

EMRS 2.0

Quick Reference for HPAI Disease Management

May 14, 2022

Please note: This document may be updated or changed at any time, based on the needs of the response effort or changes in EMRS. The date in the header is the version date. **Changes from previous version are in RED.**

This *Quick Reference for HPAI Disease Management* has a companion document, the *Flow Charts for HPAI Disease Management*, a series of diagrams which indicate what needs to be entered in EMRS and the flow for entering these data.

General Guidelines: You must set Microsoft Dynamics CRM EMRS 2 to the appropriate Time Zone. Onsite incident responders will set the time zone to the time zone the incident is located in. To set the appropriate time zone, click on the Microsoft Dynamics File Tab, select Options, and use the drop down to set the appropriate time zone. If incident responders are not sure how to set the time zone on their computers in Microsoft Dynamics CRM, the deployed EMRS Specialist will be able to assist. When entering dates for activities (such as a scheduled start date for euthanasia) Microsoft CRM provides a default time of 12:00am for dates entered in various locations in EMRS. The user should always set the start times to 8am and end times to 5pm (as defaults) in these fields if the associated date field is being utilized.

For National Reporting Purposes: If there are multiple incidents across different time zones, the National Situation Unit must set their Microsoft Dynamics CRM EMRS 2 to the Central Time Zone. If there is a single incident, the National Situation Unit should set their time zone to the incident location.

Table 1. Quick Reference Guide for EMRS

Triggering Event	Action Taken	Critical Details
Increased Morbidity/Mortality or Positive AI Screening Test	Create a Positive Status using the appropriate Suspect Premises Status Definition (requires DRO Role)	Utilize the Diagnosis Button on the Investigation to create a positive status. Choose the appropriate Premises Status Definition: <ul style="list-style-type: none"> • Suspect Clinical – to be used when illness observed that is compatible with H5/H7 AI but no test results have been received. <ul style="list-style-type: none"> ✓ Start date is date of reported increased morbidity/mortality. • Suspect test result for a reportable AI by serological test with presence of compatible illness – to be used when a screening test is positive in the presence of clinical signs compatible with AI. <ul style="list-style-type: none"> ✓ Start date is date of serological test result. • Suspect test result for a reportable AI by serological test without presence of compatible illness – to be used when a screening test is positive. <ul style="list-style-type: none"> ✓ Start date is date of serological test result.

Triggering Event	Action Taken	Critical Details
		<ul style="list-style-type: none"> • Suspect test results for a reportable AI as determined using ACIA test kit with presence of compatible illness. ✓ Start date is date of ACIA results.
Positive H5 or H7 PCR Lab Result at a NAHLN Lab	Close the Suspect Status definition if one exists	End date is the NAHLN Lab Report Date for the H5 or H7. If results are positive, continue with creating the Presumptive HPAI Positive Diagnosis (next step).
	Create a Presumptive HPAI Positive Diagnosis Status (requires DRO Role)	Start Date is the NAHLN Lab Report Date Link status to <i>LMS Record</i> .
	Create an Appraisal	Leave as Pending/Unassigned. Or may do when confirmed.
	Create an Euthanasia and Disposal	Leave as Pending/Unassigned. Or may do when confirmed.
	Create a Cleaning and Disinfection	Leave as Pending/Unassigned. Or may do when confirmed.
	Create a Flock Plan Status	<ul style="list-style-type: none"> • Close and open subsequent stages of the Flock Plan Status as it is developed and approved. • Only one Flock Plan Status should be open at any given time. • <u>Stage 1-Pending Flock Plan.</u> <hr/> <ul style="list-style-type: none"> • Close the Stage 1 Status when the draft <i>Flock Plan</i> is complete. • Open <u>Stage 2-Draft Pending USDA Approval.</u> • Attach draft <i>Flock Plan</i> submitted to HPAI Ops. <hr/> <ul style="list-style-type: none"> • Close the Stage 2 Status when HPAI Ops approves draft <i>Flock Plan</i>. • Open <u>Stage 3-USDA Approved/Pending Signatures.</u> • Attach HPAI Ops approved <i>Flock Plan</i>. <hr/> <ul style="list-style-type: none"> • Close Stage 3 Status once signatures obtained on approved <i>Flock Plan</i>. • Open <u>Stage 4-USDA Approved/Owner & USDA Signed.</u> • Attach HPAI Ops approved <i>Flock Plan</i> with all signatures.

