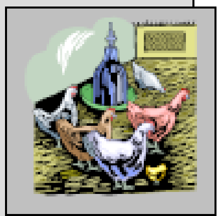
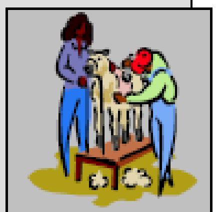
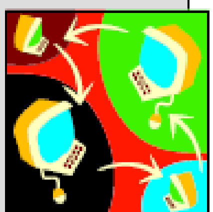
EMRS 2
User Guide







Emergency
Management
Response
Services

United States
Department of
Agriculture

Animal and Plant
Health inspection
Service

Veterinary Services

Centers for
Epidemiology and
Animal Health

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This user guide is for everyone who used the Lotus Notes version of the Emergency Management Response System (EMRS) and for anyone who will be using the new version of that system, which is now referred to as EMRS 2. The "S" now stands for "Services" instead of "System." This new version was developed using the Microsoft Dynamics CRM 2011 framework. The user interface is similar to that of the Microsoft Office 2010 suite of products.

Because the Dynamics CRM interface is very different from the Lotus Notes interface that many users have worked with for years, the first part of this guide will describe the Dynamics CRM interface and show new users how to get around in this different environment. APHIS VS developers have customized the Dynamics CRM interface so it has the look and feel of an animal disease management application, rather than a customer relationship management application, which is what the CRM acronym means.

When you become familiar with the interface, using the EMRS 2 application is very intuitive. In this guide we use various types of scenarios to show you how to do your work in EMRS 2. If there is something you need to do, just look for a scenario in the Table of Contents and go to the page to find out how to do it.

Contents

Introduction

The Centers for Epidemiology and Animal Health (CEAH) developed the Emergency Management Response System (EMRS) in 2001 in conjunction with Emergency Management (EM), Veterinary Services (VS) laboratory officials, regional and area officials, epidemiologists, and Foreign Animal Disease (FAD) diagnosticians (FADDs). EMRS was developed on a Lotus Notes Domino platform.

Efforts to re-engineer the legacy EMRS application began in 2011. The new version of EMRS is called EMRS 2 and the “S” now stands for “Services.” It was developed using the Microsoft Dynamics 2011 CRM platform, which offers a significant improvement in the user interface and provides powerful application development tools.

EMRS 2 and Dynamics CRM 2011

Microsoft Dynamics CRM is a web-based application that is built on the Microsoft .NET Framework technology platform. Because of its native web architecture, Microsoft Dynamics CRM can be accessed through the Windows Internet Explorer web browser. In addition to the web user experience (also known as the web client), another possible access point for Microsoft Dynamics CRM is through Outlook (the administrator must install Microsoft Dynamics CRM for Outlook on your computer).

EMRS 2.0 is a web-based application used for the reporting of routine investigations of foreign animal diseases (FAD), surveillance and control programs, state specific disease outbreaks, and national animal health emergency responses. It can also be used in the Incident Command System. The user experience has been greatly enhanced in this new application to make it easier for users to input data and manage the tasks involved in a FAD investigation.

Users can now enter data quickly using wizards, or custom dialogs, to input data for specific modules of the EMRS 2 application. EMRS 2 employs modules and inter-related forms to track investigations, general tasks, and administrative functions.

The investigation data is also available through a mapping interface, allowing the user to view real-time, high quality maps of outbreak areas, respond to patterns, and deliver the maps to decision makers, government institutions and the public.

Core Objectives of the Emergency Management Response System

The new Emergency Management Response System is intended to provide four major services to animal health professionals. These are described below.

Disease Management

Disease management is the ongoing systematic collection, collation, analysis, and interpretation of data and dissemination of information to those who need to know so that action can be taken. The objectives of the system include rapid detection of introduced diseases and emerging issues, monitoring and providing actionable information to allow the mitigation of any long term effects on the health of the U.S. herd and trade implications.

Resource Management

In many incidents personnel are mobilized to handle the large amount of activities that may occur in a defined geographic area. This requires ordering personnel for positions (using EMRS 2), selecting the appropriate personnel to fill those positions based on training and experience (using the Emergency Qualifications System (EQS) and managing the status of the personnel as dispatched to the assigned incident on the national level (using the Resource Ordering and Status System (ROSS) so they cannot be available for other national incidents.

The filled orders are transmitted to EMRS 2 so that incident personnel can plan for check-in and assignment of personnel to vehicles, equipment and teams to perform activities which have been scheduled using the Investigation Management portion of EMRS 2. Although the selection of appropriate personnel occurs in EQS from orders placed in EMRS and dispatch status occurs in ROSS, all of this information must be coordinated in EMRS 2 to manage the investigation process and ensure resources are properly allocated.

Knowledge Management

When responding to incidents we are required to do so within the National Response framework using the principles of the National Incident Management System. This requires our Incident Management teams to prepare and produce forms and reports consistent with these principles and maintain these records.

Enterprise Reporting

A critical component of a response is the ability to convey the current situation and provide the information to decision makers to allow an efficient and measured response during incidents. EMRS 2 must provide the ability to report the current state of events to project future needs and anticipated resources to allow Incident Management Teams to adequately respond. This includes being able to spatially enable the data and produce adequate maps for tactical operations as well as planning. To provide targeted reporting at the local, state, regional and national scales and to present this information in multiple formats or feeds to allow assimilation into a common operating picture.

Edit History

Version	Description	Date	Author
1.00	Initial Draft	Feb-02-2013	Geno Zomparelli
1.10	Remove flowchart; Add Investigation and Exam Section	Feb-15-2013	Geno Zomparelli
1.20	Update to include the latest changes to the application	June 28, 2013	Geno Zomparelli
1.21	Include Map Features	Aug-01-2013	Geno Zomparelli
1.22	Update changes in the interface; add tracing module	Mar-20-2014	Geno Zomparelli

Document References

Document	Date	Author
EMRS 2 Functional Requirements Specifications		Geno Zomparelli
EMRS Business Requirements Definition Version 1.80	Jun-2-2011	Fred Bourgeois
EMRS Business Requirements Use Case Appendix Version 1.80	Jun-8-2011	Fred Bourgeois

Icons Used in This Guide

In this guide we use the following icons to emphasize useful or important information:

Icon	Meaning	Description
	Security Warning	This icon informs the user about security issues, such as role requirements and restrictions on what a user can and cannot do.
	Additional Information	This icon points out useful tips and helpful information.
	Important Message	This icon points out important information that may be critical to the completion of a task and is usually required before the user can proceed.
	Checklist	This icon points out a list of things you should know before you start a dialog or perform some task.

Overview

In this section of the document we will describe the EMRS 2 user interface and explain how user's access the system and navigate in the Microsoft Dynamics CRM interface.

Purpose

The purpose of this section is to provide users with an overview of the EMRS 2 interface and explain how they use dialogs to enter data into the system. User access and support is also discussed.

Scope

The focus of this section shall focus on how users access the EMRS 2 application and how the EMRS 2 application interface is structured. Users will learn how to navigate within the system and use the dialogs to enter data into the appropriate modules of the application. The scope includes the following topics:

- How to use EMRS 2 in the Dynamics CRM interface
- How to access the application
- How to use Dialogs to complete forms
- How to use Quick Search in views to find records
- How to edit and enter information into forms
- Helpful links within the application
- The routine FAD investigation process
- Using the Advanced Find tool
- How to use EMRS 2 in Microsoft Outlook

The audience for this document includes USDA, APHIS, and VS employees as well as State Animal Health Officials, other Federal Agency employees, and temporary hires such as practitioners, brand inspectors, and laboratory personnel.

User Support

The Help Desk is available to answer any questions you may have about the EMRS application. The Help Desk staff is available on weekdays, (except holidays) via phone between 7:00 am and 5:00 pm Mountain Time. Outside the hours above, you may leave a voicemail message or send an e-mail:

- Phone: (877) 944-8457
- E-mail: vsithelpdesk@aphis.usda.gov

Note: In order for the e-mail to work, the user needs to have a Remedy account. If a user has never opened a ticket, they should call in a ticket first using the phone number above. After that, they can use e-mail which will create a ticket for them.

Web Resources

The following websites provide specific information about the Emergency Management Response Services program and how users may acquire access to the system.

- The public (USDA APHIS) home page: http://www.aphis.usda.gov/wps/portal/aphis/home
- The training page: https://emrs2t.aphis.usda.gov
- The EMRS 2 Test login page: https://emrs2test.aphis.usda.gov/main.aspx
- The EMRS 2 Production login page): https://emrs2.aphis.usda.gov
- For additional information about the EMRS, visit the USDA APHIS website at:

  http://www.aphis.usda.gov/wps/portal/aphis/ourfocus/animalhealth?1dmy&urile=wcm%3apath%3a%2Faphis_content_library%2Fsa_our_focus%2Fsa_animal_health%2Fsa_emergency_management%2Fsa_emrs%2Fct_emrs_home

User Access

Everyone who needs access to the EMRS must register. Access is primarily for State and Federal animal health personnel. If you require access you must complete an APHIS 513 Form and have it signed by your supervisor or VS contact. Please contact your local EMRS Network Associate or IT Specialist to complete and submit an APHIS 513 Form. If you do not receive instructions on how to access EMRS via email within a reasonable amount of time (3-5 business days), please contact EMRS_Registration_Approvers@aphis.usda.gov.

The EMRS 2 application was designed so that any registered user using Internet Explorer version 7 or greater from any computer having Internet access can access it. Persons involved with using the EMRS 2 application shall be required to have the appropriate Client Access License (CAL). There are several types of CALS available. The type of license required will depend on the role and type of user assigned to the Dynamics CRM directory.

In early 2011, Microsoft released new versions of Microsoft Dynamics CRM across all three deployment models. This latest release is called Microsoft Dynamics CRM 2011 for on-premise and partner-hosted deployments, but it is simply named Microsoft Dynamics CRM Online for the Microsoft-hosted version. The system functionality across all three deployment options is nearly identical, but differences do exist.

The VS organization is using the on-premise deployment of Dynamics CRM 2011.

User Login

Because VS is not using Microsoft Dynamics CRM Online, users will follow different steps to log on to Microsoft Dynamics CRM. The exact steps will depend on how the Dynamics CRM system administrator set up the configuration, but the two most common logon methods are:

- Logging on from the APHIS USDA network
- Logging on at an external Internet-facing address (such as a .com or .net website address)

USDA APHIS Veterinary Services Personnel

The CRM 2011 system administrator will provide you with the website address of the EMRS 2 application in Microsoft Dynamics CRM system, which you will use to log on as follows:

Open the Internet Explorer web browser.

In the Internet Explorer Address bar, type the web address (also known as the URL) of your Microsoft Dynamics CRM site. For example, the EMRS 2 test instance has the following URL: https://emrs2test.aphis.usda.gov.

We use the **USDA eFederation** service to connect to the EMRS 2 application. At the login screen enter your user name and password.

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EMRS 2.0 Login Procedure

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EMRS 2.0 (production): *https://emrs2.aphis.usda.gov*

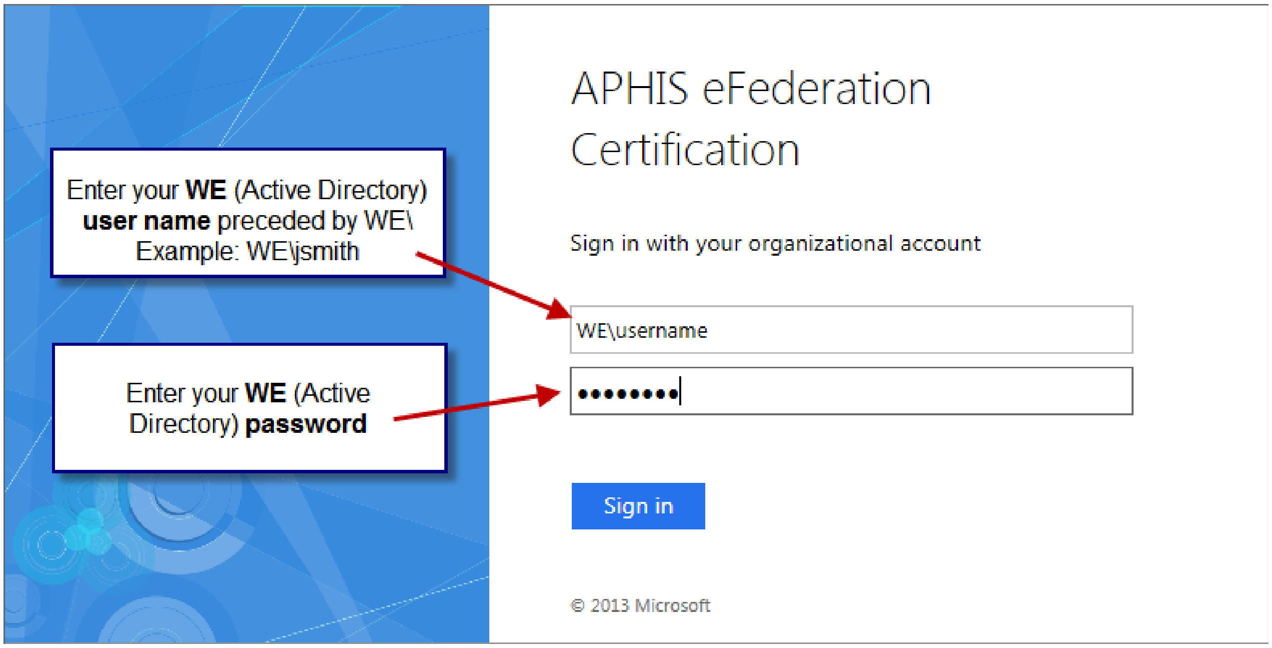
EMRS 2.0 (training): *https://emrs2t.aphis.usda.gov*

New information concerning your EMRS 2.0 login:

1. Enter your WE user name preceded by "WE\"
   example: WE\jsmith

   Note: The user name prompt may show an email address. Do not enter your email address. Instead enter your WE user name preceded by WE\, as shown in the screen shot on the following page.

2. Enter your WE password



3. Click Sign in

Need assistance?

Please contact **ATAC** for assistance with **WE user name and password** support. Please contact the **VS IT Helpdesk** for EMRS 2.0 **application support**.

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Questions or concerns, please contact ATAC.

Phone: 877-944-8457, option 3

ATAC: aphisremedy@aphis.usda.gov

VS IT Systems Helpdesk:

vsithelpdesk@aphis.usda.gov or EMRSSupport@aphis.usda.gov

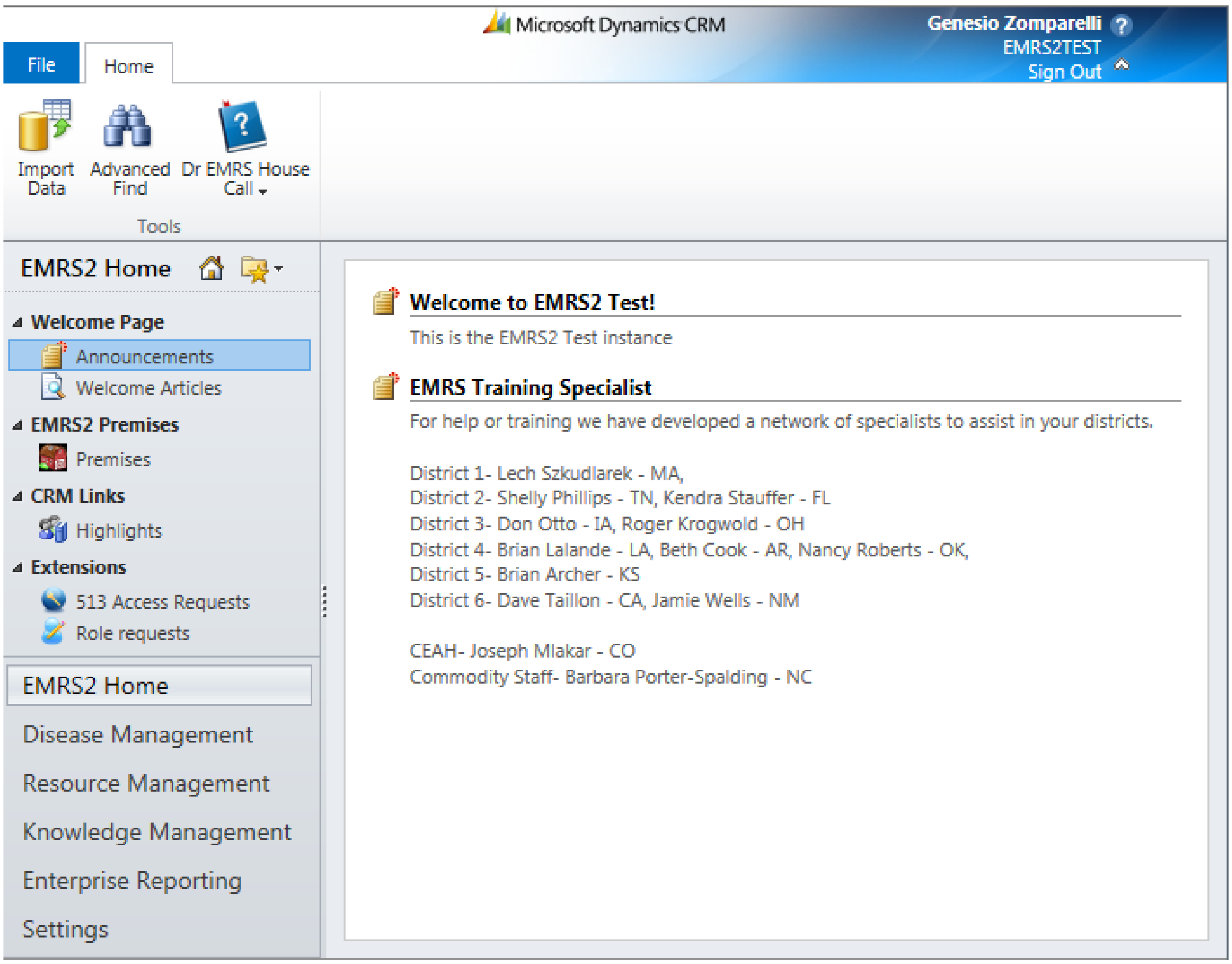
With Subject of: "VS IT Systems – EMRS 2.0"

State or Other Personnel Outside of VS

If you are logging on from an external Internet-facing address, enter your user name and password on this screen.

[Insert screenshot here]

After you sign in the EMRS2 Home Welcome page appears. It may look like the screen shown below.

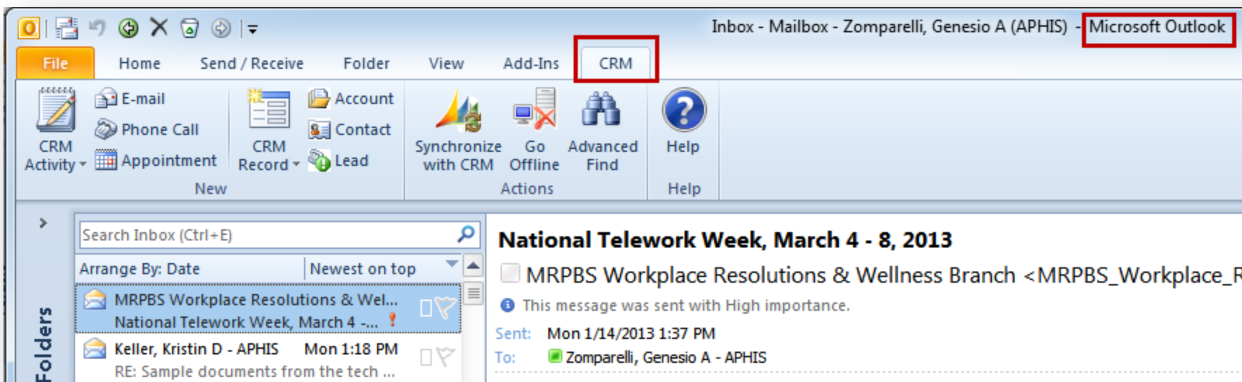


Accessing Dynamics CRM by Using Dynamics CRM for Outlook

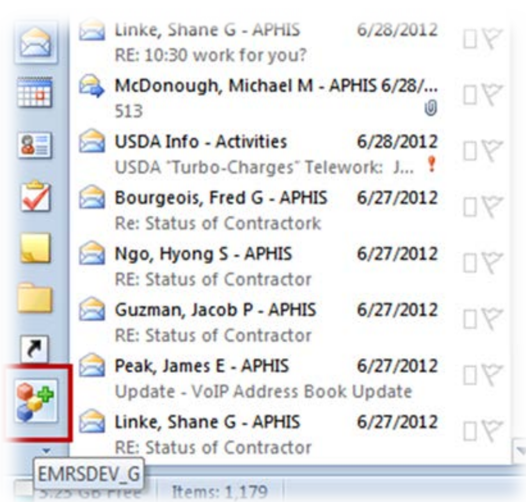
In addition to the web client, Outlook can be used to access Microsoft Dynamics CRM. Many users find accessing Microsoft Dynamics CRM within Outlook particularly convenient because they already spend a lot of time working within Outlook. The Microsoft Dynamics CRM integration with Outlook provides a single application to manage all of your investigation and task-related information. The Outlook integration of Microsoft Dynamics CRM is a unique benefit of the software that enables users to work more efficiently in a familiar software application.

Confirm that your system administrator has installed the Microsoft Dynamics CRM for Outlook software on your computer before you can view your EMRS 2 data in Outlook.

Launch Outlook. You will see that Microsoft Dynamics CRM added a CRM tab to the ribbon.



You may also notice the CRM button in your left tools navigator if you configured Outlook to display this navigator, as shown below.



In addition, you will see a CRM group with buttons such as Track and Set Regarding on the Home tab of the ribbon for the Mail, Contacts, Calendar, and Tasks modules.

We will describe how to work with the EMRS 2 application in the Outlook interface in a later section of this document.

Refer to the Appendix for details about how to configure the appropriate instance of EMRS 2 to be available in your Outlook environment.

NOTES

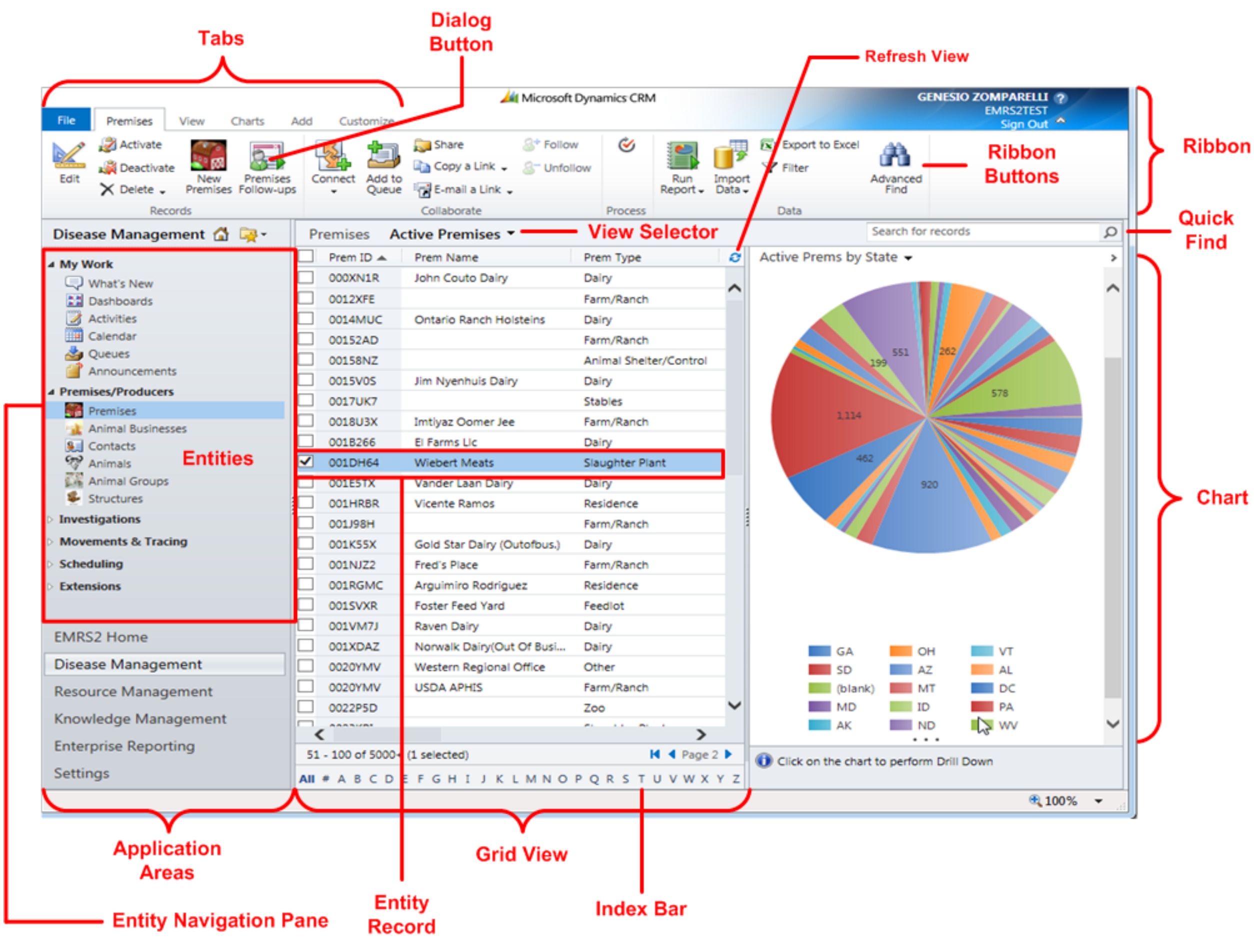
NOTES

System Navigation

If you are an experienced user of the original version of EMRS the new version may take some getting used to; but once you understand how to navigate the interface you'll find that the new version is much more intuitive to work with. In this section you'll learn how to get around in the new EMRS 2 interface.

Ribbons and Buttons and Grids, Oh My!

Before you start using EMRS to create investigations you should take some time to become familiar with the Dynamics CRM interface the application uses. A high level view of the interface is shown below.



The EMRS 2 interface consists of grids, tabs, ribbons and buttons as described below:

Ribbon and Buttons — the ribbon includes buttons (controls) and tabs that let you quickly access system actions. If you have used the Microsoft Office Suite 2010, you will recognize the ribbon because it appears in all of the Office applications as well. The ribbon is "context sensitive" because the buttons and tabs dynamically update based on what the user is doing within the system. For example, navigating to Premises will display different ribbon buttons and tabs than when you navigate to Contacts. The idea behind the ribbon is to display the most common activities to a user relative to where he or she is in the system, which will save clicks.

Entity — an entity is a single person, place, or thing about which data can be stored. It can be some unit of data that can be classified and have stated relationships to other entities. In the above screenshot the Entity Navigation Pane shows the following entities: Premises, Animal Businesses, Contacts, Animals, Animal Groups, and Structures. In Dynamics CRM entities represent the tables in a database where records are stored.

Record — data about a specific person, place, or thing stored in an entity and visible in a view or form.

Grid and Views — the grid displays the records for a selected entity. Each record set is known as a data view in Microsoft Dynamics CRM. The grid consists of rows and columns of data. At the bottom of the grid information about the number of records in the view is displayed. The grid also includes an index bar that allows you to quickly filter records in the grid based on the starting letter. In Microsoft Dynamics CRM ribbon actions are applied against the selected records in the grid. For example, if you select three records in a grid and click a button on the ribbon, Microsoft Dynamics CRM will apply that button's action to the three records you selected. *Some buttons may only act on one record at a time*.

Application Navigation Pane — this portion of the user interface provides access to the various functional areas of the EMRS 2 application. Simply click a hyperlink in the application navigation pane to view the records for that functional area.

Application Areas — each application area provides a logical grouping of Microsoft Dynamics CRM records. The Dynamics CRM interface for the EMRS 2 application has been customized to include the following application areas: EMRS2 Home, Disease Management, Resource Management, Knowledge Management, and Enterprise Reporting. Another application area called Settings is specific to Dynamics CRM and access to settings is restricted based on user roles.

The **Settings** and **Resource Management** application area may not be visible to all users and the options available in these areas may be restricted based on your assigned role and privileges. If you click on one of these application areas, Microsoft Dynamics CRM will update the application navigation pane to display the records grouped within that area based on role.

Get Started Pane — the Get Started pane displays help information about how to work with Microsoft Dynamics CRM. The help information consists of different types of content such as videos, hyperlinks to help pages, or links that launch system actions. The Get Started pane content dynamically updates with different help information depending on the type of records you are viewing. You can turn off the Get Started pane for all records by updating your personal options (Set Personal Options on page 28.)

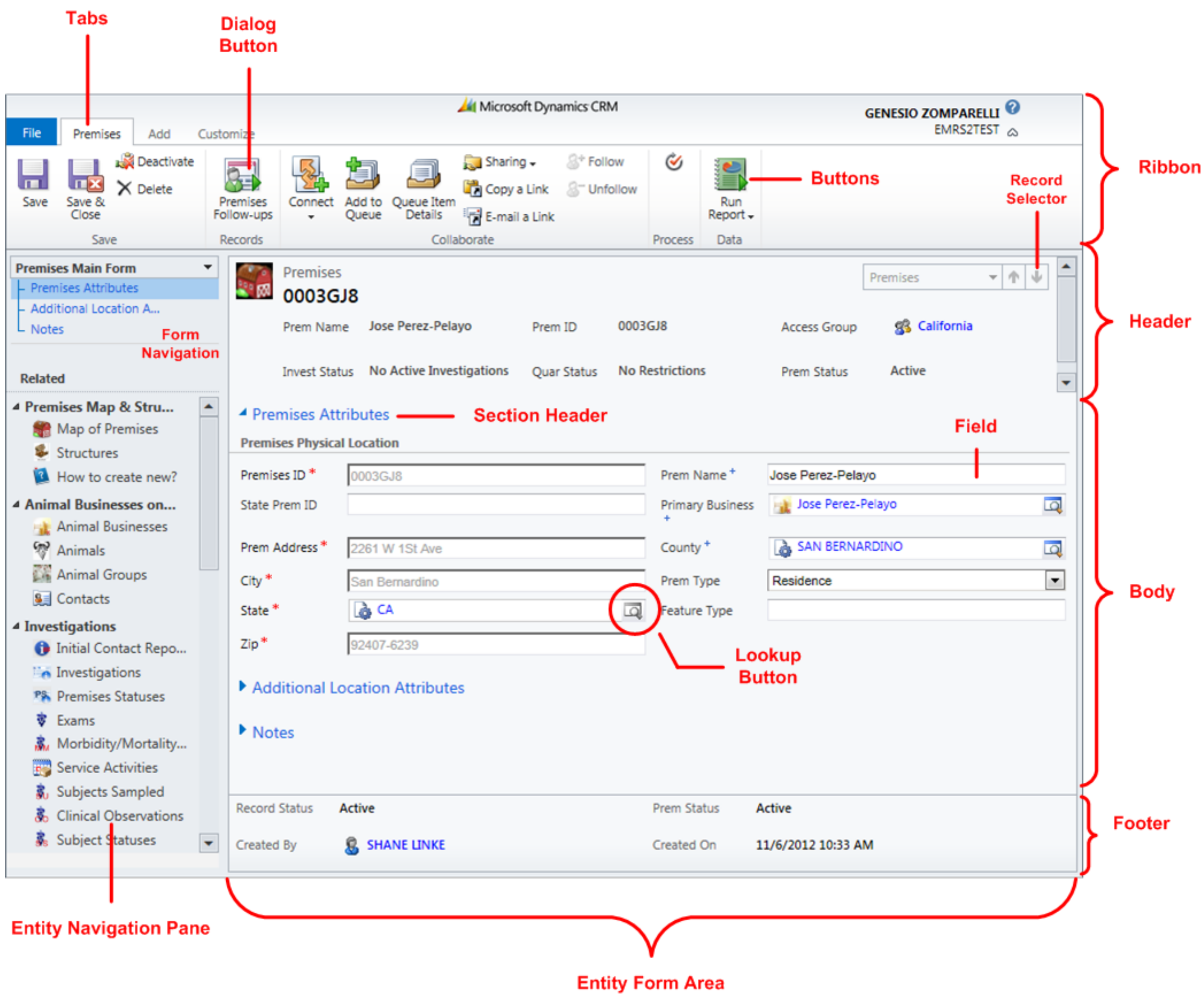
View Selector — the view selector allows you to select different views of data in the same entity.

