLIC HEALTH  
DIVISION OF HEALTH CARE ACCESS AND ACCOUNTABILITY



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# *System Requirements*

## **In this chapter:**

Internet Access  
Hardware Requirements  
Software Requirements

## Internet Access

Since SNS is a Web-based application, you will need reliable Internet access, preferably with a dedicated connection, to access it.

A modem connection will also work, but will perform more slowly. SNS does not recommend using modem access over a cellular phone. This type of connection is expensive and too unreliable to support a Web application.

## Hardware Requirements

The following are minimum hardware requirements for accessing SNS:

- Pentium 100 MHz computer (500 MHz or higher recommended).
- 32 MB RAM (64 MB or higher recommended).
- 500 MB free disk space.
- Screen display set at a minimum of 800 x 600 resolution and 256 colors.
- Mouse.

## Software Requirements

- Internet Browser software:
  - Microsoft® Internet Explorer, version 5.0 or higher, is strongly recommended. Internet Explorer version 4.0 will work, provided it is equipped with all security upgrades.
- Windows® 95 and all subsequent Windows® versions.
- Adobe Reader® version 6.
- For networked computers, port 443 of the network firewall must be open for outgoing HTTPS (secure HTTP). To verify, try typing the SNS Web address on your Internet browser: <https://www.dhfswir.org/>. If you are unable to access the site, contact your network administrator.



# *Accessing SNS*

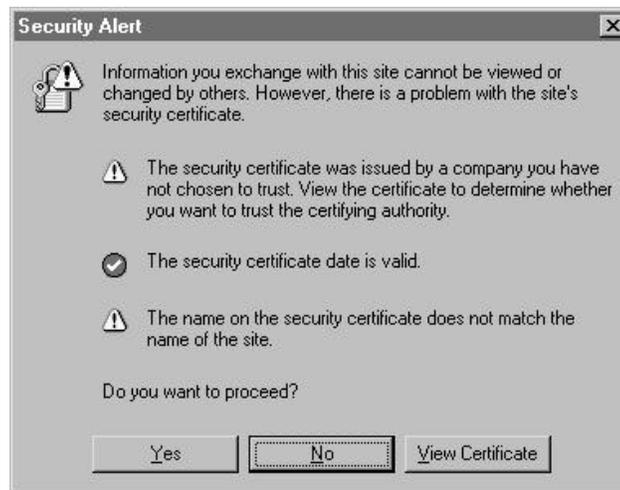
## **In this chapter:**

Accessing the SNS Web Site  
Exiting SNS  
Time Outs in SNS

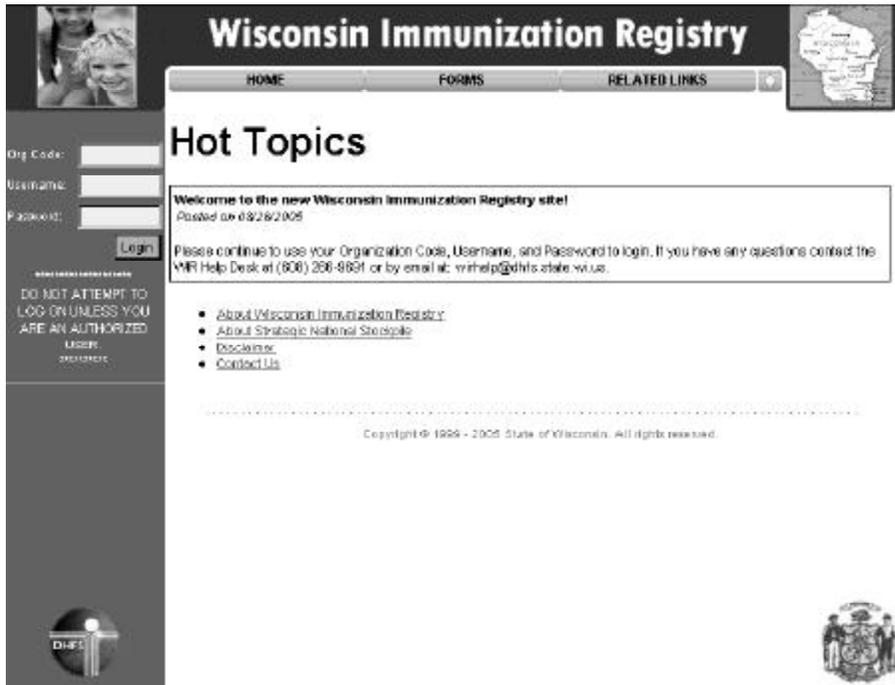
## Accessing the SNS Web Site

To access the SNS Web site, do the following:

1. Open your Internet browser. To open your browser, locate the browser icon on your computer's desktop (screen with program icons). Once you have located the Microsoft® Internet Explorer icon, double-click it with your left mouse button.
2. Click File and choose Open. If you are unable to see your browser's menu bar, you may have it set to Full Screen view. To switch this view, press F11 on your keyboard. This key toggles the Full Screen view on and off.
3. Type in the full SNS address: *https://www.dhfswir.org/*. Press **OK**. If you do not reach the SNS security/certificate warnings or the SNS Login screen after correctly typing in this address, port 43 of your network's firewall may be closed. Contact your network administrator to open this port for outgoing HTTPS, which is secure HTTP.
4. You may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates. Internet Explorer gives you the option of turning off these warnings for future use.



5. At the SNS login screen, enter your organization code, username, and password. The information on this screen is case sensitive; enter the information exactly as you received it.



The information on the login screen is case-sensitive; in other words, you need to enter the data in upper- and/or lowercase, exactly how you received it.

6. Press the **Login** button.
7. The SNS home page will now display.

### *Login Menu Items*

At the top of both the login and post-login pages, three menu items appear: Home, Forms, and Related Links. By hovering the cursor over one of these menu items, you may access a drop-down menu. To select an item from the drop-down menu, simply click the desired item.

### *Accessing the Post-Login Page from SNS*

Once in SNS, you may access the post-login page to switch organizations or to manage users or your account. To do this, simply click the Manage Access/Account menu option at the top of the screen in SNS. The post-login page will display.

### **Exiting SNS**

SNS may be exited from any screen within the application by pressing the Logout menu option at the top of the screen. Once you logout, you will be returned to the SNS login page. You may minimize your browser at this point by pressing  in the upper right corner of your computer screen.

If you wish to close your browser completely, you may either press **X** in the upper right hand corner of your computer screen, or you may click on **F**ile and then **C**lose on the browser's menu bar. If you do not see the menu bar, your browser may be in Full Screen view; press F11 on your keyboard.

### **Time Outs in SNS**

For security reasons, your session with SNS will time out after one hour of inactivity. A message to that effect will be displayed briefly and then the login screen will be displayed. To continue to use SNS, you will need to log in again.



# *Optimizing SNS*

## **In this chapter:**

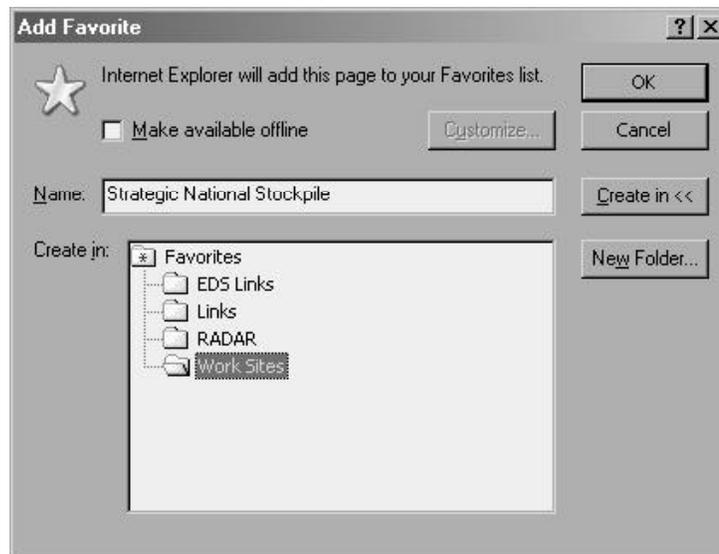
Creating Favorites and Shortcuts  
Optimizing Browser Performance  
Running Reports with Adobe Reader®  
Efficient Screen Navigation

## Creating Favorites and Shortcuts

To access SNS quickly, we recommend you set up a shortcut icon for SNS, set SNS as a favorite (also known as a bookmark), or set SNS as your browser's home page.

### *Adding SNS to Favorites:*

1. Click File and choose Open.
2. Type in the SNS Web address, <https://www.dhfwir.org/>. Press **OK**.
3. Accept any security or certificate warnings.
4. Once at the login screen, prior to entering any information, click on Favorites on your browser's menu bar or press the **Favorites** button.



5. Click Add to Favorites and press **OK**.
6. The Strategic National Stockpile should now appear on your browser's list of favorite sites.

### *Creating a SNS Shortcut on Your Desktop:*

Once you add SNS as a favorite, you may copy it as a shortcut to your computer's desktop. Once the shortcut is created, simply double-click on it to open your browser to the SNS login screen. To create a SNS shortcut:

1. Click Favorites and right-click on the Strategic National Stockpile favorite.
2. Click Send To and then Desktop (create shortcut).
3. Press **OK**.

If there is no Desktop option under the Send To pop-up menu, do the following:

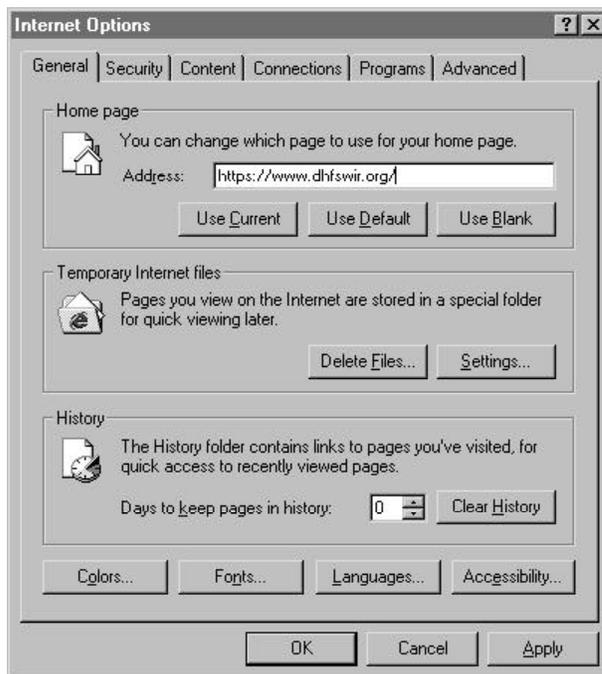
1. After right-clicking on the Strategic National Stockpile favorite, choose Copy.
2. Minimize the Internet Explorer screen.
3. Choose an open area on your desktop and right-click.
4. Choose Paste Shortcut.

Alternately, you may set a shortcut by doing the following:

1. At the SNS login screen, before entering any data, choose File from the menu bar.
2. Click Send and Shortcut to Desktop.

### *Setting SNS as Your Browser's Home Page:*

1. At the SNS login screen, before entering any data, choose Tools from the menu bar.
2. Click Internet Options.



3. In the Internet Options box, click the General tab.
4. On the Home Page section of the box, press **Use Current**.
5. Press **OK**.

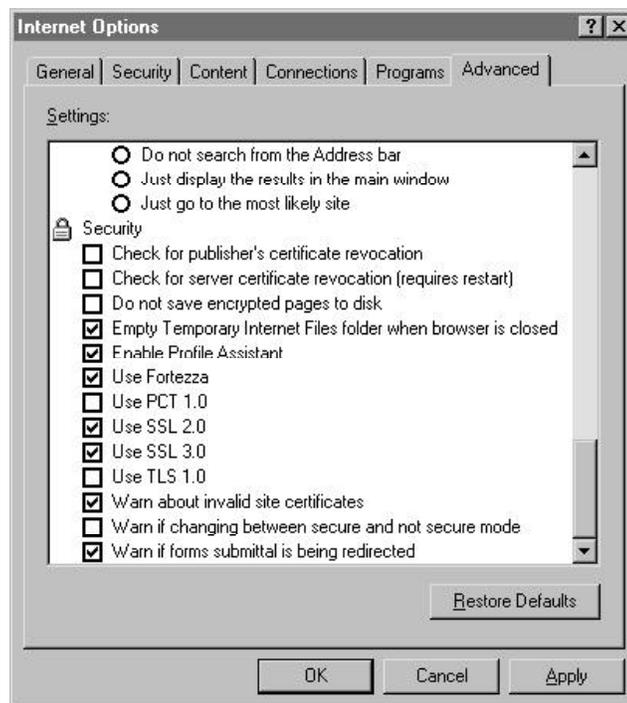
## Optimizing Browser Performance

Unless instructed to do otherwise, your browser will automatically save a copy of each new Web page you visit to your computer's hard drive. Over time, these saved files can slow down your browser's performance. To avoid this problem, you may set your browser to automatically delete the temporary Internet files each time the browser is closed.

### *Deleting Temporary Internet Files (Internet Explorer 5.0)*

To automatically delete all temporary Internet Files each time Internet Explorer is closed, follow these steps:

1. Click Tools on your browser's menu bar.
2. Choose Internet Options.
3. Click the Advanced tab.



4. Scroll down the list until you see the Security heading.
5. Put a check mark next to the command, "Empty Temporary Internet Files folder when browser is closed."
6. Press **OK**.

### *Deleting Temporary Internet Files (Internet Explorer 4.0)*

1. Click View on your browser's menu bar.
2. Choose Internet Options.
3. Click the Advanced tab.
4. Scroll down the list until you see the Security heading.
5. Put a check mark next to the command, "Delete saved pages when browser is closed."
6. Press **OK**.

### *Operating in Full-Screen Mode (Internet Explorer)*

To view most elements of SNS with a minimal amount of scrolling, set your browser to full screen mode by pressing F11 on your keyboard. This mode gives you minimal browser commands and maximum viewing area for SNS screens. To return to normal screen mode, press F11 again.

## **Running Reports with Adobe Reader®**

SNS uses Adobe Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

### *Running Adobe Reader® Files*

The first time a report is displayed using Adobe Reader®, a window may appear asking whether you want to run the file or save the file to disk. Choose "Run the file" and "Do not display this message again."

If you try to print a report in Adobe Reader® and find that some of the text is illegible, choose Edit, Preferences, and SMOOTHING. In the Smoothing dialog box, make sure the "Smooth text" and "Smooth images" boxes are checked.

### *Problems Running Reports in Adobe Reader®*

If, while using Adobe Reader® 6.0, you get a small icon resembling a segmented cube and the report does not display, Adobe Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Press the **Start** button on the lower left corner of your computer screen.
2. Click Programs.
3. Click Adobe Reader® 6.0.
5. On the Adobe Reader® menu bar, click Edit.

6. Choose Preferences.
7. Choose Internet.
8. Under Web Browser Options, uncheck Display PDF in Browser.
9. Press **OK**.

Try running your report again. If you continue to have problems, contact the WIR/SNS Help Desk at (608) 266-9691.

### *File Transfer Protocol Server Access*

When running reports and data downloads, SNS queries a File Transfer Protocol (FTP) server to ready the file. If your network has blocked FTP access for any reason or if FTP wasn't installed with your browser, you will be unable to run reports or download data. Contact your information systems (IS) staff if you suspect your FTP access is blocked.

## **Efficient Screen Navigation**

Microsoft® Windows® often allows users several ways to accomplish certain tasks. Because SNS runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in SNS, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.