Triggering Event	Action Taken	Critical Details
	<p>Create an IP Control Area Status</p> <p>(Requires DRO role; utilize the “Diagnosis” button on the Investigation tool bar and select “Zone”).</p>	<ul style="list-style-type: none"> • FIRST, ENSURE FRONT GATE COORDINATES ARE ENTERED ON THE PREMISES PAGE AND ARE CORRECT PRIOR TO CREATING THE IP CONTROL AREA STATUS! • Complete the dialogs in EMRS: <ul style="list-style-type: none"> ✓ Select “<i>Yes, I need to link to another status for reporting</i>” when prompted. EMRS will identify and link to the positive diagnosis already created. ✓ Select “<i>Yes, I want to link the disease control documents</i>” when prompted. EMRS will link the Appraisal, E&D, C&D, and <i>Flock Plan</i> to the IP Control Area for reporting purposes. ✓ Select the appropriate map package for the incident, to link the Zone Status layers on the EMRS Advanced Map. • As other premises are identified within the Surveillance, Buffer, and Infected Zones of this IP, EMRS will identify those premises and automatically place the appropriate Zone Status on those premises <u>PROVIDED</u> that the premises have front gate geo-coordinates entered on the premises page AND have an open investigation in the same incident as this IP Control Area.
	<p>Create a Tally Sheet</p> <p>(Requires DRO Role – utilize the “Diagnosis” button in the tool bar and select “ Create Tally Sheet”)</p>	<ul style="list-style-type: none"> • This form is designed to capture relevant dates and activities in one location for the entire premises. This form will best be utilized to capture initial and ongoing information, and provides summary information only. Information entered into this form must be verified and the appropriate records completed in EMRS to account for specific details.
	<p>Create a Quarantine Status if not already done (State may issue quarantine earlier in process)</p>	<p>Need to verify a quarantine has been issued.</p>
	<p>Add Special ID Information to the Investigation Summary Record</p>	<ul style="list-style-type: none"> • Navigate to Investigation Summary Record. • Enter in the Special ID Field. <ul style="list-style-type: none"> ✓ This is the County name (in which the premises resides) AND ✓ The numeric count of Infected Premises for that County. For example, if this is the third Infected Premises in Rice County, the Special ID is “Rice03”. <ul style="list-style-type: none"> ➤ Please use 2 digits in the numeric count, e.g., 03 or 08. ➤ Please put a space between the County name and the numeric count. ✓ Click Save and Close.

Triggering Event	Action Taken	Critical Details
	Create Epi Interview Record	If epidemiological investigations are being done.
Confirmation of H5/H7 PCR Results at NVSL	Close the Presumptive HPAI Positive Diagnosis Status	<ul style="list-style-type: none"> • End Date is the NVSL Report Date. • Link status to LMS Record.
	Create a Premises has a Confirmed H5/H7 Specimen Diagnosis Status	Start Date is the NVSL Lab Report Date.
Determination of Partial Sequence at NVSL	Close the Premises has a Confirmed H5/H7 Specimen Diagnosis Status	End Date is the NVSL Report Date.
	Create a Premises has a Confirmed H5N₁ or H7N₉ Positive Specimen with Clinical Signs Diagnosis Status	Start Date is the NVSL Lab Report Date.