Quick Find — the Quick Find functionality allows you to enter text to quickly search for specific records.

Chart — this area of the user interface displays charts and graphs. The data that appears in the chart is specific to the currently selected view. For example, viewing a premises chart with the Active Premises view selected will show the chart with all of the active premises in the states you are allowed to see based on your user role. The actual appearance of the chart might vary, depending on your data.

The chart can be collapsed and expanded by clicking the arrow located in the upper-right corner of the Chart area.

When you open a record in Microsoft Dynamics CRM, you'll see the record's form interface.



The record form has a ribbon and buttons and a navigator just like the grid view, except some of the buttons will be different. The components of the record form include:

Ribbon Just like the ribbon in the grid view, the ribbon on each individual record includes buttons and tabs related to that record type.

Entity Navigation Pane Similar to the application navigation pane, the entity navigation pane displays different types of Microsoft Dynamics CRM records. However, the entity navigation pane displays only those records that are *linked* to the open record. For example, clicking the **Animal Businesses** link in the entity navigation pane of a **Premises** record will display only those businesses that have the open premises record listed as their parent premises. In addition to showing *related* records, you can click the text links located under the form name to jump to specific sections of the form.

In this example, Premises LA0004 is linked to the animal business named Double R Farms, Inc.

Body The body displays the data related to the open record. The fields on the entity form are sometimes referred to as attributes. You will use a dialog to complete most of the fields on a form.

In the above screenshot you can return to the Premises Main Form by clicking on the **Premises Attributes** link in the Premises Main Form navigation pane.

Header The record header includes data about the record, and it always remains visible when the record is open even if you click one of the related entities in the navigation pane.

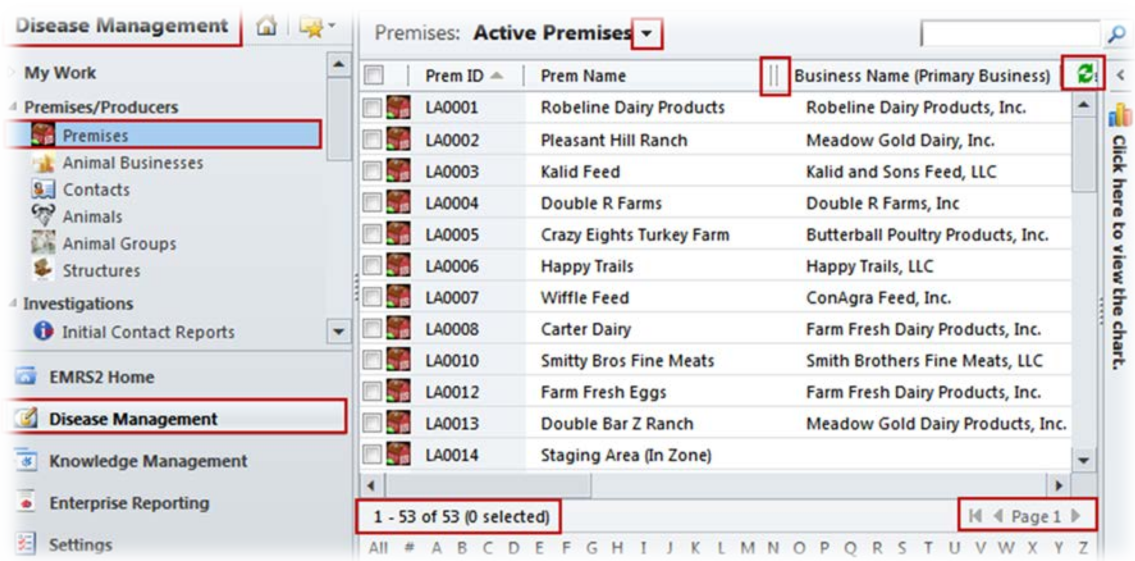
Footer Just like the header, the footer remains visible at all times when you have the record open. The footer typically displays the record status, the entity status, the name of the person who created the record, and the date the record was created.

Record Selector If you open a record from a view of data, the record selector allows you to quickly jump to other records in the view. By clicking the picklist, you can see a list of premises from the originating view and select one. In addition, you can click the Up or Down arrow to open the previous or next record from the view. You can also use the Ctrl+> (right angle bracket) keyboard shortcut to advance to the next record or Ctrl+< (left angle bracket) to move back to the previous record.

Using Views to Find Data Records

Now that you understand the main components of the Microsoft Dynamics CRM user interface, you're ready to start working with data records. Microsoft Dynamics CRM uses a view to display a list of data records in a grid. You will spend a lot of time working with views, so it's important to understand the utilities that Microsoft Dynamics CRM provides to help you work with views of data.

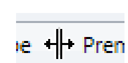
Each view can contain an unlimited number of data records. Microsoft Dynamics CRM splits the view data into multiple pages of records, so you might need to click the page arrows located in the lower-right corner of the grid to access the additional records contained in your view. If the page arrows are disabled, then the entity only has one page of records to display in the view.



Although Microsoft Dynamics CRM splits the view into multiple pages, you can view the total count of records in the view by looking in the lower-left corner of the grid. If your view contains more than 5,000 records, Microsoft Dynamics CRM will simply state that the record count is 5000+.

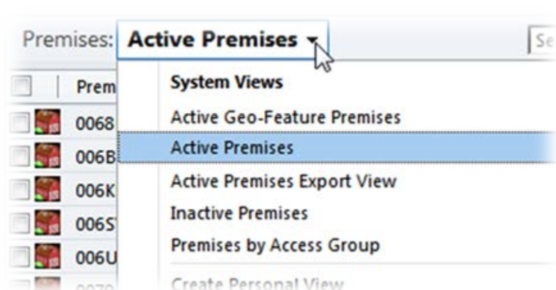
You can change the data records that appear in the grid by selecting a different view of the data. You might want to change views for various purposes, such as exporting the records from the view into Microsoft Excel for a report or editing multiple records at one time.

You can change the width of a view column by hovering the mouse over the column divider and dragging it to the left or right. Resizing the column allows you to see more or less of the record's data.



In the application areas, click the **Disease Management** button.

In the application navigation pane, click the **Premises** link.



By default, you will see a view of all of the active premises records that you own in your system.

Click the arrow in the view selector.

Microsoft Dynamics CRM displays a list of the views available for the Premises entity.

Select **Inactive Premises**.

Microsoft Dynamics CRM changes the records displayed in the grid to show all of the inactive premises in the database.

Change the view back to **Active Premises**.

Sorting Records in a View

Within each view, you can sort the records to see them in a particular order. Each view contains a default sort order, but you can change the record order in any grid. When you're looking at a view, Microsoft Dynamics CRM includes visual indicators to show how it has sorted the records.

In the column header, next to one of the column names, you will see a small triangle pointing up or down. This triangle indicates that this column's data is used to sort the view records:

- An upward-pointing triangle means that the records are displayed in ascending order (low to high or A to Z)
- A downward-pointing triangle means that the records are displayed in descending order (high to low or Z to A)

In addition to the triangle in the column heading, Microsoft Dynamics CRM shades the column a light blue color in the background to visually indicate that the view is sorting on this column.

Changing the sort order of a column is very straightforward: all you need to do is click the column heading. Clicking the column heading toggles the sort order between ascending and descending.

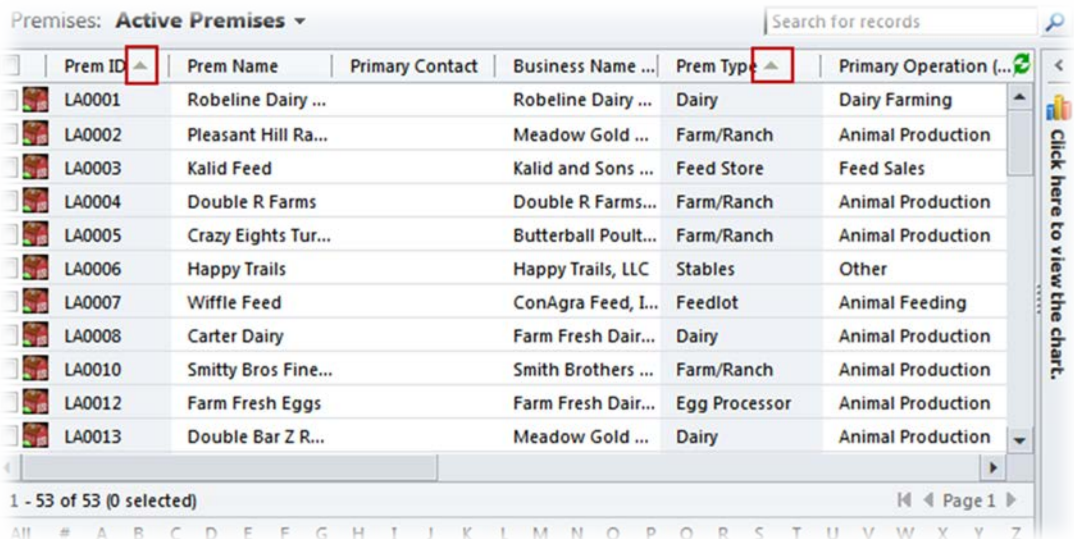
You can also sort records by more than one column at a time. In this exercise, you will sort a view by using the **Shift** key to select multiple columns.

Although you can display columns from related records in a view, *you can sort only on columns that are attributes of the primary entity in the view*. For example, if you have an Animal Business view that contains columns from the related premises records, you can sort the Animal Business view only by clicking the columns that contain Animal Business data; for example, if you click on the Prem ID column nothing will happen and no records will be sorted by that column.

1. Click the heading of the column by which you want to sort the records.
2. Microsoft Dynamics CRM adds the upward-pointing sort arrow and sorts the records in the view in ascending order.
3. **Hold down the Shift key and click the second column heading** you want to sort on.
4. Microsoft Dynamics CRM adds another upward-pointing sort arrow to this column and sorts in ascending sort order, while preserving the first sort column.

In the Animal Businesses view note that the Prem ID column comes from the Premises entity. Therefore you cannot select this column to sort in the view.

The Prem ID and Prem Type columns are shaded to indicate that they are sorted columns.



5. **While keeping the Shift key down**, click the second column heading again.

   Microsoft Dynamics CRM toggles the sort order to display the records in descending order.

Selecting and Refreshing Records in a View

You can use the buttons on the ribbon to perform actions on selected records in a view. Microsoft Dynamics CRM offers various ways to select records within a view. If you want to select one record, simply click the record row. Alternatively, you can also point to the row you want to select and then select the check box that appears on the far left. Taking either of these actions will cause Microsoft Dynamics CRM to highlight the record with a blue background to indicate which record you selected. If you want to select all of the records, select the check box that appears in the upper-left corner of the view. Microsoft Dynamics CRM will highlight all of the records that appear on the page. Deselecting the check box will deselect all of the records.

When you select the check box to select all of the records, you are only selecting all of the records on the **page**. You are not selecting all of the records in the view. For example, if your view contains 500 records and your page shows 25 records, selecting the check box will select only the 25 records displayed on the page. Some of the features in the ribbon, such as **Export To Excel** and **Send Direct E-Mail**, allow you to select all of the records from the view, but many of the features in the ribbon (such as assigning records and editing records in bulk) apply only to a single page of records. Unfortunately, in these scenarios, you will need to repeat the action on each page of records if your view contains multiple pages of records. Later in this chapter, we will explain how to display up to 250 records per page in a view (instead of the default of 25 records per page). Displaying more records per page decreases the number of times you need to repeat an action on a set of records.

If you want to select more than one record in a view (but not all of them), you can do so by pressing the **Ctrl** and **Shift** keys. This technique should be familiar to users of Microsoft Office, because other applications such as Excel and Outlook also allow users to select multiple items by holding down the **Ctrl** or **Shift** key while clicking the desired records.

As you work with the records in a view, you might find that the view does not refresh the data set as you expect. This might happen when you're working with different sets of records in multiple Internet Explorer windows or if a different user is editing the records in your view.

As a best practice, refresh the data in a view before performing any actions on the data set.

Follow these steps to manually refresh the data in a view and select multiple records in the view:

In the upper-right corner of the view, click the **Refresh** button. Microsoft Dynamics CRM refreshes the data in the view.

1. Click a record in the view. Microsoft Dynamics CRM highlights the row, indicating that the record is selected.
2. To add one record to your selection, hold down the **Ctrl** key and select another record.

   Microsoft Dynamics CRM highlights this new record as well, indicating that you've selected it.
3. To include multiple records in a selection, click one record, and then hold down the **Shift** key and select another record.

   Microsoft Dynamics CRM selects and highlights the two records you clicked and all of the records in between.

With the appropriate records selected, you can apply the desired action to the records; you can double-click on a record to open it in a form; or click on the hyperlinked (underlined) data to open the record linked to the data referenced in that column.

Data in a form can be edited if you have the appropriate privileges. Some user roles have read only privileges; other roles have edit privileges.

Editing Multiple Records in a View

As you work with various records in a view, you might want to update the data in multiple records at one time. Microsoft Dynamics CRM allows you to select multiple records in a view and edit them with one form so that you don't have to modify each record individually. This feature can provide a significant time savings if you need to modify a large number of records. Although the edit multiple records feature is very convenient, it does contain a few notable restrictions:

- You cannot edit multiple records if your role does not have sufficient privileges.
- If a particular field contains programming script behind the scenes (as configured by your system administrator), you cannot edit the data in that field while editing multiple records.
- You cannot use the edit multiple records feature to remove values from a field. You can only modify or add data to a field.
- You cannot use the edit multiple records feature to edit certain fields in Microsoft Dynamics CRM, such as the Parent Account field of the account record or the Parent Customer field of a contact record.
- The edit multiple records feature updates only the selected records on the page; you cannot use it to update all of the records in the view if the records span multiple pages.
- If a data field is read-only on the form, you cannot edit it with the multiple record edit tool.

Although you cannot edit the owner of a record by using the edit multiple records feature, you can easily change the owner of multiple records at one time by using the **Assign** button located on the ribbon.

Scenario 1: Add the Same Value to a Field for Several Records

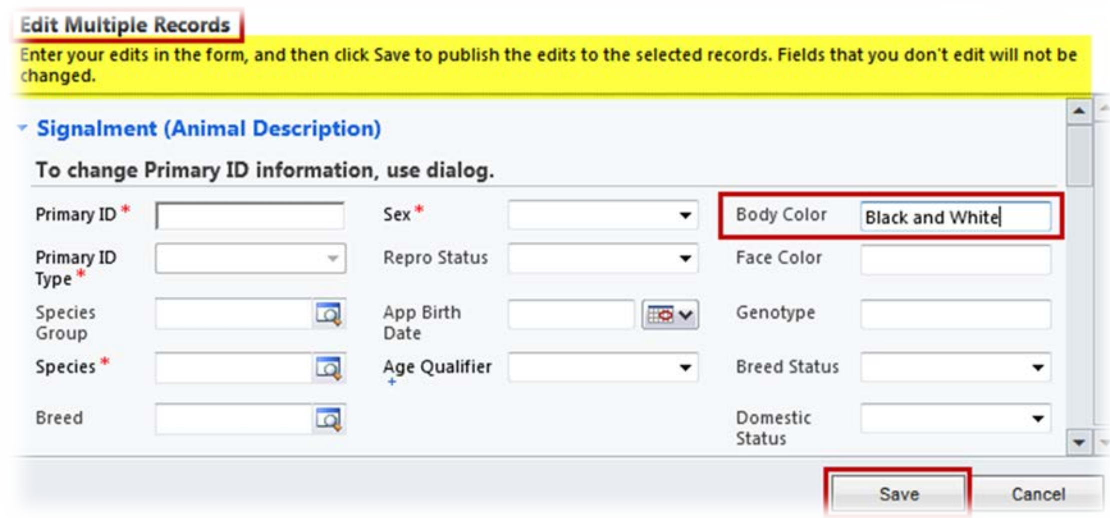
If you are adding 20 animal records and each animal has the same body color, rather than enter the body color for each animal one at a time, it is more efficient to update the **Body Color** field for all of the animals at one time. Verify that your role has the appropriate privileges to edit multiple records.

1. Under the **Premises/Producers** tab in the **Disease Management** application navigation pane select the Animals entity.
2. Select all of the animal records you want to update.

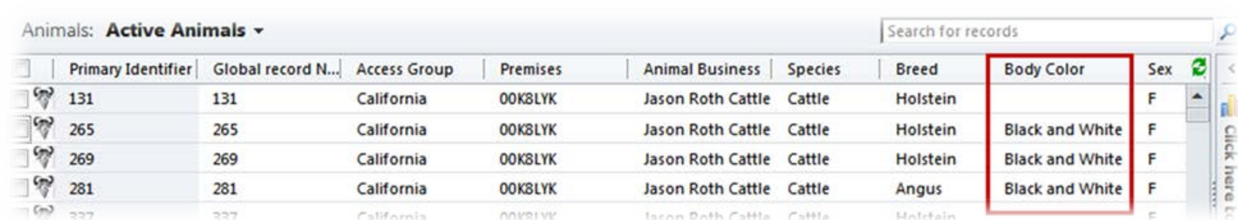
3. Click on the **Edit** button to display the Animal form.
4. The generic form will display blank fields corresponding to the fields on the actual form.
5. Enter your edits in the form and then click **Save** to publish the edits to the selected records. Fields that you don't edit will not be changed.

Microsoft Dynamics CRM updates the edited field or fields of the selected records and closes the Edit Multiple Records dialog box.

In this example we enter **Black and White** into the **Body Color** field:

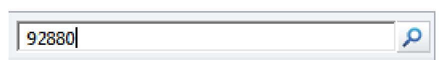


The **Active Animals** view displays **Black and White** in the **Body Color** column of the selected animals.



When you need to make the same changes to the same fields in many records editing multiple records can save a lot of time.

Using Quick Find to Search for Records in a View



Even with the sorting features in views, sometimes it can be time consuming to manually look for a particular record, especially if the view contains a large number of records. To help address this concern, Microsoft Dynamics CRM includes a **Quick Find** feature that allows you to search for records by using keywords or wildcard characters.

You can find the Quick Find search box above the grid and to the right of the view selector. To use it, enter a search phrase and press Enter on the keyboard or click the button with the magnifying glass to start the search. Even though Quick Find is simple to use, there are a few tips and tricks that will help you find records more efficiently.

- Your system administrator can configure Microsoft Dynamics CRM to search for matching records across multiple columns. For example, you could search for particular premises by name, address, or zip. You can even include custom data fields as part of the search criteria.

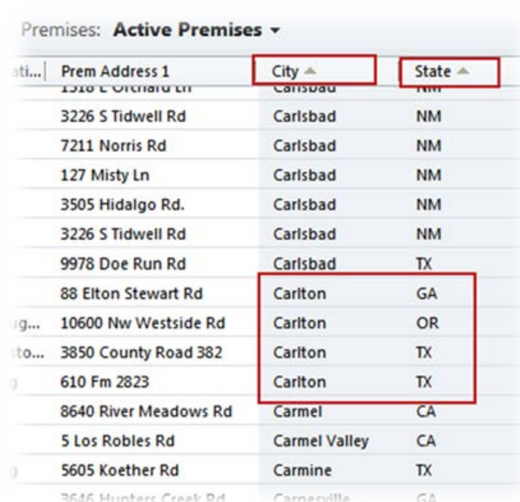
- When you enter search text, Microsoft Dynamics CRM will search for the value as it is entered. By default, it will not search for partial records. For example, if you search for a phone number by entering 555-1212 and the contact's phone number is (312) 555-1212, Microsoft Dynamics CRM will not consider that a match. It will return only those records that have 555-1212 as the start of the phone number.
- Of course, there will be times when you don't know the exact value you're searching for. In these cases, you can enter an asterisk (*) as a wildcard character in your Quick Find search. In the previous example, if you did not know the area code for the phone number, you could search for *555-1212 and Microsoft Dynamics CRM would find the (312) 555-1212 matching record, plus any other records that ended with 555-1212.

You can enter the wildcard character anywhere in your search criteria: at the beginning, in the middle, or at the end. If you can't find the record you're looking for, be sure to try different combinations with the asterisk wildcard. **Note that the Quick Find feature is not case sensitive in its searches.**

- If you start **a Quick Find** search when you're working with a specific view, such as **Active Premises**, you might expect that Microsoft Dynamics CRM would search for matching records only within the Active Premises view. However, Quick Find always searches for matching records across all active records for that entity. **Quick Find ignores inactive records**.

Using the Index Bar to Filter Records

To filter records within the current view, you can click the letters that appear at the bottom of the view (referred to as the **index bar**). Clicking a letter will update the view to show *only those records whose entry in the current sort column starts with the selected letter*. For example, to see premises in all states that start with **C** and sort all cities in each state, click on the **State** column header to sort the states, click on **C** in the index bar, then hold down the **Shift** key and click on the **City** column header. Click on **Premises** in the navigation pane to clear the sorted columns.



To display all cities in every state that start with **C**:

1. Click on the **City** column to sort all records in ascending order by **City**.
2. Hold down the **Shift** key and click on the **State** column to sort in ascending order by state.
3. Click on **C** in the index bar to display only the cities that begin with **C** sorted by **State**.

The index bar can be tricky to use. Remember that it operates only on the column that was sorted first when the **Shift** key is used; otherwise it operates on the current sorted column. To clear the sort, click on the entity in the left navigation area to refresh the view.

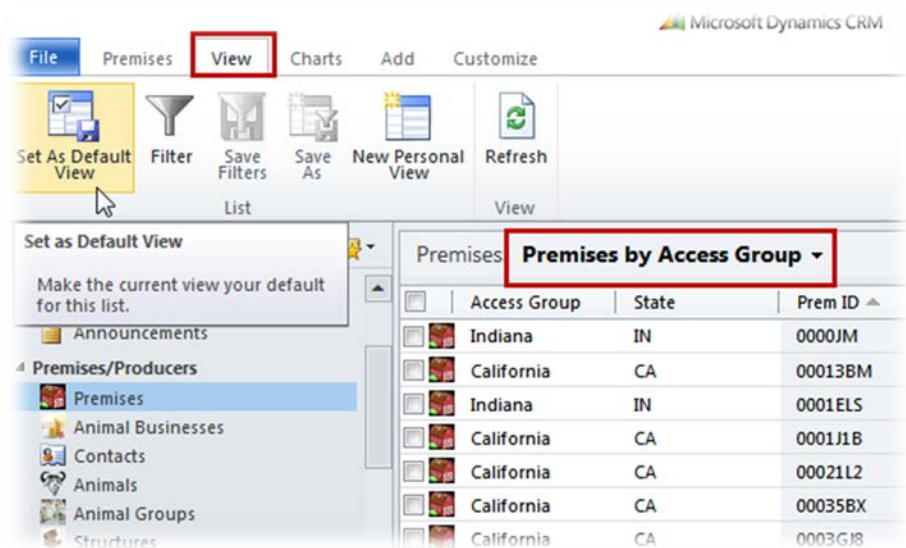
Scenario 2: Set My Default Personal View

For each type of record, your system administrator can specify the default view that you see when you navigate to a list of those records. However, Microsoft Dynamics CRM also allows each user to specify his or her own personal default view independent of the system administrator's settings. You might find that using this feature saves you dozens of mouse clicks per day.

The default view loads first for each web browsing session; however, if you set a view as your default personal view then this view will always load first for every browser session until you select a different view as a default personal view.

Follow these steps to set your default personal view for the **Premises** entity:

1. Navigate to the **Premises** view. The default view for Premises is **Active Premises**, so you will see that first. Let's assume that you want to change the default view (just for you) to **Premises by Access Group**.
2. Click the view selector and select **Premises by Access Group**.
3. On the ribbon, click the **View** tab.



4. Click the **Set as Default View** button.

You have now set this view as your personal default for **Premises**. The next time you log on to Microsoft Dynamics CRM and navigate to **Premises**, you will see the **Premises by Access Group** first.

5. Let's see how the default view works within a single web browsing session. Click the view selector and select **Active Premises**.
6. In the application navigation pane, click **Animal Business**. Now let's navigate back to **Premises** to see which view appears first.
7. In the application navigation pane, click **Premises**.

You will see the **Premises by Access Group** view first, even though the **Active Premises** view was the last view you selected before selecting the **Animal Business** view. Microsoft Dynamics CRM will always display your default personal view first even if you leave the browsing session and return later.

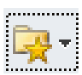
8. Close the Internet Explorer window, open a new window, and access Microsoft Dynamics CRM.
9. Navigate to the **Premises** views, and you will see the **Premises by Access Group** view first (your default personal view).

When you set a view to be your default personal view it will always be displayed first for the current browser session and all future browser sessions.

Scenario 3: A Quick Way to See the Records You Most Frequently Use

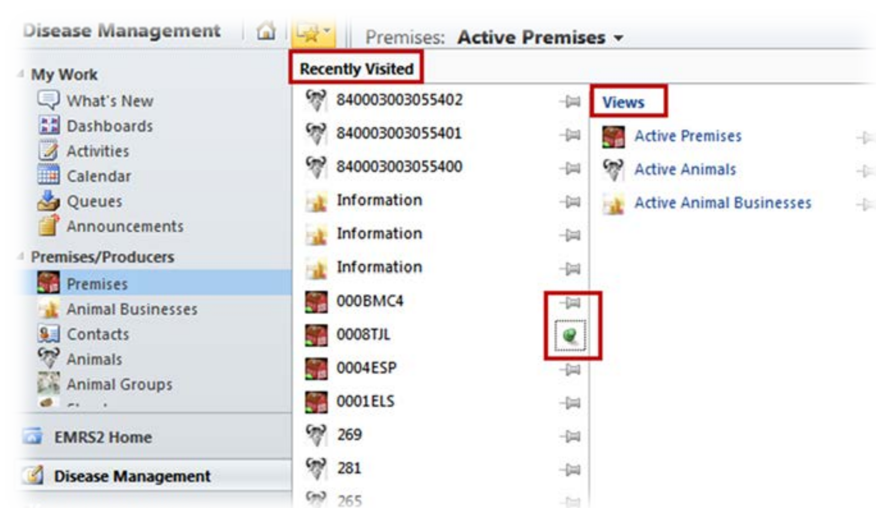
As you work with the EMRS 2 application in Microsoft Dynamics CRM, you will probably find that you frequently use the same records or views again and again. Microsoft Dynamics CRM includes *a recently visited* feature that allows you to quickly access records and views you use most often.

As you would expect, the recently visited section keeps track of the various records and views you have worked with recently. In addition, as with the other Office applications that include this type of recently used functionality, you can pin specific views or records so that they always remain in your recently visited list.

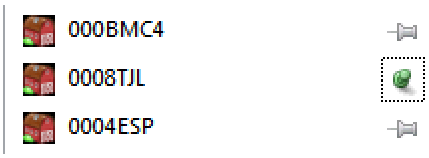


Follow these steps to access the recently visited list and pin a view for future quick access.

Click the **Recently Visited** button, which is just below the ribbon adjacent to the **Home Page** icon.



A new menu appears, and you will see two lists of records and views. The left column lists your recently visited records, and the right column lists your recently visited views. Both columns also include an icon of the record or view type so that you can visually determine which type of entity the record or view corresponds to.



Click one of the gray pin icons to permanently pin that record or view. After you click the pin, the pin icon will update by turning green and changing to look like it is standing upright. That pinned record or view will always remain in your recently visited list.

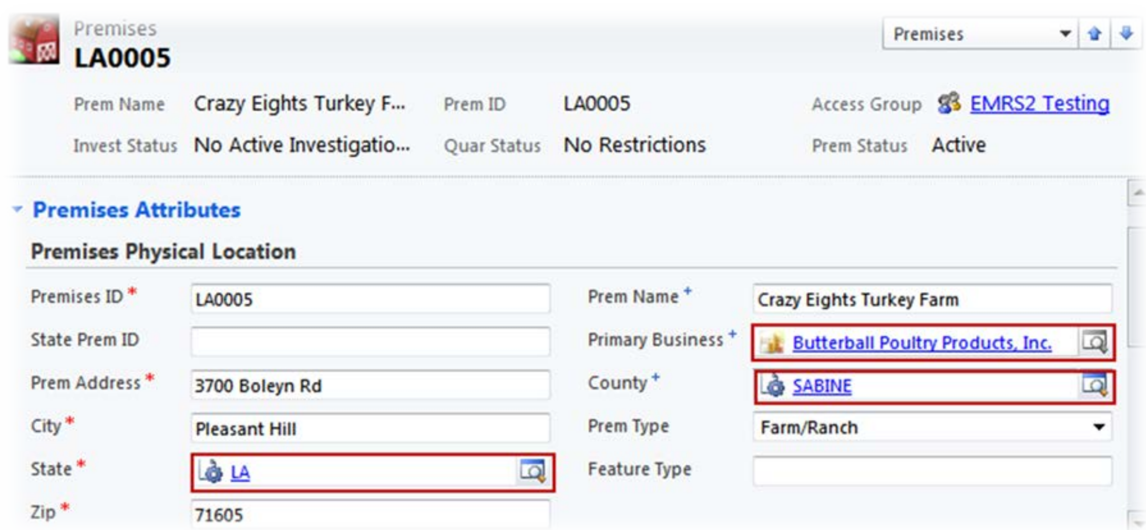
To load the record or view from the recently visited list, simply click its name. To unpin a record or view, click the green pin icon to unpin the record or view from your recently visited list.

You can click the **Home** button located to the left of the recently visited button at any time to return to your default home page.

Lookups and Automatic Resolution

One of the main benefits of using EMRS 2 in Microsoft Dynamics CRM is that the software allows you to create relationships between records in the database. These relationships allow you to link the different types of data about your premises, animal businesses, animals, structures, investigations, exams, lab submissions, and other records you work with, and to see how they interact with each other. The Dynamics CRM interface displays the link between two records by using a lookup.

The **Premises** form, for example, includes three lookups: one for the **Primary Business**, one for the **State**, and one for the **County**.



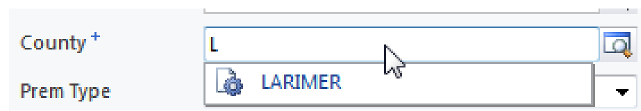
You can visually determine that a field is a lookup because:

- The text in the field is hyperlinked (blue and underlined).
- The icon to the left of the text indicates the entity type of the linked record.
- The field includes an icon with a window and a magnifying glass.

Clicking the hyperlinked text in the field will launch a new window displaying the linked record. Unlike the other fields on the form, in which you simply enter data into the field, lookup fields require you to select a record to link to.

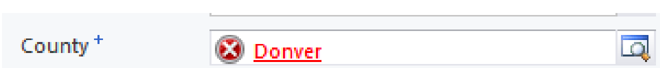
You can link records in the lookup field by using one of three techniques:

- **Use the Look Up Records dialog box** To use this technique, click the lookup icon. Microsoft Dynamics CRM will then launch the Look Up Records dialog box, which you can use to search for and select a specific record.
- **Use automatic resolution** To use this technique, simply start typing the name of the linked record in the lookup field. After you enter all (or a portion) of the linked record's name, click a different form field or press the Tab key. Microsoft Dynamics CRM will then try to automatically resolve your entry to an existing record.
- **Select recently used** As you start typing in a lookup field, you might notice that a list of records automatically appears under the lookup field. This list of records is known as the most recently used list. To choose one of these records, simply click the one you want.