### *Keyboard Shortcuts in SNS*

The following keyboard shortcuts may save entry time in SNS.

**Deleting data:** When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you hit the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and click the left mouse button once.

**Tab:** The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the Web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed.

- Shift+Tab:** Holding down the Shift key and pressing the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the Web page.
- Enter:** In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK, etc.
- (Left Arrow):** The left arrow moves the cursor one character to the left.
- (Right Arrow):** The right arrow moves the cursor one character to the right.
- Ctrl+ :** Holding down the Ctrl key and pressing the left arrow key moves the cursor one word to the left.
- Ctrl+ :** Holding down the Ctrl key and pressing the right arrow key moves the cursor one word to the right.
- Ctrl+A:** Holding down the Ctrl key and pressing the A key will select all the text in the current field.
- Ctrl+C:** Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.
- Ctrl+V:** Holding down the Ctrl key and pressing the V key will insert (“paste”) the contents of the clipboard at the current cursor position.
- Ctrl+X:** Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.
- Delete:** This key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.
- Backspace:** Backspace deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.

Home:	The Home key positions the cursor to the left of the first character in the field.
End:	The End key positions the cursor to the right of the last character in the field.
Shift:	Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.
Ctrl:	Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.
Space:	When the cursor is at a check box, the Space bar toggles the check mark on and off.

### *Mouse Shortcuts in SNS*

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page. To position the cursor, click the mouse in the desired field.

*Clicking in a field:* Clicking in a field will place the cursor in that position.

*Double-clicking in a field:* When a field contains one character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

*Triple clicking in a field:* When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

*Dragging the mouse:* To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

*Right clicking in a field:* When you right click in a field, SNS displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu options are as follows:

Undo: Undo reverses your last action. Undo may be repeated several times.

Cut: Cut deletes all highlighted text in the current field and places it on the clipboard.

Copy: Copy duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.

Paste: Paste inserts the contents of the clipboard into the current field.

Delete: Delete removes the highlighted text without placing it on the clipboard.

Select All: Select All highlights all text in the current field.





# Home Page

## **In this chapter:**

- Menu Bar
- Menu Panel
- Announcements
- Release Notes
- Inventory Alerts

The home page of the SNS Web site opens after you have provided a valid organization code, username, and password. The home page of SNS is divided into several sections. Refer to the Accessing SNS chapter of this manual for information on accessing the SNS Web site.

**SNS**  
Wisconsin  
Strategic National  
Stockpile

Staging Region 7.1.0

home manage access/account forms related links logout help desk training

organization WIR Physicians • user Rachel Fisher • role SNS Typical User

**announcements:**

Currently, there are no announcements.

**release notes:**

NEW 09/27/2007 ~ [Release Version 7.0.1](#) [Release Test](#)  
[more release notes](#)

**Inventory Order/Transfer Notification ...**

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)		No Order Notification	
Transfer(s)		No Transfer Notification	

**Active inventory that is Going to Expire ...**

Site Name	Product Description	Lot Number	QOH	Units	Exp Date
No products are currently set to expire.					

**Inventory that is Running Low ...**

Product Description	Quantity On Hand	Units
Aspirin	1	CS
Test Product 1	3	CS

**Clients**  
manage client  
enter new client

**Prophylaxis**  
manage prophylaxis

**Reports**  
isolation orders form  
voluntary isolation  
contract  
iq individual follow up  
iq daily call list  
event statistics

**General**  
user manual

## Menu Bar

At the top of the screen toward the right side, you have several menu options. These menu options will appear on every screen within SNS. The options available are the following:

1. Home: Clicking this menu option will return you to the SNS home page from anywhere in the registry.
2. Manage Access/Account: Clicking this menu option will bring you to the post-login page, where you may switch organizations, manage your account, or manage access to other accounts. Refer to the Managing Users and Organizations and Managing My Account chapters of this manual for more information on these functions.
3. Logout: Clicking on the Logout menu option will log you out of your current SNS session and return you to the Login screen. You may logout from any screen within SNS.
4. Help Desk: Clicking on the Help Desk menu option will give you a screen with contact information for the WIR/SNS Help Desk.

5. **Training:** Clicking on this menu option will display any assigned training courses on the post-login page.
6. **Online Help:** Clicking on the light bulb in the right corner of the screen brings up page-specific help. Refer to Appendix 1 of this manual for more information on online help.

Directly below the menu bar is a row of information highlighted in a different color. This row contains your organization's name, your first and last name, and your role within the organization. If any of this information is incorrect, contact your organization administrator.

## **Menu Panel**

The menu panel is blue shaded and appears on the left of all screens within SNS.

### *Menu Selections*

The menu panel contains links — options that, when clicked, take you to the functions of the SNS Web site. These links, which include functions under Inventory, Prophylaxis, Clients, Maintenance, and others, are used to navigate the SNS Web site. Your role will determine your access to these functions.

## **Announcements**

The right portion of the home page, which has a white background, contains recent information on enhancements and maintenance relating to SNS. Recent announcements that have not been viewed will have “New” highlighted in yellow alongside them. Once you have viewed the announcement and returned to the home page, the flag will disappear. To view a full announcement, do the following:

1. Click the underlined announcement title.
2. The SNS Announcement screen will display, giving full details and the posting date of the selected title.
3. Click the Return to Main Page link to return to the home page.

## **Release Notes**

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of SNS and features included in the releases. Release notes may be viewed in the same manner as announcements.

## **Inventory Alerts**

The inventory alerts section will appear on the SNS home page for users with SNS Administrator and SNS Inventory Control levels of access.

The inventory alerts section of the home page consists of three tables. The top table, Inventory Order/Transfer Notification, lists the status of recent or open orders and transfers. The middle table, Active Inventory That is Going to Expire, lists inventory at each site that will expire within 60 days. The bottom table lists, by site, inventory that is nearly depleted.



# Managing Users and Organizations

## **In this chapter:**

- User Roles
- Adding Users
- Adding Multiple Users
- Finding/Viewing Users
- Maintaining Users
- Viewing Provider Organizations
- Editing Organizations

The Manage Access function allows users with administrator rights to add and update information on users and organizations for which the administrator has access.

Other user roles are able to update only their own user information using the Manage My Account function. See the Managing My Account chapter of this manual for more information on this function.

## User Roles

SNS is set up to accommodate various user types. Each user has access to certain features on the site based on the role assigned to him or her. The roles, or levels of access, for SNS are hierarchical and as follows:

1. **SNS Administrator:** This is the main contact for SNS within the health care organization. This role allows the user to manage inventory, administer prophylaxis, and update key maintenance tables.
2. **SNS Inventory Control:** The SNS inventory control user is responsible for managing the organization's product inventory. This role allows the user to manage inventory and administer prophylaxis.
3. **SNS Typical User:** The SNS typical user has access to clients, but not to inventory. This role allows users to administer prophylaxis.



Required fields are shown in blue type. For example, when entering information on the Add User screen, the user's first and last name are required; thus they are shown in blue type. Input fields not shown in blue are optional.

## Adding Users

To add a user to SNS, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Add User under the Manage Access section of the menu panel.

3. Enter the following required information for the user:
  - First name, last name, and middle initial (optional).
  - Username. The username should be a minimum of four characters in length and may include mixed-case letters and numbers.
  - Password. The password should be a minimum of four characters in length and may include mixed-case letters and numbers.
4. Enter additional information if desired, such as the user’s postal and e-mail addresses and telephone number.
5. Press **Save**.
6. Once a user is successfully saved in the database, “User Added” will appear at the top of the Edit User screen.

### *Modifying Access*

After adding a user, you will need to complete the Modify Access screen for the user; the user will not have access to SNS until you complete this step. To give a user access, follow these steps:

1. At the Edit User screen, click the Modify Access tab.



When choosing user names, be as specific as possible. This will avoid confusion as users are added over time.



The username and password fields are generally entered with lowercase letters. However, if they are entered in mixed case (upper- and lowercase), be sure to enter them the same way on the SNS login screen.



Since there is no password verification on the Add User screen, enter this information carefully. Once the Save button is pressed, there is no way for an organization administrator to look up the password. If the password was entered incorrectly or the user forgets the password, the organization administrator may go into the Edit User function and reset the password.



When entering Organization Type on the Modify Access screen, keep in mind that Organization Type can either be a specific kind of organization such as a public or private organization, or it can be the name of the parent organization, such as Aurora, which has several sites or child organizations. If a parent organization is chosen, you will be able to enter a specific site or sites to which the user will have access in the Organization pick list.

Application	Organization Type	Organization	Role	Add Access
	All Types			Add

Application	Organization	Role	Status	Select
-------------	--------------	------	--------	--------

2. Select the Application, Organization Type, Organization, and Role the user will have using the pick lists provided.
3. Press **Add** to add the information entered for this user.
4. Enter access to other organizations/applications by completing steps 2 and 3 again for this user.
5. Press **Save** when finished entering access information for this user.

## Adding Multiple Users

Administrators also have the option of adding multiple users at once to an application and organization. To add multiple users with roles other than administrator, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Add Multiple Users under the Manage Access section of the menu panel.
3. At the Add Users screen, select the Organization Type, Organization, and Application from the pick lists provided for the user being added. Then enter the last name, first name, username, password, and role for the user.
4. Press **Save**.
5. Follow steps 3 and 4 for each additional user.
6. When finished saving the last user, press **Cancel** to return to the post-login page.

## Finding/Viewing Users

SNS allows administrators to search for users using first and last names, or to create a list of all users by organization and application. To search for users within your organization, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Edit User under the Manage Access section of the menu panel.

**Edit User - Search**

Application: All Apps Find

Organization Type: All Types

Organization: All Orgs Refresh

Status Active  Disabled  Terminated

Last Name  First Name

*To get a complete list of users, leave both fields blank and click the find button.*

**Search Results**

Last Name	First Name	MI	User Name
-----------	------------	----	-----------

3. At the Edit User-Search screen, select the appropriate Application, Organization Type, and Organization from the pick lists provided. Check the box under Status that indicates whether the user is Active, Disabled, or Terminated. Then enter the last and first name of the user for whom you are searching, or leave both fields blank to bring up a complete list of users matching the search criteria.
4. Press **Find**.
5. All names matching the search criteria will be listed under the Search Results portion of the screen. To display the Edit User screen for a specific user, click on the user's underlined last name.

## Maintaining Users

The edit user function allows you to change any previously entered information about a user, including the initial password and status. To edit user information, follow these steps:



To find a specific user, enter at least one character for either the first or last name. To display a list of all users within the parameters entered, leave both the first and last name fields blank.

1. Find the user whose information needs updating by following the steps outlined in the Finding/Viewing Users section of this chapter.
2. At the Edit User screen, update the information found on the screen. To reset a user's password, enter a new password and confirm the new password on this screen. To change a user's status, click on the appropriate status to indicate that the user is active, disabled, or terminated.

The screenshot shows the 'Edit User' form with the following details:

- Tab:** Edit User (selected), Modify Access
- User Id:** 20484
- \* User First Name:** Cindy
- \* User Last Name:** User
- User Middle Initial:** (empty)
- Username:** imauser
- New Password:** (empty)
- Confirm New Password:** (empty)
- Status:**  Active,  Disabled,  Terminated
- Street Address:** (empty)
- Other Address:** (empty)
- P.O. Box:** (empty)
- City:** (empty)
- State:** WI
- Zip:** (empty)
- Email:** (empty)
- Phone Number:** (empty)
- Ext:** (empty)
- Buttons:** Save, Cancel

3. Press **Save** when you are finished updating the user's information.
4. Once a user is successfully saved in the database, "User Updated" will appear at the top of the Edit User screen.
5. To modify the access of the user, click on the Modify Access tab.
6. To add access to additional applications/organizations, follow steps 2-5 under the Modifying Access section of this chapter.
7. To edit current access, check the Select box for the access to be edited. Press **Select**.
8. Update the user's role and/or status for the selected access and press **Update**.
9. Press **Save** when finished making access changes.

## Viewing Provider Organizations

SNS allows users with an administrator role to view a list of provider organizations/sites within the database. To view the listing, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click List Organizations under the Manage Access section of the menu panel.

**List Organizations**

Organization Type:  Show:  Active  Inactive  Both

Index A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Name	City	Main Contact	Phone
16th Street Community Health Center	MILWAUKEE	Cynthia Obletz, RN, BSN	414-672-1315
16th Street Community Health Center Program	MILWAUKEE		414-672-1315
Abbotsford Center	Colby		715-389-3456
ABMC - Womens Health	GREEN BAY	Victoria Ruetten	920-468-2427
Adams County Public Health Department	FRIENDSHIP	Kathy Challoner	608-339-4253
Advanced Care Clinic	MEQUON	Marsha Davis MD	262-242-0700
Affiliated Physicians SC	EDGERTON		
Affinity Health System - North	MENASHA	LeeAnn Spoehr	920-727-8721
Affinity Health System - South	OSHKOSH	LeeAnn Spoehr	920-727-8721

3. If desired, select an organization type from the pick list provided and click to indicate organizations that are active, inactive, or both to narrow the list. You may also select an underlined letter under Index to view those organizations beginning with the letter selected.

## Editing Organizations

Users may also edit organization information for the organizations/sites for which they have administrator access. To edit this information, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Edit Organization under the Manage Access section of the menu panel.
3. Select the organization/site you wish to edit by clicking on the underlined organization/site name. The organization with an asterisk before the name indicates the parent organization and will only display if the administrator has access to it.

4. Enter the updated organization name, county, address information, contact information, or telephone number. The Org ID, Org Classification, Type, Short Name, and Medicaid ID can only be updated by contacting the SNS/WIR Helpdesk.
5. Press **Save**. The message “Organization Updated” will appear at the top of the screen. Any information that is updated is also updated for related sites so that the information stays in sync.



# Managing My Account

## **In this chapter:**

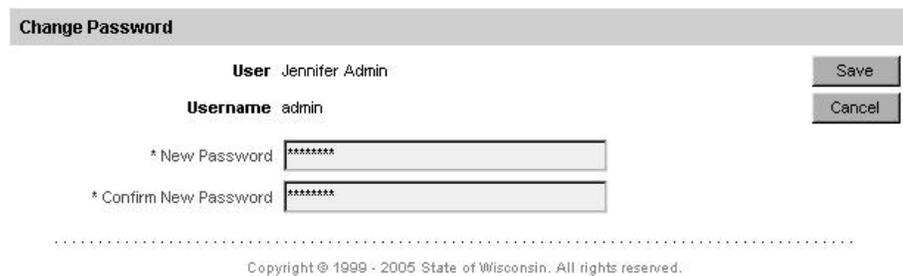
Changing Passwords  
Editing User Information

SNS allows all users to manage their own user information and change their own password.

## Changing Passwords

To change your own password for SNS, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Change My Password under the Manage My Account section of the menu panel.



The screenshot shows a web form titled "Change Password". At the top, it displays "User Jennifer Admin" and "Username admin". To the right of the user information are two buttons: "Save" and "Cancel". Below the username field are two password input fields, both masked with asterisks. The first is labeled "\* New Password" and the second is labeled "\* Confirm New Password". At the bottom of the form, there is a horizontal dotted line and a copyright notice: "Copyright © 1999 - 2005 State of Wisconsin. All rights reserved."

3. Enter a new password with a minimum length of four alphanumeric characters.
4. Re-enter the new password in the Confirm New Password field.
5. Press **Save**. The message "Password Updated" appears in red at the top of the screen.

## Editing User Information

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Edit My User Account under the Manage My Account section of the menu panel.