Triggering Event	Action Taken	Critical Details
Appraisal	Appraisal	<ul style="list-style-type: none"> • Each VS 1-23 represents a separate Appraisal record. The initial appraisal record for Animals is automatically created when a Positive Premises status is opened by the DRO • Information to enter from the VS 1-23: <ul style="list-style-type: none"> ✓ Scheduling Section <ul style="list-style-type: none"> ➤ Assigned Resource = enter name of Field Reimbursement Specialist (FRS) located in block 27 of VS 1-23. Assign the resource through an appraisal follow up. ➤ Assigned Date = date assigned to FRS. ➤ Scheduled start date = date appraisal is to begin, set time to 8am. ➤ Scheduled end date = date appraisal scheduled to end, set time to 5pm. ✓ Business Contact and Legal Name <ul style="list-style-type: none"> ➤ Link Animal Business and Business Owner (create an Animal Business contact record if necessary) ✓ Date Appraised / Type / Destroyed Section <ul style="list-style-type: none"> ➤ Claim For = select Animals, Materials, Depop & Disposal, VE or Other ➤ Disease = Highly Pathogenic Avian Influenza ➤ Date Appraised = enter date found in block 26 of VS 1-23 ➤ Destroyed = enter date that animals/materials were destroyed (block 5 of VS 1-23) ➤ C&D Date = enter C&D date if appropriate ➤ Total Details Indemnity = locked field will populate from the appraisal details ➤ Associated Status = Is auto filled for the initial appraisal record for animals. For subsequent appraisal records, select the Positive Diagnosis Status for this premises. ➤ Link the appropriate E&D and C&D records ✓ Appraisal Details Section <ul style="list-style-type: none"> ➤ Ensure that Animal Groups in the Animal Business are entered by barn prior to entering Appraisal Details ➤ Enter an appraisal detail for each line of the VS 1-23 ➤ Enter data in the appraisal record regarding # units and price per unit ✓ Notes Section <ul style="list-style-type: none"> ➤ Attach mortality records, inventory records, indemnity requests (appropriate appendix documents), Sam.gov Exemption and all stages of the VS 1-23. ➤ Do Not attach the EFT form with banking information

Triggering Event	Action Taken	Critical Details
		<ul style="list-style-type: none"> ✓ Source of Pricing Data / Appraiser <ul style="list-style-type: none"> ➤ Source of Pricing Data = enter source from block 25 of VS 1-23 ➤ Appraiser GOV = enter name of Poultry Indemnity Specialist located in block 29 of the VS 1-23 ➤ Gov App Title = Poultry Indemnity Team ✓ Owner or Claimant Name, Date Signed and Title <ul style="list-style-type: none"> ➤ Link to AB contact record that signs as the claimant on the VS 1-23 in block 30 and enter the date and title from blocks 31 and 32. ✓ Total Amount Approved, Approver Name, Approver Title and Date Section <ul style="list-style-type: none"> ➤ Total Amount Approved = auto filled, but may need to be adjusted for split payments and Virus Elimination claims ➤ Appraiser, Title and Date = enter name, title and date from blocks 39, 41, 42 and 43 of the VS 1-23 ✓ Indemnity Processing Section <ul style="list-style-type: none"> ➤ Finance / Budget / ICG personnel will enter the name of the person that sends the final packet to FOST for payment. The date submitted will be entered and Final VS 1-23 and VS 1-31 will be attached in the Notes Section. The appraisal record will be completed by Finance/ Budget personnel when the payment clears the financial system. <p>Notes:</p> <ul style="list-style-type: none"> • Field Reimbursement Specialist or IMT Finance Chief (for IMT deployed sites) sends completed VS 1-23 (with SAMS UEI number and owner signature) along with all supporting documents to VS.FiOps.ASC.Finance@usda.gov and emrssupport@usda.gov with a courtesy copy to AVIC and District AO. • Please refer to the EMRS Appraisal SOP for more information.
Euthanasia and Disposal	Euthanasia	<ul style="list-style-type: none"> • Select Euthanasia Method. • Euthanasia Scheduled Start Date = Select appropriate date and set the time to 8am. • Euthanasia Start = Date actual euthanasia activities being on the premises. ✓ Entered by Operations.