The automatic resolution feature in lookups can provide a significant time savings when you work with many different records. If you want to manually remove a record from the most recently used list, point to it with your mouse and click the Delete button.

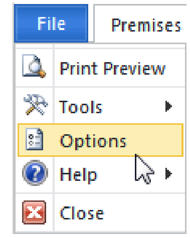
Microsoft Dynamics CRM will try to match records in the lookup by using the find fields of the entity. The record name is typically included as a find field, but your administrator might configure additional find fields that you can use with automatic resolution. If Microsoft Dynamics CRM finds just one matching record during the automatic resolution, it will populate the lookup field with a link to that record. If more than one match is found, the lookup field will display a yellow match icon and color the text you entered as red. Click the yellow match icon to view the potential matches, and then select the record you want. Microsoft Dynamics CRM will then use that value for the lookup field.



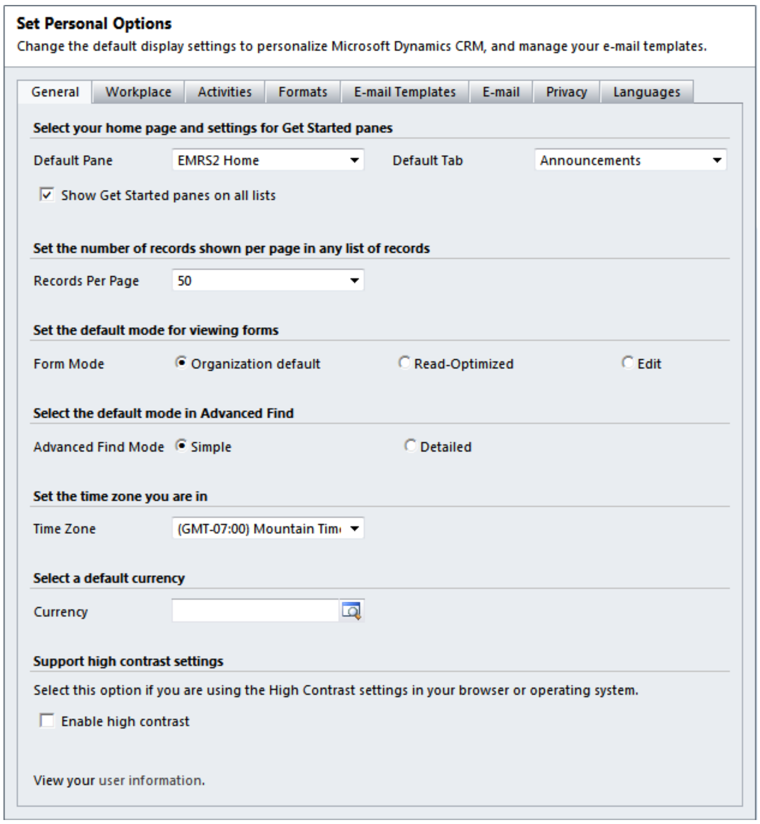
If Microsoft Dynamics CRM does not find any potential matches, it will color the text red and display a red circle with a white X.

If you want to remove a value from a lookup field, you can select the white portion of the field (without clicking the hyperlinked text) and then press the Backspace key or Delete key.

Set Personal Options



Microsoft Dynamics CRM allows you to set personal options to modify the user interface. You can access your personal options by clicking the **File** tab in the ribbon and then clicking **Options** to open the **Set Personal Options** dialog box. Although we won't review all of the personal options available, we will look at a few common configuration options.



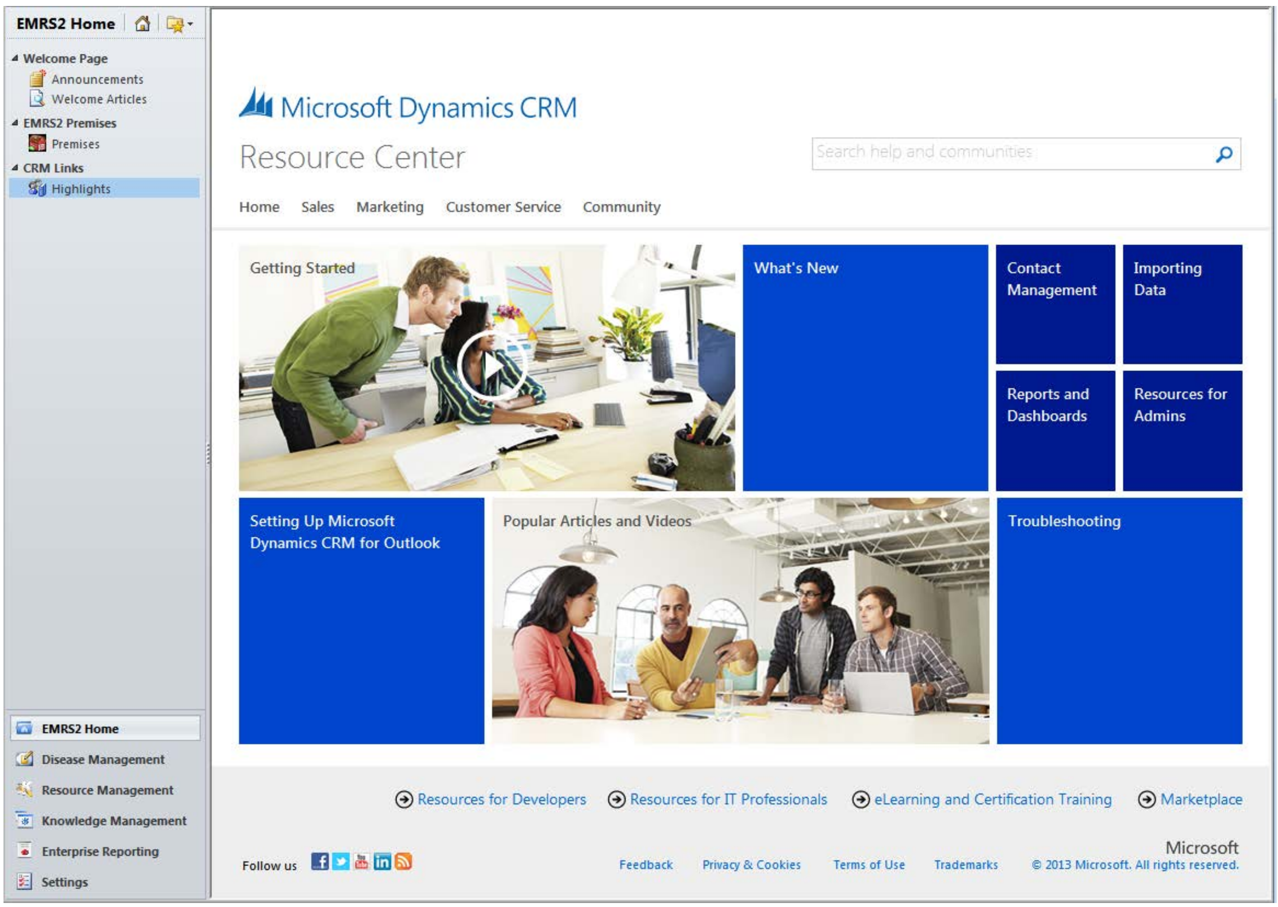
On the **General** tab, you can specify the following:

- **Default Pane** By changing this selection, you can determine which page Microsoft Dynamics CRM will start on after you log on with the web client. Select the Default Pane and Default Tab you use most frequently.
- **Show Get Started panes on all lists** If you want to turn off the Get Started panes throughout the entire system, deselect this check box.
- **Records Per Page** As we mentioned earlier, you might want to change the number of records that appear on a page. By displaying more records on a page, you can apply actions to a larger data set. However, you should be aware that users with a large number of records per page might experience slower performance as the page loads, so use caution with this setting.
- **Form Mode** You may select how you want to display forms by either accepting the Organization default, or Read-Optimized, or Edit (if you have edit privileges).
- **Time zone** Be sure to select the correct time zone to match the time zone of your computer. If this time zone setting does not match the time zone on your computer, you might find that appointments synchronized to Outlook are shifted by a few hours.

On the Workplace tab, you can select which application areas to display in the navigation pane. This setting will appear only to you as an individual user; it will not apply to all users in the system. Therefore, feel free to set up the Workplace area in whatever manner is most comfortable for you. In this exercise, you will modify your Workplace pane to include new areas of the user interface.

The Resource Center

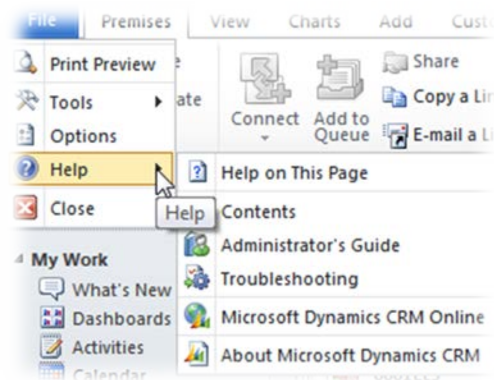
Microsoft Dynamics CRM includes a **Resource Center** that provides additional information about the software. To access the Resource Center, simply click Highlights under CRM Links in the EMRS2 Home application navigation pane. The Resource Center contains dynamic content hosted on the Microsoft servers, and Microsoft provides continual updates to this content. You will need an Internet connection to access content from the Resource Center.



In addition to articles about using the software, the Resource Center contains links to other Microsoft Dynamics CRM resources such as downloads, support information, online communities, and documentation.

Help in Microsoft Dynamics CRM

Although many EMRS 2 users have said that Microsoft Dynamics CRM is intuitive and easy to learn, you might have questions about the software. Fortunately, Microsoft Dynamics CRM includes help guides for end users as well as for administrators. To access help, you can click the Help button that is always located in the upper-right corner of the screen.

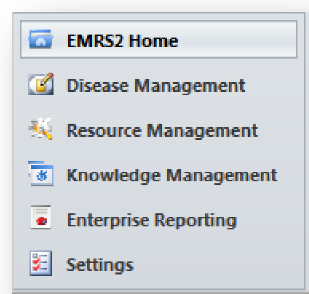


Alternatively, you can access the help information by clicking the **File** tab on the ribbon and then clicking **Help** on the submenu.

Microsoft Dynamics CRM Help is usually *context sensitive*, which means the software can show you the portion of the help content most relevant to the page you're currently viewing. However, because of the extensive customization we have done with the environment the help screens may not be able to help with customized parts of the application.

The developers can customize the help content that appears in Microsoft Dynamics CRM to include more specific instructions about your unique Microsoft Dynamics CRM deployment.

The EMRS 2 Application Areas (Modules)



Out of the box, Microsoft Dynamics CRM was designed for businesses to manage accounts, contacts, activities and tasks related to customers and clients — hence the name *Customer* Relationship Management. We used the Dynamics CRM platform as the foundation upon which we would build the EMRS 2 application. We *extended* the platform and developed a highly customized interface that is organized to match the four modules of the Emergency Management Response System. Thus the customized Dynamics XRM interface includes the following application navigation areas:

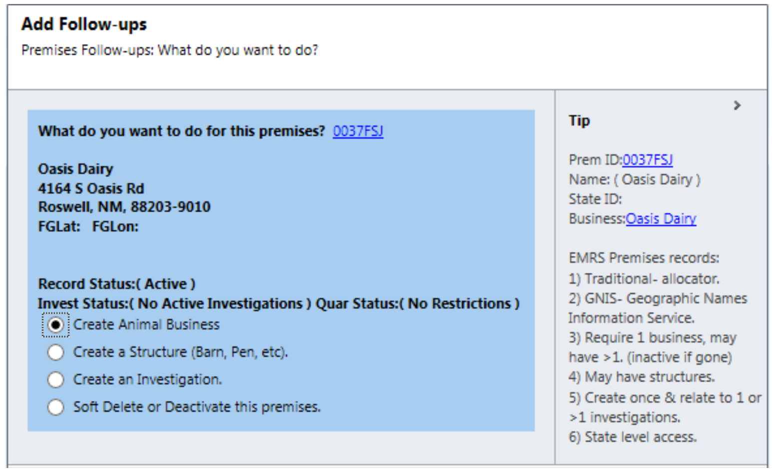
- EMRS2 Home
- Disease Management
- Resource Management
- Knowledge Management
- Enterprise Reporting

The **Settings** application area is part of the out-of-the-box CRM software. We did not customize this application area but we restricted who has access to the options available in the **Settings** application.

We will describe each of the application areas in various sections of this document.

Because we *eXtended* the Dynamics CRM interface with customized views and entities, we sometimes call the customized version Dynamics **XRM** instead of **CRM**.

Working with Dialogs



The core functionality of the EMRS 2 application depends on the interrelationships between the various entities used in the application and these relationships must be maintained as you work through the business processes involved in an animal disease investigation. The main entities used in EMRS 2 are premises, businesses, animals, structures, and investigations.

As you know, a premises location is the place where animals are maintained and where animal disease incidents are discovered and reported. In most cases the animals are owned by a business and the animals are usually kept in a structure located on the premises. If an animal disease is identified in one or more of the animals on a premises a veterinarian may report the incident by completing an initial contact report (ICR). This report may be converted into an investigation if the FADD decides that an investigation is required. In this scenario the relationships between the premises, the animal business, the animals, the disease, the ICR and the investigation must be maintained. In the EMRS 2 application this complex requirement is achieved through the use of dialogs that guide the user in the creation of the various records required to complete an investigation of the incident. By using dialogs you can focus on getting the necessary data into the system as quickly as possible without having to be concerned about ensuring that you are starting an investigation for the proper premises. Simply put, dialogs take care of the relationships between entities automatically so you can focus on your job instead of thinking about how one entity relates to another.

Understanding Dialogs

Dialogs are the synchronous/interactive processes used in the EMRS 2 application to collect and process information by using step-by-step scripts or “wizards” that guide you through a process. For example, developers can create dialogs to act as a guide for regional epidemiologists to create premises records and initial contact reports. Similarly, developers can create dialogs for standardizing investigations and manage lab submission records and monitor samples and their respective test results.

Dialogs used in EMRS 2 consist of simple pop-up screens that prompt you to make a selection or input data related to a specific entity. They work much like the wizards used in popular programs that most users are familiar with. You simply provide the data and the dialog generates the record in the background and maintains the necessary relationships between entities.

The EMRS 2 application uses dialogs to make it easy for you to enter data quickly without having to think about how the data relates to other data in the system.

Tips for Using Dialogs

As you do your work with the EMRS 2 application in Dynamics XRM you will most likely use over 100 different dialogs to complete the forms used for registering premises, doing investigations, herd exams, lab submissions and so on. You will discover just how useful dialogs can be to help you get your work done as quickly and as accurately as possible.

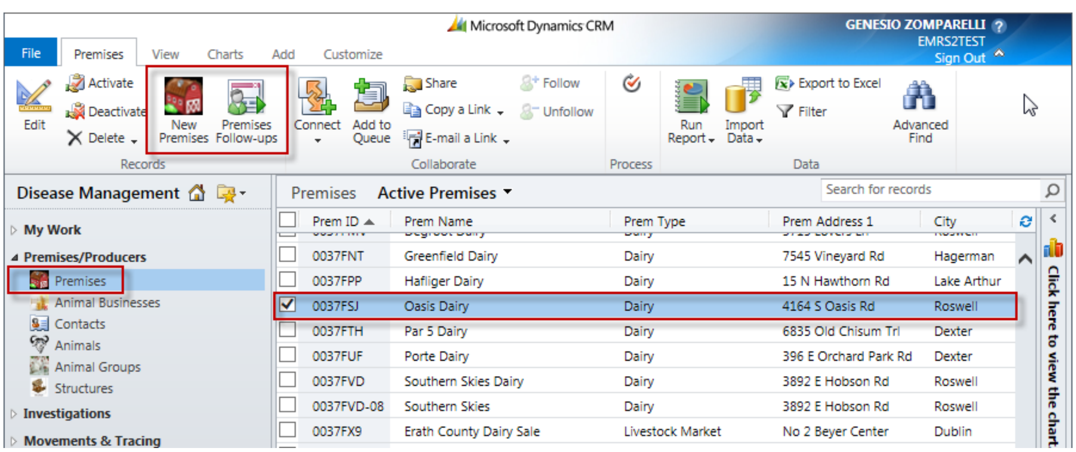
In this manual you will learn how to work with specific dialogs. In this section we provide some general guidelines for using dialogs that will apply to all of the dialogs you will be using.

All Dynamics XRM dialogs will have the following characteristics:

- Dialogs present you with a wizard-like interface and always require you to provide input to start and run the dialog to completion.
- Dialogs require your interaction (in other words, they always run *synchronously*).
- Dialogs cannot be triggered automatically; in other words they can only be started by you.
- Dialogs can query CRM data while they are running and present this data to you in a prompt.
- Dialogs can call other dialogs (called *child* dialogs) and pass data to them during the process.
- Dialogs are based on an entity record you must select and *only act on one record at a time*.

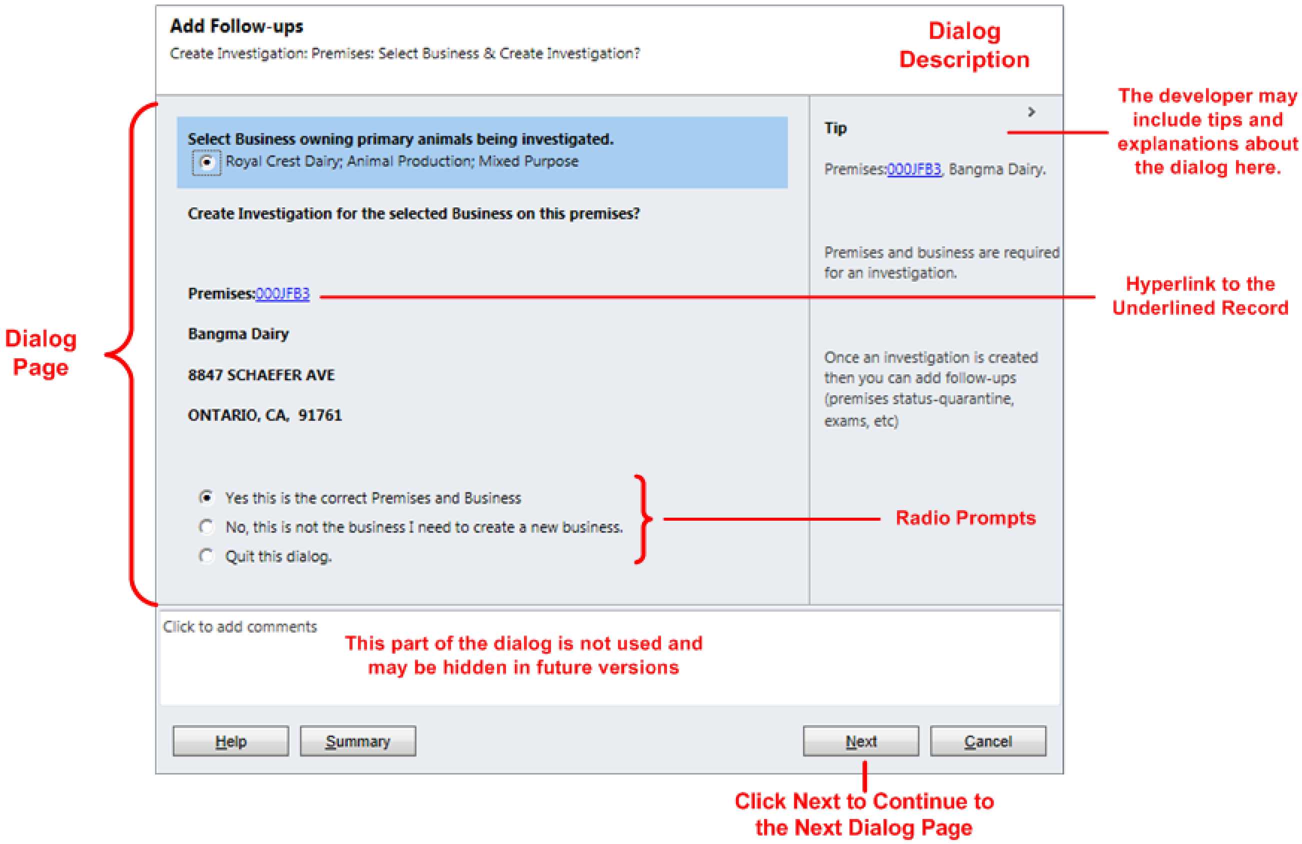
In the EMRS 2 application you start a dialog process either by selecting a record in a grid view and clicking on the **Dialog** button in the grid ribbon; or by opening a record and clicking on the **Dialog** button in the form ribbon. When a dialog is running you are required to respond to the prompts they present.

Dialog buttons will appear faded if there is no record selected. Dialog buttons may have different names, based on the entity being viewed. For example, in the **Premises** ribbon two dialog buttons are named **New Premises** and **Premises Follow-ups**.

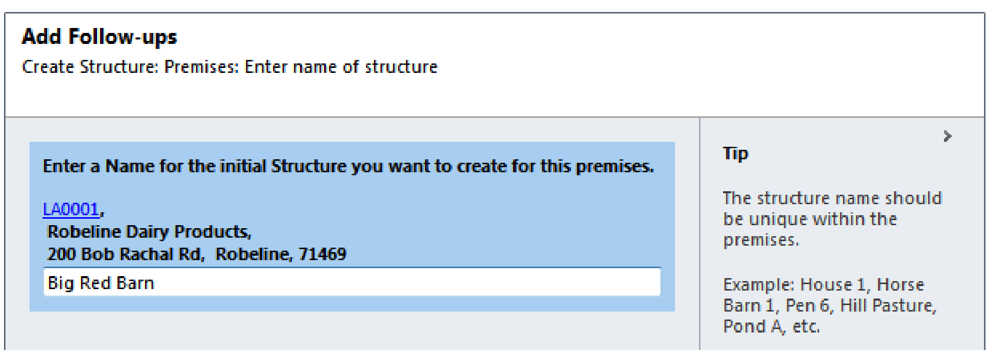


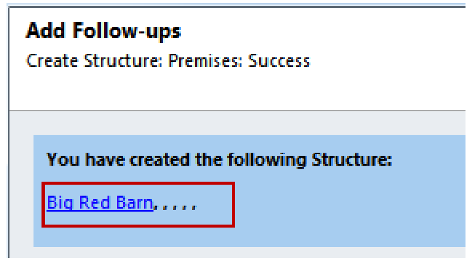
Once a dialog gathers the data you enter, it can create, update and assign records, send e-mails, include conditional logic and perform many functions to automate the creation of records and maintain relationships and connections to other records.

This is the dialog you will see when you decide to create a new investigation on a premises record:



As you do your work in the EMRS 2 application you will use a variety of dialogs to help you get your work done quickly and accurately. Some dialogs will prompt you to make a choice by clicking on a radio button; other dialogs will require you to type data into a field; and others will require you to select from a droplist or do a lookup.



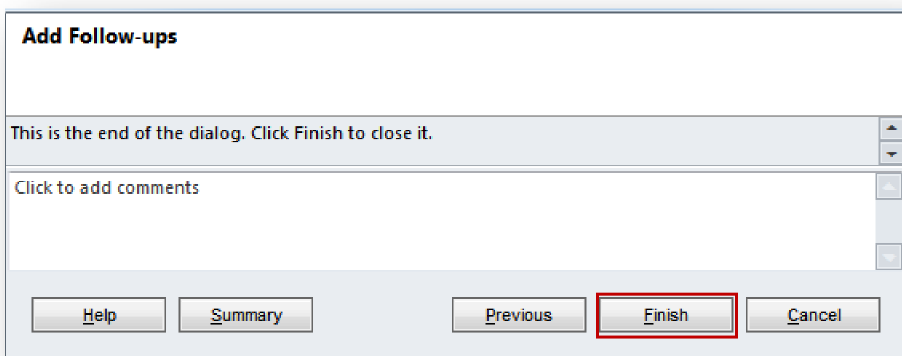


Some dialogs may include several pages of prompts for you to complete. You can tell if there are more pages to complete when you see the **Next** button in the bottom right corner of the dialog. When you have finished entering data in a dialog you will see the **Finish** button instead of the **Next** button in the bottom right corner of the dialog.

The main purpose of dialogs is to create new records. When the dialog creates the record it will include a hyperlink to the record form. You may click on the link to display the new record in the form in a new window. This allows you to review the data in the form or make additional edits, if necessary.

If you click on the link to open the form the dialog is still running in the background. When you are done working in the form click on **Save & Close** to save changes and close the form to return to the dialog.

It is often necessary to click on the **Finish** button when you are done with the dialog. This will end the dialog session and close the dialog log that runs in the background.

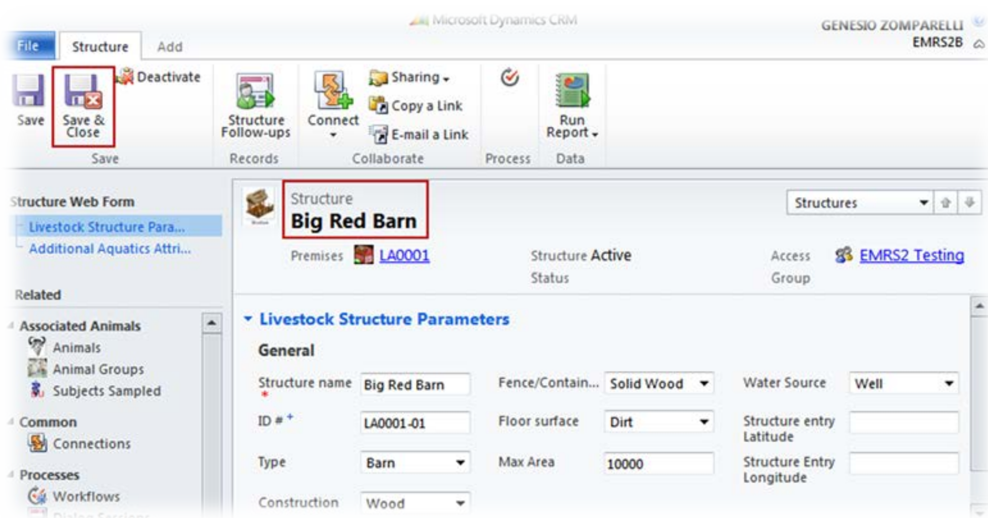


If you discover that you made a mistake when entering data in a dialog page you may click on the **Previous** button to return to the page where you made the mistake and make the necessary correction. Then click **Next** to continue. *This will not work if the record was already created*.

Although you can click on the **Previous** button after a record is created to edit the data in the dialog, this does not edit the record you just created (you'll have to open the actual record to do that). Instead you will be creating a new record with different data. This may be useful if you want to create multiple records without having to leave the dialog, but just remember that you cannot click on the **Previous** button to edit data in a record that was already created by the dialog.

Watch Your Open Windows

We mentioned previously that when you create a new record you can click on the link to open the record in a form to do additional editing. When you do this the dialog is still running.

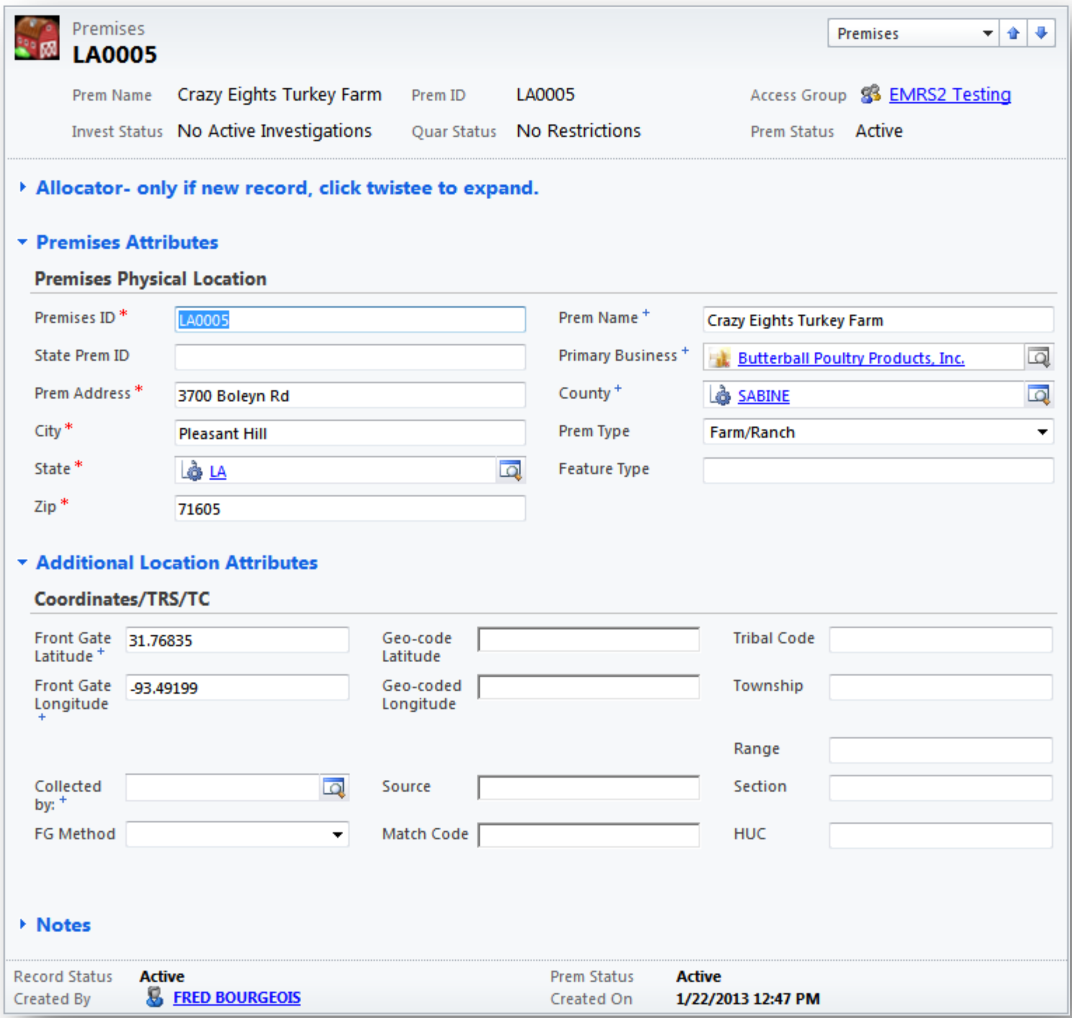


When you are finished editing the data in the form make sure you click on **Save & Close** to save your edits and close the form. You should see the dialog page you were on before you opened the form. Click **Next** to continue working on the dialog and click **Finish** to end the dialog session.

It is always a good idea to think about the number of windows you open when you are working through a dialog session. Close windows that you no longer need and be sure you save changes.

Behind Every Dialog There is a Form

Most of the dialogs you will be using in EMRS 2 are really just quick ways to get data into a form. After you create a new record using a dialog you can always go back later and open the record in a form. The purpose of the dialog is to keep you from getting bogged down entering data into every field on a form. When you open the form you can always make changes to the data you entered using the dialog as well as complete some of the other fields that were not populated using the dialog.