The screenshot shows a web form titled "Edit User" with a grey header bar. Below the header, the "Username" field is pre-filled with "admin". The form contains several input fields: "\* User First Name" (containing "Percy"), "\* User Last Name" (containing "User"), "User Middle Initial" (containing "A"), "Street Address", "Other Address", "P.O. Box", "City", "State" (a dropdown menu showing "WI"), "Zip" (two separate input boxes), "Email" (a long single input box), and "Phone Number" (four separate input boxes with a hyphen and "Ext" label). To the right of the form are two buttons: "Save" and "Cancel".

3. Edit your first or last name in the appropriate fields. You may also enter or edit your middle initial, e-mail address, postal address, or telephone number information in the appropriate fields.
4. Press **Save**. If changes were made, the message "User Updated" appears on the screen.



The first and last name fields on the Edit User screen are required fields. If you are a user with the role of administrator, the e-mail, street address, and telephone number fields are also required; you may edit these fields, but do not remove the information from them.





# Managing Training

## **In this chapter:**

Assigning Training  
Training Status  
Accessing Training Courses



The list of available users on the Assign Training screen includes only those active users within the application, organization, and user role specified. Inactive and terminated users will not appear on the list, nor will users who already have a training assigned to them.



The user message entered on the Assign Training screen will appear at the top of the selected users' My Training screen.

Administrative users are able to assign online SNS training to users within their organization. These training classes are accessed by the users through the My Training link on the post-login page. For more information on accessing assigned training courses, refer to Accessing Training Courses in this chapter.

## Assigning Training

Administrative users in SNS may assign online training by role; in other words, the training courses available to a given user will depend on his or her role(s) in SNS.

To assign a training, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of an SNS screen.
2. Click Assign Training under the Manage Training section of the menu panel.

**Assign Training**

\* Application: SNS  
\* Organization: WIR Physicians  
\* User Role: SNS Typical User

Available Users: Betty Crocker (bcrocker), Fred Smith (sfred)

\* Selected Users: Brian Waterley (bwaterley)

User Message: Please complete training by COB June 30, 2008.

Buttons: Add >, Add All >>, < Remove, << Remove All, Save

3. Select an application (WIR or SNS) from the pick list, if applicable. If you have access to only one application, only that application name will display.
4. Select an organization from the pick list, if applicable. If you have access to only one organization, only that organization will display.

5. Select a user role from the pick list. The user role selected will determine the list of available users and the type of training assigned.
6. Highlight a name in the “Available Users” box and press **Add** to include the selected user in the training group. The name selected should now appear in the “Selected Users” box. To add all available users to the training group, simply press **Add All**. To remove a selected user, highlight the name and press **Remove**, or simply press **Remove All** to remove all names from the training group.
7. Enter a message in the “User Message” box, if desired. The user message is limited to 500 characters in length.
8. Press **Save**. The message “Training Assigned” appears in red at the top of the screen.

## Training Status

Administrators may view the status of assigned SNS online training for users within their organization by using the Training Status link.

To view training status, follow these steps:

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of an SNS screen.
2. Click Training Status under the Manage Training section of the menu panel.

**Training Status**

\* Application:

\* Organization: VWR Physicians

\* User Role:

\* Show:  Not Complete  Complete

Select the user(s) to cancel their training.

User	Training Class	Status	Date Assigned	Select
<a href="#">Fred Smith (sfred)</a>	SNS Typical User	Pending	2008-02-07	<input type="checkbox"/>
<a href="#">Mitzy Bluderwoven (mbluder)</a>	SNS Typical User	Pending	2008-02-07	<input type="checkbox"/>
<a href="#">James Handerski (jhanders)</a>	SNS Typical User	Pending	2008-02-07	<input type="checkbox"/>
<a href="#">Betty Crocker (bcrocker)</a>	SNS Typical User	Pending	2008-02-07	<input type="checkbox"/>
<a href="#">Brian Waterley (bwaterley)</a>	SNS Typical User	Pending	2008-02-07	<input type="checkbox"/>

3. Select an application (WIR or SNS) from the pick list, if applicable. If you have access to only one application, that application name will display as text.

4. Select an organization from the pick list, if applicable. If you are assigned to only one organization, that organization will display as text.
5. Select a user role from the pick list provided.
6. Select either “Not Complete” or “Complete” by clicking the appropriate radio button. “Not Complete” will display all users who have not yet completed their assigned training for the selected user role; “Complete” will display all users who have completed their assigned training for the selected user role.
7. To cancel an assigned training for a user, click the checkbox under the “Select” column for that user. Press **Cancel Training**. The Training Status screen will refresh, with the selected user removed from the list.

### Viewing User Training Status

To view an individual user’s training status, follow these steps:

1. Click the underlined user name in the “User” column on the Training Status screen.

**User Training Status**

**Organization** WMR Physicians  
**User** Rachel Fisher (rfish)  
**Role** SNS Typical User  
**Status** In Progress

Select the training course(s) to put status to complete. **Complete**

Return to previous page. **Cancel**

Assigned Training Courses	Topics	Status	Select
SNS Home Page			<input type="checkbox"/>
SNS Manage Client	SNS Home Page	Completed	<input type="checkbox"/>
	SNS Client Search	Completed	<input type="checkbox"/>
	SNS Editing Client Information	Completed	<input type="checkbox"/>
SNS Manage Prophylaxis	SNS Enter Prophylaxis	Pending	<input type="checkbox"/>
	SNS Edit Prophylaxis	Pending	<input type="checkbox"/>
SNS Manage My Account	SNS Manage My Account	Pending	<input type="checkbox"/>

2. In the event that you need to mark a course as complete, click the checkbox next to any assigned training courses that have been completed on the User Training Status screen. Press **Complete**.
3. Press **Cancel** to return to the Training Status page.

## Accessing Training Courses

Users who have been assigned training courses by an administrator in their organization may access those courses by following these steps:

1. Click the Training menu option at the top of the SNS screen. Or, access the post-login page by logging in to SNS and clicking My Training from the Manage My Account section of the menu panel.



The screenshot shows the 'My Training' section of the SNS interface. It includes a header 'My Training', a message 'Please complete all online training by March 3, 2008.', and a table with columns: User Role, Course, Topic, Status, and Date Completed. The user role is 'SNS Typical User'. The table lists four courses, each with one or more topics and a 'Pending' status.

User Role	Course	Topic	Status	Date Completed
SNS Typical User	SNS Home Page	<a href="#">SNS Home Page</a>	Pending	
	SNS Manage Client	<a href="#">SNS Client Search</a> <a href="#">SNS Editing Client Information</a>	Pending Pending	
	SNS Manage Prophylaxis	<a href="#">SNS Enter Prophylaxis</a> <a href="#">SNS Edit Prophylaxis</a>	Pending Pending	
	SNS Manage My Account	<a href="#">SNS Manage My Account</a>	Pending	

2. Click the underlined topic to begin the training. When you have completed the topic, the “Status” column on your My Training screen will show “Complete” and the date the topic was completed will appear in the last column. If you cancel a topic before completing it, the Status column will read “In Progress.”



When a user has completed a training topic, the topic link will remain on the user’s My Training screen, so that it may be viewed again, if desired. If you view a topic again, be sure to complete it; otherwise, a status of “In Progress” will display on the administrator’s Training Status screen.



In order for your training to show as “Complete” to your administrator, you must complete all training topics.





# *Maintenance*

## **In this chapter:**

- Use of Pick Lists in SNS
- Managing Physicians
- Managing Sites
- Managing Clinicians
- Managing Events



Required fields are shown in blue type. For example, when entering information on the Add Physician screen, only the physician's last name is required; thus it is shown in blue type. All other input fields on this screen are optional.

The Maintenance section on the menu panel allows users with administrator rights to add and update information on users, schools, physicians, clinic sites, clinicians, and events.

## Use of Pick Lists in SNS

When entering information in SNS, you will use pick lists for many fields. SNS uses pick lists — fields that contain a list of options from which you may choose — rather than free-text fields for certain input data. The advantages of pick lists over free-text fields include:

- Ease of use. Pick lists allow users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliant. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily.
- Uniformity of entered data. By choosing information from a pick list, users do not risk entering conflicting information that could decrease the accuracy of SNS reports. For example, one user using a free-text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- Confidentiality. By using standard pick lists, SNS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

## Managing Physicians

Administrators use the Add Physician/Edit Physician screens to enter new and update existing primary care providers. Health care organizations or clinic names may also be entered in the Add Physician screen. Physicians or health care organizations entered on this screen will be available for selection as primary care providers from a pick list on the Manage Client screen. Reports may then be generated from this data.

### *Adding Physicians*

1. Click Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, press **Add Physician**.
3. At the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. The Prefix/Title field, for example, could be filled with “Dr.” and the Suffix field would then be “M.D.” To add a clinic name, type the site name in the Last Name field and the location in the First Name field.

**Add Physician**

Prefix/Title Save

First Name Cancel

Middle Name

Last Name

Suffix

Street Address

Other Address  P.O. Box

City  State  Zip  -

Email

4. Press **Save**.
5. Once the physician is successfully saved, "Physician Added" will appear in the upper right corner of the Edit Physician box.
6. Press **Cancel** twice to return to the Manage Physicians screen.

### *Editing Physician Information*

1. Click Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to edit from the Physician Name pick list at the top of the screen, or click the physician's name in the Physician Listing at the bottom of the screen.

**Select a Physician to Edit**

Physician Name  Add Physician List All

**Physician Listing**

Name	Street	City/State/ZIP	Email
<a href="#">Dr. Scott Chandler</a>			
<a href="#">Dr. Jonathan Dewey</a>			
<a href="#">Dr. Frank Sanders</a>	33 Main Street	Madison, WI 53705	fsanders@aol.com
<a href="#">Dr. Sophia Schiffer</a>			
<a href="#">Dr. Hansel Schlecht</a>			
<a href="#">Dr. Anni Sharma</a>			

3. Add or change information in the Edit Physician box.
4. Press **Save**.
5. Once your changes are successfully saved, "Physician Updated" will appear in the upper right corner of the Edit Physician box.
6. Press **Cancel** twice to return to the Manage Physicians screen.

### *Deleting Physicians*

1. Click Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to delete from the Physician Name pick list at the top of the screen, or click the physician's name in the Physician Listing at the bottom of the screen.
3. In the Edit Physician box, press **Delete**.
4. A box will open asking if you want to delete this physician. Press **OK**.
5. Once your changes are successfully saved, "Physician Deleted" will appear in the upper right corner of the Manage Physicians screen.

### *Listing All Physicians*

A list of all physicians entered into an organization's database may be viewed by pressing **List All** on the Select a Physician to Edit screen.

### *Printing All Physicians*

To print out a list of all the primary care providers in your organization's database, follow these steps:

1. Click Manage Physicians under Maintenance in the menu panel.
2. Press **List All** in the Select a Physician to Edit box.
3. Do either of the following:
  - Choose **F**ile, then **P**rint, from your browser's menu bar. In the Print dialog box, press **OK**.
  - Press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
  - Choose **F**ile, then **P**rint, from your browser's menu bar.
  - In the Print dialog box, press **Properties**.
  - In the Properties box, find the section where you may specify orientation. Choose landscape.
  - Press **OK**.
  - Press **OK** in the Print dialog box.

## Managing Sites

Administrators use the Manage Site screens to add new or update existing sites that provide prophylaxis within their organizations. Once a site is added to SNS, it is available from several pick lists used for prophylaxis recording and reporting.

### Adding Sites

1. Click Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, press **Add Site**.

**Add Site**

Site Name: Eastside Clinic

Has Inventory:  Yes  No

Draw Inv From: Badger Clinic

Contact Name: Dr. WMR Physician

Street Address: 555 Orbiting Dr.

Other Address: \_\_\_\_\_ P.O. Box: \_\_\_\_\_

City: Anytown State: WI Zip: 55555 - 5555

Email: eastside@usernet.net

Telephone # ( 555 ) 555 - 5555 Ext 555

Save Cancel

3. Fill in the following information:
  - Within the Add Site screen, enter the site name into the required field.
  - Indicate whether the site maintains its own product inventory or whether it draws inventory from another source by clicking the Yes or No radio button under Has Inventory. If the site draws inventory from another source, choose the source from the Draw Inv From pick list. All sites with inventory *must* be created prior to setting a site that draws from another.
  - Complete any additional information you wish to supply on the site.
4. Press **Save**.
5. Once your site has been successfully saved, "Site Added" will appear in the upper right corner of the Edit Site box.
6. Press **Cancel** twice to return to the Manage Sites screen.



Required fields are shown in blue type. For example, when entering information on the Add Site screen the Site Name is required; thus it is shown in blue type. Input fields not shown in blue are optional.



When inventory is drawn from another site, the source site must be selected from a pick list. Therefore, you will need to create all sites that maintain inventory prior to adding sites that draw from those inventories.



It is important to tie sites that draw inventory to their inventory sources. This way, the registry will be able to keep an accurate count of all products.



Sites that draw inventory from another site are shown indented on site pick lists in SNS.

### *Editing Site Information*

1. Click Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to edit from the Site Name pick list at the top of the screen, or click the site name in the Site Listing at the bottom of the screen.
3. Add or change information on the Add Site box.
4. Press **Save**.
5. Once your site has been successfully saved, "Site Updated" will appear in the upper right corner of the Edit Site box.
6. Press **Cancel** twice to return to the Manage Sites screen.

### *Deleting Sites*

1. Click Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to delete from the Site Name pick list at the top of the screen, or click on the site name in the Site Listing at the bottom of the screen.
3. In the Add Site box, press **Delete**.
4. A box will open asking if you want to delete this site. Press **OK**.
5. SNS will return to the Manage Sites screen and the message "Site deleted" will appear at the upper right corner of the screen.

### *Listing All Sites*

A list of all sites entered into an organization's database may be viewed by choosing **List All** on the Manage Sites screen. This table lists the name of the site, the contact name and telephone number for the site, and whether the site has its own inventory or draws from another site.

### *Printing All Sites*

To print out a list of all sites in your organization, follow these steps:

1. Click Manage Sites under Maintenance on the menu panel.
2. Press **List All** in the Select a Site to Edit box.
3. Do either of the following:
  - Choose **F**ile, then **P**rint, from your browser's menu bar. In the Print dialog box, press **OK**.
  - Press the printer icon on your browser's toolbar.

4. If your printout is cut off, try setting your printer to landscape. To do this:

- Choose **F**ile, then **P**rint, from your browser's menu bar.
- In the Print dialog box, press **Properties**.
- In the Properties box, find the section where you may specify orientation. Choose landscape.
- Press **OK**.
- Press **OK** in the Print dialog box.

## Managing Clinicians

Clinicians are the individuals within the organization who administer and/or approve the administration of prophylaxis. A clinician may be associated with one or more clinic sites. The organization administrator will use the Manage Clinicians function to enter new and update existing clinicians within the organization. Clinicians added to the registry through this function will be available from pick lists used for recording prophylaxis.

### Adding Clinicians

1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. Press **Add Clinician**.

**Add Clinician Information**

Role:  Clinician  Ordering Authority  Ordering Authority / Clinician

Prefix:

Last Name:

First Name:

Middle Name:

Suffix:

Complete site listing:

Selected sites:

**Address Information (optional)**

Street 1:

Street 2:

PO Box:

City:

State:  Zip:

Email:

Area Code:  Phone Number:  -



Required fields are shown in blue type. For example, when entering information on the Managing Clinicians screen the Last Name field is required; thus it is shown in blue type. Input fields not shown in blue are optional.



When entering clinician site information on the Add Clinician screen, you may move the sites in the field in the middle of the screen from left to right simply by double-clicking them.