Triggering Event	Action Taken	Critical Details
		<ul style="list-style-type: none"> • Euthanasia Scheduled End = estimated completion date of euthanasia activities on the premises; select the appropriate date and set the time to 5pm. <ul style="list-style-type: none"> ✓ Entered by Operations. • Enter E&D Details. <ul style="list-style-type: none"> ✓ Enter one detail per barn. <p>NOTE: Ensure that Animal Groups in the Animal Business are entered by barn prior to entering E&D Details. Select Animal Group for <i>Item Euthanized</i>. Head for <i>Item Unit</i>, in <i>Further Item Description Box</i> Enter in Barn Number or Barn Name, Enter # of <i>Animals Euthanized</i>.</p> <ul style="list-style-type: none"> • Euthanasia Completed = date all euthanasia activities are complete. <ul style="list-style-type: none"> ✓ Entered by Operations.
	<p>Disposal</p> <p>NOTE: Carcass compost pile information is captured</p>	<p>Select Disposal Method:</p> <ul style="list-style-type: none"> • IF COMPOSTING <ul style="list-style-type: none"> ✓ Disposal Scheduled Start = Anticipated start date of building carcass compost piles. <ul style="list-style-type: none"> ➤ Usually this date is 24 hours after completion of euthanasia, but may be same day. ➤ Select the appropriate date, and set the time to 8am. ✓ Disposal Start Date = Date building of carcass compost piles begins. ✓ Disposal Capped Date = Date last carcass/high risk materials compost pile on premises is capped. <ul style="list-style-type: none"> ➤ Select appropriate date and set the time to 5pm. ✓ Compost Temp Start = Date temperature recording begins (usually 24 hours after Disposal Capped Date). <ul style="list-style-type: none"> ➤ Select date and set time to 8 am. ➤ Attach compost inspector reports/temperature logs throughout compost period in Notes. ✓ Compost Turn Date = Date last carcass compost pile is turned as verified by SME/Compost Temperature Logs (per incident protocols) <ul style="list-style-type: none"> ➤ Select the appropriate date and set the time to 5pm. ✓ Disposal Scheduled End = Anticipated date composting will be completed assuming all time, temperature, and other requirements are met. <ul style="list-style-type: none"> ➤ Date should be 28 days after the Compost Temp Start Date. Select the appropriate date and set the time to 5pm.

Triggering Event	Action Taken	Critical Details
	Note: Carcass burial pile information is captured	<ul style="list-style-type: none"> ✓ Disposal Completed Date = Date all compost piles have met time and temperature requirements as directed and are released per incident protocol. <ul style="list-style-type: none"> ➤ Attach compost release letter in Notes. <hr style="border-top: 1px dashed black;"/> <ul style="list-style-type: none"> • IF BURIAL OR LANDFILL <ul style="list-style-type: none"> ✓ Disposal Scheduled Start = Date activities are anticipated to begin, usually 24 hours after Euthanasia Completion Date, but may be sooner. <ul style="list-style-type: none"> ➤ Select appropriate date and set the time to 8am. ✓ Disposal Start Date = actual date burial or moving to landfill activities begin on the premises. ✓ Compost Capped, Compost Temp Start, and Compost Turn fields: leave blank. ✓ Disposal Scheduled End = Anticipated date all disposal activities are anticipated to be completed. <ul style="list-style-type: none"> ➤ Select appropriate date and set the time to 5pm. ✓ Disposal Completed Date = <u>date of disposal completion of carcass/high risk materials.</u> <ul style="list-style-type: none"> ➤ Attach relevant burial documents in Notes. <p>AND</p> <ul style="list-style-type: none"> ✓ Create Permit and Movement Records for materials moved to landfill or offsite for burial.
Cleaning and Disinfection (Virus Elimination)	Cleaning	<ul style="list-style-type: none"> • Select Item Cleaned. • Select Cleaning Method. • Select Cleaning Party: Contractor, Owner, Personnel (USDA or State). <ul style="list-style-type: none"> ✓ Used to keep track of who is responsible for activity. ✓ If USDA/IMT personnel, select Cleaning Team/Cleaning Assigned as applicable. • Clean Scheduled Start = date cleaning activities are scheduled to begin, set time to 8am. • Clean Scheduled End = date cleaning activities are scheduled to be completed in the last barn on the premises; select appropriate date and set the time to 5pm. • Cleaning Completed = date cleaning activities are actually completed on last barn on premises. <ul style="list-style-type: none"> ✓ Attach Cleaning Inspection Report in Notes.