NOTES

NOTES

Premises and Producers

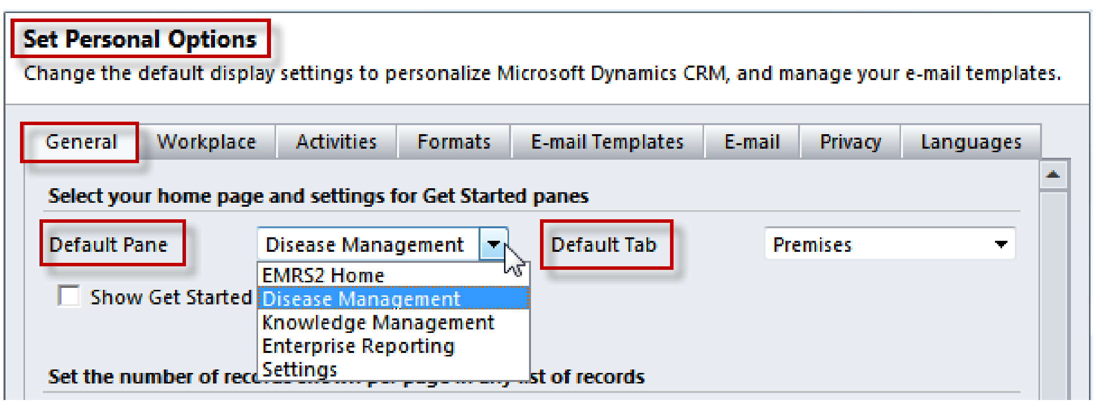
Now that you understand how to get around in the Dynamics XRM interface you are ready to start using the EMRS 2 application to manage your Foreign Animal Disease (FAD) investigations. We mentioned that in Dynamics XRM the EMRS 2 application is organized into five application areas:

- EMRS2 Home
- Disease Management
- Resource Management
- Knowledge Management
- Enterprise Reporting

Set Personal Options

The **EMRS2 Home** application area is the default application area. This is where you will see your Welcome Page and Announcements. The Microsoft Dynamics CRM Resource Center is also found here in Highlights under the CRM links tab. You will be able to view all of your premises records in the EMRS2 Home application area under the EMRS 2 Premises tab.

You may change your default home page by selecting a different application area in the **Default Pane** droplist under the **General** tab in the **Set Personal Options** dialog that you access by selecting **Options** under the **File** jewel. If you change your Default Pane you must also select the **Default Tab** under the Default Tab droplist.



Most of your work will be done in the **Disease Management** application area. This area is organized to help you follow your business process to accomplish the steps necessary to complete a Foreign Animal Disease (FAD) investigation. This application area is organized into four functional areas:

- Premises/Producers
- Investigations
- Movements & Tracing
- Extensions (Epi Interview, Epi Response)

Premises, Businesses, and Animals

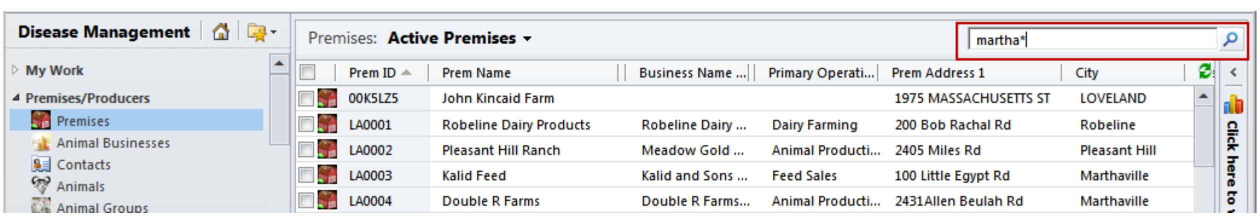
A premises is a place where animals and animal-related products and by-products are kept, maintained, processed and/or treated. Animals are usually owned by a business. A premises location must have a valid address; or it must be located using geographical coordinates. A FAD investigation involves a visit to a premises location where an incident was reported.

Checklist before creating a new premises record:

- Before you create a new premises record verify that the record does not already exist in the EMRS 2 database by doing a quick search in the Premises grid
- You can search by Prem ID if you have it; or try searching on other attributes
- If a premises record does not exist for the premises of interest then create a new record
- You will need to know the name of your access group (this is usually your state, unless there are special circumstances)
- You will need a valid street address, city, and zip code (unless an exception is required)
- A Premises Name is helpful but not required

Scenario 4: Search for a Premises Record

The Premises grid is displayed by clicking on the **Premises** link under the **EMRS2 Premises** tab in the EMRS2 Home page navigation pane. It can also be displayed by clicking on the **Premises** link under the **Premises/Producers** tab in the **Disease Management** navigation pane.



You can search for an existing premises record using the **Quick Search** tool. Let's say you know the name of the city the premises is in and you have a street address. Type the city name in the quick search box and click on the search icon to search for all of the premises in the city.

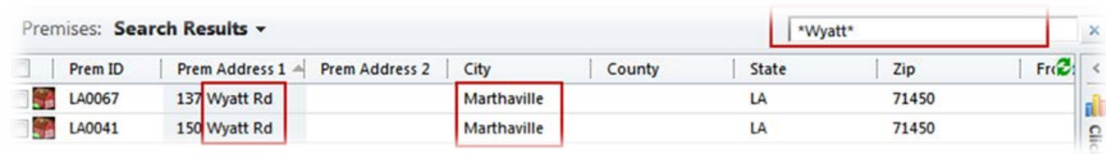
Wildcard Searches

If the city name is long or difficult to spell, type the first few letters of the name followed by an asterisk (*). This will return all cities that start with the characters you entered. Use the asterisk (*) wildcard to substitute for any number of characters.

If the search returned a lot of premises in the city you can narrow the list by including address information in a search on the results. For example if you know the name of the street you can precede the name with an * and follow the name with an *. This would return all the addresses on that street.

This is really all you need to know to do quick searches. On page 106 we'll show you how to use the **Advanced Find** tool to do more complicated queries, which can then be saved as personal views.

We found all of the premises records on Wyatt Rd in the city of Marthaville in the state Louisiana.



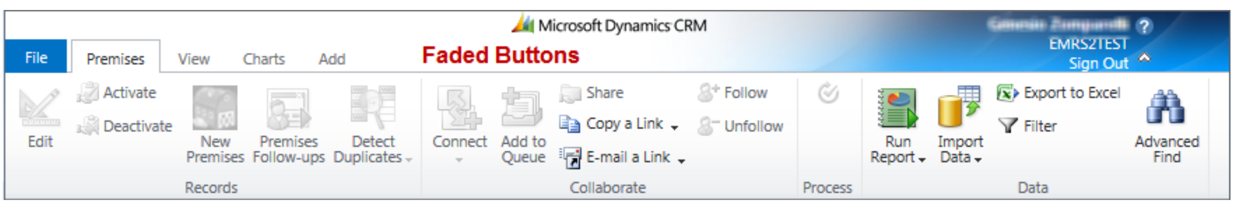
If the premises you are interested in is not found, then you will have to create a new premises record. This is done by clicking on the **Premises Follow-ups** button in the grid ribbon.

Premises Dialogs

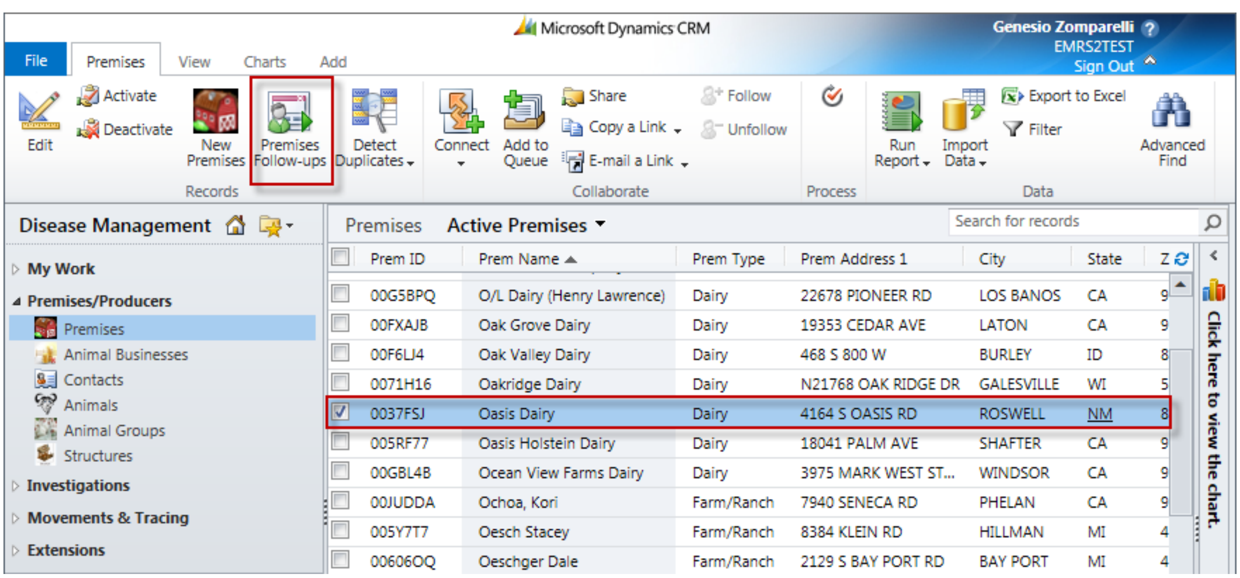
You will use dialogs to create a new premises record. Premises dialogs are launched by clicking on the Premises Follow-ups button in the premises grid ribbon (or in the form ribbon if a record is open).

Faded Buttons

If buttons in the ribbon appear to be faded that means the button is not available.

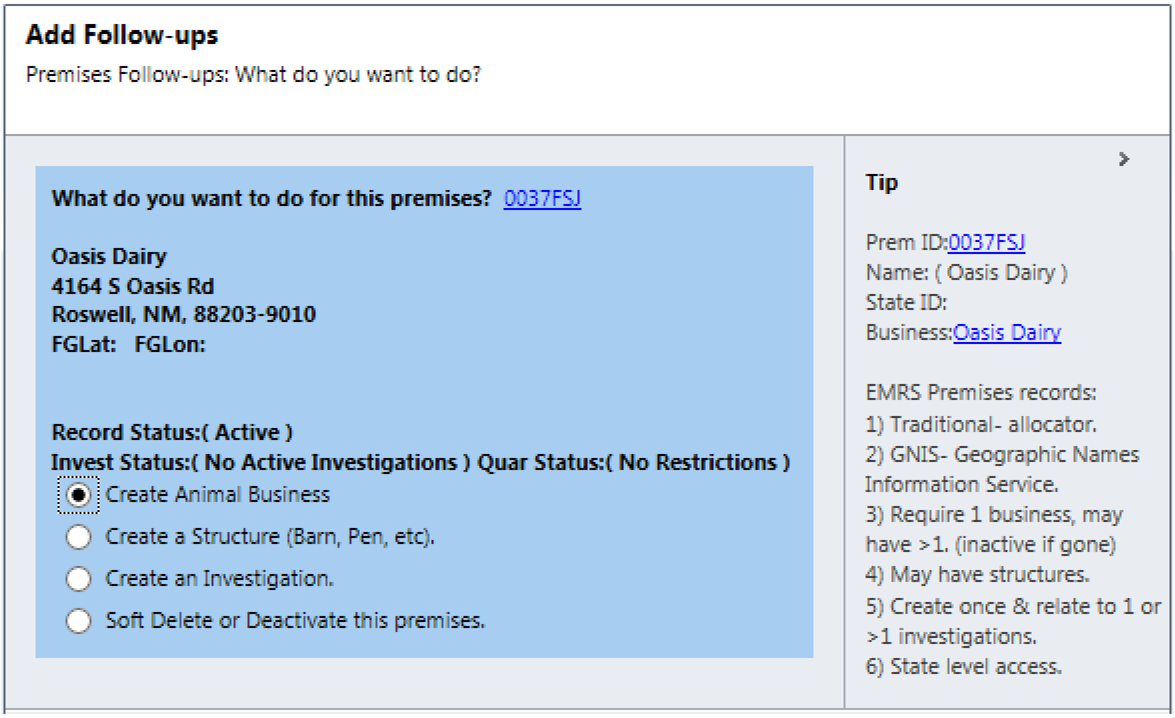


The **Premises Follow-ups** dialog button is faded because no record has been selected in the view. To activate the Premises Follow-ups button you must select a record in the view. If you are creating a new premises record it does not matter what record you select in the view. The exception is the case when your role allows you to view records from more than one state. In this case, you must select the record with the state where the new premises record is located (see page 43).



When a record is selected the dialog button is available.

Click on the **Premises Follow-ups** button in either the grid or form ribbon to display the **Premises Follow-ups** dialog menu, as shown below.



In the **Premises Follow-ups** dialog menu you may select one of the following actions:

Premises Follow-Ups Actions

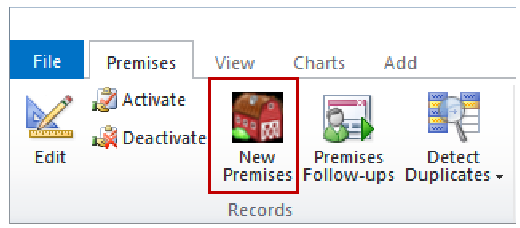
Action	Description
Create an Animal Business	Add a new animal business record to the selected premises.
Create a Structure (Barn, Pen, etc.)	Add s new structure record to the selected premises.
Create an Investigation	Start a new investigation on the selected premises (a business record must exist).
Soft Delete or Deactivate Premises	Move the selected premises record to the Trash bin (it is not permanently deleted).

With the exception of creating a new premises record, all actions will be performed on the premises you select in a view or on a premises record you open in a form.

Scenario 5: Register a Premises

A possible FAD incident was reported on a dairy farm. You know the address of the farm so you did a quick search on the address to see if a premises record was created for this farm. If you did not find a record with that address in EMRS 2 follow these steps to create a new premises record:

1. Click on **Premises** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Premises** view.
2. Select a premises record in the view (important: if you can view premises in multiple states, select the record for the appropriate state).
3. Click on the **Premises** dialog button.

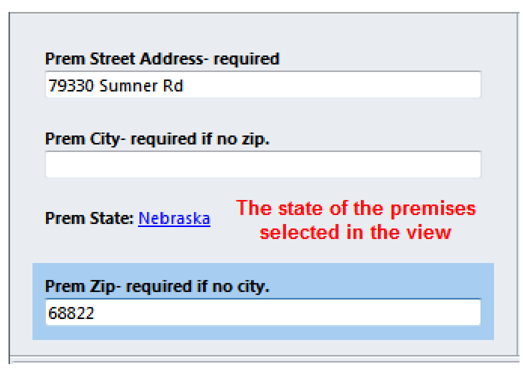


4. Select the **Type of Premises** you want to create. You may select one of the following options:
    a. **Traditional Premises** (most common); click **Next** to continue.

       Traditional premises represent the typical location that has an address or a unique set of coordinates that identify a farm, ranch or other types of premises.

    b. **Geographic Name Premises** (GNIS); click **Next** to continue (see page 50).

       Geographic Name Premises are based on a unique geographic feature that has been identified in the Geographic Names Information Service (GNIS) database by the USGS. These would most often represent a large area where some type of surveillance activity that is not related to traditional premises is conducted, most often wildlife based.
5. If you selected **Traditional Premises** you may select one of the following options:
    a. Use **Address** to query Allocator to get Prem ID; click **Next** to continue.
    b. Use **PremID** to query Allocator to get address; click **Next** to continue. (see page 47)



6. If you select **Address to get Prem ID**, the next dialog page prompts you to enter the Street Address, City, and zip code.

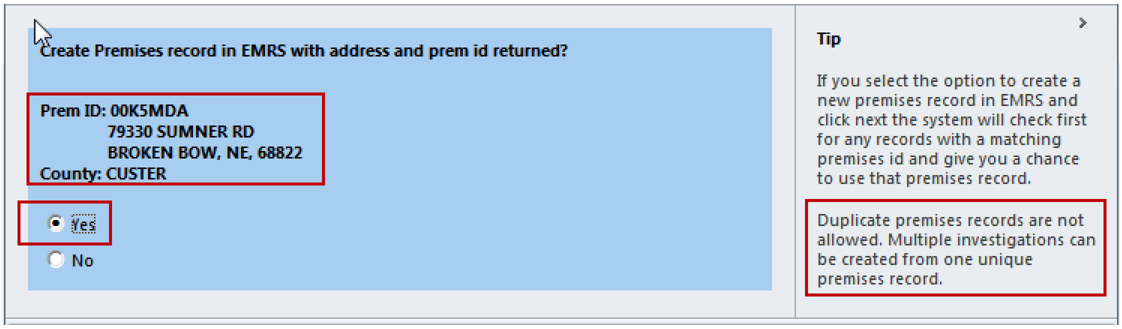
   Depending on your circumstances, you may enter a combination of either:

    - Address and zip — minimum data required (zip must be in the selected state).
    - Address, and city — required if you don't have the zip code.
    - Address, city, and zip — required when processing exceptions.

Note that the **Prem State** cannot be changed. The state that appears in the dialog is the state from the premises record you selected before you launched the dialog. If your role permits you to view records from more than one state make sure you select a record that is in the same state as the premises you want to add.

7. Click **Next** to continue. This will launch the allocator web service process.

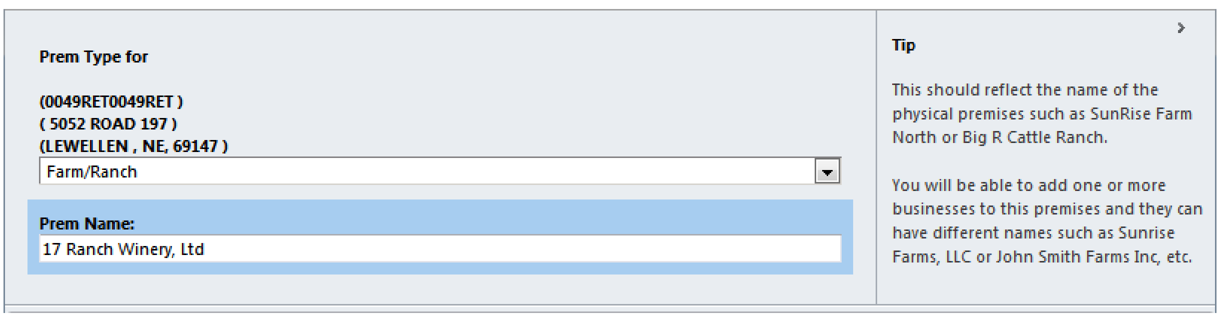
8. If the allocator was able to validate the address you provided it will display a new dialog page showing the premises id and validated address data:



9. Select **Yes** to create a new premises record using the address information provided, then click **Next** to continue.

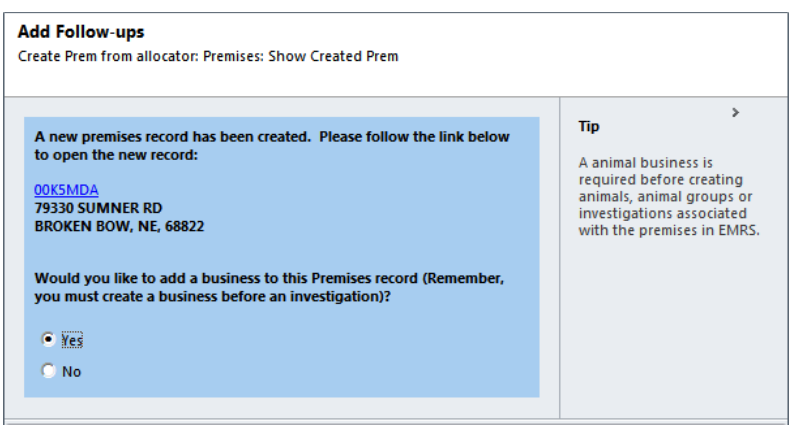
   If the allocator does not find an existing record with a matching address a new record is created.

10. Select the Prem Type for the new premises record from the droplist.



   The Prem Name is optional (recommended if there is more than one business on the premises).

11. Click **Next** to continue and display the confirmation screen.



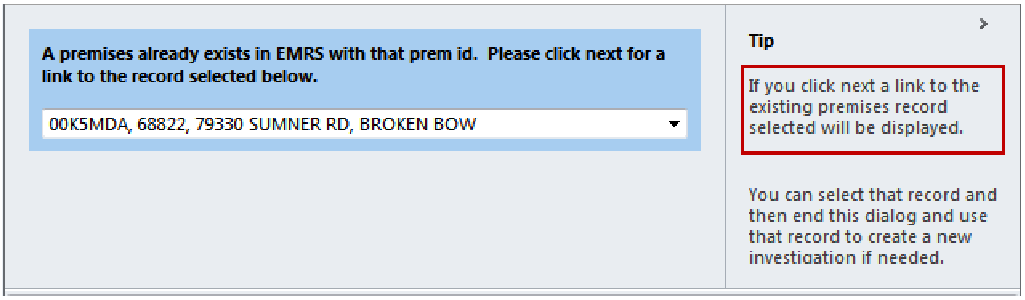
12. You may choose one of the following:

    a. Click on the link to the premises record to review and edit. When finished, click on **Save and Close** to close the form and return to this dialog.

b. If you do not want to create a premises record, select **No** and click **Next**; then click **Finish** to end the dialog.

c. If you select **Yes**; click **Next** to continue to the next step in the dialog.

If the allocator finds a premises record with the same address the dialog page will display the duplicate record; click **Next** to continue (click **Previous** to correct the address, if necessary).



A link to the premises record is displayed in the dialog page. You may click on the link to open the record or click **Next** to continue; then click **Finish** to end the dialog.

13. Select the **Prem Type** from the droplist.

The **Prem Type** should indicate the *primary* type of premises. You will be able to add more specific operation types to businesses on this premises later. For example if this is a Dairy that feeds a few heifers the type would be Dairy not feedlot.

14. Enter the **Prem Name**.

The **Prem Name** is optional but if you use one it should represent the name of the physical premises, such as SunRise Farm North or Big R Cattle Ranch. You will be able to add one or more businesses to this premises and they can have different names such as Sunrise Farms, LLC or John Smith Farms Inc, etc.

15. Click **Next** to continue.

The dialog page displays premises data with the id linked to the new premises record.

16. You may select one of the following options:

- If you are ready to associate a business to this premises select **Yes** and click **Next** to create a new business record. This launches a new dialog to allow you to add a new business record. Refer to the "Scenario 10: Animal Businesses" on page 57.
- Otherwise select **No** and click **Next** and then **Finish** to end the dialog.

To verify that the premises record was created refresh the **Active Premises** view and use the **Quick Search** tool to enter the necessary search terms to find the record. You could also create a personal view that displays active premises records sorted by the most recently created records.

About the Allocator Service

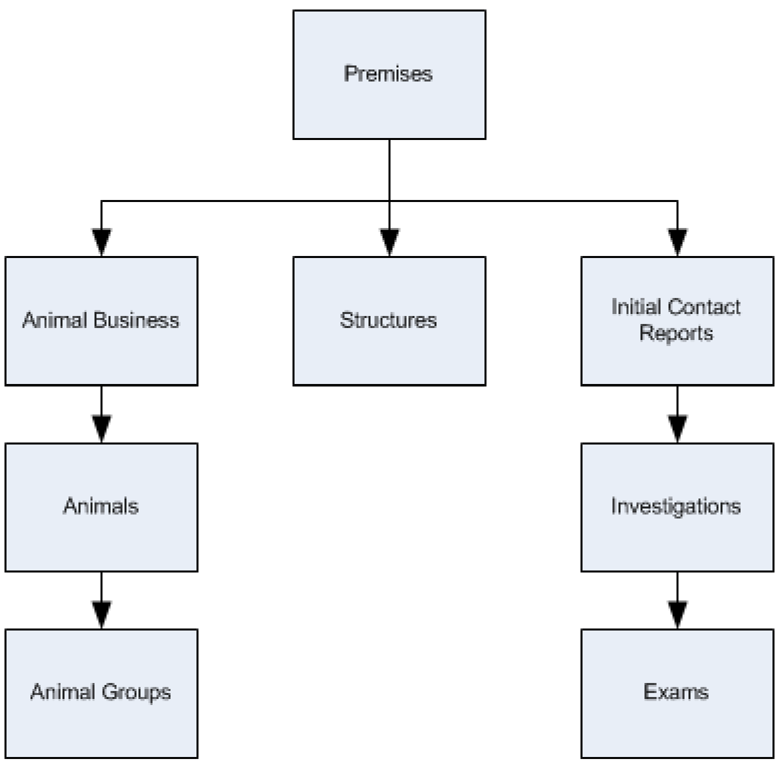
When you enter address data to create a new premises record you will initiate a call to the allocator web service to start the following process:

- Verify that the address provided is a valid address.
- If the address cannot be validated an *exception* handler will be initiated. We will show you how to manage exceptions in a different scenario.
- If the address is valid the process will search for the address in the National Repository.
- If the address was found in the National Repository the Premises ID for the address is displayed on the form.
- If the address is not found in the repository the Allocator generates a new Premises ID and displays the new ID, validated address, and latitude and longitude of the premises location.

The Premises Form

Refer to page 35 to see an example of a Premises form. While the premises form is open you can review the data in the form and make additional edits if necessary; for example, you may click on the lookup icon to find the **County** that the premises is in and you may select the **Prem Type** from the droplist.

If this is a new premises record the lookup icon for the **Primary Business** field is disabled. This is because animal businesses were not associated with this premises record. You will have to run a dialog to add an animal business record to this premises (see page 57).

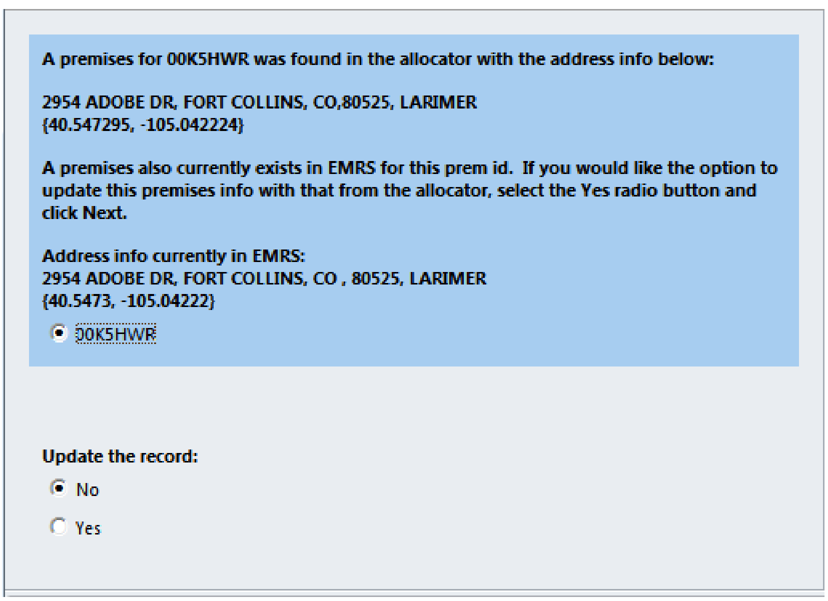


Scenario 6: Add a Premises Record Using Data from the NPIR

If you have a valid premises id and you want to know if the premises record is in the EMRS 2 database you can enter the id into the Quick Search field to find out if the record is there. However, because EMRS 2 is a new application it is possible that a premises was registered previously and it is stored in the National Premises Information Repository (NPIR) database but the record was not added to the EMRS 2 database. In this case you can add the record to EMRS 2 if you have a valid prem id for the premises.

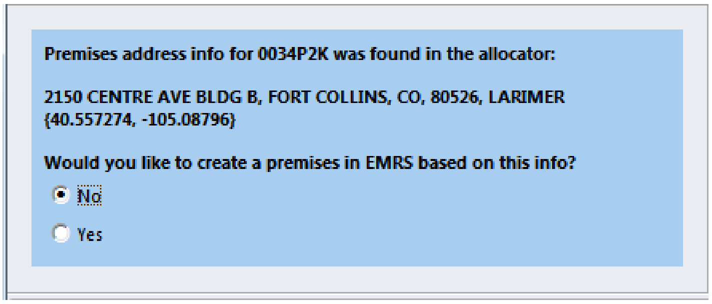
Follow this procedure to add a premises record to the EMRS 2 database using a valid premises id:

1. Click on **Premises** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Premises** view.
2. Select a premises record in the view.
3. Click on the **New Premises** dialog button.
4. Select **Traditional Premises**; click **Next** to continue.
5. Select **Prem ID to Get Address**; click **Next** to continue.
6. Enter a valid Prem ID; click **Next** to continue.
7. If a record matching the premises id is found in both the allocator and in EMRS 2 the dialog returns the data from both locations; you may select one of the following options.



   a. Select **No** if you do not want to update the data in EMRS 2 with the data from the allocator, then click **Next** to continue and click **Finish** to end the dialog.
   b. Otherwise select **Yes** and click on **Next** to continue to update the premises record in EMRS 2 with the address data from the allocator; you may click on the prem id link to display the updated premises record or click on **Next**, then **Finish** to end the dialog.

8. If the premises id was found in the allocator but it is not in EMRS 2 you may select one of the following options.



a. If you do not want to create a premises record in EMRS using the data from the allocator, select **No** and click **Next** to continue, then click **Finish** to end the dialog.

b. If you want to create a new premises record using the data from the allocator, select **Yes** then click on **Next** to continue the dialog to add a new premises record.

    a. Select a Prem Type from the droplist.

    b. Enter a Prem Name and click **Next** to continue.

    c. The new premises record is created; you may click on the prem id to open the record or click **Next** to continue and **Finish** to end the dialog session.

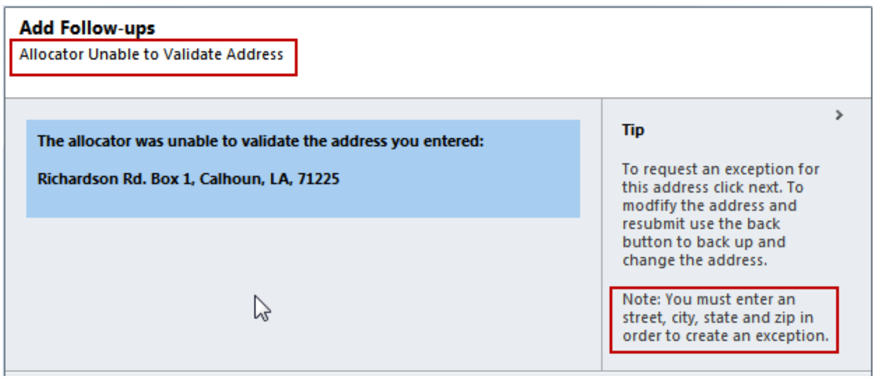
You cannot add a premises record using a premises id that is for a premises in a state that is not in your business unit. If you attempt to do so the dialog will display an error message.

Scenario 7: When an Address Cannot Be Validated

When you enter a premises address the allocator web service checks various databases to see if the address you provided is a valid postal address. There may be cases when the address you entered is the correct address but for some reason the address does not appear in any of the databases and therefore cannot be validated. In this case you will have to process the address as an *exception*.

Follow this procedure to process an address exception:

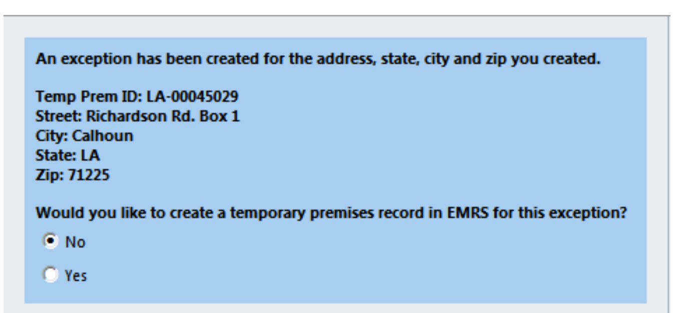
1. After you enter the address data and click **Next** and a dialog page tells you that the allocator is unable to validate the address, click **Next** to request an exception for the address you entered.