3. At the Add Clinician Information screen, choose a role for the clinician. Definitions of these roles are as follows:  
**Clinician:** The clinician is the person who administers the prophylaxis.  
**Ordering Authority:** In a public health department, the ordering authority is the medical director. In private practice, the ordering authority is the client's pediatrician or primary care physician.  
**Ordering Authority/Clinician:** Select this option if the person both authorizes and administers prophylaxis, such as a pediatrician.
4. Fill in the required field, Last Name, and any other fields you wish to complete. The Prefix field, for example, might be filled with "Dr." and the Suffix field would then be "M.D."
5. In the Complete Site Listing field at the bottom of the screen, highlight a site with which the clinician will be associated and press **Add**. Do this for each site at which the clinician may practice. If the clinician is associated with all the sites in the Complete Site Listing, press **Add All**.
6. Press **Save**.
7. After the clinician is successfully saved, the message "Inserted clinician: <last name>, <first name>" will appear at the bottom of the screen.
8. Press **Cancel** to return to the Manage Clinicians screen.

### *Editing Clinician Information*

1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. Press **Find Clinician**, or choose a health care site from the Site List and click on the appropriate clinician name on the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.
3. At the Clinician Search screen, enter the last and first names of the clinician and press **Find** to bring up his or her information. Then click on his or her last name in the Search Results table, or leave both fields blank and press **Find** to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.

**Clinician Search**

Last Name:       First Name:

To get a complete list of clinicians, leave both fields blank and press the find button.

4. Make the desired changes or updates to the clinician's information.
5. Press **Save**.
6. Once the clinician's information is successfully updated, the message "Updated clinician: <last name>, <first name>" will appear at the bottom of the screen.
7. To return to the Manage Clinicians screen, press **Cancel**.

### *Deleting Clinicians*

1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, choose a health care site from the Site List.
3. Press **Find Clinician**, or click on the appropriate clinician name in the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 5.
4. At the Clinician Search screen, enter the first and last name of the clinician and press **Find** to bring up his or her information. Then click on his or her last name in the Search Results table, or leave both fields blank and press **Find** to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.
5. At the Edit Clinician Information screen, press **Delete**.
6. A box will open asking if you want to delete this clinician. Press **OK**.
7. SNS will return you to the Manage Clinicians screen.

### *Listing All Clinicians*

1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, press **Clinician List**.
3. The Clinician Listing screen will open, showing all available clinicians, their site association(s), and their role(s).
4. Press **Close** to return to the Manage Clinicians screen.

### *Printing All Clinicians*

To print out a list of all the clinicians in your organization's database, follow these steps:

1. Click Manage Clinicians under Maintenance in the menu panel.
2. Press **Clinician List** at the Manage Clinicians screen.

3. Do either of the following:
  - Choose **F**ile, then **P**rint, from your browser's menu bar. In the Print dialog box, press **O**K.
  - Press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
  - Choose **F**ile, then **P**rint, from your browser's menu bar.
  - In the Print dialog box, press **P**roperties.
  - In the Properties box, find the section where you may specify orientation. Choose landscape.
  - Press **O**K.
  - Press **O**K in the Print dialog box.

SNS provides users with the ability to add, edit, and view events to which a client may have been exposed. This feature allows providers and SNS administrators to link symptoms, illnesses, and prophylaxis to an event(s). Entered events will appear in pick lists within SNS.

## Managing Events

Events on the Event Listing screen are indexed in alphabetical order. To view a list of events entered in SNS, follow these steps:

1. Click Manage Events under the Maintenance section of the menu panel.

**Event Listing**

[Add Event](#)

**Event Type:**  **Show:**  Active  Inactive  Both

**Index**    [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Event Name	Event Type	City	Event Date	Active
<a href="#">Chlorine Gas Explosion in Lodi</a>	Chem/Biological	Madison	06/30/2005	Y
<a href="#">Melttdown at Oak Creek Nuclear Plant</a>	Radiological	Sturgus	07/28/2005	Y
<a href="#">Mishap in Prairie du Chien</a>	Trauma	Prairie du Chien	08/23/2005	Y
<a href="#">Train Derailment in Hayward</a>	Trauma	Hayward	08/16/2005	Y
<a href="#">Wisconsin River Contamination - Muscoda</a>	Biological	Muscoda	08/18/2005	Y

2. Select an Event Type from the pick list provided.
3. Select Active, Inactive, or Both by clicking the appropriate radio button.

## Adding/Editing Events

To add or edit an event, follow these steps:

1. **Click** Manage Events under the Maintenance section of the menu panel.
2. At the Event Listing screen, either press **Add Event** or click the underlined event name of the event you wish to edit.

**Edit Event Information**

Active:  Active  Inactive

Event # 200507311

Event Name: Chlorine Gas Explosion in Lodi

Type: Chem/Biological

Event Date: 06/30/2005

Event Description: Explosion involving a release of both chemical gas and an unidentified biological agent (probably a virus).

Event Location One:

Event Location Name: location one

Contact Name: Stanley Johnson

County: BARRON

Street 1: 1 West Wilson

Street 2:

PO Box:

City: Madison

State: WI Zip: 32342-2234

Email: emailne@thisaddress.com

Area Code: 608 Phone Number: 221-4746 Ext. 22333

Save Cancel

3. In the fields at the top of the Add or Edit Event Information screen, do the following:
  - Active/Inactive: Click the appropriate radio button to indicate whether the event is active or inactive. If the event is currently in effect, choose "Active."
  - Event Name: Enter/edit the description of the event and its location in this field.
  - Event Type: Select an event type from the pick list provided.
  - Event Date: Enter/edit the date the event took place using the MMDDYYYY format or by using the calendar icon.
  - Event Description: Enter/edit a detailed description of the event, its location, and circumstances.



When you add an event, an announcement with information regarding the event will appear on the SNS home page. Editing the event will also edit the information in the announcement.

### *Event Location*

SNS users may identify up to four locations where an event has taken place. Users must enter at least one location per event.

1. For each location, enter/edit the following information:
  - Location Name: Enter a name for the location.
  - Contact Name: Enter the name of a contact person for the location.
  - County: Enter the county in which the location is found.
  - Street 1: Enter a street address for the location.
  - Street 2: Enter a second physical street address for the location.
  - PO Box: Enter a post office box address for the location.
  - City: Enter the city in which the location is found.
  - State: Enter the state in which the location is found.
  - Zip Code: Enter a 5-digit Zip code and +4 for the location.
  - Email Address: Enter an e-mail address for the contact person.
  - Telephone Number: Enter a telephone number for the location, including area code, telephone number, and extension, if applicable.
2. Press **Save** to save all event information to the database.
3. Press **Cancel** if you do not wish to save the entered information. Once this button is pressed, the Event Listing screen will display.



# *Managing Inventory*

## **In this chapter:**

- Inventory Alerts
- Viewing Inventory
- Adding New Inventory
- Updating Inventory
- Viewing Inventory Transactions
- Inventory Usage Reports
- Transaction Summary Reports
- Viewing Orders
- Ordering Products
- Ordering for Another Organization
- Modifying Orders
- Viewing Transfers
- Creating Transfers
- Modifying Transfers
- Accepting or Rejecting Transfers
- Shipping and Restocking Transfers



The red type in the View Inventory screen indicates that a product is inactive. A product may be inactive for a number of reasons; the inventory for that product's lot number may be used up, the products in that lot may be expired, or the inventory may have been recalled.



Products on the View Inventory screen that are highlighted in pink will expire within 60 days.

The inventory management function of SNS is used to view, add, or update any product in an organization's inventory. This function is designed to be a tracking system for a provider's product inventory.

## Inventory Alerts

The Inventory Alerts screen is displayed when you click on Manage Inventory under Inventory on the menu panel. The top table on this screen, Inventory Order/Transfer Notification, updates you on the status of product orders and transfers. The next table, Active Inventory That is Going to Expire, lists products at each site that will expire within the number of days specified in the expired alert setting.

The bottom table on the same screen lists inventory that is running low.

### Updating Inventory Alert Preferences

To change system options for expiration alerts and low inventory alerts, follow these steps:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **Update Alert Prefs**.

**Inventory Expiration Alerts**

*The current system expiration default is **120** days.*

Notify me when a lot will expire within  days.

---

**Update Low-Level Alerts for Inventory**

*The current system low-level default is **100** in the Unit of Measure.*

Product Description	NDC/Mfr Item Number	Low-Level Threshold Quantity	Unit of Measure
Conforming bandage, 4 x 75	36749ABK	<input type="text" value=""/>	BX
Abdominal pads, 0x 10	9323-6782	<input type="text" value=""/>	CS
Gentamicin sulfate 40mg/ml (20ml) multi-dose vial for inj	1023082S	<input type="text" value=""/>	CS

3. In the Inventory Expiration Alerts section, enter the number of days prior to the expiration date within which you wish to be notified. The expired alert setting has no effect or interaction with inventory items that do not have an expiration date.
4. The Low Inventory Alert gives a threshold quantity for the product

throughout the organization. All inventory is counted, regardless of active status or expiration date. To enter a low-level alert, follow these steps:

- Enter the number of doses/products that will indicate that the inventory is running low for each item listed on the Update Low-Level Alerts by Trade Name screen.
  - Press **Save**.
7. Press **Save**. If the new preferences were saved successfully, the message “Updated Alert Preferences” will appear at the top of the screen.
  8. To restore all inventory alerts to SNS system defaults, press **Reset to Default**. Press **OK**.
  9. To return to the Manage Inventory screen, press **Cancel**.

## Viewing Inventory

To view the inventory at a particular site, follow these steps:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **Show Inventory**.
3. The inventory table shown by default will include inventory for a default site within the organization, regardless of event, and will include nonexpired active and inactive products. To sort the inventory listing:
  - Site: Select a site name from the Site pick list.
  - Event: Select an event from the pick list provided, or leave this filter empty, which means the search is unrestricted.
  - SNS/OJA: Either select SNS, Office of Justice Assistance (OJA), or Other from the pick list or leave this indicator empty, which means the search is unrestricted.
  - Show: Select one of the following indicators:
    - Active: Select the ‘Active’ option to view only those products that have valid (nonexpired) items remaining in the site’s inventory.
    - Inactive: Select the ‘Inactive’ option to view only those products that have either no remaining items or have expired.
    - Non-Expired: Select the ‘Non-Expired’ option to view any active or inactive inventory that has not yet expired.
    - Expired: Select the ‘Expired’ option to view any inventory that has expired.



Always check existing inventory before adding a new lot. If a lot already exists, add the new inventory to the existing lot.

Site: WMR Physicians - SNS Testing Site		Event: Anthrax at Kohl Center - Madison		SNS/OJA: [ ]				
Show <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Non-Expired <input type="radio"/> Expired								
Select	Product Description	Lot Number	Product Type	QOH	Unit	Event	SNS or OJA	Exp Date
<input type="checkbox"/>	<a href="#">Amoxicillin 400mg/5ml oral suspension, powder, 100ml bottle</a>	1411934	Antibiotic Oral liquid	27.99	CS	Anthrax at Kohl Center - Madison	SNS	05/31/2006
<input type="checkbox"/>	<a href="#">Oxygen mask, non-rebreather, adult</a>	186440700	Airway General	4	CS	Anthrax at Kohl Center - Madison	SNS	
<input type="checkbox"/>	<a href="#">Polymixin/bacitracin antibiotic ointment, 0.9gm packet</a>	M4072009	IV Admin Topical	3	CS	Anthrax at Kohl Center - Madison	SNS	07/31/2006

The following is an explanation of the columns in the inventory table:

- Select:** A mark in this checkbox allows you to modify the quantity of the selected product or add inventory for the selected product.
- Product Description:** This column gives the descriptive name of the inventory item.
- Lot Number:** This column lists the lot number of the inventory item.
- Product Type:** This column gives both the type and subtype of the inventory item.
- QOH:** This column lists the quantity of inventory on hand; the number may include up to two decimal places.
- Unit:** This column lists the unit of measure for the inventory item.
- Event:** This column gives the event for which the inventory is allocated.
- SNS or OJA:** This column indicates whether the inventory item is an SNS or OJA item.
- Exp Date:** This column gives the item's expiration date. Products that will expire within the number of days specified in the expired alerts setting are highlighted in pink.

### Printing Inventory

To print out a list of inventory at a particular site, follow these steps:

1. Follow Steps 1-3 under *Viewing Inventory*.
2. Click anywhere on the page.
3. Do either of the following:
  - Choose **F**ile, then **P**rint, from your browser's menu bar. In the Print dialog box, press **OK**.
  - Press the printer icon on your browser's toolbar.

4. If your printout is cut off, try setting your printer to landscape. To do this:
  - Choose **F**ile, then **P**rint, from your browser's menu bar.
  - In the Print dialog box, press **Properties**.
  - In the Properties box, find the section where you may specify orientation. Choose landscape.
  - Press **OK**.
  - Press **OK** in the Print dialog box.

## Adding New Inventory

Use the Add Inventory function only if you are adding a product with a *new* lot number. If you are adding a product with a lot number that already exists in your inventory, refer to *Updating Inventory*.

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **Show Inventory**.
3. Select the site to which you will be adding inventory from the Site pick list.
4. Press **Add Inventory**.
5. At the Add Product Inventory Information screen, do the following:

**Add Product Inventory Information**

Site: SNS Mt. Horeb Site Save

Product Type:  Cancel

Product Subtype:

Product Description:

NDC/Mfr Item Number:

Lot Number:

Expiration Date:

Item Active:

Price per UOM(\$):

Linked Event:

SNS/QA Indicator:

Dispense to Client:

Container Number:

Seal Number:

Locator:

Quantity on Hand:

Unit

---

**Define Unit Equivalency**

Quantity	Unit	Quantity	Unit
1	<input type="text"/>	=	<input type="text"/> <input type="text"/>

- **Site:** Verify that the site at which the inventory will be located is listed under Site.
- **Product Type:** Select the product type from the pick list provided. The product type is the category describing the kind of inventory item being entered.
- **Product Subtype:** Select the product subtype from the pick list provided. This category further narrows down the type of inventory item being entered.
- **Product Description:** Enter a description of the product in the Product Description field.
- **NDC/Mfr Item Number:** Enter the NDC/Mfr Item Number associated with the product description.
- **Lot Number:** Enter the lot number for the inventory item.
- **Expiration Date:** Enter the date the inventory item expires in MM/DD/YYYY format.
- **Item Active:** Select Yes from the Item Active pick list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on pick lists.
- **Price per UOM (\$):** Enter the price in dollars per unit of measure.
- **Linked Event:** Select the event to which the inventory is linked and for which it is allocated.
- **SNS/OJA Indicator:** Click “SNS,” “OJA,” or “Other” to indicate from where the inventory originated.
- **Dispense to Client:** Click “Yes” or “No” to indicate whether the inventory item will be available on the Add Client/Prophylaxis pick list.
- **Container Number:** Enter the container number for the inventory item for reference use.
- **Seal Number:** Enter the seal number for the inventory item for reference use.
- **Locator:** Enter the locator for reference purposes.
- **Quantity on Hand:** Enter the initial amount of inventory on hand for the item.
- **Unit:** Select the unit of measure used to determine quantity on hand. This field will most often be used to transfer and order the inventory item.

Define Unit Equivalency: Use this optional section to specify how many pieces of inventory are contained within the unit of measure. For example, 1 case = 24 each (units). If you do not enter anything in this field, SNS automatically populates this section to show that 1 unit of measure = 1 unit of measure and all inventory is tracked and distributed at the unit of measure level.