Triggering Event	Action Taken	Critical Details
	Disinfection	<ul style="list-style-type: none"> • Select Item Disinfected. • Select Disinfection Method. • Select Disinfection Party (Contractor, Owner, Personnel). <ul style="list-style-type: none"> ✓ Used to keep track of who is responsible for activity. ✓ If USDA/IMT personnel, select Disinfection Team/Disinfection Assigned as applicable. • Disinfection Scheduled Start = date disinfection begins. <ul style="list-style-type: none"> ✓ Used as forecasting tool for environmental sampling. • Disinfection Scheduled End = anticipated end date. • Disinfection Completed = date of completion of disinfection on the premises. <ul style="list-style-type: none"> ✓ This is date of last barn disinfection process completed. ✓ Complete Final Inspection Section. ✓ Attach final inspection report in Notes. • After disinfection is complete, environmental sampling may commence. • NOTE: A NEW field has been added to the Tally Sheet – the Initial VE Complete Date <ul style="list-style-type: none"> ✓ This field is CRITICAL for Control Area Release count down ✓ Date is entered when initial virus elimination activities are complete, including but not limited to outside areas of premises, equipment, trucks, and other potential fomites used in depop activities. This does NOT include barn interiors. This date should be recorded in the disinfection comments section of the C&D record. The Initial VE completion date will be prior to the Final Disinfection Completed date
Control Area Closure criteria met for potential release	Enter Scheduled Control Area Closure Date on the Tally Sheet and as the scheduled end date on the IP Control Area Status record	<ul style="list-style-type: none"> • Scheduled CA Closure date should be 14 days after the Initial VE Completion Date, provided the following conditions are met: <ul style="list-style-type: none"> ✓ The last infected premises in the CA has been depopulated, the compost pile has been capped or mortality buried, or mortality removed from the premises for appropriate disposal ✓ Initial VE activities on the infected premises are complete NOTE: Refer to the HPAI Control Area Response document for Surveillance timing information.

Triggering Event	Action Taken	Critical Details
Cleaning and Disinfection Completed	Create a Stage 1 Pending Restock Premises Status	<ul style="list-style-type: none"> • <u>Stage 1 - Pending Restock Approval.</u> • Enter anticipated restock date 14 days after initial VE completion date (14 day fallow period, so eligible to restock on day 15 assuming all requirements are met).
Close IP Control Area as instructed by the SAHO/IMT	Close the IP Control Area Status	<ul style="list-style-type: none"> • End date = the date the IMT/SAHO determines the Control Area appropriate to close. The Control Area may be released before restocking is approved on the last IP. Surveillance should have been completed as directed by the HPAI Response Control Area Release document. Enter the date on the Control Area Close field on the Tally Sheet & Close the IP Control Area Status on the Investigation. • When the <u>IP Control Area Status</u> is closed on the premises, EMRS will automatically identify those premises with an <u>Infected Zone, Buffer Zone, or Surveillance Zone Status or Statuses</u>, that were created due to their proximity with this Infected Premises and close those statuses.
Environmental Sampling	Create Exam with Reason = Quarantine Release (in future, will be = Environmental Sampling)	<ul style="list-style-type: none"> • Create when disinfection is underway; if environmental sampling is required: leave as pending. <ul style="list-style-type: none"> ✓ Change Exam Reason to Quarantine Release Inspection (there will be a modification: an exam reason of Environmental Sampling Exam to better reflect the reason – look for this to change in the near future). ✓ Environmental Sampling Team Lead responsibility.
	Complete Exam	<ul style="list-style-type: none"> • When disinfection is complete, assign exam to environmental sampling technician. NOTE: Ensure proper structures are entered into the Animal Business utilizing the barn names as used by the premises (Barn 1, Barn 2, Barn 3, etc.). • Assigned Date = date technician assigned to do work. • Scheduled Start Date = date environmental sampling begins. • Scheduled End Date = anticipated date environmental sampling is concluded on the premises. • Utilize <i>Enter AI Environmental Sample Package</i> in the Exam Follow-Ups to enter environmental samples collected. This will create the lab submission and all samples associated with the exam via a workflow greatly decreasing data entry steps required. <ul style="list-style-type: none"> ✓ Examined Date = date environmental sampling is concluded on the premises. ✓ Complete the exam; attach reports/notes. ✓ All steps above are Environmental Sampling Team Lead responsibility.