Before you attempt to process the address exception make sure you provided a street, city, and zip. You may have to click **Previous** to update the address data. Also, if you think you made a mistake entering the address you may click the **Previous** button to go back and correct the data and resubmit the corrected address.

2. When the Exception Form is displayed the following data is required:
   a. Your **First Name** and **Last Name**
   b. **Phone Number** and **Email** address
   c. Driving Directions
   d. Optional Comments
3. Click **Next** to continue.

   A New Temporary Premises ID (prefixed with the state code) is created.

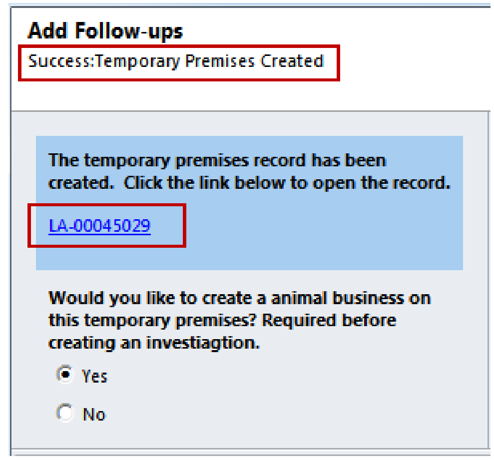


4. Select **Yes** and Click **Next** to create a premises record using the temporary id. Otherwise select **No** if you do not want to create a premises record at this time.

   This will create a new premises record with the temporary id. EMRS will continue to poll the exception process and if an exception is granted will update the record with the prem id.

   The Success dialog is displayed with the temporary premises id linked to the new premises record.

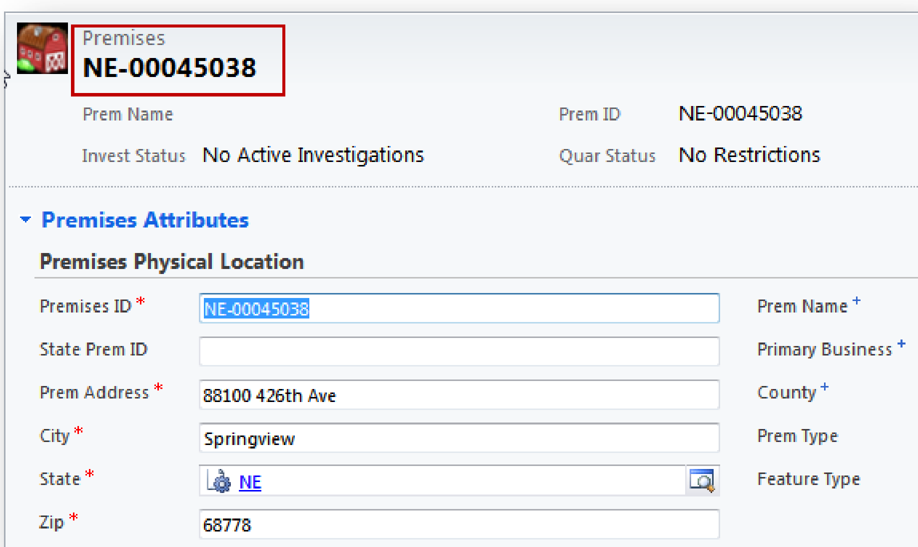
   You may click on premises id link to open the Premises form and work on the new premises record just like any other record. If this is determined to be a duplicate of an existing premises record when ID is issued then a manual process will be necessary to merge the two records.



5. You may select one of the following options:

   - You may select **Yes** and click **Next** if you want to add an animal business record to this premises. This will launch the Animal Business dialog (see page 57).
   - Otherwise, select **No** then click **Next** and **Finish** to end the dialog.

If you choose to create a new premises record the premises record will show the temporary id prefixed with the state code. When the allocator validates the address a permanent premises id is generated and the premises record is automatically updated with the new premises id and address data.



Scenario 8: Add Geographic Features

In some cases an incident may be reported at a location that does not have an actual address. This could be in a wildlife refuge or in the middle of a wilderness area. In this case you cannot use the Allocator to process address data because you do not have an address. Instead, you will have to see if the location can be found using an external web site called the **Geographic Names Information System (GNIS)**. The EMRS team periodically downloads the data from the GNIS web site and imports it into the EMRS 2 application. This way it is not necessary for you to look for the data on the GNIS web site.

To learn more about GNIS data the web site is: **http://geonames.usgs.gov**

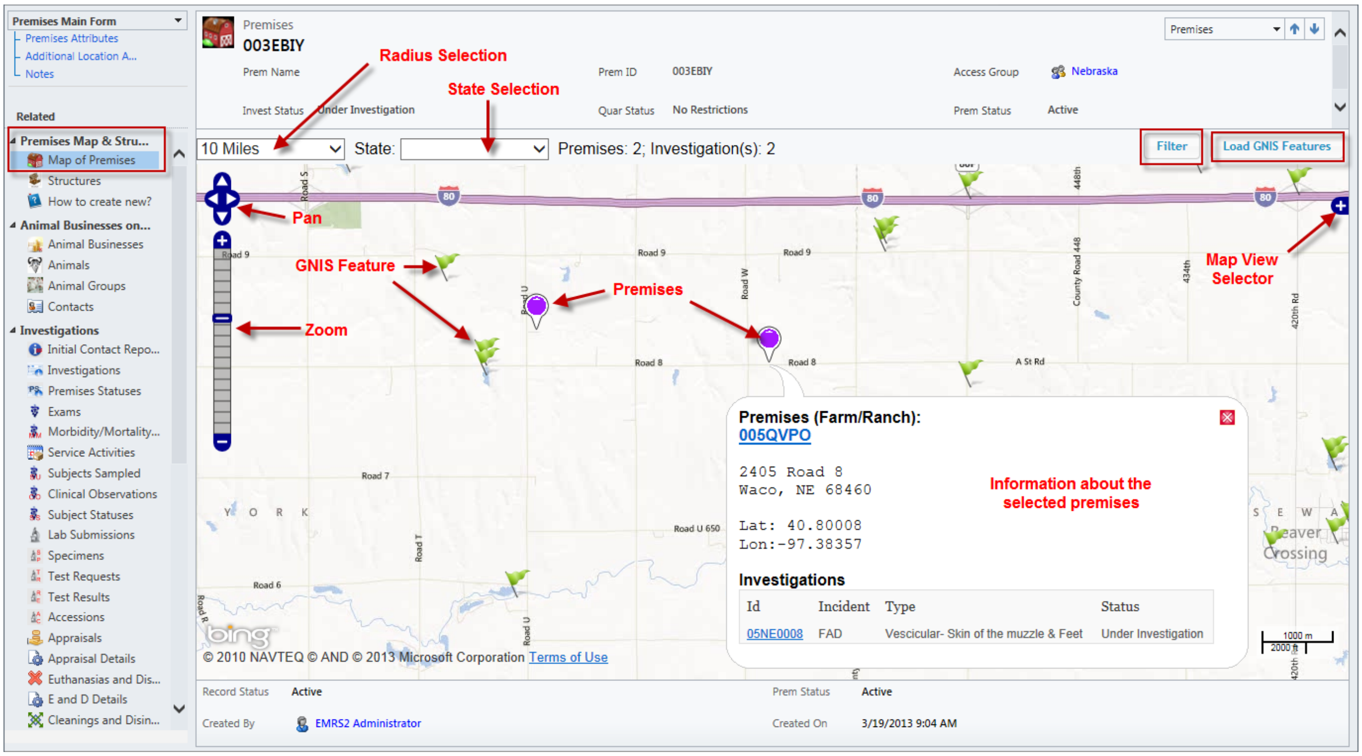
Follow this procedure to add a location from the GNIS database:

1. Click on **Premises** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Premises** view.
2. Select a premises record in the view.
3. Click on the **New Premises** dialog button.
4. Select **Geographic Name Premises (GNIS)-rare**; click **Next** to continue.
5. Select the **County** where the geographic feature is located.

   All of the counties in the state of the premises you selected before starting the dialog are displayed in a droplist. If you do not see the desired county you may have to change your personal options settings to set the number of records shown per page in any list of records. The recommended setting is 250. See Set Personal Options on page 28.
6. Select one of the following **Feature Types** from the droplist:
   a. Airport
   b. Bay
   c. Beach
   d. Civil
   e. Park
   f. Reservoir
   g. Stream
7. Click **Next** to continue to display GNIS features filtered by the selected county and feature type.
8. Select the desired GNIS feature from the droplist; click **Next** to continue.
9. The Success dialog displays a link to the GNIS premises using the GNIS reference number; you may click on the link to review and/or edit the record, or select one of the following options:
   a. Add Follow-Ups to new GNIS premises; click **Next** to continue.
   b. Quit; click **Next** then **Finish**.

Premises Maps

When a premises form is open you can display a map showing the premises location by clicking on **Map of Premises** under the **Premises Map & Structures** tab in the **Premises** form navigator. The premises is shown with a color-coded pin. If there are other premises located within the user-specified radius of the current premises these will be displayed as well. The user may choose to display geographic features from the Geographic Names Information System (GNIS) by clicking on the **Load GNIS Features** button and selecting the features to display. GNIS features are displayed on the map using green flags.

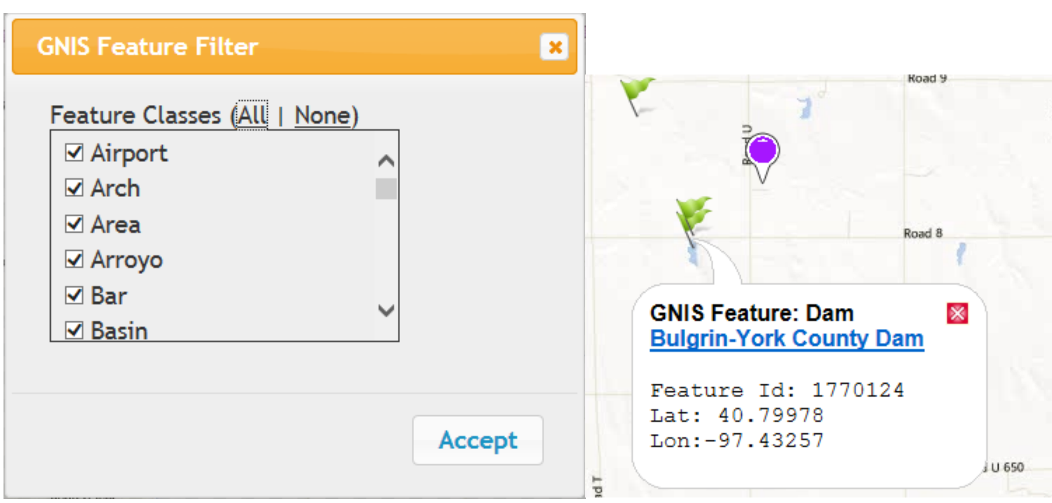


A summary of the map features is shown in the following table.

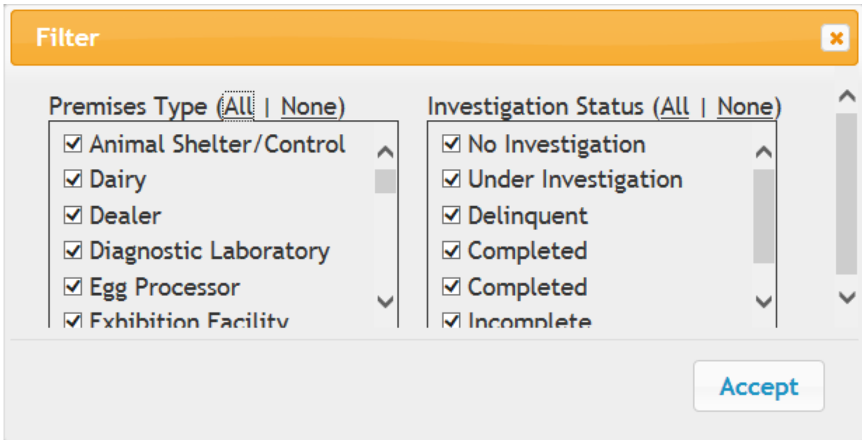
Summary of Premises Map Features

Feature	Description
Radius Selection Dropdown	Display all premises and GNIS features within a specified radius by selecting the desired radius from the droplist: 1, 5, 10, 15, or 20 miles.
State Selection Dropdown	If the user's role allows them to see premises in other states the state selection dropdown allows them to select a different state.
Pan (Up, Down, left, Right)	Pan up, down, left, or right by clicking on the desired pan direction arrows; or drag the map in the desired direction using the mouse (hold the left mouse button while dragging the mouse).
Zoom-In/Zoom-Out	Display a greater or lesser area of the map dragging the zoom button up to zoom in or down to zoom out or by using the mouse wheel to zoom-in or zoom-out from the mouse pointer position.
Load GNIS Features	The user may hide or show GNIS features by clicking on the Load GNIS Features button and selecting or deselecting the features and clicking on **Accept**.
Filter Button	Filter the premises to display by selecting Premises Type and Investigation status and clicking Accept.
Premises Pin Colors	Premises pins are color coded using the following colors to indicate the investigation status; if the pin color is Gray then there are no active investigations on the premises. The colors include: Purple = "Under Investigation" Green = "Completed" Yellow = "Incomplete" Red = "Delinquent" Gray = Default
Premises Pop-up	Click on a premises pin to display more information in a pop-up; click on the X to close the pop-up.
GNIS Flag and Pop-up	If the option to display GNIS information on the map is selected green flags indicate the location of the selected GNIS features; click on the flag to display a pop-up describing the feature; click on X to close pop-up.
Map View Selector	Click on the + button to open the map display options; in the map Base Layer select either Hybrid, Aerial, or Road; toggle GNIS layer Overlays to show or hide GNIS features.; click on – to close view selector.

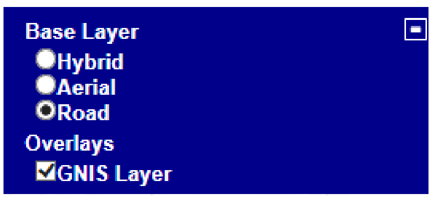
Load GNIS Features Dialog and GNIS Flag Pop-up Box



Premises Filter Options



Map Display Options



Scenario 9: Barns and Other Structures

In the EMRS 2 application a barn is considered a *structure*. In some cases structures may be an important part of an investigation. Structures are located on a premises and are usually the places where animals are sheltered, such as a barn or hen house. Structures can also be any kind of physical entity that may be a part of an investigation, such as pig pens, water holes, a feed storage shed, or other facility where animals may have direct contact.

To add a structure to a premises record follow these steps:

1. In the **Disease Management** navigation pane click on **Premises** under the **Premises/Producers** tab to display the **Active Premises** view.
2. Look for the premises record where you want to add the structure.
3. Select the record (it is not necessary to open the record).
4. Click on the **Premises Follow-ups** button.
5. Select **Create a Structure (Barn, Pen, etc.).**
6. Click **Next** to continue.
7. Enter a unique name for the structure.

   The structure name can be something simple, like, “House,” “Barn 1,” “Hill Pasture” or “Pen 3.” You cannot have two structures with the same name on one premises.

   A name that is unique to the premises is all that is required to add a structure record. The rest of the fields in the dialog are optional. If you know more about the structure then it would be helpful to complete the fields for which you have data.

8. Enter a structure unique id.

   This would usually be something assigned to larger operations to uniquely identify structures possibly business wide or on premises that have a lot of structures that need to be uniquely identified, such as 2504 Bldg A, or Pen #23, or Area 51, etc..

9. Select the **Structure Type** from the droplist.
10. Select the structure’s primary construction from the droplist.
11. Select the structure’s floor surface from the droplist.
12. Enter the Max Structure Area (5,000 sq. ft., 4 acres, etc.)
13. Select the structure’s primary fence/containment type from the droplist
14. Select the structure’s primary water source from the droplist.
15. Enter additional information about the structure.

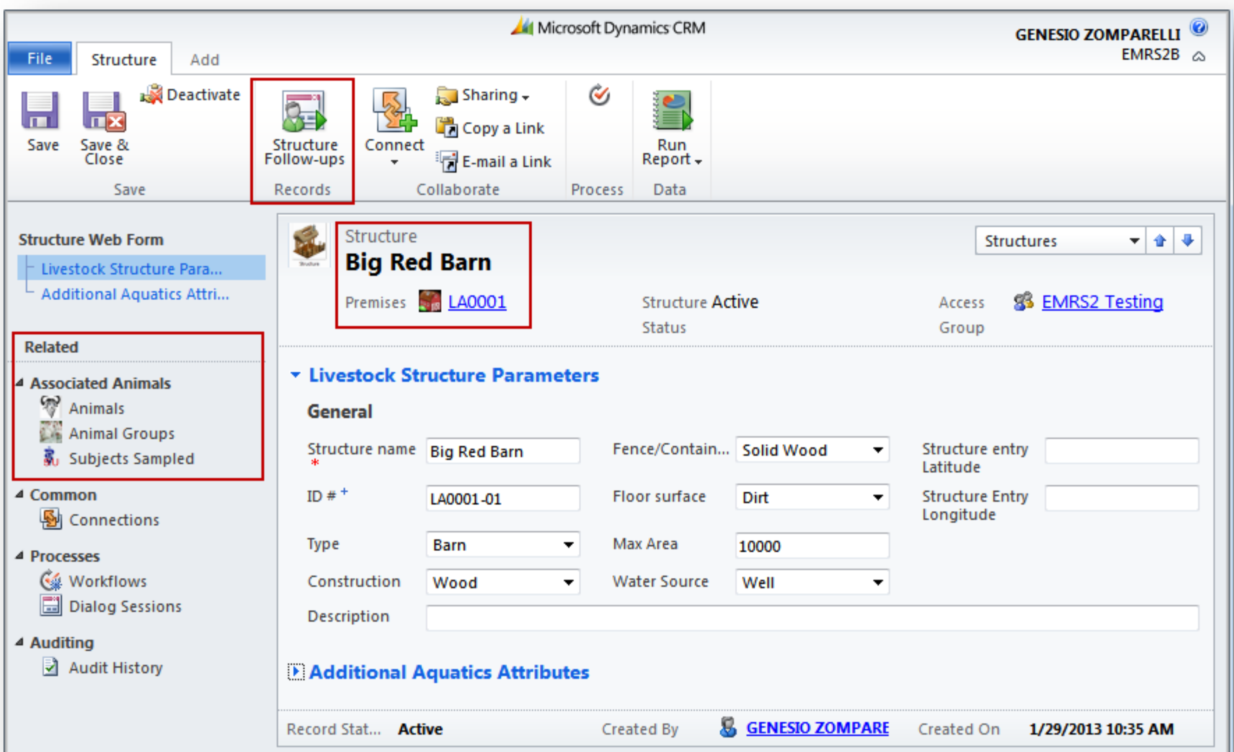
16. Enter the latitude and longitude GPS coordinates for the main entrance to the structure.
17. Click **Next** to continue.

    The Success dialog includes a link to the new structure record.

18. Select one of the following actions:
    a. If you are done, select **Quit this dialog;** click **Next** then click **Finish** to close the session.
    b. If there are other structures on the premises that are similar to the structure you just added, select **Copy this structure** and click **Next** to continue and repeat the dialog.
    c. Create a different structure on this premises; click **Next**.
    d. If you want to add animals or other follow-ups to the structure record select **Add structure follow-ups** and click **Next** to display the Structure Add Follow-ups dialog menu.
    e. If you want to add follow-ups to the premises select **Add other premises follow-ups** and click **Next** to display the Premises Add Follow-ups dialog menu.

The Structure Web Form

Click on **Structures** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Structures** view. Click on the structure name to open the Structure Web Form.



Scenario 10: Animal Businesses

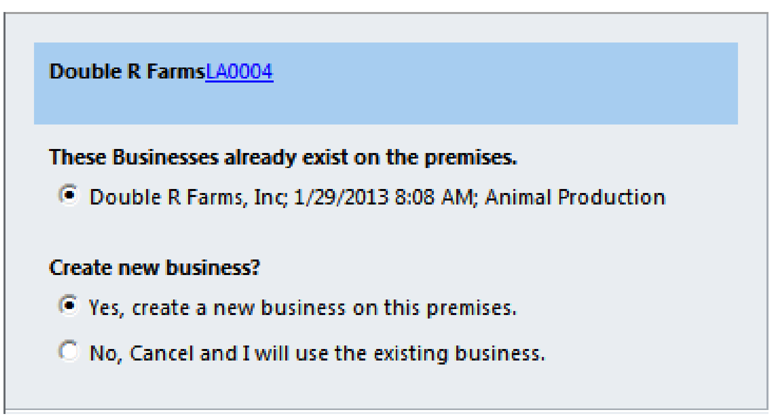
In most FAD investigations you will be examining animals on a premises. The animals are usually owned by a business. Animal businesses are always associated with a premises record and are necessary if there will be a premises investigation.

Things to know about animal business records:

- Animal businesses are created on a single premises
- Animal businesses own animal records on a premises
- Animal businesses have contacts
- An Animal Business may own animals located on some other premises
- If a business closes or no longer owns any animals on a premises it is deactivated from the premises (it is never deleted)
- Inactive business records remain connected with the premises record for historical purposes

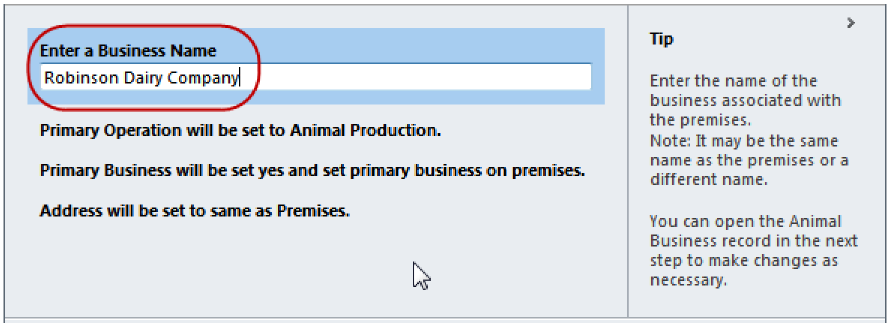
To add an animal business to a premises record complete the following steps:

1. In the **Disease Management** navigation area select **Premises** in the **Premises/Producers** tab to display the **Active Premises** view.
2. Search for the desired premises record and select the record.
3. Click on the **Premises Follow-ups** dialog button to display the dialog menu.
4. Select **Create Animal Business** and click **Next** to continue.
5. If there is already a business associated with the premises the dialog prompts you to choose one of the following actions:



- If a business record is already associated with the premises you will have to decide whether to use the existing business record or create a new business record.
- Cancel the dialog if you want to use the existing animal business record.
- If the business record listed is not the business you want to use, or if there are no business records associated with the selected premises record then you will need to create a new business record on this premises.

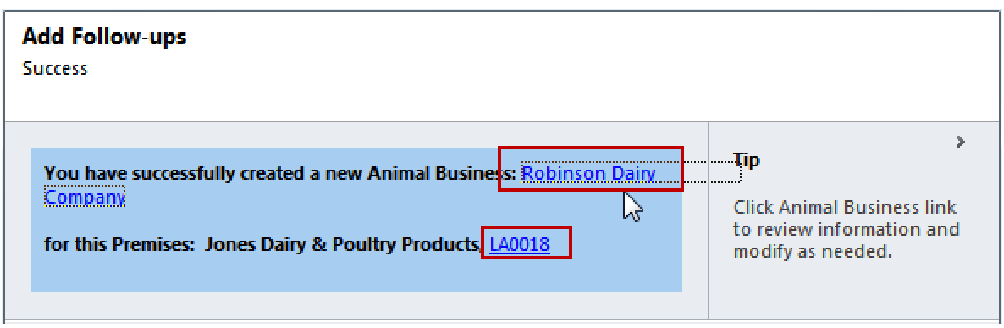
6. Enter the name of the business.



7. The dialog will automatically assign values to the following fields on the Animal Business form. If necessary, you may edit the form later and change these settings.
   - Primary Operation set to Animal Production
   - Primary Business set to Yes (this business will be the primary business on this premises)
   - The business address will be set to be the same as the premises address

8. Click **Next** to create the new business record.

   The name of the business is displayed as a hyperlink in the dialog. You may click on the hyperlink to open the record in the animal business form if you would like to review and edit the fields on the form, otherwise you may click **Next** to continue working on the dialog.



If you click on the business name hyperlink the animal business form is displayed in a new window. The premises dialog is still running in the background. You may review and edit the form as needed. Click on **Save & Close** to save changes and close the form window.

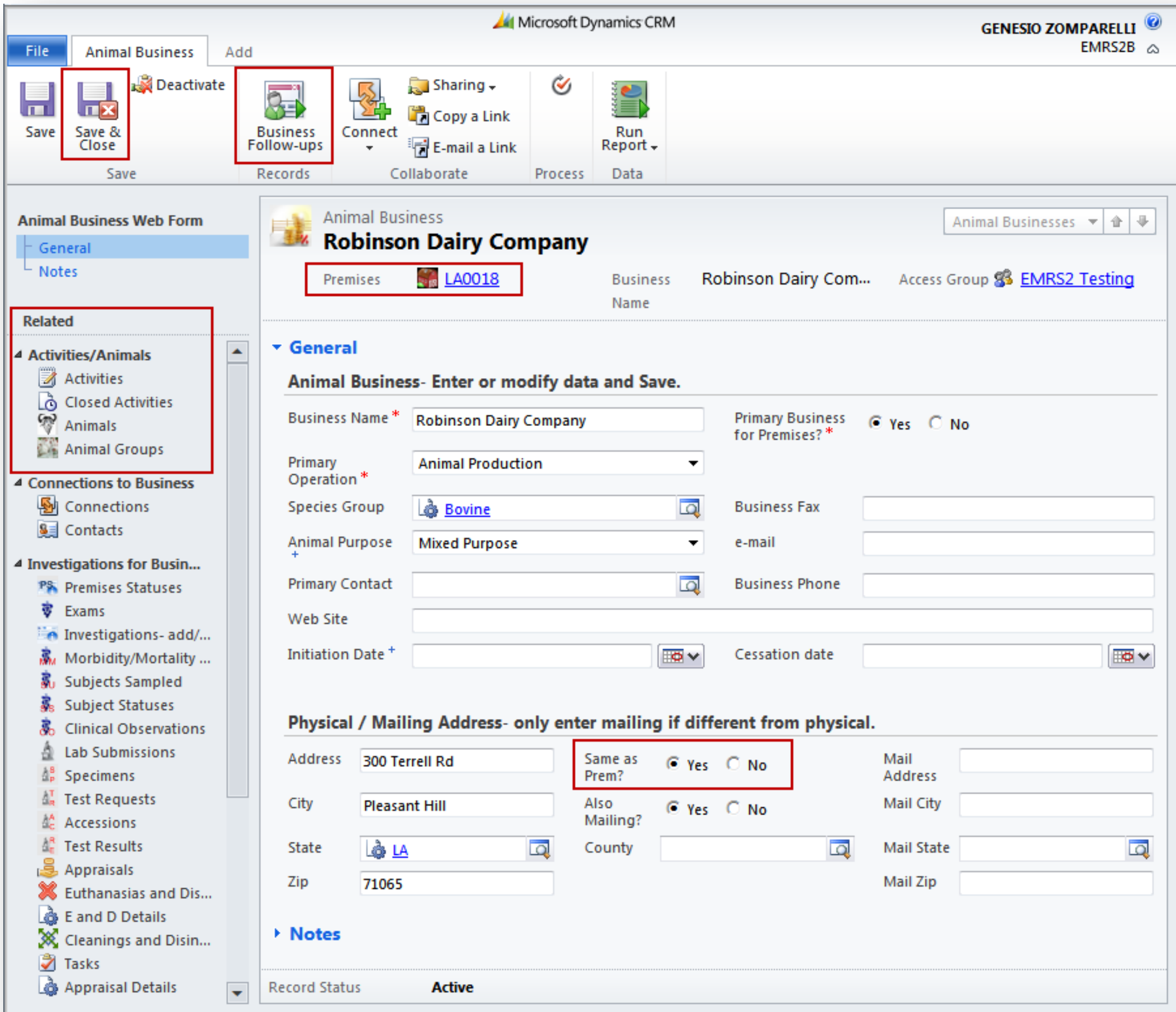
In the Animal Business form note that the header displays the premises id of the premises record that is related to the animal business record. In all forms used in EMRS 2 the header will always tell you how one entity record is related to another entity record.

In the Success dialog you may choose one of the following:

- I want to add follow-ups to this business.
- I want to add follow-ups to the premises.
- I want to quit this dialog.

Animal Business Form

You may open an animal business record to review and edit data in the form.



If you make any changes in the form click on **Save & Close** to save your edits and close the form window to return to the dialog session. If you don't make any changes you can still click on **Save & Close** to close the form or just click on the  in the upper right corner of the window.

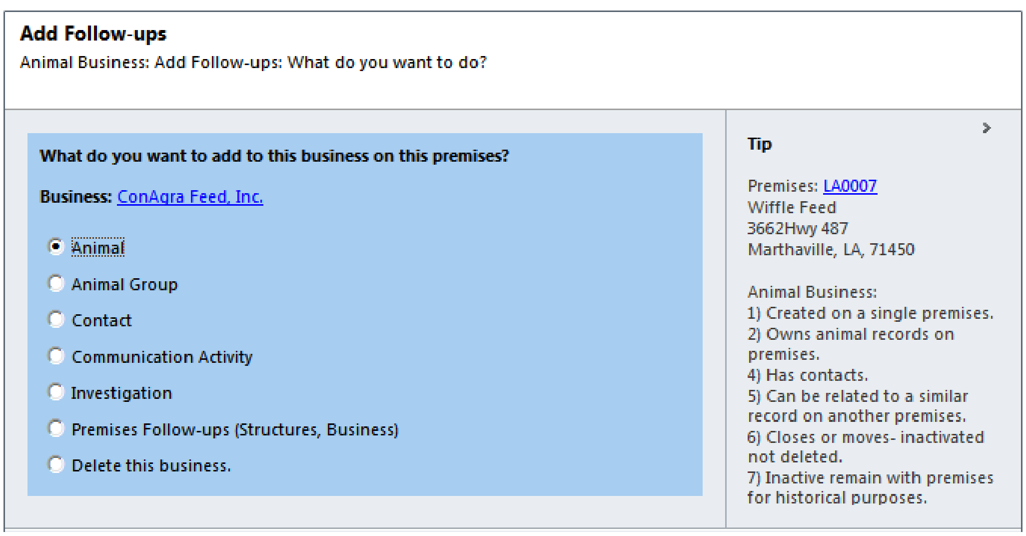
You may also work with the related entities shown in the navigation pane. For example, you may click on the **Animals** entity to display a view of the animals owned by the business.

Animal Business Dialog

If there are no animals listed in the Animal Business form and you happen to have a list of the animals owned by this business that you will be examining when you visit the premises you may enter the animals into the EMRS 2 database now. *This means you will be launching another dialog*.

To return to the Animal Business main form click on **General** in the navigation pane. In the Animal Business form you will see the **Business Follow-ups** button in the ribbon.

Click on the **Business Follow-ups** button to start the **Animal Business** dialog:



Animal Business Follow-Ups Actions

Action	Description
Animal	Add a new animal record to the current business.
Animal Group	Add a new animal group to the business record.
Contact	Add business contact information.
Communication Activity	Start a dialog to help you keep track of phone calls, e-mails, faxes, tasks and meetings.
Investigation	Start a new investigation on the selected premises.
Premises Follow-ups	Launch the premises follow-ups dialog.
Delete This Business	Move the selected business record to the Trash bin (it is not permanently deleted).