- Unit: Enter the type of unit used as the unit of measure. For example, unit is “Case.”
- Quantity/Unit: Enter the quantity of inventory and type of unit used to show number of units within each unit of measure. For example, Quantity is “24,” and Unit is “Each.”

6. Press **Save**.
7. If the new item was saved successfully, the message “Inventory was inserted successfully” will appear at the bottom of the screen.
8. To return to the Show Inventory screen, press **Cancel**.

## Updating Inventory

To change information on an existing inventory item, follow these steps:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **Show Inventory**.
3. Once the appropriate site’s inventory displays, select the inventory item you wish to update by clicking on the product’s description, which is underlined and in blue.
4. On the Edit Inventory screen, make the desired changes to any of the editable fields. Refer to the Adding New Inventory section of this chapter for information on fields.
5. To modify the quantity on hand, enter the following information:

**Modify Quantity On Hand**

Action: Add

Amount: 14 CS

Reason: Receipt of Inventory

- Action: Select to add to or subtract from the inventory on hand.

- Amount: Enter the amount of inventory to be added or subtracted. Then select the unit for the quantity you are adding or subtracting.
- Reason: Select a reason for adding or subtracting inventory from the following list:

*Receipt of Inventory:* Use this reason when you are adding new inventory to a particular lot.

*Error Correction:* Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.

*Items Used:* Use this reason when subtracting inventory that has been used while responding to an event, but not associated with a specific client.

*Items Returned:* Use this reason when adding inventory to a particular lot because inventory was returned from another site.

*Items Transferred:* Use this reason when subtracting inventory that has been transferred to another site.

*Items Wasted/Damaged:* Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.

*Items Returned to CDC:* Use this reason when inventory is subtracted because it was returned to the CDC.

6. Press **Save**.
7. Once your updates are saved to the registry's database, the message "Inventory was updated successfully" will appear at the bottom of the screen.
8. Press **Add Inventory** to display the Add Inventory screen.
9. Press **Cancel** to return to the Show Inventory screen.

### *Modifying Quantities of Multiple Items*

To change inventory quantities of multiple inventory items, follow these steps:

1. Follow steps 1-3 under the Updating Inventory section of this chapter.
2. Once the appropriate site's inventory displays, put a check mark next to the inventory item(s) for which you want to modify the quantities.
3. Press **Modify Quantity**.

Modify Quantity On Hand for Selected Site(s)							
Product Description	Lot Number	QOH	Unit	Action	Amount	Unit	Reason
IV admin set, 10 drops/ml, y-site	00A4770FLLS	26	Box	Add		Case	Receipt of Inventory
Latex Gloves	1237791001	75	Case	Add		Case	Receipt of Inventory

4. On the Modify Quantity On Hand for Selected Site(s) screen, enter the following information:

- Unit for QOH: Select the unit type in which the quantity on hand is displayed.
- Action: Select to add to or subtract from the inventory on hand.
- Amount: Enter the amount of inventory to be added or subtracted.
- Unit: Select the unit type for the quantity you are adding or subtracting.
- Reason: Select a reason for adding or subtracting inventory from the following list:

*Receipt of Inventory:* Use this reason when you are adding new inventory to a particular lot.

*Error Correction:* Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.

*Items Used:* Use this reason when subtracting inventory that has been used while responding to an event, but not associated with a specific client.

*Items Returned:* Use this reason when adding inventory to a particular lot because inventory was returned from another site.

*Items Transferred:* Use this reason when subtracting inventory that has been transferred to another site.

*Items Wasted/Damaged:* Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.

*Items Returned to CDC:* Use this reason when inventory is subtracted because it was returned to the CDC.

5. Press **Save**.
6. Press **Cancel** to return to the Show Inventory screen.

## Viewing Inventory Transactions

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press **Show Transactions**.
3. At the Inventory Transactions screen, do the following:

**Inventory Transactions for: WIR Physicians**

Date Entered [From]:  To:

Date Item was dispensed [From]:  To:

User Name: All User Names

Transaction Type: All Transaction Types

Site Name: All Sites with Inventory

Product Description: All Product Descriptions

Lot Number: All Lot Numbers

Event: All Events

SNS/OJA: All SNS, OJA, and Other inventory

Display Last  Records

View

Cancel

- Enter the From and To dates for when the transactions were entered in SNS in MM/DD/YYYY format (Date Entered), or enter the From and To dates for when the inventory items were given to the client in MM/DD/YYYY format (Date Item was Dispensed).
- Select a specific user name or All User Names from the User Name pick list.
- Select a specific transaction type or All Transaction Types. These transactions relate to the Reason pick list on the Edit Inventory Information screen.

### Transaction types:

*Receipt of Inventory (REC):* This type indicates inventory was added as new.

*Error Correction (ERR):* This type indicates inventory was added or subtracted to correct a previous error.

*Items Returned (RET):* This type indicates inventory was added to after being returned from another site or organization.

*Items Transferred (TRA):* This type indicates inventory was subtracted due to transfer to another site or organization.

*Items Wasted/Damaged (WAS):* This type indicates inventory was

subtracted because it was damaged or contaminated.

*Items Used (USED):* This type indicates inventory was subtracted because it was used in the normal course of an event, though not distributed or associated with a specific client.

*Prophylaxis Given (GIVEN):* This type indicates inventory was administered to a specific client.

*Prophylaxis Deleted (DEL):* This type indicates inventory was added because it was deleted from a client's record.

*Items Returned to CDC (RET-CDC):* This type indicates inventory was subtracted because it was shipped back to the CDC.

- Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.
- Select the product description, lot number, event, and SNS/OJA from the pick lists provided.
- Enter the quantity of records you wish to view in the Display Last <#> Records field.

4. Press **View**.

5. The Show Transactions Report will then display.

### Show Transactions

The top chart on the Show Transactions report gives the following information:

Inventory Transactions for Organization: WBR Physicians											Record Count: 5
Site Name	Trans Date	Product Description	Lot Number	Event ID	SNS/OJA	Type	Qty	Unit	Client Name	DOB	
Ag Building	10/08/2004	Doxycycline hyclate 100mg powder vial IV	PS4720	200504061 Anthrax at Kohl Ctr	OJA	REC	200	BT			
Ag Building	10/04/2004	Gentamicin sulfate 40mg/ml (20ml) multi-dose vial for inj	PS4726	200504061 Anthrax at Kohl Ctr	OJA	GIVEN	-2	BX	NORRIS, JAMES	03/31/1974	
Ag Building	10/08/2004	Gentamicin sulfate 40mg/ml (20ml) multi-dose vial for inj	3297AAV	200503281 Toxic Dump at Dells	SNS	GIVEN	-2	BX	SMITH, LOREN	04/18/1975	
Ag Building	10/15/2004	NaCl 0.9% 1000 ml IV solution	GH83820	200503281 Toxic Dump at Dells	SNS	TRA	-6	CS			
Dermatology Center	10/20/2004	NaCl 0.9% 1000 ml IV solution	PZ3827	200503281 Toxic Dump at Dells	SNS	RET	2	CS			

- Site Name: Transactions are first sorted alphabetically by site name.
- Trans Date: Transactions are next sorted numerically by transaction date; the most recent transactions are shown first.
- Product Description: A description of the transaction item is listed in this column.
- Lot Number: The lot number for the transaction item is listed in this column.
- Event ID: The event for which the transaction item is allocated is listed in this column.

SNS/OJA: The SNS/OJA column indicates whether the inventory item for the transaction is SNS, OJA, or Other.

Type: Refer to Transaction Types in this chapter for an explanation of the transaction codes shown in this column.

Qty: The number in this column indicates the quantity added to or subtracted from inventory due to the listed transaction.

Unit: The number in this column indicates the units for the quantity listed in the previous column.

Client Name: The client associated with the transaction is listed in this column, if applicable.

DOB: The date of birth of the client is indicated in this column, if available.

### Transaction totals

The chart at the bottom of the Show Transactions report gives a breakdown of transactions by transaction type.

Inventory Transactions Totals		
Trans Code	Trans Description	Trans Count
REC	Receipt of Inventory	1
GIVEN	Dispensed Item Given	7
DEL	Dispensed Item Deleted	1
TRA	Items Transferred	0
WAS	Items Wasted	0
RET	Items Returned	0
ERR	Error Correction	1
RET-CDC	Items Returned to CDC	0
USED	Items Used	1
<b>Transaction Totals:</b>		<b>11</b>

Trans Code: This column displays the abbreviated code that identifies the transaction type.

Trans Description: This column displays the full transaction type.

Trans Count: This column represents the number of times a particular transaction type was performed within the dates you specified.

### *Printing Inventory Transactions*

To print out a list of inventory transactions, follow these steps:

1. Follow steps 1-4 under the Viewing Inventory Transactions section of this chapter.
2. Click anywhere on the page.

3. Do either of the following:
  - Choose **F**ile, then **P**rint, from your browser's menu bar. In the Print dialog box, press **OK**.
  - Press the printer icon on your browser's toolbar.
4. If your printout is cut off, try setting your printer to landscape. To do this:
  - Choose **F**ile, then **P**rint, from your browser's menu bar.
  - In the Print dialog box, press **Properties**.
  - In the Properties box, find the section where you may specify orientation. Choose landscape.
  - Press **OK**.
  - Press **OK** in the Print dialog box.

## Inventory Usage Reports

The Inventory Usage Report will give you information about how many inventory items have been dispensed to clients by age group. To generate an inventory usage report for your organization, follow these steps:

1. Click Inventory Usage under the Inventory section of the menu panel.

Inventory Usage Request Status				
Report Name	Status	Target From	Target To	
Inventory Usage Report	QUEUE	01/01/2004	08/23/2005	Refresh
				Cancel

2. At the Request Inventory Usage Report Criteria screen, select an event from the pick list or select All Events Combined.
3. Select a site from the pick list or select All Sites Combined.
4. Select SNS, OJA, or Other from the pick list, or select All SNS, OJA, and Other Inventory.
5. In the From field under Report Date Range, choose a starting date on which transactions were entered into the SNS system using the MMDDYYYY format.

6. In the To field under Report Date Range, choose an ending date on which transactions were entered into the SNS system using the MMDDYYYY format.
7. Press **Generate Report**.
6. Press **Refresh** after a few moments to check the status of your report.
7. Click the name of your report once it is underlined and displays in blue type.
8. The report displays in Adobe Reader®.
9. To print the report, press the printer icon on the Adobe® toolbar.
10. Press **OK** in the Print dialog box.
11. To return to the previous screen, press **Cancel**.

## Transaction Summary Reports

The Transaction Summary Report gives information on how many quantities are associated with all transactions, by transaction type, for each NDC/Mfr Item Number. The report also gives information on how much inventory was expired, transferred, received, restocked, wasted, or given in error. To generate a transaction summary report for one site or all sites in your organization, follow these steps:

1. Click Transaction Summary under the Inventory section of the menu panel.

2. At the Transaction Summary Report Criteria screen, select an event from the pick list or select All Events Combined.
3. Select a site from the pick list or select All Sites Combined.
4. Select SNS, OJA, or Other from the pick list, or select All SNS, OJA, and Other Inventory.
5. In the From field under Report Date Range, choose a starting date on which transactions were entered into the SNS system using the MMDDYYYY format.

6. In the To field under Report Date Range, choose an ending date on which transactions were entered into the SNS system using the MMDDYYYY format.
7. Press **Generate Report**.
8. The report displays in Adobe Reader®.
9. To print the report, press the printer icon on the Adobe® toolbar.
10. Press **OK** in the Print dialog box.
11. To return to the Transaction Summary screen, press the **Back** button on your browser.

## Viewing Orders

The Manage Orders screen displays orders, the date they were submitted, and their current status. Orders are categorized as Current, Historical, or Both. To view the Manage Orders screen, click Manage Orders under the Inventory section of the menu panel.

### *Current Orders*

By selecting the Current radio button, you will be able to view all new orders and processed orders that have not been accepted or rejected. These orders will show a status of one of the following:

- |               |  |
|---------------|--|
| Pending:      | A status of pending means the order has been created and submitted; however, the state has not yet opened the order. You may still modify or cancel the order through SNS. |
| In Progress:  | A status of in progress means the order is being filled by the state; you may no longer modify or cancel the order through SNS.  |
| Shipped:      | A status of shipped means the order has been filled completely and has been shipped.   |
| Backorder:    | A status of backorder means that all of the inventory items need to be backordered; none of the items have yet been shipped.   |
| Partial Ship: | A status of partial ship means part of the order has been shipped and the remaining items are backordered.   |

Click the link for any order to view the order details, including product descriptions, and quantities ordered, shipped, or backordered.

## Historical Orders

By selecting the Historical radio button, you will be able to view all complete orders within the last 30 days. You may also enter a date range in MMDDYYYY format to view completed orders; if you enter dates in these fields, press [Refresh List](#). Historical orders will show a status of one of the following:

- Denied: A status of denied means the order was reviewed by the state and completely denied.
- Accepted: A status of accepted means the inventory filled by the order has been received by the submitting organization.
- Rejected: A status of rejected means the order has been completely rejected by the receiving organization.
- Partially Accept: A status of partially accept means that the order has been partially accepted by the receiving site.

Click the link for any order to view the order details, including product descriptions and quantities denied.

## Ordering Products

Product orders can be created in SNS and then tracked through the fulfillment process. Once an organization has accepted a shipment, SNS will automatically post the shipment to the organization's inventory.

To create an order in SNS, follow these steps:

1. Click Manage Orders under the Inventory section of the menu panel.
2. Press [Create Order](#).

### Create Order

Order the quantity of inventory that is needed.  
The order should be to accommodate the following BT event.

Linked Event:

Receiving Site:

### Inventory from State

Quantity	Unit	Product Description	NDC/Mfr Item Number
<input type="text"/>	<input type="text" value="Case"/>	Doxycycline, 500mg, 30# bottles	150-270-2701

3. Select an event for which the products are being ordered. If no linked event is specified, you may submit an order for any inventory, regardless of the linked event.

4. Select the site that you anticipate will be the receiving site.
5. Enter the amount desired next to the chosen product(s).
6. Select the unit for the product amounts you have chosen.
7. Press **Submit Order**.
8. Once your order is submitted, the Manage Order screen will display. From this screen you can track the status of your order. Pending orders can be modified or cancelled by clicking the blue underlined "Pending" on the Manage Order screen.

## **Ordering for Another Organization**

SNS allows you to create a new order for an organization other than the one you to which are logged in. To complete an order for another organization, follow these steps:

1. Click Manual Orders under the Inventory section of the menu panel.
2. Select the organization for which you want to create a new order from the pick list.
3. Press **Create Order**.
4. Create a new order for the selected organization by completing the instructions found in the Ordering Products section of this chapter.

## **Modifying Orders**

SNS allows you to modify or cancel orders that are in a pending status. To modify or cancel an order, follow these steps:

1. Click Manage Orders under the Inventory section of the menu panel.
2. Click the link to the pending order that you wish to edit.

**Modify Order**

**Organization** WMR Physicians

**Site** WMR Physicians - SNS Testing Site

**Address** 157 South Main Street  
Madison, WI 55123-4433

**Contact** Stanley Johnson

**Phone #** (608) 223-2233 ext 4433222

*Order the quantity of inventory that is needed.*

Linked Event:

Receiving Site:

---

**Inventory Ordered**

Remove	Quantity	Unit	Product Description	NDC/Mfr Item Number
<input type="checkbox"/>	<input type="text" value="4"/>	<input type="text" value="Case"/>	Doxycycline, 500mg, 30# bottles	150-270-2701

---

**Products from State**

Quantity	Unit	Product Description	NDC/Mfr Item Number
----------	------	---------------------	---------------------

3. Select a different linked event or receiving site, if this information has changed.
4. To remove an order item, click the Remove checkbox to the left of the item(s) to be removed from the order. Press **Submit Order** if changes are complete.
5. To modify the quantity of an ordered item, enter a new quantity next to the item under the Inventory Ordered section of the screen. Press **Submit Order** if changes are complete.
6. To add new products to the order, specify quantity and units desired next to the desired items under the Inventory from State section of the screen. Press **Submit Order** if changes are complete.
7. To cancel the entire order, press **Cancel Order**.
8. To leave the order as is and return to the Manage Orders screen, press **Cancel**.