Triggering Event	Action Taken	Critical Details
	Finalize the Lab Submission	Finalize the Lab Submission once all results are received.
Negative Environmental Results Following Cleaning and Disinfection	Close the Premises has confirmed H5N₁ positive specimen with clinical signs Diagnosis Status	<ul style="list-style-type: none"> • End Date = the date of final negative environmental sample results lab report for all barns on premises. <ul style="list-style-type: none"> ✓ There should not be any positive statuses on the premises at this point as it is believe virus neutralization has occurred.
	Open a new Premises is considered Presumptive Negative Based on Negative Environmental Results Status	<ul style="list-style-type: none"> • Start date = date of final negative environmental sample results lab report. • Link Related LMS Accession of final negative environmental samples on the status page.
Restock Eligible Requirements Have Been Obtained/Met	Close the Stage 1 Pending Restock Approval Status	<ul style="list-style-type: none"> • Once environmental sampling results have been received as negative, on the day after the 14 fallow period post disinfection, close the <u>Stage 1 Pending Restock</u> status <i>if all requirements for restock have been met and approval has been granted by the SAHO/IMT.</i> <p>NOTE: In some situations, the <i>Approval to Restock letter</i> may be signed by the SAHO/IMT after negative environmental results have been received but prior to the end of the fallow period and delivered to the producer to allow for planning for restock.</p> <ul style="list-style-type: none"> • In this situation, <ul style="list-style-type: none"> ✓ Attach a copy of the approval letter to the pending status. ✓ Once the fallow period has ended, attach the approval letter to the <u>Stage 2 Restock Approved Status</u>.
	Open a new Stage 2 Restock Approved Status	<ul style="list-style-type: none"> • Open <u>Stage 2 Restock Approved</u> on day 15 after disinfection complete and if approved by the State Veterinarian/IMT and if negative environmental sampling results have been obtained. • Attach a copy of the <i>Restock Approval Letter</i>.

Triggering Event	Action Taken	Critical Details
First Post Restocking Test (Negative)	Close the Premises is Considered Presumptive Negative Based on Negative Environmental Results Status	<ul style="list-style-type: none"> • End Date = date of first eligible negative test of restocked bird's lab report (if restock testing of birds is required). • If restock testing is not required, the end date of <u>Premises is Considered Presumptive Negative Based on Environmental Results Status</u> is determined by <i>Flock Plan</i>/or epi.
	Open a new Premises is Considered Negative due to Restock Animal Testing Status	<ul style="list-style-type: none"> • Start date = date of first eligible negative test or restocked bird's lab report (if restock testing of birds is required). • Link the LMS Accession of the first negative results to the status page.
Final Post Restocking Test (Negative) as Specified in <i>Flock Plan</i>	Close the Quarantine Status	<ul style="list-style-type: none"> • Quarantine Release date as directed by the SAHO, attach copy of quarantine release document in Notes <p>NOTE: Quarantine release dates will vary across State Lines and SAHO policies. This is provided as a guideline, as in some situations quarantines may be released prior to final post-restock test.</p>
	Close the Flock Plan Status	End date = the Quarantine Release Date or as dictated for completion by the <i>Flock Plan</i> .
	Close the Restock Status (Stage 2)	End date = the Quarantine Release Date or as dictated by the <i>Flock Plan</i> and/or the State Veterinarian/IMT. In some states, the quarantine may have been released prior to it being appropriate to close the <i>Flock Plan</i> and <u>Restock Status</u> .
	Close the Premises is Considered Negative Due to Restock Animal Testing Status	<ul style="list-style-type: none"> • End date = the Quarantine Release Date or as dictated by the <i>Flock Plan</i> and/or the State Veterinarian/IMT. • If the State required the company to provide a letter requesting release that provided data such as dates of negative restock testing and accession numbers, attach the request letter on the <u>Premises is Considered Negative Due to Restock Animal Testing Status</u>
Final Negative Status for Premises w/o Restock testing as Specified in <i>Flock Plan</i>	Open a new Premises is Considered Negative Due to Disease Eradication and/or Mitigation Actions per Flock Plan Status	<ul style="list-style-type: none"> • This status is to be used for those premises where restock testing will not be used, such as backyard flocks that remain fallow for 150 days, for those flocks where restock testing is not required by the SAHO, or for other unique situations. • Start date and end date may be variable, refer to <i>Flock Plan</i> for appropriate start date of this status.