Scenario 11: Add Animals to a Business

After you create a new animal business record you can add the animals that are owned by the business by selecting **Animal** from the **Business Follow-ups** dialog.

You should have the following information available before you attempt to add animal records:

- The primary id on the animal
- The type of id
- The animal's species
- The animal's breed
- The animal's sex
- The animal's reproductive status

1. If the Business Follow-ups dialog is not open, search for the desired animal business record and select it in a view or open it in a form.

2. Click on the **Business Follow-ups** dialog button to display the **Add Follow-ups** dialog menu.

3. Select **Animal** and click **Next** to continue.

4. Complete the animal dialog.

    - Click on the lookup icon to select the Species of animal.
    - Enter the animal's primary ID. The animal may have more than one ID on it but for now just enter the primary ID. If necessary, you can add other ids later. See page 66.
    - Display the droplist and select the type of ID that is the primary ID.
    - If you know the secondary ID you may enter it now and specify the ID type.
    - If you know the tertiary ID you may enter it now and specify the ID type.

5. Click **Next** to continue.

    - Select the animal's breed from the droplist.
    - Select the animal's sex.
    - Select the animal's reproductive status.

6. Click **Next** to continue.

7. If you know the animal's date of birth you may use the calendar to select it and be sure to select **DOB Entered**; otherwise select **Adult** if no DOB was entered.

8. The other fields are not required but if you know the animal's body color, face color or other descriptive markings you may enter them in this dialog.

9. Click **Next** to continue.

10. The default breed status is Grade/Mixed; otherwise select either Purebred Appearance or Purebred/Registered.

11. Select the animal's domestic status from the droplist.
    - Domestic
    - Wildlife
    - Feral
    - Zoo Animal
    - Research Animal

12. Enter the Genotype.

13. Click **Next** to continue.

    You have successfully created a new animal record.

14. When the animal record **Success** page is displayed you may click on the animal id link to open the animal record to review and edit, if necessary. You may select one of the following options from the dialog:
    a. Add another new animal record
    b. Copy the animal record created except for id
    c. Create other animal follow-ups
    d. Create animal business follow-ups
    e. Create Premises follow-ups
    f. Quit the dialog

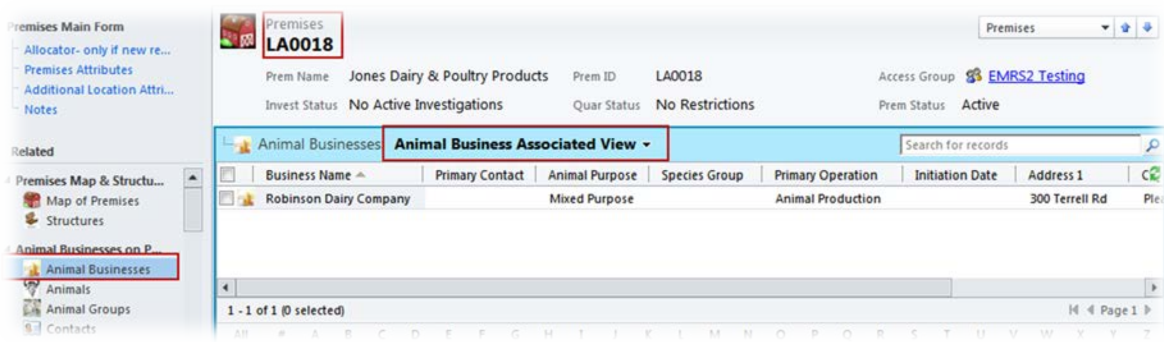
If you have just a few more animal records to add, select "Add another new animal record" and click **Next** to run the same dialog again to add another animal record.

If you have a lot of animal records to add and most of the data is the same (except for the id) you may choose the option to copy the animal record. See page 64 for more information.

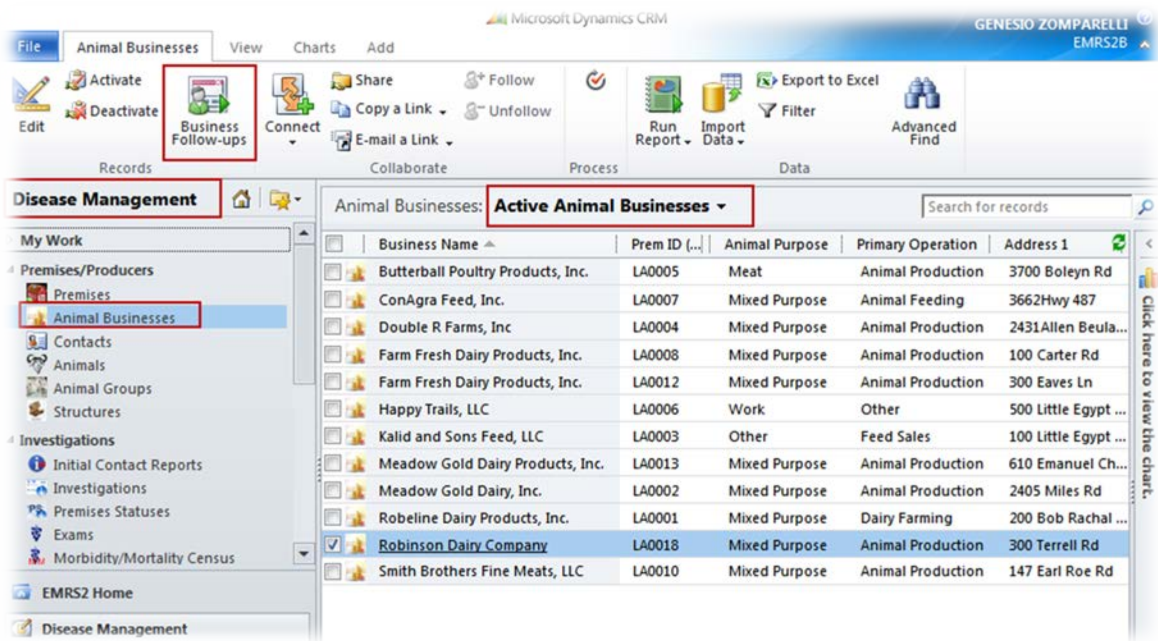
Otherwise, you could quit the dialog and do something else. Click **Next** then click **Finish** to end the dialog session. This will end the Business Follow-ups dialog but not the Premises Follow-ups dialog.

If you decide to start an investigation select Create animal business follow-ups and click **Next** to run the Animal Business follow-ups dialog. Select **Investigation** to run the Investigation dialog. This will close the Animal dialog and start the Investigation dialog. The Investigation dialog is described in more detail on page 98.

You can display all of the animal business records associated with a specific premises by selecting **Premises** under the **Premises/Producers** tab in the **Disease Management** navigator and then selecting the premises record you want to open. When the **Premises** form is open click on **Animal Businesses** under the **Animal Businesses on Premises** tab in the navigator. This will display a grid listing all of the businesses associated with this premises.



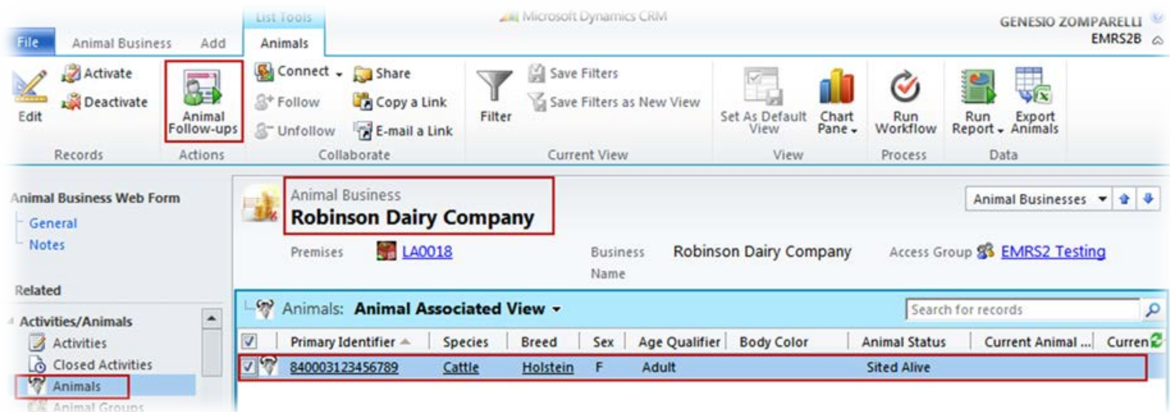
You can also display all animal business records by selecting **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator.



The **Active Animal Businesses** view displays all of the active animal business records and the id of the premises to which they are associated.

Managing Animal Records

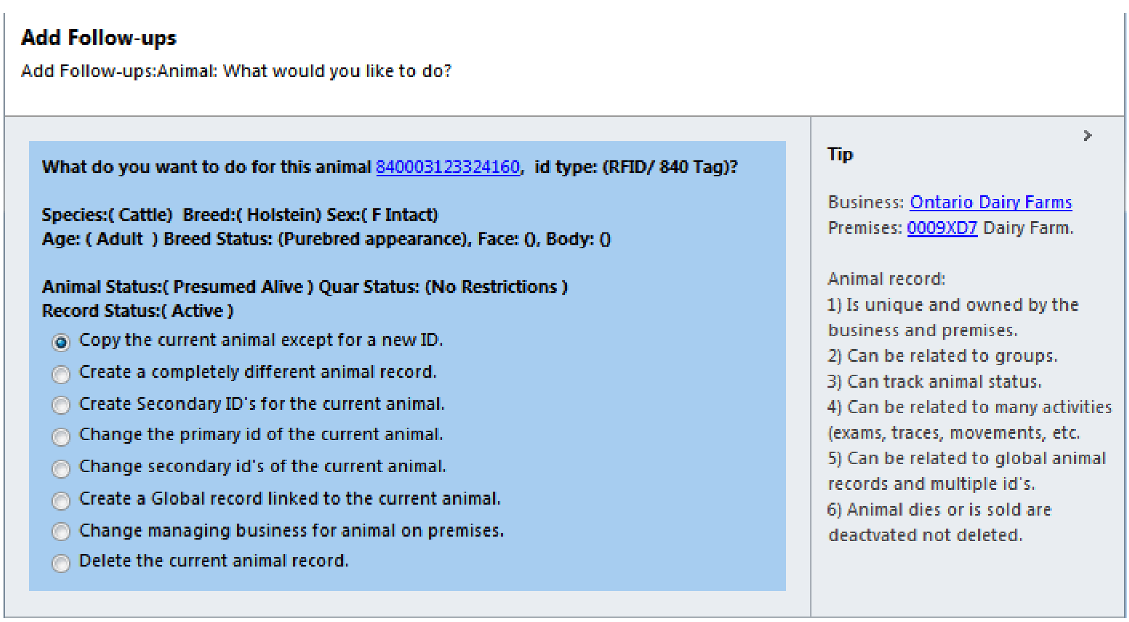
You can display all of the animals associated with a particular business record by opening the selected animal business record displayed in the **Active Animal Businesses** view. In the animal business form click on **Animals** under the **Activities/Animals** tab in the navigator. The **Animal Associated View** is displayed.



Scenario 12: A Quick Way to Add a Lot of Animals

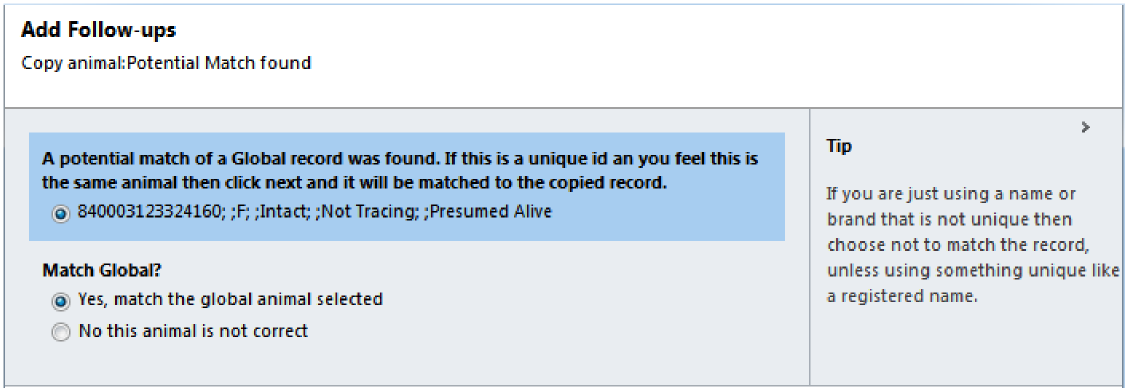
In some cases you may have a large number of similar animals to add to the business. When the only major difference between the animals is their ID follow these steps:

1. Select the animal record you want to copy and click on the **Animal Follow-ups** dialog to launch the Add Follow-ups dialog session.
2. Select the option to copy the current animal record; click **Next** to continue.



3. Enter the animal's primary ID and select the type of Official ID it is; click **Next** to continue.
4. If the ID you entered matches an id already in the system you will be prompted with a dialog indicating that this id is a potential match of a Global record. If this is true then select Yes to match the global animal record selected; otherwise select No if that is not your intention.

   If the id is not correct, click on Previous to enter the correct id, as in Step 3.



5. When the animal record is successfully created you may select one of the following:
   - Quit this dialog
   - Copy the animal again
   - Create a new animal with different attributes on same business
   - Create other animal follow-ups
   - Create business follow-ups
   - Create premises follow-ups
6. After selecting your choice click **Next** to continue.
   - If you selected "Quit this dialog" click **Finish** to end the dialog session.
   - If you selected one of the other options the appropriate dialog is displayed.

Another quick way to add a large number of animal records is to import the data from a spreadsheet. This option is described on page 68.

The following table summarizes all of the activities you can do in the **Animal Follow-ups** dialog:

Animal Follow-Ups Actions

Action	Description
Copy the current animal except for a new ID	Add a new animal record by copying the selected animal record.
Create a completely different animal record	Add a new animal record using all new data.
Create secondary IDs for the current animal	If an animal has more than one ID run this dialog to add more IDs.
Change the primary id for the current animal	Run this dialog if you need to change the primary id of an animal.
Change secondary Ids for the current animal	Run this dialog if you need to change secondary ids on an animal.
Create a Global record linked to the current animal	Run this dialog if you need to see the animal in all records.
Change managing business for animal on premises	Run this dialog when an animal is sold to a different business.
Delete the current animal record	Move the selected animal record to the Trash bin (it is not deleted).

Scenario 13: Adding Multiples IDs for Animals

All animals should have at least one ID, which is their primary ID. In some cases you will find animals having more than one ID attached; some may even be branded or tattooed.

If you know the name of the business that owns the animal:

1. Click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the Active Animal Businesses view.
2. Search for the desired business.
3. Open the business record.
4. Click on **Animals** under the **Activities/Animals** tab in the entity navigator to display the **Animal Associated View.**
5. If you do not see any animals in the view click on the refresh icon to refresh the view.

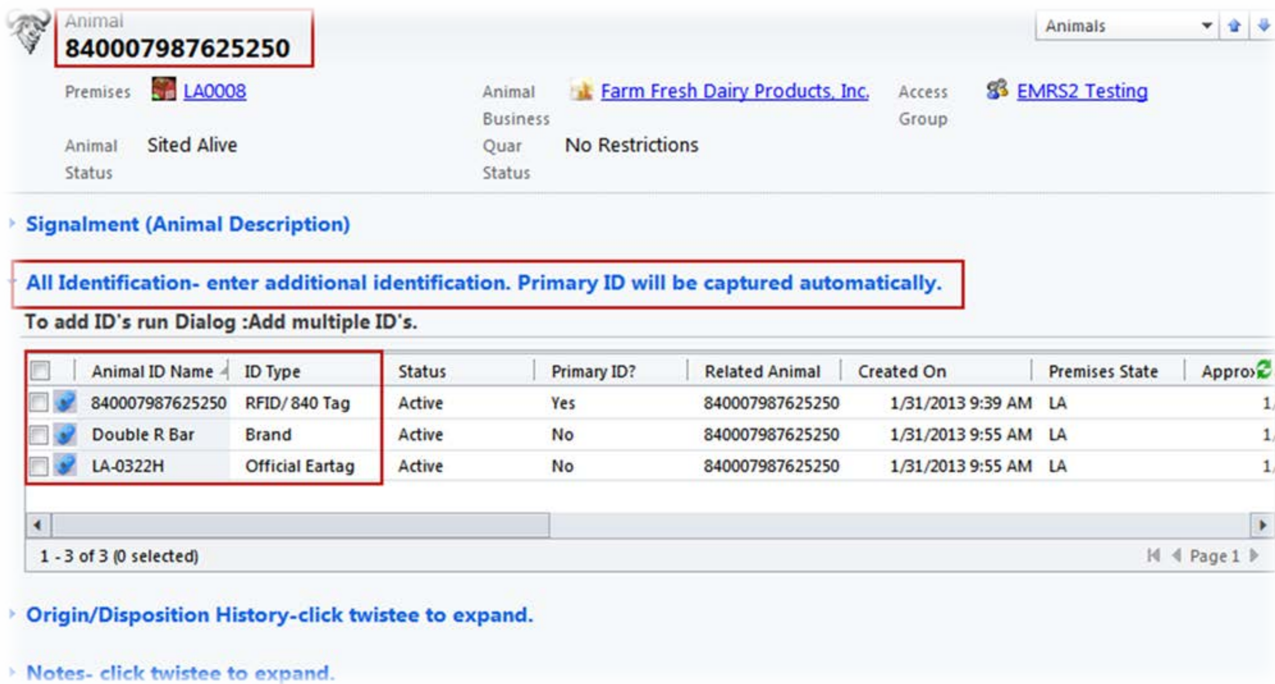
If you do not know the name of the business that owns the animal:

1. Click on **Animals** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Animals** view.
2. Search for the desired animal in the view.
3. If you do not see any animals in the view click on the refresh icon to refresh the view.

Continue as follows:

1. Select the animal.
2. Click on the **Animal Follow-ups** dialog to display the Add Follow-ups menu.
3. Select **Create Secondary ID's for the current animal**.
4. Click **Next** to continue.
5. Enter a valid ID.
6. Select the ID Type.
7. You may specify up to 4 IDs and their respective ID types in this dialog.
8. Click **Next** to continue.
9. The Success page is displayed showing the animal id data you just entered.
10. If necessary, you may click on the primary animal id link to open the animal record.
11. Select **Quit this dialog** and click **Next** and then click **Finish** to end the dialog session.
12. Select **Return to animal follow-ups dialog** if you want to continue to work in the dialogs.

If there are more than four IDs on the animal you can run the dialog again to add more IDs. To see all of the animal's ids, open the animal record and scroll down to the **All Identification** section of the form.

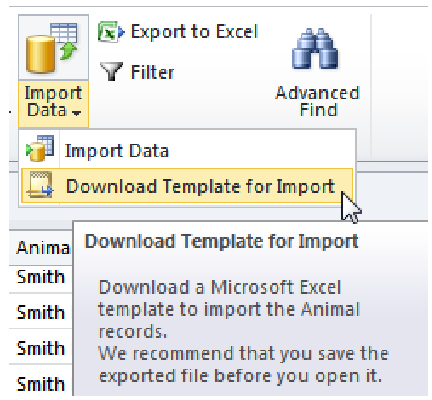


You may click on the animal id to open the id record form.

Scenario 14: Import Data from a Spreadsheet

In Scenario 12: A Quick Way to Add a Lot of Animals we showed you how you can quickly add a large number of animals to the Animal entity using a dialog. Another quick way to get a large number of animal records into the EMRS 2 application is to import the animal data from a spreadsheet. This is done by clicking on the **Import Data** button in the grid ribbon of any of the views of the **Animals** entity.

Before you can import the data in your spreadsheet the spreadsheet column names should be identical to the field names used on the Animal entity form. The spreadsheet can be used as a template whenever you need to import a large number of animal records.

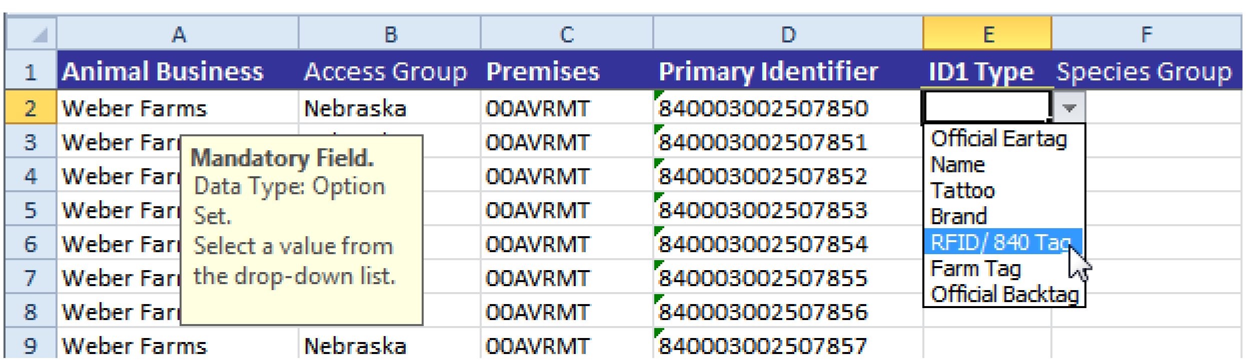


The easiest way to get a spreadsheet template to match the fields in the form is to download a template for import using the **Import Data** button. You add your animal data records to the template and save it in a file. Then you click on the **Import Data** button to import your animal data. This process is described as follows:

1. Click on **Animals** under the **Premises/Producers** tab in the **Disease Management** navigator to display **Active Animals**.
2. Select **Active Animals – Import View** from the view droplist.
3. Click on the **Import Data** droplist button in the grid ribbon.
4. Select **Download Template for Import**; when the following prompt is displayed click on **Save** then click on **Save As** and specify a directory and file name for the XML file.

5. When the next prompt is displayed click on **Open** and click on **Open** again to open the blank template file.

The spreadsheet template with column headers is shown below (with some data added). Note that the spreadsheet template inherits the droplist data from the attributes in the **Animals** form.



In this scenario we want to import a total of 99 animal records owned by Weber Farms in Plainview, Nebraska. Of these animals, 21 head are Angus females with 840 tags and 78 head are Holstein females with official ear tags. The Premises ID is 00AVRMT.

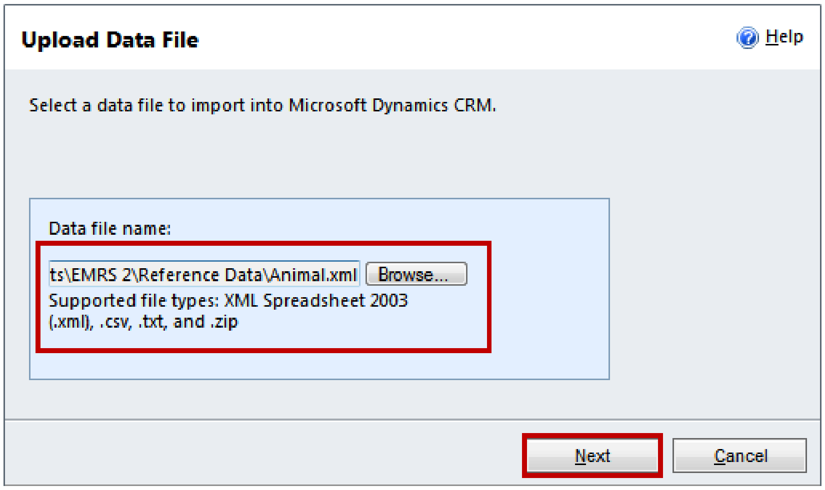
6. In this scenario the data is available in a different spreadsheet, so we will copy the data from the source spreadsheet into the appropriate columns in the target (template) spreadsheet.
7. For the columns that inherit droplist data you must first select the appropriate option from the droplist and then you may copy the selection to the other rows as needed.
8. If the animal data is similar you can enter one set of data in a row and then copy the row to the desired number of rows and edit the data that is different in each row. This is how the template looks after we add the data.

H86 Holstein

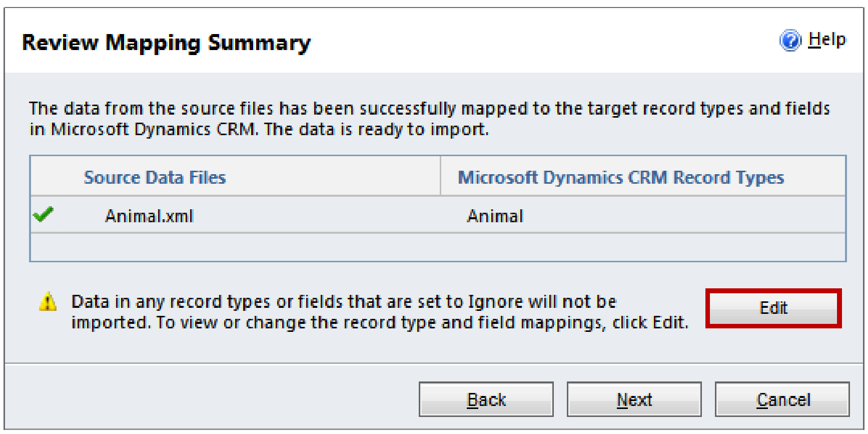
	C	D	E	F	G	H	I	J	K	L
1	Premises	Primary Identifier	ID1 Type	Species Group	Species	Breed	Description/Mark	Current Structure	Sex	Repro Status
9	00AVRMT	840003002507857	RFID/ 840 Tag		Cattle	Angus			F	Intact
10	00AVRMT	840003002507858	RFID/ 840 Tag		Cattle	Angus			F	Intact
11	00AVRMT	840003002507859	RFID/ 840 Tag		Cattle	Angus			F	Intact
12	00AVRMT	840003002507860	RFID/ 840 Tag		Cattle	Angus			F	Intact
13	00AVRMT	840003002507861	RFID/ 840 Tag		Cattle	Angus			F	Intact
14	00AVRMT	840003002507862	RFID/ 840 Tag		Cattle	Angus			F	Intact
15	00AVRMT	840003002507863	RFID/ 840 Tag		Cattle	Angus			F	Intact
16	00AVRMT	840003002507864	RFID/ 840 Tag		Cattle	Angus			F	Intact
17	00AVRMT	840003002507865	RFID/ 840 Tag		Cattle	Angus			F	Intact
18	00AVRMT	840003002507866	RFID/ 840 Tag		Cattle	Angus			F	Intact
19	00AVRMT	840003002507867	RFID/ 840 Tag		Cattle	Angus			F	Intact
20	00AVRMT	840003002507868	RFID/ 840 Tag		Cattle	Angus			F	Intact
21	00AVRMT	840003002507869	RFID/ 840 Tag		Cattle	Angus			F	Intact
22	00AVRMT	840003002507870	RFID/ 840 Tag		Cattle	Angus			F	Intact
23	00AVRMT	NERMT3670	Official Eartag		Cattle	Holstein			F	Intact
24	00AVRMT	NERMT3671	Official Eartag		Cattle	Holstein			F	Intact
25	00AVRMT	NERMT3672	Official Eartag		Cattle	Holstein			F	Intact
26	00AVRMT	NERMT3673	Official Eartag		Cattle	Holstein			F	Intact
27	00AVRMT	NERMT3674	Official Eartag		Cattle	Holstein			F	Intact
28	00AVRMT	NERMT3675	Official Eartag		Cattle	Holstein			F	Intact
29	00AVRMT	NERMT3676	Official Eartag		Cattle	Holstein			F	Intact
30	00AVRMT	NERMT3677	Official Eartag		Cattle	Holstein			F	Intact

It is not necessary to enter data in every column unless it is a **Mandatory Field** column.

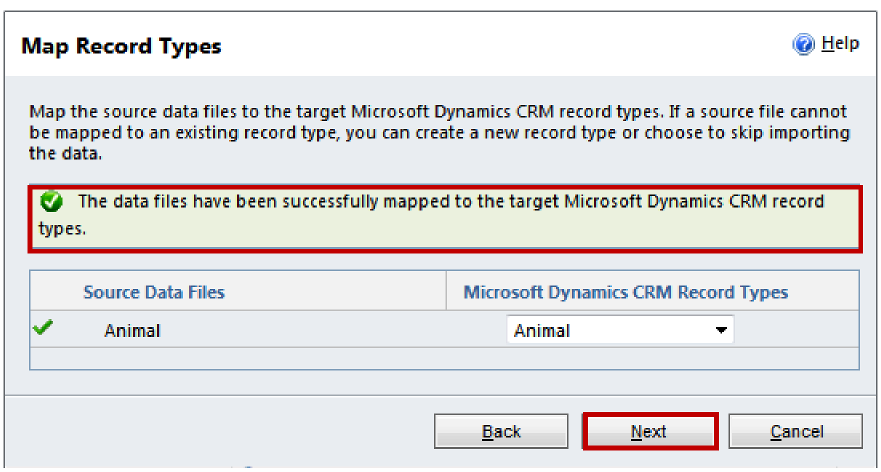
9. Save the spreadsheet data using an appropriate file name and folder.
10. Return to the **Active Animals – Import** view and click on the **Import Data** button and select **Import Data**.
11. In the **Upload Data File** dialog enter the path and file name you want to import or click **Browse** to look for the desired file; click **Next** to continue.
12. Select the desired file and click **Next** in the **Upload Data File** dialog.



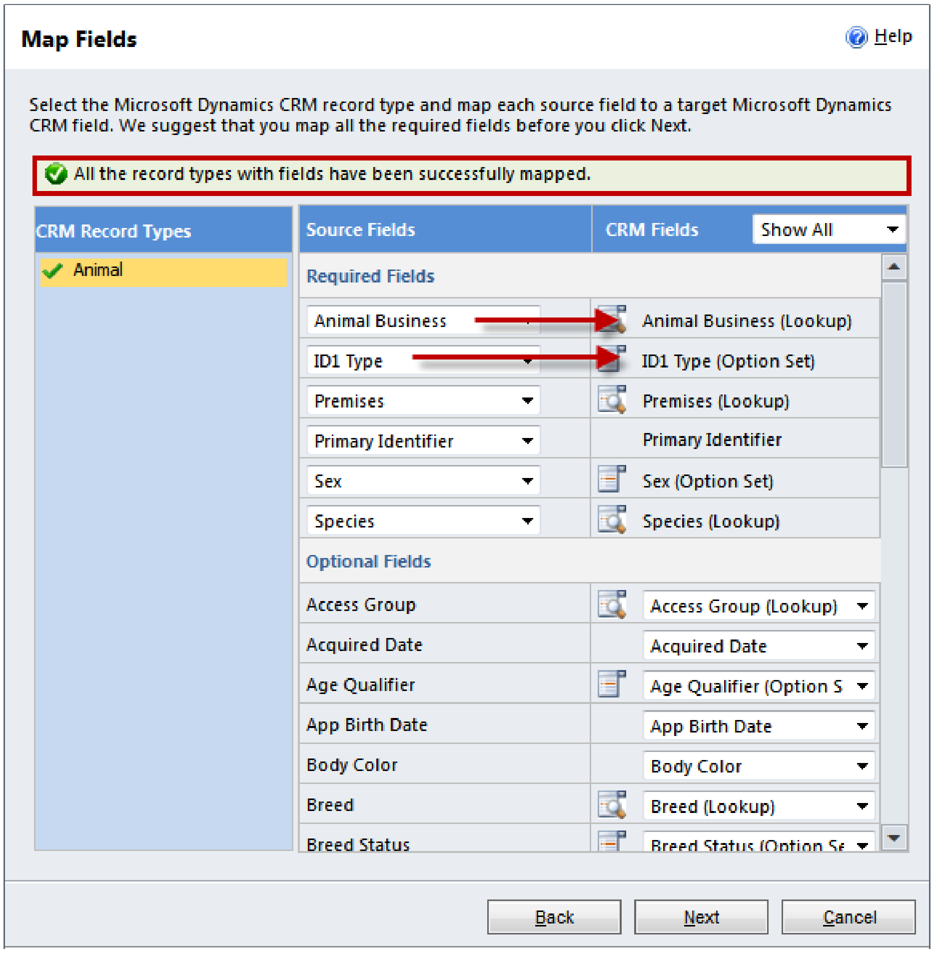
13. Click **Next** in the **Review Mapping Summary** dialog to map the source data files to the target EMRS 2 record in Microsoft Dynamics CRM.