## Viewing Transfers

The Manage Transfers screen displays transfer types; the dates they were created and shipped, received, returned, or restocked; and the sending and receiving sites. Transfers are categorized as outbound, inbound, or historical. To view the Manage Transfers screen, click Manage Transfers under the Inventory section of the menu panel.

- Outbound:** An outbound transfer of inventory is a transfer that is shipped out to another organization's site.
- Inbound:** An inbound transfer is an incoming shipment of inventory to a site within your organization.
- Historical:** Historical transfers are those transfers for which your organization is either the sending or receiving organization and that have been totally accepted into inventory or otherwise completed. SNS displays by default transfers that have been completed within the last seven days. You may also enter a date range in MMDDYYYY format to view completed transfers; once you enter dates in these fields, press **Refresh List**.

To view further details on an inbound transfer that has not shipped or an outbound transfer that has shipped, click the Create Date link for the transfer.

## Creating Transfers

SNS allows you to transfer products between sites within your organization or between two organizations. To create a transfer, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. Press **New Transfer**.

**New Transfer**

Sending Site:

Internal Receiving Site:  or

Receiving Organization:

Receiving Site:

*Note: Only those sites or organizations which have inventory set up are displayed.*

**Add from Inventory**

Event:   SNS/OJA:

Show:  Active and Non-Expired  Inactive or Expired

Transfer Quantity	Unit	Product Description	Lot Number	Available Qty	Unit	Active	Event	SNS/OJA	Expiration Date
<input type="text" value="2"/>	<input type="text" value="CS"/>	Amoxicillin 400mg/5ml oral suspension, powder, 100ml bottle	1411934	27.98	CS	Y	Anthrax at Kohl Center - Madison	SNS	05/31/2006
<input type="text"/>	<input type="text" value="CS"/>	Oxygen mask, non-rebreather, adult	186440700 4		CS	Y	Anthrax at Kohl Center - Madison	SNS	

3. Enter the following information:
  - The sending site from which the inventory will be transferred.
  - The internal receiving site or the external receiving organization to which the inventory is being transferred.
  - The receiving site of the external organization, if an external receiving organization was specified in the previous pick list.

- The event with which the transfer is associated, if desired.
  - SNS, OJA, or Other, if the transfer is restricted to inventory from one of these sources.
  - Select active/nonexpired or inactive/expired inventory by clicking the appropriate radio button.
4. Press **Save**. If desired, press **Add All** to automatically populate the transfer quantity and units fields with the sending organization's available quantity and units. Then enter or edit:
    - The amount of inventory to be transferred.
    - The units for the amount to be transferred.
  5. Press **Save**.
  6. Press **Packing List** or **Label**, if desired. Press **Ship** when ready to ship the inventory. Either use today's date or enter an alternate date in MMDDYYYY format. Press **Ship**. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
  7. To complete an internal transfer without printing shipping documents, press **Finish Trans**. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site's inventory and deducted from the sending site's inventory.

### *Shipping Documents*

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see the Creating Transfers section of this chapter) or by using the following feature:

1. Click Shipping Documents under the Inventory section of the menu panel.
2. Click the linked date to view the packing list, if desired.
3. Enter the amount of packing lists and/or shipping labels you wish to generate in the Packing List Quantity and Label Quantity fields.
4. Press **Packing List** or **Label**. Print labels and/or packing list, if desired.
5. Enter a ship date if different from today's date, using a MMDDYYYY format.
6. Check the box next to the job you wish to ship.
7. Press **Ship**. Press **OK**.

## Modifying Transfers

Outbound transfers that have not yet shipped can be modified using the edit transfer function in SNS. The Edit Transfer screen has two sections; the top section lists all of the inventory items that are part of the transfer, while the bottom section lists the sending site's available inventory that could be added to the transfer. To modify an unshipped outbound transfer, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. Click the link to the outbound transfer that you wish to edit.
3. To cancel the entire transfer, press **Cancel Transfer**.
4. Select a different linked event or receiving site/organization, if this information has changed.
5. To remove a transfer item, click the Remove checkbox to the left of the item(s) to be removed. Press **Save**.
6. To modify the quantity of a transferred item, enter a new quantity next to the item under the Add from Inventory section of the screen. Press **Save**.
7. To add new transfer items, specify quantity and units next to the desired items under the Add from Inv section of the screen. Press **Save**.
8. Press **Packing List** or **Label**, if desired. Press **Ship** when ready to ship the inventory. Either use today's date or enter an alternate date in MMDDYYYY format. Press **Ship**. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
9. To complete an internal transfer without printing shipping documents, press **Finish Trans**. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site's inventory and deducted from the sending site's inventory.

## Accepting or Rejecting Transfers

Orders and transfers made through SNS and received by the provider organization must be accepted, rejected, or partially accepted so that SNS can post and track inventory properly. To accept or reject a transfer in SNS, follow these steps:

1. Click on Manage Transfers under the Inventory section of the menu panel.
2. The Manage Transfer screen categorizes transfers as follows:
  - Outbound Transfer: Displays transfers that are outbound from your organization.
  - Inbound Transfer: Displays transfers that are inbound to your organization.
  - Historic Transfer: Displays completed transfers.

To view the actual order sent to the DPH, click the underlined “Order” under Type of Transfer.

3. To proceed to the Receive Transfers screen (on which you may accept or reject orders and transfers), click the date underlined in the Create Date column that corresponds with the transfer you wish to receive.

Receive Transfer	
Accept Entire Transfer....	Accept Transfer
Reject Entire Transfer....	Reject Transfer
Partially Accept Transfer....	Partially Accept
Return to the Previous Screen....	Cancel

Receiving Site	
<i>If you wish to accept all or part of this transfer, you must specify the site which will receive the inventory in this transfer.</i>	
Receiving Site	North Carolina DHHS

Transfer Between Organizations Created on 04/11/2005	
Sending Entity	Receiving Entity
<b>Organization</b> WMR Physicians	<b>Organization</b> North Carolina DHHS
<b>Site</b> Ag Building	<b>Site</b> North Carolina DHHS
<b>Address</b> 10 E Wilson Madison, VM 53701	<b>Address</b> 1330 St. Mary's St. Raleigh, NC 27605
<b>Contact</b> Maria Thies	<b>Contact</b> Mary Beth Lister
<b>Phone #</b>	<b>Phone #</b> (919) 715-6761
<b>Ship Date</b> 04/11/2005	

Transfer Inventory Item					
Transfer Quantity	Unit	Product Description	Lot Number	Product Type	Inventory Action
2	BX	Gas-resistant Emergency Stethoscope	STEH448710	Analgesic/sedative	Create New Item

4. At the Receive Transfer screen, you may accept the entire transfer, Reject the entire transfer, or Partially Accept some of the transfer, while rejecting the remainder.

- Accept Transfer: To accept the entire transfer, press **Accept Transfer**. Press **OK** to accept the transfer and add all transfer items into inventory.
- Reject Transfer: To reject the entire transfer, press **Reject Transfer**. Select a reason for the rejection: Damaged, Not Wanted, Wrong Product, or Never Received. After selecting a reason, press **Reject**. Press **OK** to continue with the rejection and be returned to the Manage Transfers screen.
- Partially Accept: To accept part of the shipment, press **Partially Accept**. At the Partially Accept Transfer screen, select the amounts and units of the items you wish to accept and a rejection reason for those you wish to reject. Press **Save**. Press **OK** if you have rejected items.

## Shipping and Restocking Transfers

When an order or transfer has been rejected with a reason code of Damaged, Not Wanted, or Wrong Product, it is necessary to ship and restock transfers in the system so that they are correctly reported in inventory.

### *Shipping Back a Rejected Transfer*

If you are the receiving site of a transfer or order that you then reject, you must ship the rejected quantities back to the original sender. To do this, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. Click the underlined rejected inbound transfer date under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer screen by entering the date in MMDDYYYY format. Press **Save**.

### *Restocking a Rejected Transfer*

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.

2. Click the underlined transfer date of the rejected outbound transfer under the Create Date column.
3. Press **Save** at the Restock Rejected Transfer screen. The Manage Transfer screen will display, and the transfer will be added to the Historical section of the screen.



# Managing Clients

## **In this chapter:**

- Finding Clients
- Editing/Entering Client Information
- Documenting Exposed Clients
- Saving Client Information



**Manage Client vs. Manage Prophylaxis**  
Manage Client and Manage Prophylaxis are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Manage Client screen, which consists of the client's demographic information, responsible person(s), etc., while the Manage Prophylaxis query will display the client's prophylaxis screen.

SNS shares client information with the Wisconsin Immunization Registry (WIR) system. Since SNS clients may already be entered in WIR, you should attempt to find a client in SNS before entering him or her as a new client. However, SNS will attempt to deduplicate (compare entered information against information saved to the registry for duplicate clients) client records prior to saving the information on the Enter New Client screen.

## Finding Clients

When searching for an existing client in SNS, more information is not always better. By entering too much information about a client (mother's maiden name, social security number, phone number, birth date, etc.) you will increase your entry time and decrease the odds of finding the client due to typing and interpretation errors. We recommend that you supply four characters of the client's last name and three characters of the first name only, unless the client's name is very common, in which case supplying a complete name, birth date, or mother's maiden name will help narrow the search.

1. Click Manage Client under the Clients section of the menu panel.
2. In the Client Search Criteria box, you have several options for finding your client:

**Client Search Criteria**

Last Name  Gender  M  F  N/A

First Name  SSN  -  -

Middle Name  Phone  -  -

Mother's Maiden Last  Chart #

Mother's First Name

Birth Date   Registry

- Last Name: Entering the first three letters of the client's last name, along with the first two letters of the first name, will initiate a search of all clients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters "Li" will produce only last names of "Li." If the client's name is common, typing in the full name will narrow the search.
- First Name: Entering the first two letters of the client's first name, along with the first three letters of the last name, will initiate a search of all clients matching those letters. If the client's name is common, typing in the full name will narrow the search.

- Middle Name: Entering the client's middle name (or a portion of it) in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter data in this field.
  - Mother's Maiden Last: Entering the mother's maiden last name, in combination with the data entered in the name fields, will narrow a search for a client with a common name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
  - Mother's First Name: Entering the mother's first name, in combination with the data entered in the name and mother's maiden last fields, will narrow a search for a client with a common last name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
  - Birth Date: Entering the client's birth date in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter a date in this field.
  - Gender: Indicating the gender of the client will narrow a search for a common name, especially if the first name is androgynous.
  - SSN: Entering the Social Security number (SSN) only will produce a single name match. Note: To find a client by using his or her SSN, the number must have been entered previously for the client.
  - Phone: Entering the client's telephone number only will produce a single name match. However, this method is not recommended, as a telephone number may not be entered for a client and telephone numbers may change over time.
  - Chart #: Entering the client's chart number only will produce a single name match. Note: To find a client using this method, the chart number must have been entered previously for the client.
  - Registry: Changing the designation in this field allows you to query another state's immunization registry. Refer to the Querying Other Registries chapter of this manual for more information.
3. Press **Find**.
  4. If multiple records are found matching the information you entered, a table listing up to 75 matches with detailed information on each will be shown below the Find Client Information box. To choose a client from this list, click the client's underlined last name.
  5. If only one client matches your search, the Manage Client screen for that individual will display automatically.

- If no clients match your search, recheck the information you entered for accuracy. If you suspect the client has not been entered into SNS, proceed to “Editing/Entering Client Information.”

## Editing/Entering Client Information

The Update Existing Client screen allows you to update or change specific, non-prophylaxis information relating to any client in SNS. The Enter New Client screen, accessed by clicking this option on the menu panel, allows you to input this information for a client new to SNS. The Update Existing Client and Enter New Client screens are divided into five sections: Personal Information header, Client Information tab, Contact(s) tab, Client Symptom(s) tab, and I/Q Follow-Up tab (Isolation/Quarantine).

### Personal Information Header

The Personal Information section at the top of the Manage Client/Enter New Client screens contains client-specific information fields used primarily to distinguish among clients when doing client searches. All fields shown in a blue font are required.

Personal Information		Save
Last Name <input type="text"/>	SSN <input type="text"/> - <input type="text"/> - <input type="text"/>	Immunizations
First Name <input type="text"/>	Gender <input type="radio"/> M <input type="radio"/> F <input checked="" type="radio"/> Unknown	History Prophylaxis
Middle Name <input type="text"/>	Birth Date <input type="text"/> <input type="button" value="Calendar"/>	Record Prophylaxis
Mother's Maiden Last <input type="text"/>	County <input type="text"/>	Add Next
Mother's First Name <input type="text"/>	Country of Birth <input type="text"/> UNITED STATES	Exposed Clients
		Cancel

- Last name: Required field.
- First name: Required field.
- Middle name: Optional field.
- Mother's Maiden Last: Required field. SNS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
- Mother's First Name: Required field. SNS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
- SSN: The SSN field is optional. If the field is blank, an SSN may be entered. Once the SSN is entered and saved, however, a provider cannot change it. In addition, it will not show on the Manage Client screen (it will say “On File”) and will not appear on any reports. *As the SSN cannot be easily changed once it is entered, enter this information very carefully.*
- Gender: Click the appropriate radio button to choose male or female. This field is optional.

8. Birth Date: This is a required field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. When using the calendar icon, choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press **OK**.
9. County: This optional field will be used by public organizations that are responsible for all clients within the county.
10. Country of Birth: This field defaults to "United States." Use the pick list to select a different country of birth, if applicable.
11. Updating organization: Below the Personal Information header, the name of the organization that last updated the client's information displays in bold, along with the date the update was entered.

### *Client Information Tab*

The Client Information tab gives demographic and quarantine information about the client.

1. Ethnicity: Choose the client's ethnic background from the pick list provided.
2. Race: Choose the client's race from the pick list provided.
3. PCP: Choose the client's primary care physician (PCP) or health care organization from the pick list or press the **PCP** button to add a new physician. If adding a new physician, enter data in the Add Physician screen and press **Save**. The Client Information tab will again display. Physician information is used only for reporting.

The screenshot shows the 'Client Information' tab with the following fields and controls:

- Ethnicity:** A dropdown menu.
- Race:** A dropdown menu.
- PCP:** A dropdown menu with a 'PCP' button next to it.
- Chart #:** A text input field.
- Event:** A dropdown menu.
- I/Q Start Date:** A date picker field.
- I/Q End Date:** A date picker field.
- Restriction:** Radio buttons for 'Isolation', 'Quarantine', and 'None' (which is selected).
- Previous Event Exposure:** A list box containing 'Test Event 2: SNS' and 'Test Only: SNS Verification'.
- Selected Previous Event Exposure:** An empty list box.
- Buttons:** 'Add >' and '< Remove' buttons between the event exposure list boxes.

4. Restriction: Choose the type of restriction, if any, that the client is under by clicking the appropriate button.
5. Chart #: Enter your organization's chart number for the client in this field, if desired. A client may have numerous chart numbers associated with him or her; each number is organization dependent.
6. Event: Choose the event name from the pick list through which the client was exposed.