Triggering Event	Action Taken	Critical Details
Biosecurity and Safety Inspections	Communication Activity/Inspection Task	<ul style="list-style-type: none"> • Create when Inspection assigned/completed. ✓ Attach Inspection Report, type relevant comments in Notes.
Close Investigation (Requires DRO Role)	Close the Investigation	Close the Investigation when appropriate and as dictated by the SAHO/IMT.

APPENDIX A NAMING CONVENTIONS & DOCUMENT ATTACHMENTS

Naming Conventions

- ◆ For all forms, except lab results and appraisals (VS1-23), the following naming conventions apply:

PremisesID_ABName_Form_Date [Date=yyyymmdd]

Example: 00K1234_TomsTurkeys_NoticeofQuarantine12842_20150908

- ◆ For laboratory results, the following naming conventions apply:

PremisesID_ABName_LabResult_Accession_Date [Date=yyyymmdd]

Example: 00K1234_TomsTurkeys_Negative_D15-01234_20150908

Note: Accessions will usually have multiple results from multiple specimens. If one result is suspect, and 9 are negative for example, list the convention name using suspect as the lab result.

- ◆ For appraisals, the following naming conventions apply:

- PremisesID_State_SpecialID_Form_ClaimFor_Status_Date(yyyyymmdd)

- Example: 00K1234_IN_Dubois01_VS1-23_AN_CS_20160217

- ClaimFor Code:

- AN = Animals
- MT = Materials
- DD = Depopulation & Disposal
- VE1 = Virus Elimination 1st Payment (1st half of full payment – when VE activities begin)
- VE2 = Virus Elimination 2nd Payment (2nd half of full payment when activities verified as effective/complete)
- OT = Other

- Status Code:

- AP = Animals/Materials appraised; no claimant signature.

- CS = Animals/Materials appraised; claimant signature obtained.
- FINAL = Final approved by Finance in box 41.

Note: String length of the file name may be an issue for some appraisals, especially if the county name contains many characters. If string length is an issue, the Documentation Unit Leader must consult with the Situation Unit Leader and the DRO to determine a standard abbreviation naming convention for the Special ID, and properly communicate any issues/abbreviations with the HPAI OPS Finance Team.

- ◆ For all forms, do not include the following characters in the document file name: " # % & * : < > ? \ / { | } ~

EMRS Document Attachments & Location

Table 2 provides locations of EMRS documents, including the naming convention and example.