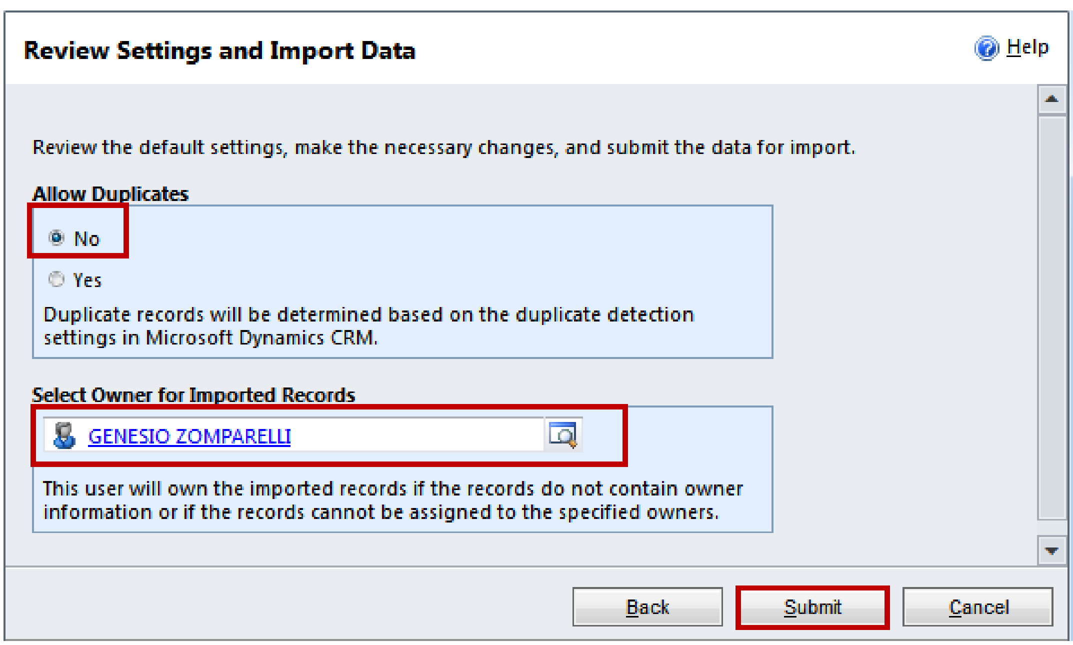
14. When the source data files are mapped to the target click **Next** to continue.



15. Verify that the mapping of the source and target fields is correct; click **Next** to continue.

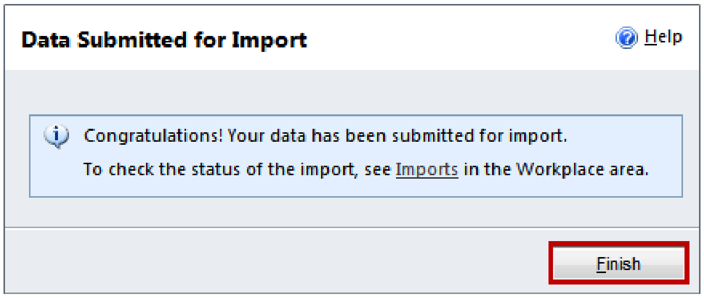


16. Because you used a template all of the fields should be properly mapped; click **Next** to continue.

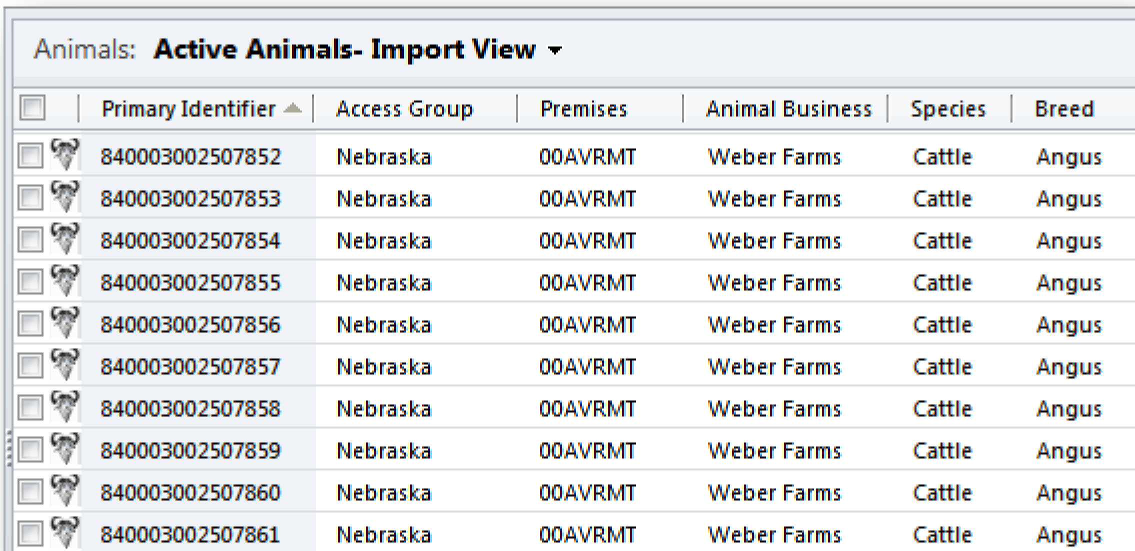


17. Under **Allow Duplicates** Select **No**; verify the owner name; click **Submit** to submit the data.

18. In the **Data Submitted for Import** dialog click **Finish**.



You may verify that the animal records have been imported buy refreshing the **Active Animals – Import View** and look for the records in the view. You may see the records in any view of the **Animals** entity.



Animals: **Active Animals- Import View**

Primary Identifier	Access Group	Premises	Animal Business	Species	Breed
840003002507852	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507853	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507854	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507855	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507856	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507857	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507858	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507859	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507860	Nebraska	00AVRMT	Weber Farms	Cattle	Angus
840003002507861	Nebraska	00AVRMT	Weber Farms	Cattle	Angus

Data Management

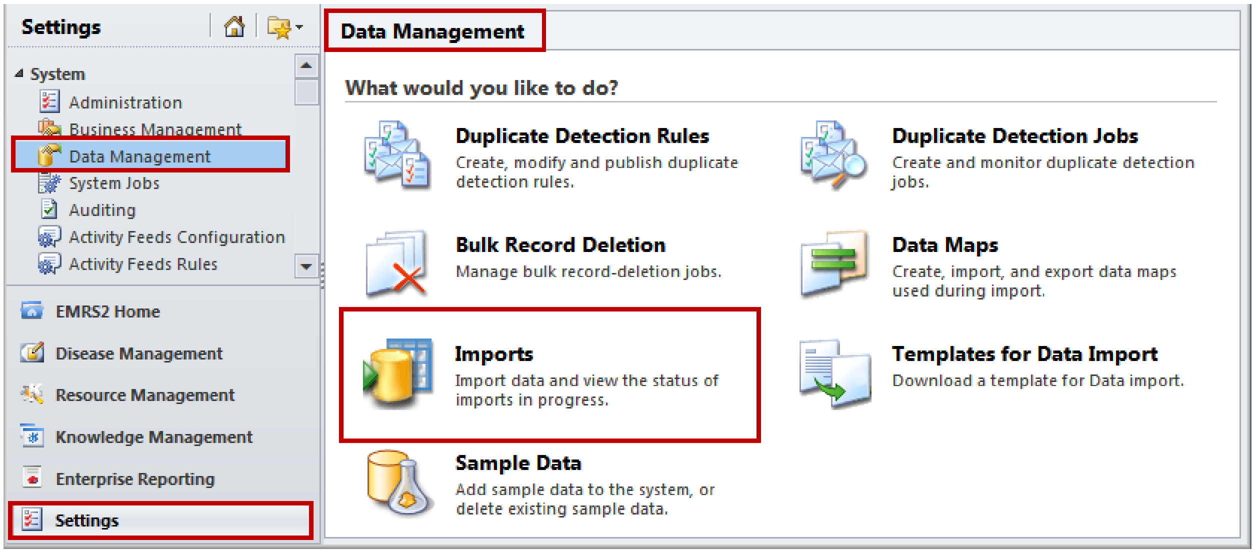
In the previous scenario it did not take very long to import 99 animal records. But there may be cases when it is necessary to import hundreds of records. If there are thousands of records the import process could take several minutes. You can check the progress of the import process in the Settings navigation pane. This can be done as follows:

1. Click on **Settings** in the applications pane
2. Click on **Data Management** under the **System** tab in the **Settings** navigator.

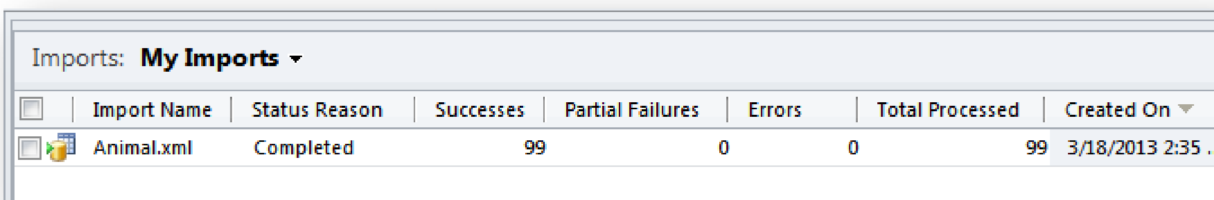
   The **Data Management** workspace is displayed.

3. Click on **Imports** to view the status of your import process.

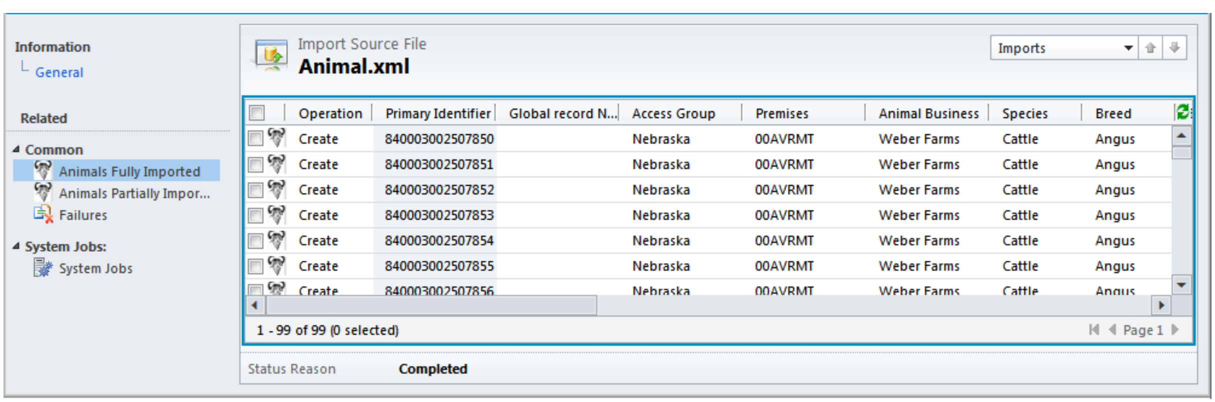
The Data Management workspace.



The status of you import is displayed in the **My Imports** view.



You may click on the **Import Name** record to open the **Import Source File**. In the **Import Source File** you may click on **Animals Fully Imported** in the navigation pane to see all of the animal records. You may click on the animal id to open the record view and/or edit the data, if necessary.



Scenario 15: Replace a Lost Primary ID with a New Primary ID

Sometimes animal ids are lost or destroyed. If you need to replace an animal's primary id with a new id follow these steps:

If you know the name of the business that owns the animal:

1. Click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the Active Animal Businesses view.
2. Search for the desired business.
3. Open the business record.
4. Click on **Animals** under the **Activities/Animals** tab in the entity navigator to display the **Animal Associated View.**
5. If you do not see any animals in the view click on the refresh icon to refresh the view.

If you do not know the name of the business that owns the animal:

1. Click on **Animals** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Animals** view.
2. Search for the desired animal in the view.
3. If you do not see any animals in the view click on the refresh icon to refresh the view.

Continue as follows:

1. Select the animal
2. Click on the **Animal Follow-ups** button to display the Add Follow-ups menu.
3. Select **Change the primary id of the current animal**.
4. Click **Next** to continue.
5. Select **I want to change the id and replace it with a new one**.
6. Click **Next** to continue.

   The primary id is displayed in the dialog. Select one of the following options:

   - I want to edit and update the id
   - I want to change the id and replace it with a new one
   - I want to change the id and replace it with an existing id

7. Select **I want to change the id and replace it with a new one**.
8. Enter New Primary Identifier
9. Select Primary ID Type
10. Click **Next** to continue.

    The Success page confirms your changes.

11. Select **Quit this dialog** and click **Next** and **Finish** to end the dialog session.
12. Select **Return to animal follow-ups dialog** to continue working with animal dialogs.

Scenario 16: Delete an Animal Record

Normally, animals don't just disappear; but there may be situations when it is necessary to remove an animal from a business record, such as when you added an extra animal record by mistake. Here is what you can do to "soft delete" the animal record from a business:

If you know the name of the business that owns the animal:

1. Click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the Active Animal Businesses view.
2. Search for the desired business.
3. Open the business record.
4. Click on **Animals** under the **Activities/Animals** tab in the entity navigator to display the **Animal Associated View.**
5. If you do not see any animals in the view click on the refresh icon to refresh the view.

If you do not know the name of the business that owns the animal:

1. Click on **Animals** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Animals** view.
2. Search for the desired animal in the view.
3. If you do not see any animals in the view click on the refresh icon to refresh the view.

Continue as follows:

1. Select the animal
2. Click on the **Animal Follow-ups** button to display the Add Follow-ups menu.
3. Select **Delete the current animal record**.
4. Click **Next** to continue.

   A summary of the animal record with the primary id is displayed. You are prompted to select one of the following actions:

   - Deactivate the record only.
   - No, cancel this action.
   - Yes, move the Animal to the Trash Bin.

5. Select **Yes, move the Animal to the Trash Bin**.
6. Click **Next** to continue.

   The dialog explains that you are actually doing a "soft deletion" of the animal record. This means the record is moved to a special folder called the Trash Bin. You will be removed from the Access Group and therefore will no longer be able to see the animal record.

7. Select **Yes, I'm sure I want to move the Animal to the Trash Bin**.
8. Click **Next** to continue; click **Finish** to end the dialog.

If you can still see the animal record in the view you will need to refresh the view (F5) after the dialog completes; the Animal record will no longer appear in the view.

If you accidently delete the wrong animal record you can contact EMRS2 Support to have the access changed back to your team access and the record will be restored.

If an animal dies or is sold to another business the record should not be deleted. Instead, the animal record is *deactivated* in the current business record; if the animal is sold to another business the same animal is added to that business record as an active animal record and deactivated from the previous business record.

Scenario 17: An Animal is sold to Another Business on the Same Premises

In this scenario Business X sells one animal to Business Y. Business Y is associated with the same premises as Business X. Complete the following steps in EMRS 2 to record this activity.

1. In the **Disease Management** navigation pane click on **Animals** under **the Premises/Producers** tab to display the **Active Animals** view.
2. If you know the id of the animal that was sold to the other business search for the animal record sing the animal id; otherwise, if you know the name of the business that sold the animal, search for the business that sold the animal.
3. Select the animal record of the animal that was sold.
4. Click on the **Animal Follow-ups** button to display the Add Follow-ups menu.
5. Select **Change managing business for animal on premises**; click **Next**.
6. Select the new business on the premises that will manage the specified animal; click **Next**.
7. Select **Quit I am done** and click **Next** then **Finish** to end the dialog.

Scenario 18: An Animal is sold to Another Business on a Different Premises

In this scenario Business X sells one animal to Business Y. Business Y is <u>not</u> located on the same premises as Business X. Complete the following steps in EMRS 2 to record this activity.

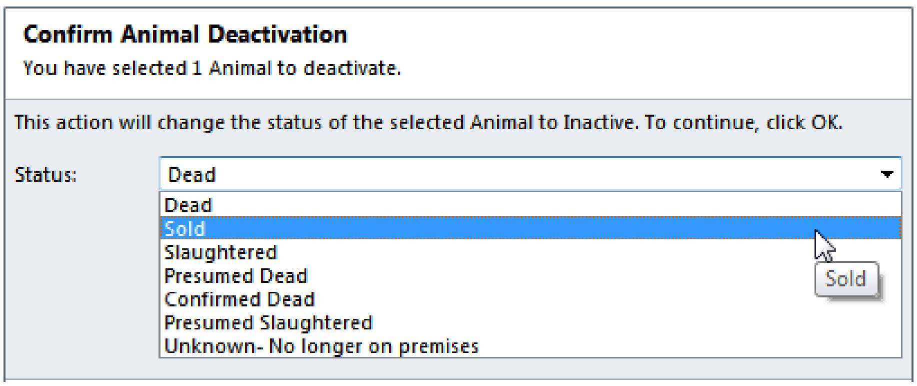
8. In the **Disease Management** navigation pane click on **Animal Businesses** under **the Premises/Producers** tab to display the **Active Animal Businesses** view.
9. Look for the business that sold the animal and select the record.
10. Open the record.
11. Click on **Animals** under the **Activities/Animals** tab in the navigation pane to display the **Animal Associated View.**

12. Look for the animal that was sold and select the record.

Make a note of the animal's identification numbers and other attributes of the animal. One way to do this is to open **Notepad** and copy the animal data from the record and paste it into Notepad. You will need to use this data to create a new animal record in the business that purchased the animal.

13. Click on **Deactivate** in the ribbon.

14. Select **Sold** from the droplist in the **Confirm Animal Deactivation** dialog.



15. Refresh the view and note that the animal record is still visible but the **Animal Status** is "Sold."

16. Click on **General** in the **Animal Business Web Form** navigation pane to display the Animal Business form.

17. Click **Save & Close** to Save changes and close the record.

    You may also keep the record open in case you need to refer to the animal data when you add the animal record to the business that purchased the animal.

18. Return to the **Active Animal Businesses** view and look for the animal business that purchased the animal.

    If the business is not found in the view you may create a new business record.

19. Select the business record (it is not necessary to open the record).

20. Click on the **Business Follow-ups** button.

21. Select **Animal** from the **Add Follow-ups** dialog menu.

22. Click **Next** to continue.

23. Enter the animal's **Primary id**.

    If you copied it to the notepad you can copy it from the notepad and paste it in the dialog.

24. Select the **ID Type**.

25. Select the Species.

26. Click **Next** to continue.

27. Select the **Breed, Sex**, and **Reproductive Status**.

    This should be the same data taken from the animal that was sold by the previous business.

28. Click **Next** to continue.

29. If you have the **DOB** enter it and select **DOB Entered**; otherwise select **Adult**.

30. Enter **Body Color**, **Face Color**, and **Description/Markings**.

31. Click **Next** to continue.

32. Select the **Breed Status** and **Domestic Status**; enter the **Genotype**.

33. Click **Next** to continue.

34. The **Success** page is displayed showing the link to the new animal record.

35. Select **Quit the dialog**.

36. Click **Next** to continue; click **Finish** to close the dialog session.

The animal record now exists in two different places. The business that sold the animal displays the animal status as **Sold**. The business that purchased the animal displays the status as **Sited Active**.

Animal records may be deactivated (not deleted) for the following reasons:

- Dead
- Sold
- Slaughtered
- Presumed Dead
- Presumed Slaughtered
- Unknown – No longer on premises

If an animal record was deactivated for one of the above reasons, but it was later determined that the reason for the deactivation was incorrect, you may click on the **Activate** button to activate the animal record and, if necessary, deactivate the record and select the correct reason.

Scenario 19: Managing Groups of Animals

In some cases a business may own hundreds of animals but you might only be interested in a group of these animals during a FAD investigation. Rather than work with each individual animal it may be more efficient to work with the animals as a group.

Before you can work with a group of animals you have to know the following:

- What is the name of the business that owns the animals?
- Are there animals listed in the business record?
- What are the ids of the animals you want to put into a group?
- What do you want to call the group?

Follow these steps to work with animal groups:

1. Click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the Active Animal Businesses view.
2. Search for the desired business.
3. Open the business record.
4. Click on **Animals** under the **Activities/Animals** tab in the entity navigator to display the **Animal Associated View.**
5. If you do not see any animals in the view click on the refresh icon to refresh the view.
6. If you see animals click on **General** in the navigation pane to return to the main form.
7. Click on **Business Follow-ups** to display the Add Follow-ups dialog menu.
8. Select **Animal Group** and click **Next** to continue.
9. Enter a descriptive name for the animal group.
10. Enter the approximate number of animals in the group.
11. Select the Species of the group.
12. Select the Sex of the group.
13. Select the Reproductive Status of the group and click **Next** to continue.
14. Select the Predominant Breed of the group.
15. Select the Predominant Breed Status.
16. Enter the Median Date of Birth and select DOB Entered; or select either Adults or Mixed Ages.
17. Select the Domestic Status and click **Next** to continue.

When the Success page is displayed the group name is hyperlinked to the new group record. At this time you have not added any animals to the group.

18. In the dialog select **Add animal group follow-ups** (or click on the hyperlink to open the animal group record); click **Next** to continue.
19. Select **Add or link animals to this group** and click **Next** to continue.
20. You may choose one of the following options:
    a. Create New Animals and link them to this group and click **Next** to continue.
    b. Add Existing Animals to this group and click **Next** to continue.

    If you choose to create new animals the Add Follow-ups dialog for Animals is displayed and you follow the process to add new animals as was explained in a previous scenario.

If you choose to add existing animals continue as follows:

21. Select the desired animal from the droplist.

    You should know the animal's primary id. Unfortunately, you may select only one animal at a time, so you should try to keep track of all of the animals you are selecting.

22. Click **Next** to continue.

    The dialog will display the id of the animal you just added to the group and prompt you to indicate if you want to repeat the process (to add more animals) or quit (there are no more animals to add).

23. Select **Repeat the process** and click **Next** to continue.
24. Select **Add Existing animals to this group** and click **Next** to continue.
25. Select the next animal you want to add to the group and click **Next** to continue.
26. Repeat this process until you are done adding all of the animals to the group.
27. When you are done adding all of the animals to the group select **Quit, I am done** and click **Next** to continue then click **Finish** to end the dialog session.
28. If the Create Animal Group: Animal Business: Success dialog is still running you may select one of the following options:
    a. Quit dialog – I am done.
    b. Repeat process and create more groups.
    c. Add animal group follow-ups (associate animals, etc.)
    d. Add animal business follow-ups (animals, investigations, etc.)
    e. Add premises follow-ups (structures, new business)
29. Select **Quit dialog** – I am done and click **Next** to continue then click **Finish** to close the dialog.

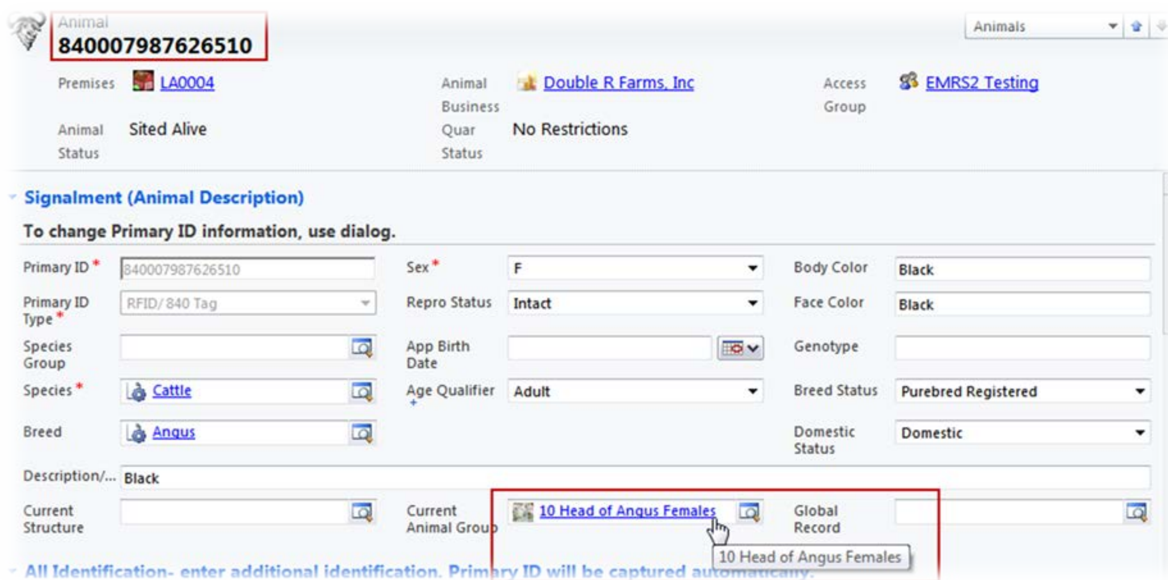
Scenario 20: Taking an Animal Out of a Group

If an animal that was previously included in a group should no longer be a member of the group follow this procedure to remove the animal from the group.

Before you begin this process you should know the following:

- The name of the group the animal is in
- The animal's primary id

1. In the **Disease Management** navigation pane select **Animal Groups** under the **Premises/Producers** tab to display the **Active Animal Groups** view.
2. Look for the animal group name that the animal is in and open the record.
3. In the form navigation pane select **Animals** under the **Animals in Group** tab to display the list of the animals in the group.
4. Look for the primary id of the animal you want to remove from the group and open the record.
5. Remove the group name from the **Current Animal Group** field.



6. Click **Save & Close** to save changes and close the form.
7. Refresh the Animal Associated View in the **Animal Group** form to see that the animal record is no longer listed in the group.
8. Click Save & Close to save changes and close the Animal Group form.

You may also move the animal to a different group using this procedure. If there are other groups available you may display them in the lookup view and select the group you want to assign the animal to.

Managing Contacts

Before you can visit a premises to do an investigation you have to know who is responsible for the animals or other subjects that were reported in the incident. This person will be your primary contact. In some cases, the contact may be the farmer or rancher who lives on the premises. The contact could be an employee of the business that owns the animals but does not necessarily reside on the premises. There may also be secondary contacts, such as the veterinarian who reported the incident or the persons who will be involved in other aspects of the investigation

Contact information is stored in the **Contacts** entity. The Contacts entity is related to the **Animal Business** entity. Therefore, to add contact information you have to display the **Active Animal Businesses** view and select the business record that is associated with the contact.

Things you should know about contacts:

- All contacts are created from an animal business but are visible on related premises records.
- Contacts are unique for a business but can be copied to other businesses on the same premises or to other businesses on different premises.
- Contacts can be related thru connections to other entities, including other contacts. This is how you can tell if the contact named John Smith found on two different premises is actually the same person.
- The minimum data required to add a contact is their name and phone number.
- Every business must have one primary contact.
- You may manage individual contact records in the Contacts views.
- All contact information is protected by state level access.

If you have the contact information you can create the contact record immediately after you create the animal business record using the same dialog used to create the animal business record.

Scenario 21: Managing My Contacts

1. You can search for existing contacts by clicking on **Contacts** under the **Premises/Producers** tab in the **Disease Management** navigator to display **All Active Non-Personnel Contacts**.
2. You may use the view selector to select the following types of contacts:
    - Active Expert Appraiser Contacts
    - Active Personnel
    - All Active Contacts
    - All Active Non-Personnel Contacts
    - Inactive Contacts
    - My Active Contacts
3. If the contact cannot be found in any of the **Contacts** views, click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Animal Businesses** records.

4. Look for the business record where the contact will be added.
5. Select the record and click on the **Business Follow-ups** button.
6. In the Add Follow-ups dialog select **Contact** and click **Next** to continue.
7. Select **Yes** if the contact is the **Primary Contact** for the business; otherwise select **No**.

   If primary is set to "Yes" then this contact will replace any other designated current primary contact. Multiple contacts can exist for a business but there can be only one contact designated as the primary contact.

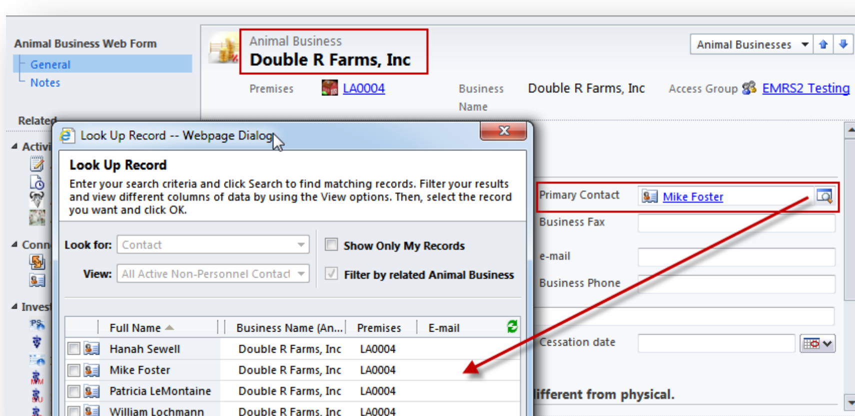
8. Enter the **First** and **Last Name** of the Contact
9. Enter the **Business Phone** Number
10. Select the **Type of Contact** from the droplist. The contact type may be one of the following:
    a. Producer
    b. Veterinary Practitioner
    c. Reporting Source
    d. Industry Representative
    e. Expert Appraiser
    f. Other
11. Enter the contact's e-mail address; click **Next** to create the contact record.

    The success page is displayed with the contact name linked to the record.
12. Select one of the following options:
    a. Quit if you are done adding contacts
    b. Add another contact to this business
    c. Return to the Animal Business Follow-ups dialog
13. Click **Next** to continue.
    a. If you selected option "a" then click **Next** and **Finish** to close the dialog.
    b. If you select "b" then the dialog repeats to allow you to add another contact.
    c. If you select "c" the Animal Business Follow-ups dialog is displayed.

You can change primary contacts at any time by opening the animal business record and clicking on the lookup icon in the **Primary Contact** field to select a different contact name.

Scenario 22: Logging Phone Calls with My Contacts

You can keep records of all of your communications with any



of your contacts. The communication options include:

- Phone Calls
- E-mails
- Faxes
- Tasks
- Meetings

1. Click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Animal Businesses** view.
2. Look for the animal business record that has the contacts you communicate with.

   If the business record does not have any contacts you cannot record any communication activities.

3. Select the animal business record and click on **Business Follow-ups**.
4. In the Add Follow-ups dialog select **Communication Activity** and click **Next** to continue.
5. Select **Phone Call** as the type of communication activity to want to add.
6. Click **Next** to Continue.
7. Enter the **Date** of the call.
8. Select the **Name** of the contact you called.
9. Enter the **Number** you called (if it is not the same as the contact's number).
10. Enter the subject of the call and click **Next** to continue.
11. A new phone record is created with the subject as the link to the new record.

    You may click the subject link to open the record and add further details about the call, such as the duration of the call, the caller, and the details of what was discussed.
12. You may select one of the following options:
    a. Select **Quit** and click **Next** to **Finish** the dialog.
    b. Select **Add Business Follow-ups** and click **Next** to continue working in the dialog.

       For example, you could run a dialog to send an e-mail to the contact.