### Address Status

Address status information is located at the top of the Contact(s) tab. The date and time the address was last updated appear on the left; on the right, the address status line displays the result of address validation. The address validation process runs at night, so addresses entered will initially appear as "Not Validated" until validation occurs. Validated addresses allow responsible person or primary contact information to appear on Geographic Information Systems (GIS) maps.

7. I/Q Start: Enter the date that the client must begin his or her restriction using the MMDDYYYY format or by selecting the calendar icon.
8. I/Q End: Enter the date that the client will end his or her restriction using the MMDDYYYY format or by selecting the calendar icon.
9. Previous Event Exposure: Choose an event(s) name and number from the list to which the client may previously have been exposed. To select an event, double-click on the event name or highlight the event name and press **Add**.

### Contacts Tab

The Contact(s) tab allows you to identify those responsible for the care of the client and those who may have been in contact with or exposed to the client.

1. Click the Contact(s) tab.
2. To edit an existing contact, do the following:
  - Click the Select radio button next to the name of the person you wish to edit.
  - Change or add information for the fields listed.
  - Press **Next**.

Client Information	Contact(s)	Client Symptom(s)	I/Q Follow-Up					
<b>Contact Listing</b>								
<input checked="" type="radio"/>	JETSON	GEORGE	Guardian	SHEBOYGAN	No	No	Zip Code	New
								Copy
								Delete
<b>Details for Contact: GEORGE JETSON</b>								
<i>Last Updated: 06/03/2005 02:31:40 PM</i>								
<b>Address only validated to zip code</b>								
Last Name: JETSON		Street Address: 6767 SPACELY CIR		Next				
First Name: GEORGE		Other Address:		Cancel				
Middle Name:		P.O. Box: P.O. 195						
Relation: Guardian		City: SHEBOYGAN						
Telephone: - -		State: WI Zip: 53083 +4						
Extension:		Language: ENGLISH						
E-Mail:		Primary? <input type="checkbox"/> Permitted Visitor? <input type="checkbox"/>						

3. To enter a new contact, fill in the following information:
  - Last Name: Enter the last name of the contact into this field.
  - First Name: Enter the first name of the contact into this field.

- Middle Name: Enter the contact's middle name in this field.
  - Relation: Choose the relationship of the contact to the client from the pick list provided. This is a required field.
  - Telephone: Enter the contact's telephone number, including the area code, in this field.
  - Extension: Enter the contact's extension to the above telephone number, if any, in this field.
  - E-mail: Enter the contact's e-mail address, if any, in this field.
  - Street Address: Enter the contact's street address into this field.
  - Other Address: Enter the contact's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
  - P.O. Box: Enter the contact's post office box, if any, into this field.
  - City: Enter the contact's city into this field.
  - State: Choose the contact's state from the pick list provided.
  - Zip: Enter the contact's Zip code in this field.
  - +4: Enter the contact's +4 code in this field, if it is known.
  - Language: Choose the language that this contact speaks.
  - Primary?: Check this box to indicate that the contact is the primary or emergency contact for the client.
  - Permitted Visitor?: Check this box to indicate that the contact is permitted to visit the client while in isolation/quarantine.
4. To enter a new contact and save the information you entered, press **Next**.
  5. To clear existing information and enter a new contact, press **New**.
  6. To display previously updated material for editing, press **Cancel**.

### **Copying an existing record**

1. Select the record you wish to copy on the Contact Listing.
2. Press **Copy**.
3. This information may now be edited and saved as another contact.

### **Deleting an existing record**

1. Select the record you wish to delete on the Contact Listing.
2. Press **Delete**.
3. Press **OK** in the confirmation box.

## Client Symptoms Tab

The Client Symptoms tab allows you to enter information on any symptoms the client may be exhibiting.

1. Click the Client Symptom(s) tab.

The screenshot shows the 'Client Symptom(s)' tab selected. The interface includes a table for listing symptoms and a form for entering new symptoms. The table has columns for 'Select', 'From Date', 'To Date', and 'Client Symptom'. The 'Enter New Client Symptom ...' section has a dropdown menu for 'Client Symptoms' (currently showing 'positive laboratory tests'), 'From Date' and 'To Date' fields with calendar icons, and 'Next' and 'Cancel' buttons.

2. Enter the following information:
  - Choose the appropriate symptom from the Client Symptom pick list.
  - Enter the first date the client began showing the symptom in the From Date field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field.
  - Enter the last date the client showed the symptom in the To Date field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field.
3. To enter the symptom into the Client Symptoms Listing and enter a new symptom or view the next symptom, press **Next**.
4. To clear existing information and enter a new symptom, press **New**.
5. To display previously updated information for editing, press **Cancel**.
6. To read a list with more than 10 symptoms, use the scrolling arrows at the top right corner of the box. A counter near the scrolling arrows displays the number of symptoms entered.

### Deleting an existing symptom

1. Select the symptom you wish to delete on the Client Symptom Listing.
2. Press **Delete**.
3. Press **OK** in the confirmation box.

### I/Q Follow-Up Tab

The I/Q (Isolation/Quarantine) Follow-Up tab allows you to enter information on clients in isolation or quarantine.

Client Information	Exposure/Contact(s)	Client Symptom(s)	I/Q Follow-Up
Case Classification <input type="text"/>		Location <input type="text"/>	
Total Persons At Location <input type="text"/>		IQ Address <input type="text"/>	
Telephone <input type="text"/> - <input type="text"/> - <input type="text"/>		City <input type="text"/>	
		State <input type="text"/> Zip <input type="text"/> +4 <input type="text"/>	
Location Notes <input type="text"/>			
Disease <input type="text"/>			
Disease Notes <input type="text"/>			
Infection Control Precautions		Selected Infection Control Precautions	
<input type="text"/> contact <input type="text"/> airborne <input type="text"/> droplet		<input type="text"/>	
<input type="text"/> Add >			
< Remove			
Special Needs		Selected Special Needs	
<input type="text"/> special diet <input type="text"/> medications <input type="text"/> child care		<input type="text"/>	
<input type="text"/> Add >			
< Remove			
Special Needs Notes <input type="text"/>			
General Notes <input type="text"/>			

1. Case Classification: Select a case classification from the pick list provided.
2. Total Persons at Location: Enter the number of persons at the treatment/care location.
3. Telephone: Enter the contact telephone number for the location.
4. Location: Select the type of location from the pick list provided.
5. IQ Address: Enter the address of the isolation/quarantine location.
6. City: Enter the city where the isolation/quarantine facility is located.
7. State: Select the state where the isolation/quarantine facility is located.

8. Zip: Enter the zip code of the location.
9. +4: Enter the zip code +4 extension, if known.
10. Location Notes: Enter the name of the facility at which the client was isolated or quarantined. The I/Q Daily Call List will be sorted alphabetically by this field.
11. Disease: Select the disease to which the client was exposed from the pick list provided.
12. Disease Notes: Enter any notes applicable to the disease.
13. Infection Control Precautions: Select infection control precautions applicable to the client from the list provided. To add a precaution, double-click on the selected precaution or highlight it and press **Add**.
14. Special Needs: Select all applicable special needs for the client from the list provided. To add a special need, double-click on the selected special need or highlight it and press **Add**.
15. Special Needs Notes: Enter any notes applicable to the client's special needs.
16. General Notes: Enter any general notes on the case.

## **Documenting Exposed Clients**

SNS allows users to track exposure from one client to others. Users may choose whether or not to link exposed clients by event; in the case of secondary exposure, clients would not be linked by event.

To add an existing client to the exposed client listing, follow these steps:

1. Press **Exposed Clients** at the top of the Update Existing Client or Enter New Client screen.
2. Select a current linked event, previous event exposure, and/or none on the Event for Exposed Client Listing screen. Press **OK**.

Select	Last Name	First Name	Middle Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
<input type="checkbox"/>	KESTER	WARREN		07/12/2001		MARIE	BARTHES	M	
<input type="checkbox"/>	MESTER	WARREN		11/24/1998		LOUISE	DORIAN	U	573-2388
<input type="checkbox"/>	VESTER	WARREN		04/18/2003		SHIELA	TASQUE	U	

**Search for Exposed Client**

Last Name:  Gender:  M  F  N/A

First Name:  SSN:  -  -

Middle Name:  Phone:  -  -

Mother's Maiden Last:  Chart #:

Mother's First Name:

Birth Date:

**Possible Matches: 1**

Select	Last Name	First Name	Middle Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
<input type="checkbox"/>	BESTER	WARREN		04/15/2001		TAMARA	RASHBUROGH	F	611-4

- At the top of the Exposed Client Listing screen, other clients already identified as exposed to the client are listed. To search for additional clients, enter the last name, first name, and other search criteria as documented in the "Finding Clients" section of this chapter. Press **Find**.
- Select the appropriate client(s) from the list of possible matches at the bottom of the screen by clicking the "Select" box next to the client's name. Press **Add Selected Client to Exposed Client Listing**.

If the client for whom you were searching did not display on the list of possible matches, follow these steps:

- Press **Create New Exposed Client**.
- Enter known information for the client on the Enter New Client screen.
- Press **Save**. The client will be added to the exposed client listing.

### *Removing Exposed Clients from the Listing*

To remove a client from the exposed client listing, follow these steps:

- Follow steps 1-2 under "Documenting Exposed Clients."
- Select the client(s) to be removed by checking the box next to the name at the top of the Exposed Client Listing screen.
- Press **Remove Selected Client from Exposed Client Listing**.

## Saving Client Information

There are several ways to save information on the Manage Client/Enter New Client screens:

- Save:** When pressed, the **Save** button at the top of the screen will save all database changes, provided all required fields are filled and the data entered are valid. Once the information is saved, the Add Client Prophylaxis screen will display.
- Immunizations:** As with the **Save** button, the **Immunizations** button will save all information fields. Once the information is saved, the user will either be directed to the client's WIR Immunization History screen or to an uneditable print screen listing immunization history, depending upon the user's role.
- History Prophylaxis:** When the **History Prophylaxis** button is pressed, all information fields will be saved and the View Client Prophylaxis screen will display.
- Record Prophylaxis:** As with the **Save** button, the **Record Prophylaxis** button will save all information fields. Once the information is saved, the Select Client Prophylaxis screen will display.
- Add Next:** When the **Add Next** button is pressed, all information fields will be saved and a blank Enter New Client screen will display.
- Exposed Clients:** When the **Exposed Clients** button is pressed, all information fields will be saved and the linked event screen will display. Select a linked event and press **OK**. WIR will then display the Exposed Client Listing screen.
- Reports:** When the **Reports** button is pressed, all database changes will be saved and the View Client Reports screen will display.
- Cancel:** When pressed, the **Cancel** button clears all entered information and does not save it to SNS. The View Client Prophylaxis screen will display.

## Deduplicating Client Records

After you enter a new client and press one of the buttons that will save the data, SNS initiates a process that ensures that the client information you entered does not duplicate a client that already exists in WIR/SNS.

If after attempting to save a new client you receive a message box titled “Client Match Detected,” you should read the message and proceed carefully. A table below the message box contains one or more names of potential matches within WIR/SNS. If one of these names matches your client, click the client’s last name to display his or her information. SNS will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click the link(s) to determine whether one of the links matches your client’s record.

**Client Match Detected**

Based on the information you entered, your client is likely already in WIR and is one of the clients listed below. Please review the demographic information for each of these clients and if none of them appears to be your client, you may then click the **Create New Client** button.

**Please keep in mind that if you choose to ignore a client match and create a new record, that client will have two records in WIR, neither of which will be complete and accurate!**

[Create New Client](#)

**Possible Client Matches:1**

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
<a href="#">STENSON</a>	RANDY	08/07/1994		WANDA	STEUCK	U	

If after reviewing all the names given in the table you do not find a match for your client, press the [Create New Client](#) button. A confirmation box will appear; press **OK**. Be aware that if you do override the listed matches and end up creating a duplicate record for a client, it will be difficult to manage the client’s immunization and personal information, and the registry will lose its accuracy and efficiency.





# Managing Prophylaxis

## **In this chapter:**

Viewing Prophylaxis  
Adding Prophylaxis  
Editing Prophylaxis

SNS allows users to add, edit, view, and print prophylaxis administered to a particular client. Prophylaxis can only be entered for a client if it was deducted from inventory.

When adding or editing prophylaxis information, a specific client may be accessed one of two ways:

1. From the Manage Client screen, press **Record Prophylaxis** to save entered information and display the Add Client Prophylaxis screen.
2. Choose Manage Prophylaxis under the Prophylaxis section of the menu panel. This will bring up the Find Client screen. For information on finding clients, refer to the Finding Clients section in the Managing Clients chapter of this manual.

## Viewing Prophylaxis

The View Client Prophylaxis screen allows you to view all records of any medication administered to a client resulting from an event. The screen has two sections: Client Information and History.

Client Information					
Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Chart #	
WARREN DAARTH DESTER	12/31/1943	U	CARSONS	2551580	
Address	40 DESTEREAU LN., CAMPSON, VI 34082 (444) 432-2342 x 53				
Symptoms	{1 of 3} .. 07/04/2005 - 01/01/2005 ~ chest x-ray findings of pneumonia				
Reactions	11/02/2005 ~ Anaphylaxis within 24 hours				
History					
<a href="#">Add Prophylaxis</a> <a href="#">Edit Client</a> <a href="#">Reports</a> <a href="#">Print</a>					
Product Description	Date Administered	Event	Qty	React?	Edit
Amoxicillin, 500mg	12/01/2005	Plane Crash - Brookfield	1	Yes	
Gas Mask, Adult, hypo-allergenic	12/01/2005	Plane Crash - Brookfield	1		
Dentoxicillin, 50mg/mL, tsp doses for child	12/01/2005	Plane Crash - Brookfield	6		
Cortisone Cream, 500mg tube	12/01/2005	Plane Crash - Brookfield	1		
Cortisone Cream, 500mg tube	11/02/2005	Plane Crash - Brookfield	1	Yes	

### Client Information

The Client Information section at the top of the screen gives vital information about the client, such as name, date of birth, chart number, address, and a list of symptoms. Use this information to verify that the client indicated is the client for whom you were searching. To edit this information, press **Edit Client** and refer to the Editing/Entering Client Information section in the Managing Clients chapter of this manual.

## History

The History section of this screen shows a list of prophylaxis administered to the client and the event with which the administration was related. The information in this section includes the product description, date administered, event, quantity, reaction, and an edit icon.

## Printing the View Client Prophylaxis Screen

To print a copy of the View Client Prophylaxis screen, press **Print**.

## Adding Prophylaxis

The Add Client Prophylaxis screen contains three main sections. In the first section, the user can view client information. The second section contains an area where the user can identify the defaults relating to the inventory from which the prophylaxis will come. The third section outlines any prophylaxis administered to the client.

To add a prophylaxis for a located client, follow these steps:

Client Information				
Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Chart #
SYMPHONY SALISBURY	11/12/1999	U	PERUSHKA	
Address				
Symptoms				
Reactions				
Defaults for new Prophylaxis				
Event	Test Only: SNS Verification			
Organization Site	WIR Physicians - SNS Testing Site			
Ordering Authority	Unknown			
Administered By	Unknown			
Date Administered	12/02/2005	<input type="checkbox"/>	Activate Expired	
Active Prophylaxis inventory on: 12/02/2005				
OK Cancel				
Product Description	Lot	Quantity		
Amoxicillin 400mg/5ml oral suspension, powder, 100ml bottle				

1. At the Add Client Prophylaxis screen, review the information at the top section of the screen to confirm you have the correct client record.
2. In the Defaults for New Prophylaxis portion of the screen, select the event that resulted in prophylaxis being administered.
3. Select the organization site from which inventory the prophylaxis is deducted.