Table 2. EMRS Documents and Locations

EMRS Documents	Details & Location in EMRS	
Quarantine (from backyard surveillance)	Location:	Premises → Premises Status → Status Group = Quarantine → Notes
	Naming Convention:	PremisesID_ABName_FormName&number_date(yyyymmdd)
	Example:	00K1234_TomSmith_Notice of Quarantine12842_20150908
Survey/Lab Form	Location:	Investigations → Lab submissions → Notes
	Naming Convention:	PremisesID_ABName_FormName_Date(yyyymmdd)
	Example:	00K1234_TomSmith_MNBYSurvLab_20150908
Laboratory Results	Location:	Investigation – Accessions - Notes
	Naming Convention:	PremisesID_ABName_LabResult_Accession_Date [Date=yyyymmdd]
	Example:	00K1234_TomSmith_Positive_20163453_20160202
Quarantine	Location:	Investigation → Premises Status → Status Group = Quarantine → Notes
	Naming Convention:	PremisesID_ABName_FormName&#_date(yyyymmdd)
	Example:	00K1234_TomSmith_Notice of Quarantine12842_20150908
Appraisal & Indemnity Request Form, Owner/Grower Worksheets, etc.	Location:	Premises - Investigation → Appraisal → Notes
	Naming Convention:	PremisesID_State_SpecialID_FormName_O(owner) or CG(contract grower) Date(yyyymmdd)
	Example:	00K1234_IN_Dubois01_AIRequestForm_O_20150908
Appraisal (VS 1-23); Salvage (VS 1-24) & receipts, etc.	Location:	Premises → Investigation - Appraisal → Notes
	Naming Convention:	PremisesID_State_SpecialID_Form_ClaimFor_Status_Date(yyyymmdd)
	Example:	00K1234_IN_Dubois01_VS1-23_AN_OS_20160217

Infected Premises questionnaire	Location:	Investigation → Epi Interview
	Naming Convention:	PremisesID_ABName_FormName_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Supplemental Epi Investigation Form_20150908
Statement of Work (SOW) Form to Request National Veterinary Stockpile (NVS) 3D Response Support Services	Location:	<i>Process under development</i>
	Naming Convention:	
	Example:	
Biosecurity & Safety Inspection Reports	Location:	Premises → Investigation → Investigation Follow Ups → Create a Communication Activity/Inspection Task → Notes
	Naming Convention:	PremisesID_ABName_FormName_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_MN BioSafety Inspection_20150908
Draft Flock Plan	Location:	Investigation → Premises Status → Status Group= Flock Plan → Premises Status Definition = <i>Stage 1- Pending Flock Plan</i> → Notes (Attach versions of draft until draft complete)
	Naming Convention:	PremisesID_ABName_FlockPlan DraftVersion#_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Flock Plan Draft v3_20150908
Draft Flock Plan ready for submission to HPAI Ops	Location:	Investigation → Premises Status → Status Group= Flock Plan → Premises Status Definition = <i>Stage 2- Draft Pending USDA Approval</i> → Notes
	Naming Convention:	PremisesID_ABName_FlockPlan Submitted for Approval_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Flock Plan Submitted for Approval_20150908

Flock Plan approved by HPAI Ops – awaiting signatures	Location:	Investigation → Premises Status → Status Group= Flock Plan → Premises Status Definition = <i>Stage 3- USDA Approved/Pending Signatures</i> → Notes
	Naming Convention:	PremisesID_ABName_Flock Plan Approved-Pending signatures_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Flock Plan Approved-Pending signatures_20150908
Flock Plan Approved by HPAI Ops – all signatures obtained	Location:	Investigation → Premises Status → Status Group = Flock Plan → Premises Status Definition = <i>Stage 4- USDA Approved/Owner&USDA Signed</i> → Notes
	Naming Convention:	PremisesID_ABName_Flock Plan Approved-Signed_Complete_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Flock Plan Approved-Signed-Complete_20150908
Composting Turn Approval and Temperature Logs	Location:	Investigation → Euthanasia and Disposal→ ED Name → Notes
	Naming Convention:	PremisesID_ABName_FormName_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Compost Logs_20150908
Composting Release Approval and Temperature Logs	Location:	Investigation → Euthanasia and Disposal→ ED Name → Notes
	Naming Convention:	PremisesID_ABName_FormName_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_Compost Release Approval_20150908
C&D Walk-through Summary (Date of walk-through may be all that is required per State Animal Health Authorities)	Location:	Investigation → Cleaning and Disinfection → CD Name → Notes
	Naming Convention:	PremisesID_ABName_FormName_Date(yyymmdd)
	Example:	00K1234_TomsTurkeys_CD Final Inspection_20150908