4. Select the ordering authority; this is the person authorized to order prophylaxis for this client.
5. Select the name of the individual who administered the prophylaxis.
6. Enter the date that the prophylaxis was administered in MMDDYYYY format. Press **Activate Expired** to show all inventory for the site and date selected.
7. In the Active Prophylaxis Inventory section of the screen, select the lot number and quantity for each prophylaxis used for this client.
8. Press **OK** to save the information to the database. The View Client Prophylaxis screen will display.
9. Press **Cancel** if you do not wish to save any information. The View Client Prophylaxis screen will display.

## Editing Prophylaxis

To edit a prophylaxis for a located client, follow these steps:

1. At the View Client Prophylaxis screen, select the prophylaxis you wish to edit by pressing the appropriate notepad icon in the Edit column.

**Edit Prophylaxis**

**Product Description:** Gas Mask, Adult, hypo-allergenic

**Lot:** R1570

**Quantity:** 1

**Partial Dose:**

**Date Administered:** 12/01/2005

**Ordering Authority:** Unknown

**Administered By:** Unknown

**Event:** Plane Crash - Brookfield

**Entered By Site:** SNS Lodi Main

**Input Source Of Record:** Created Through User Interface

**Reactions to Prophylaxis**

Anaphylaxis within 24 hours

Persistent crying lasting >= 3 hours within 48 hours

2. Select the amount of prophylaxis administered under Quantity.
3. Check the Partial Dose box only if the amount administered was not an adequate amount for prophylaxis.
4. Enter the date that the prophylaxis was administered in MMDDYYYY format.
5. Select the ordering authority; this is the person authorized to order prophylaxis for this client.

6. Select the name of the individual who administered the prophylaxis.
7. Select the event that resulted in prophylaxis being administered.
8. In the Reactions to Prophylaxis section of the screen, check any reactions that apply to this prophylaxis.
8. Press **Save**.
9. Press **Cancel** if you do not wish to save any information.
10. Press **Delete** to delete the entire prophylaxis record and return to the View Client Prophylaxis screen.





# Reports and Forms

## **In This Chapter:**

Viewing Client Reports  
Isolation/Quarantine Daily Call List  
Isolation/Quarantine Event Statistics  
Report

SNS allows users to generate contracts, such as the Voluntary Client Isolation Contract and Isolation Orders. SNS users can also generate reports, such as the Isolation/Quarantine Daily Call List, Isolation/Quarantine Event Statistics, and the Isolation/Quarantine Follow-Up reports.

## Viewing Client Reports

The View Client Reports screen has three main sections: Client Information, Reports Available for this Client, and Report Viewing Requirements. The screen can be accessed one of two ways:

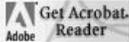
1. Press **Reports** on the Update Existing Client screen, discussed in the Managing Clients chapter of this manual.
2. Press **Reports** on the View Client Prophylaxis screen, discussed in the Managing Prophylaxis chapter of this manual.

Client Information				
Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Chart #
BRIAN SAGEDAL	04/01/2005	U	JONES	
Address				
Symptoms				

Reports Available for this Client	
Report	Description
<a href="#">Isolation/Quarantine Individual Follow-Up Report</a>	Provides client information that can be used for isolation and quarantine follow-up.
<a href="#">Voluntary Client Isolation Contract</a>	Provides a legal document requesting voluntary isolation and highlighting the procedures that isolation will involve.
<a href="#">Isolation Orders</a>	Provides a legal document ordering isolation and highlighting the procedures that isolation will involve.

Report Viewing Requirements	
	<b>Registry reports are best viewed with Adobe Acrobat Reader 5.0 or later.</b> Earlier versions of Adobe may work, but there will probably be formatting differences. If you do not have a qualifying version, click the Adobe image to the left to download the current version of Acrobat Reader. In addition, you may find helpful guidelines at the Adobe Support Site for configuring Acrobat Reader to work with your browser. Configuration guidelines for the Internet Explorer browser may be found at <a href="http://www.adobe.com/support/techdocs/98fe.htm">http://www.adobe.com/support/techdocs/98fe.htm</a> , while the guidelines for the Netscape Browser may be found at <a href="http://www.adobe.com/support/techdocs/78c6.htm">http://www.adobe.com/support/techdocs/78c6.htm</a> .

You will need to have Adobe Reader® version 5.0 or later to view client reports. Information for downloading Adobe Reader® is found in the bottom section of the screen.

To view a client-specific report, click the desired link under Reports Available for this Client. The reports available are as follows:

*Isolation/Quarantine Individual Follow-Up Report:* To access a blank version of this form, click I/Q Follow-Up under Reports on the menu panel. This report facilitates individual follow-up for clients who have been

isolated or quarantined. When generated from the View Client Reports screen, this report is populated with client information.

*Voluntary Client Isolation Contract:* To access a blank version of this form, click Client Isolation Contract under Reports on the menu panel. This contract is a legal document that contains information about the client's restriction and includes blanks for signatures from a member of the health department staff, the client, and a witness. When generated from the View Client Reports screen, this report is populated with client information.

*Isolation Orders:* To access a blank version of this form, click Isolation Orders under Reports on the menu panel. This contract is a legal document that orders the client into isolation or quarantine. The Isolation Orders form contains information about the client's restriction and includes blanks for signatures from the health officer, the client, a witness, and the server. When generated from the View Client Reports screen, this report is populated with client information.

## **Isolation/Quarantine Daily Call List**

The Isolation/Quarantine Daily Call List is a legal listing of clients in isolation and quarantine that health departments will use to contact clients regarding the current status of their disease. The list is sorted alphabetically by location.

To access the Isolation/Quarantine Daily Call List, click Daily Call List under the Reports section of the menu panel.

## **Isolation/Quarantine Event Statistics Report**

The Isolation/Quarantine Event Statistics Report allows the user to produce a report outlining the number of clients in isolation and quarantine by disease, location, case classification, and special needs.

To generate an Isolation/Quarantine Event Statistics Report, follow these steps:

1. Click Event Statistics under the Reports section of the menu panel.
2. Select an Organization from the pick list provided. Users may only enter the organization they are logged into.
3. Select an event name or select all events.

4. Uncheck the Currently in Isolation/Quarantine field if you wish to report on all clients, not only on those clients currently in isolation or quarantine.
5. Press **Generate Report**.



# *Appendix 1*

## **In Appendix 1:**

Online Help  
WIR/SNS Help Desk

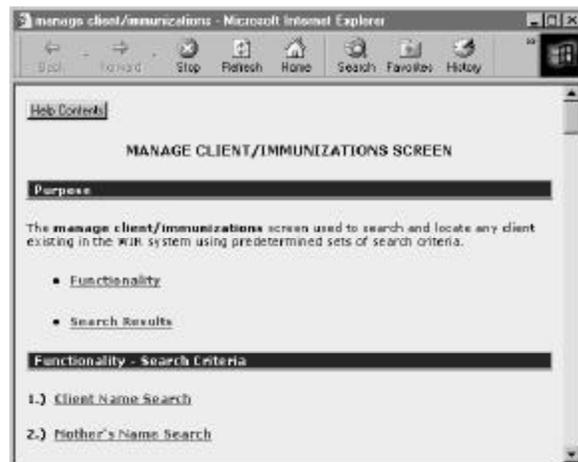
## Online Help

SNS's online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in SNS by pressing the yellow light bulb on the menu bar in the right corner of the screen.

### *Screen-Specific Help*

To access screen-specific help, follow these steps:

1. Press the light bulb on the menu bar of the screen on which you would like help.
2. A box with screen-specific help information will display. This help box may have any or all of the following features:



- Purpose. This section describes what the screen is meant to do or what kind of information needs to be entered.
- Required fields. This section lists the required fields on the screen and describes the information needed for these fields.
- Other fields. This section lists and describes non-required fields.
- Information provided. This section lists the information that may be found on the screen.
- Functionality. This section gives step-by-step instructions on how to enter information on the screen or features on the screen and describes their function.
- Results. This section describes the outcome of a search, report, download, or other information entered into the database.
- User tips. This section has advice or further information on how to use this screen.

- To view these features, you may either click the links under the Purpose section or scroll down the box.
- To close the help box, press the **X** button in the top right corner of the box.



SNS's online help function includes a notes feature. Notes appear underlined and in red type; click the "\*Note" link to view.

### General Help

General help contains information on screens throughout SNS. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

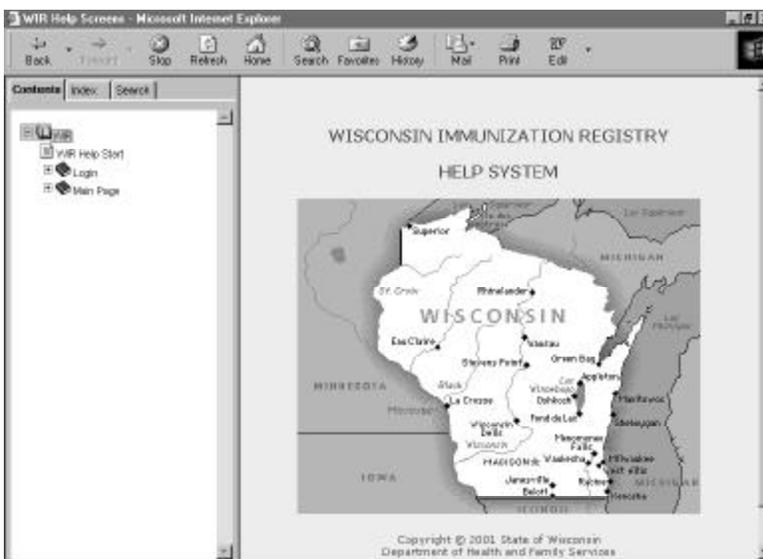
### Contents of general help

To access the contents of general help, follow these steps:

- Press the light bulb on the menu bar.
- Press the **Help Contents** button in the top right corner of the help box.
- A dialog box will open asking if you want to display both secure and nonsecure items; press **Yes**.



- Press the "+" sign to the left of "SNS" on the left side of the Contents box. A list of index items will display, with a "+" sign to the left of each item.

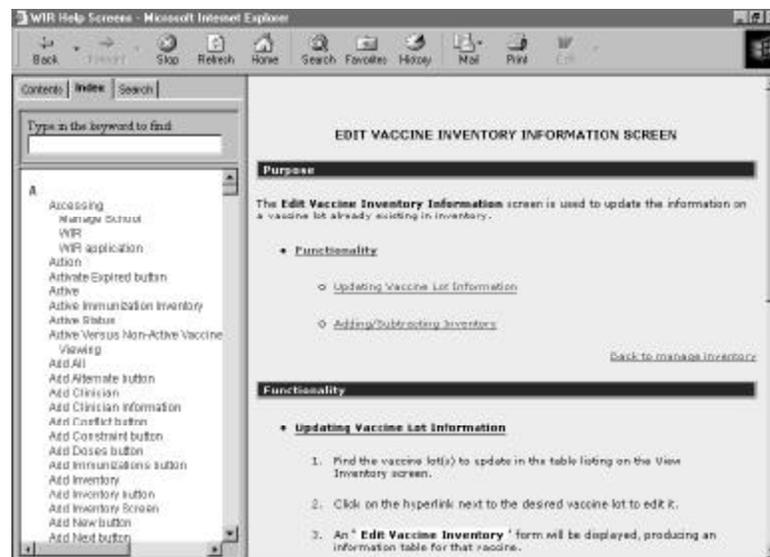


5. Press the “+” sign next to the index item you wish to view. A list of help items will appear.
6. Click the name of the help item to view it. You may also click the document icon next to the help item.
7. The help information you selected will display on the right side of the help box.
8. Use the links at the top of the screen or scroll down to view the information you need.
9. To return to a previous help screen or to skip ahead one screen, use the help box’s **Back** and **Forward** buttons.
10. To collapse an index item, press the “-” sign next to the item.
11. To close out of the help box, press the **X** button in the top right corner of the box.

### Viewing/searching the general help index

To view or search the general help index, follow these steps:

1. Follow Steps 1-3 under the Contents of General Help section of this chapter.
2. Press the Index tab on the top left side of the help box.



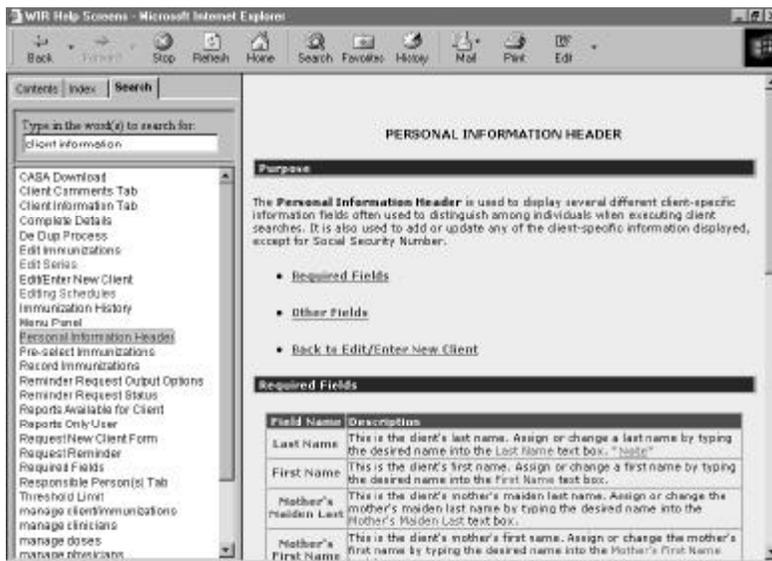
3. To find an index topic, do one of the following:
  - Use the scroll bar to view index topics.
  - Enter a keyword in the field provided. As you type, the index will display help items containing the letters you enter.

4. Click one of the help items to view the item.
5. The help information you select will display on the right side of the help box.
6. To return to a previous help screen or to skip ahead one screen, use the help box's **Back** and **Forward** buttons.
7. To close out of the help box, press the **X** button in the top right corner of the box.

## Searching general help

To search general help using a keyword, follow these steps:

1. Follow Steps 1-3 under the Contents of General Help section of this chapter.
2. Press the Search tab on the top left side of the help box.
3. Type in a word to search for in the field provided.
4. Press Enter.
5. Click one of the help items in the box below the search field to view the item.



6. The help information you selected will display on the right side of the help box.
7. Use the links at the top of the screen or scroll down to view the information you need.
8. To return to a previous help screen or to skip ahead one screen, use the help box's **Back** and **Forward** buttons.
9. To close out of the help box, press the **X** button in the top right corner of the box.



If you experience any problems accessing or dealing with the help desk, please contact Thomas Maerz, WIR/SNS systems manager, by calling (608) 261-6755 or e-mailing [maerztr@dhfs.state.wi.us](mailto:maerztr@dhfs.state.wi.us).

## WIR/SNS Help Desk

If you are experiencing difficulties or have questions regarding SNS, you may contact the WIR/SNS Help Desk. Several individuals staff the help desk. All calls are logged and tracked through to completion; calls are put in a pending status until a remedy to the user's problem(s) is found.

The WIR/SNS Help Desk hours are 7:30 a.m. to 4:30 p.m., Monday through Friday.

Help Desk telephone number: (608) 266-9691

Help Desk e-mail address: [WIRHELP@dhfs.state.wi.us](mailto:WIRHELP@dhfs.state.wi.us)



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