Scenario 23: Send E-mail to Contacts

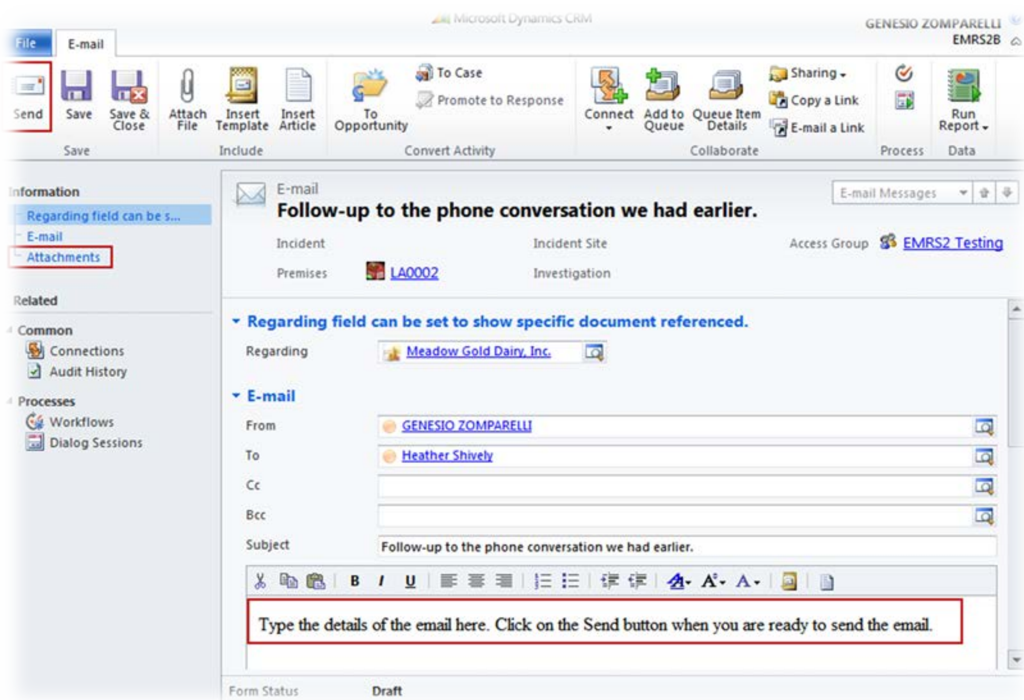
Follow these steps to send email to your contacts:

1. Click on **Animal Businesses** under the **Premises/Producers** tab in the **Disease Management** navigator to display the **Active Animal Businesses** view.
2. Look for the animal business record that has the contacts you communicate with.

If the business record does not have any contacts you cannot record any communication activities. **The contact must have an email address**.

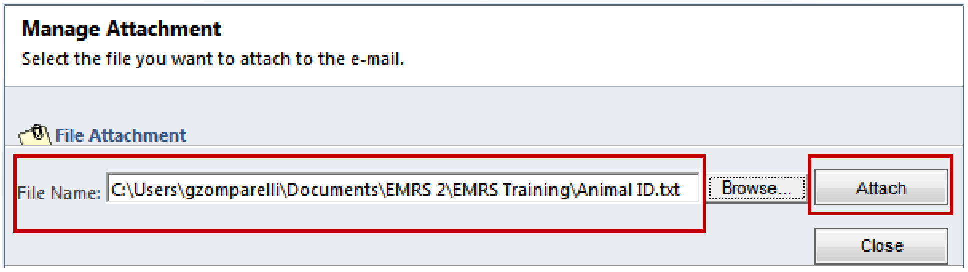
3. Select the animal business record and click on **Business Follow-ups**.
4. In the **Add Follow-ups** dialog select **Communication Activity** and click **Next** to continue.
5. Select **E-mail** as the type of communication activity to want to add.
6. Click **Next** to Continue.
7. Select the name of the contact you emailed.

   If an email address is not displayed after the contact name then you cannot send an email to this contact.
8. Enter the subject of the email and click **Next** to continue.
9. A new email record is created with the subject as the link to the new record.
10. Click on the link to open the e-mail record to add additional details.



In the e-mail form you may add attachments, if necessary.

11. If you want to add an attachment to the e-mail:
    a. Click on the **Attach File** button to display the **Manage Attachment** dialog.
    b. Type the name of the file you want to attach or click the Browse button to find the file.



   c. Click Attach to attach the file to the e-mail.
   d. Click Close to close the Manage Attachment dialog.

12. Click **Send** to send the e-mail.
13. Click **Save & Close** to save the e-mail record and close the form to return to the dialog.
14. In the dialog you may select one of the following options:
    a. Select **Quit** and click **Next** to **Finish** the dialog.
    b. Select **Add Business Follow-ups** and click **Next** to continue working in the dialog.

NOTES

NOTES

Investigations and Exams

"The rapid diagnosis and ultimate control of foreign animal and emerging diseases is dependent on the diagnostic abilities, experiences, and diligence of veterinary practitioners. Animal health officials recognize that practitioners are the first line of defense for preventing incursions of these types of diseases into the United States." — Brian J. McCluskey, DVM, MS, USDA/APHIS, Centers for Epidemiology and Animal Health.

Each state must follow a protocol when assisting the United States Department of Agriculture, Animal and Plant Health Inspection Service (USDA, APHIS) in conducting routine investigations for Foreign Animal Disease (FAD).

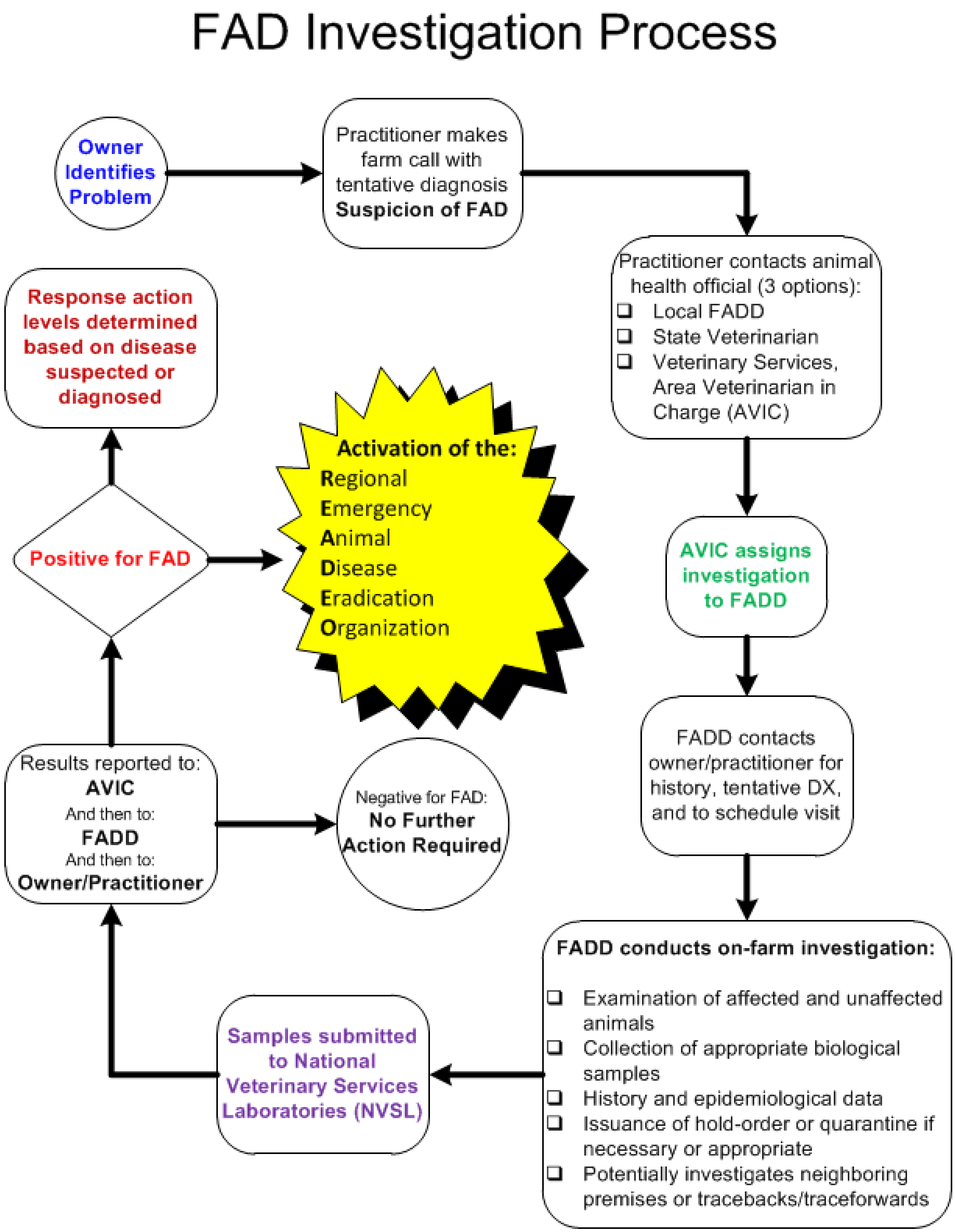
Investigation Protocol

The protocol for conducting investigations includes:

- Dispatch a USDA, Veterinary Service Foreign Animal Disease Diagnostician to the premises where suspicious animals are located.
- Initiate a Foreign Animal Disease investigation.
- If warranted, submit samples to the nearest laboratory, such as the USDA, APHIS Veterinary Services Diagnostic Lab in Plum Island, New York.
- Quarantine the premises until test results are obtained.
- If test results are positive, continue quarantine.
- If test results are negative, release quarantine.
- Quarantine of a premises occurs once samples have been submitted to the USDA for analysis.
- Quarantine is a precaution — it is NOT a diagnosis of a Foreign Animal Disease.

In order to protect the rights of individuals, states do not release the name and location of a routine investigation until such time as a definite diagnosis of a FAD is made.

The FAD Investigation process is summarized on the following page.



In this section we will step you through some scenarios to show you how to do FAD investigations in EMRS 2 using dialogs to create Initial Contact Reports, Investigations, and Examination records.

Scenario 24: Report an Incident without Starting an Investigation

There may be times when an incident is reported on a premises but there is not sufficient information to determine whether an investigation is warranted. In these instances you can create a record that a potential FAD incident was reported in an **Initial Contact Report** (ICR).

Some things you should know about Initial Contact Reports:

- The information reported may result in an investigation
- A Premises is not required if it will not be investigated
- A FAD number is not required unless there is an investigation
- An ICR can be used to track FAD numbers as issued
- An ICR can be converted to an investigation when linked to a premises record
- If an investigation is not warranted the ICR can be closed

In the Initial Contact Report Reports Follow-ups dialog you may choose one of the following options:

- Create a New Initial Contact Report (ICR)
- Link EMRS premises or create new premises
- Convert the selected report to an Investigation
- Close the selected report without an Investigation
- Quit this dialog
- Delete the selected Initial Contact Report

Follow these steps to create a new ICR:

1. Click on **Initial Contact Reports** under **Investigations** in the **Disease Management** navigator to display **Active Initial Contact Reports**.
2. Select a record in the view and click **Initial Contact Follow-ups.**

   If you can view records from different states, select the record in the desired state for the ICR.
3. Select **Create a New Initial Contact Report** in the Add-Follow-ups dialog.
4. Click **Next** to continue.
5. Enter the **Report Date and Time**.
6. You are required to select one of the following **Reasons** for the report:

   - Complaint
   - Permits
   - Surveillance
   - Trace

   The options that appear in the next dialog page will change based on the reason for the report you selected above.

7. Select your **Access Group** (this is the state of the ICR selected in the view; it cannot be changed).
8. Select the Incident for this report from the droplist:

   - FAD
   - IDAI12
   - TB Tracebacks

9. Select the **Site Responsible** for the investigation; Click **Next** to continue.
10. Click on the Lookup icon to select the **Primary Species Group** being reported.
11. Select **Report Condition Type** being reported from the droplist.

    If the report reason is **Complaint** select one of the following:

    - Abortion
    - Central Nervous System
    - Diarrhea
    - Ectoparasite — maggot, tick, mite
    - Hemorrhage
    - High Death Rate
    - Integument/Skin, not Vesicular
    - Reproductive, not Abortion
    - Respiratory
    - Vesicular — Skin of the Muzzle & Feet
    - Vesicular — vesicle, papule, erosion

    If the report reason is **Permits** select **Permits to Slaughter** from the droplist.

    If the report reason is **Surveillance** select one of the following from the droplist:

    - Illegal Import
    - Positive Clinical Test
    - Positive Test on Specimen

    If the report reason is **Trace** select one of the following:

    - Into a Positive Flock
    - Into Positive Herd
    - Neighboring Flock
    - Neighboring Herd
    - Other Direct Contact
    - Other Indirect Contact
    - Trace into Positive Herd
    - Out of a Positive Flock
    - Out of a Positive Herd

12. Select the **Source** reporting the condition from the droplist.

    If the report is a C**omplaint** select one of the following:

    - Diagnosis Lab
    - Other Source
    - Practitioner
    - Producer

    If the report is **Permits** select **Regulatory Official**.

    If the report is **surveillance** select one of the following:

    - Diagnosis Lab
    - Regulatory Official

    If the report is **Trace** select **Regulatory Official**.

13. You may include explanations of the condition, such as clinical signs or animals involved.

    This will create a note on the ICR for the FADD and should include any additional clinical signs reported or any census information on animals.

14. Click **Next** to continue.
15. You are required to provide the **First** and **Last Name** of the reporting party.
16. You are required to provide the **Main Phone** of the reporting party.
17. Enter an **E-mail** Address of the reporting party if it is available.
18. Provide **Additional Comments** on the reporting party if necessary.
19. Click **Next** to continue.
20. A Prem id is not required, but if you know the **Prem ID** you may enter it in the dialog.
    a. If you don't know the Prem ID you may look it up, if it is available.
    b. If you think the Reporting Person is related to an existing premises then you can select it in the dialog lookup. If a premises id is linked to the ICR then the report can be converted to an Investigation later, if it is necessary.
    c. If an existing premises is linked to the ICR then it is only necessary to enter a First and Last Name and Phone Number for the premises contact.
21. Enter a **Premises Name** if one is available.

    You could open the premises record in a different window to get the necessary information.

22. You are required to enter the **First and Last Name of the Premises Contact**.

23. Physical Address, City, and Zip data are not required in the report. This should be where animals are physically located. You may provide this data if it is available unless the report was linked to an existing premises record; if not linked this data will be required to create a premises and an investigation.
24. The **Prem State** is the state for the ICR you selected in the view before starting the dialog.
25. You are required to enter the **Premises Contact Main Phone**.
26. You may include **Additional Directions** to the premises location to be investigated.
27. Click **Next** to continue.
28. Select a person to Assign the ICR to; click **Next** to continue.

    The Success dialog displays the ICR number as a link to the ICR record.

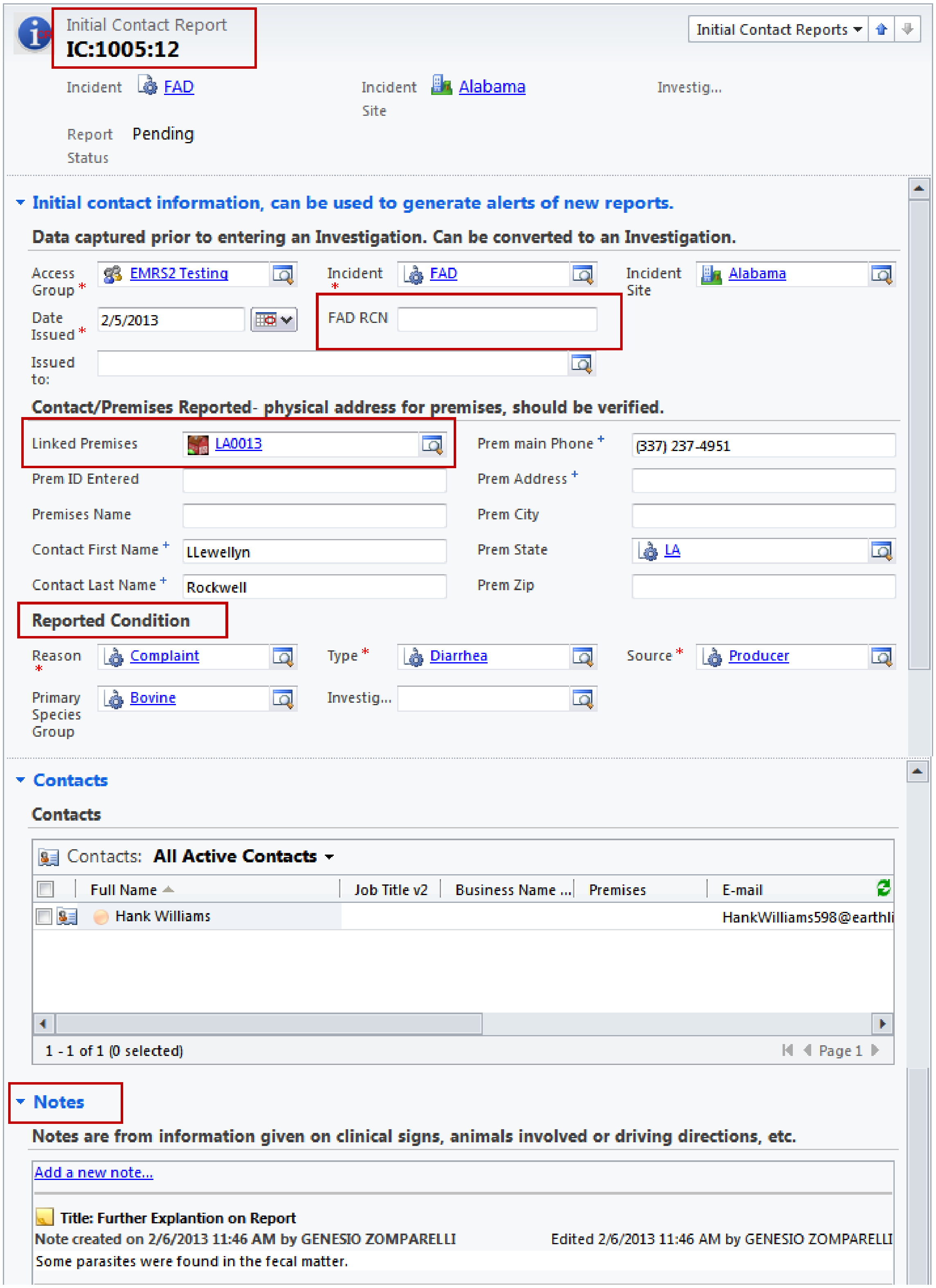
29. You may click on the link to open the ICR record to review and edit the data if necessary.
30. You may select one of the following options:

    - **Quit** the dialog and click **Next** and **Finish** to end the dialog.
    - **Add another** Initial Contact Report and Click **Next** to repeat the process.
    - **Use the premises address** to create a new premises; click **Next** to continue.
    - **Convert** this report to an Investigation and click **Next** to continue.
    - **Close this Report** without an Investigation and click **Next** to continue.

Add Follow-Ups Actions (Initial Contact Report)

Action	Description
Create a New Initial Contact Report	1) Capture information reported that may result in an investigation. 2) Premises not required if not investigated. 3) FAD number not required until investigated. 4) Can be used to track FAD numbers as issued. 5) Can be converted to an investigation when linked to premises. 6) Reports not warranting an investigation can be closed.
Link EMRS premises or create new premises	If an investigation is necessary the ICR must be linked to a premises.
Convert this report to an Investigation	If an investigation is necessary the ICR can be converted to an Investigation record; the ICR must be linked to a premises record.
Close this report without an Investigation	If an investigation is not necessary the ICR can be closed.
Quit this dialog	Close the dialog session.
Delete this Initial Contact Report	Move the ICR to the trash bin.

The Initial Contact Report (ICR) Form



To convert the ICR into a FAD Investigation a FAD RCN and premises id are required.

Scenario 25: Convert Initial Contact Report (ICR) to Investigation

In some cases an incident may be reported but there was not sufficient information to warrant a full investigation of the premises. The **Initial Contact Report** (ICR) is used to capture as much information as possible about these cases. Some of these incidents may never warrant an investigation and the ICRs are simply closed. In other cases, it may be necessary to investigate the premises to confirm a FAD incident. In these cases, if an ICR was created it can be converted into an Investigation if the ICR is linked to an existing premises record.

What you should know before you attempt to convert an ICR into an Investigation:

- Do you know if the ICR was linked to a premises?
- If it is a FAD, do you have the Referral Control Number (RCN)?
- Do you have information about the premises, such as an id, name or address?
- Do you have the IC Report ID?

Follow these steps to convert an ICR into an Investigation:

If you don't know the IC Report ID but you know the ICR was linked to a premises record and you have information about the premies:

1. Click on **Premises** under **Premises/Producers** in the **Disease Management** navigator to display the **Active Premises** view.
2. Search for the premises that is linked to the ICR you want to convert.
3. Open the premises record.
4. In the premises form navigator select **Initial Contact Reports** under **Investigations** to display the **Initial Contact Reports Associated View**.
5. Select the ICR you want to convert to an investigation.
6. Click on the **Initial Contact Follow-ups** button to display the **Add Follow-ups** dialog.
7. Select **Convert this report to an Investigation**; click **Next** to continue.

If the ICR is a Foreign Animal Disease (FAD) a FAD RCN is required, otherwise you will not be able to proceed. If you have the FAD number, open the report record and enter the number into the FAD RCN field in the Initial Contact Report form.

8. A FAD number is required to create a FAD Investigation. Enter the FAD number in the format (FYST0000) Fiscal Year, state code, four-digit sequential number (for example, 14NE0003).
9. Click **Next** to continue.
10. Select the name of the **Investigation Coordinator** by clicking on the Lookup icon.
11. Select **Yes**, convert to Investigation; click **Next** to continue.
12. If there is more than one business associated with the premises, select the appropriate business to associate with the investigation; click **Next** to continue.

13. The **Success** page displays the Investigation ID as a link to the new investigation record.
14. Click **Next**, then **Finish** to end the dialog session and return to the Premises form.

The Premises Header should **show Invest Status Under Investigation**. If the status is not changed you may have to click **Save & Close** to update the header. When you open the record again the status should be changed.

If there is already an open investigation for the same incident you may select it from the droplist.

If you know the IC Report ID and the report is linked to an existing premises and has a FAD Number:

1. Click on **Initial Contact Reports** under **Investigations** in the **Disease Management** navigator to display the **Active Initial Contact Reports** view.
2. Search for the ICR you want to convert to an investigation.
3. Select the desired record and click on **Initial Contact Follow-ups** to display the Follow-ups dialog.
4. Select **Convert this report to an investigation**; click **Next** to continue.
5. Folllow the steps on page 96 to convert the ICR to an investigation.

Scenario 26: Start an Investigation without an ICR

If a potential FAD incident is reported on a premises and the FADD determines that a premises investigation is warranted then you can create the investigation in EMRS 2 without creating an ICR.

You should have the following information before you attempt to start an investigation:

- Do you have information about the premises, such as a Prem ID or address?
- Do you have information about the business that owns the animals to be investigated?
- Are there animal records associated with the business?
- If this is a FAD investigation, do you have a Referral Control Number (RCN)?

Follow these steps to create a new investigation:

If you have information about the premises where the incident was reported:

1. Click on **Premises** under **Premises/Producers** in the **Disease Management** navigator and search for the premises that you want to investigate.
2. Select the desired premises record and click on the **Premises Follow-ups** button to display the Follow-ups dialog (you may also open the premises record and launch the dialog).
3. Select **Create an Investigation**; click **Next** to continue.

If you do not have any information about the premises but you have information about the business that owns the animals that are the subjects of this investigation follow these steps:

1. Click on **Animal Businesses** under **Premises/Producers** in the **Disease Management** navigator and search for the animal business that owns the animals you want to investigate.
2. Select the desired business record and click on the **Business Follow-ups** button to display the Follow-ups dialog.
3. Select **Investigation**; click **Next** to continue.

You may also create a new investigation record from the Investigations view, but you will still need to know the premises id and the name of the animal business record.

If your role permits you to see investigations in several states, be sure to select an investigation record that is in the state where you want to create a new investigation record.

1. Click on **Investigations** under the **Investigations** tab in the **Disease Management** navigator.
2. Select any investigation record (do not open the record).
3. Click on **Invest Follow-up** to display the **Add Follow-ups** dialog.
4. Select **Create a New Investigation**; click **Next** to continue.
5. Enter a valid Premises ID (or search for a Premises record); click **Next** to continue.

Note: If a new Premises recorded is required, you may create one but it is recommended that you cancel the dialog and create a new premises record by following the steps on page 43.

Continue following these steps:

1. If there is more than one business associated with the premises select the appropriate business; and select **Yes, this is the correct Premises and Business**; click **Next** to continue.

   If there is no business record associated with this premises you may create a new business record using the dialog and then create the investigation later; or you may quit the dialog.

2. If there is already an active investigation associated with the selected premises you can proceed by clicking **Next** if you are creating an Investigation for a <u>different</u> Incident; note that you will be prevented from creating an Investigation for an Incident if one is Active and not completed.
3. Select the **Access Team** for this investigation (this will always be the state of the investigation you selected before you launched the dialog).
4. Select the **Incident** for this investigation (i.e., FAD).
5. Select the **Incident Site** where this Investigation will be managed.
6. Enter the **RCN** for this investigation if the incident is FAD; click **Next** to continue.

   For FAD investigations the RCN is an identifier like “YYSTNNNN,” where YY is the two digit year, ST is the state code, and NNNN is a numeric counter; e.g., 14KS0003.

7. Select the **Investigation Reason Category** (Complaint, Surveillence, or Trace).
8. Select the **Primary Species Group** that triggered the investigation; click **Next** to continue.

   This would be the species group reported and is broader than species (Bovine, Equine, etc) . Other species found on the premises can be recorded on Mortality/Morbidity Census on Exam.

9. Select the Investigation Coordinator.
10. Specify the Investigation Start Date (default is current date); click **Next** to continue.
11. Select the Type of Investigation:

    If the investigation reason is a **Complaint** select one of the following:

    - Abortion
    - Central Nervous System
    - Diarrhea
    - Ectoparasite — maggot, tick, mite
    - Hemorrhage
    - High Death Rate
    - Integument/Skin, not Vesicular
    - Positive Test on Specimens
    - Reproductive, not Abortion
    - Respiratory
    - Vesicular — Skin of the Muzzle & Feet
    - Vesicular — vesicle, papule, erosion

If the investigation reason is **Surveillance** select one of the following:

- Illegal Import
- Positive Clinical Test
- Positive Test on Specimen

If the investigation reason is **Trace** select one of the following:

- Into positive Herd
- Neighboring Herd
- Other Direct Contact
- Other Indirect Contact
- Out of a Positive Herd

12. Select the **Source** reporting the condition from.

    If the investigation is a **complaint** select one of the following:

    - Diagnosis Lab
    - Other Source
    - Practitioner
    - Producer

    If the investigation is **surveillance** select one of the following:

    - Diagnosis Lab
    - Regulatory Official

    If the investigation is **Trace** select **Regulatory Official**.

13. Click **Next** to continue.
14. Select the appropriate FAD investigation Classification from the following:
    a. Classification Undetermined
    b. High Suspicion
    c. Intermediate Suspicion
    d. Low suspicion

If classification is not known it can be entered later directly in the Investigation form or the selected classification can be modified. Investigation Classification is used in conjunction with the FADD's differential impressions and other factors to determine a suitable Lab Submission priority which determines method of transportation and if lab uses expedited testing methods.

15. Click **Next** to continue.

Allow a few seconds for the system to generate the investigation record. When the investigation record is created the dialog page displays the RCN as a link to the investigation record. You may click on the link to open the investigation record to view and make changes. If you review the investigation form click **Save & Close** to save any changes and close the form to return to the premises follow-ups dialog.

16. In the Add Follow-ups dialog you may select one of the following:
    a. Add Follow-ups to this Investigation (exam, quarantine, etc.)
    b. **Quit the dialog**; click **Next**, **Finish**, to end dialog.
17. If you are ready to add follow-ups select **Add follow-ups to this Investigation** and click **Next** to continue; in the next dialog page you may select one of the following:

- Create an Exam
- Create a Prem Status
- Create an Appraisal
- Create a Euthanasia and Disposal
- Create a Cleaning and Disinfection
- Create a Permit
- Create a Restricted Movement (1-27)
- Create a Trace
- Create an Epi Interview
- Create a Communication Activity
- Create a New Investigation
- Delete this Investigation
- Change Access Group
- Change Incident

Although you could create all investigation follow-ups in a single dialog session (if you had all of the necessary information) we will describe each of the follow-ups in different scenarios.

Scenario 27: Close an ICR That Does Not Require an Investigation

If an Initial Contact Report was created but it was later determined that an investigation is not necessary, follow these steps to close the ICR:

If you have information about the ICR (such as the ICR ID):

1. In the **Disease Management** navigator select **Initial Contact Reports** under the **Investigations** tab to display the **Active Initial Contact Reports** view.
2. Search for the ICR you want to close and select the record.
3. Click on **Initial Contact Follow-ups** to display the **Follow-ups** dialog.
4. Select **Close this report without an investigation**; click **Next** to continue.
5. Enter an explanation why this report was not investigated; click **Next** to continue.
6. The confirmation page displays a link to the ICR and sets the status to inactive.
7. Click **Next** to continue and click **Finish** to end the dialog session.

If you do not have information about the ICR but you have information about the premsies it was linked to (such as an address or prem id) follow these steps:

1. In the **Disease Management** navigator select Premises under the **Premises/Producers** tab to display the **Active Premises** view.
2. Search for the Premises that is linked to the ICR you want to close and open the record.
3. In the Premises Form Navigator click on **Initial Contact Reports** under the **Investigations** tab to display the **Initial Contact Reports Associated View**.
4. Select the ICR you want to close.
5. Click on **Initial Contact Follow-ups** to display the Follow-ups dialog.
6. Select **Close this report without an investigation**; click **Next** to continue.
7. Enter an explanation why this report was not investigated; click **Next** to continue.
8. The confirmation page displays a link to the ICR and sets the status to inactive.
9. Click **Next** to continue and click **Finish** to end the dialog session.

Scenario 28: Convert a De-Activated ICR to an Investigation

If an ICR was de-activated and it is later determined that the report should be converted into an investigation follow these steps:

1. In the **Disease Management** navigator select **Initial Contact Reports** under the **Investigations** tab to display the **Inactive Initial Contact Reports** view.
2. Search for the ICR you want to activate and select the record.
3. Click on **Activate** in the ribbon.

   The ICR will now appear in the **Active Initial Contact Reports** view.
4. Look for the record in the **Active Initial Contact Reports** view and select it.
5. Click on **Initial Contact Follow-ups** to display the **Follow-ups** dialog.
6. Folllow the steps on page 96 to convert the ICR to an investigation.

Scenario 29: Create an Exam Record

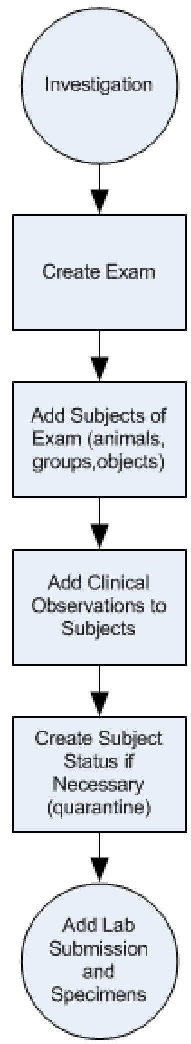
If a premises investigation was started, a visit to the premises to examine the animals that are the subjects of the investigation must be done. The data gathered during the exam is recorded in the **Exam** form using a dialog.

This is what you should know before you start the exam:

- Was an investigation record created?
- Do you have information about the premises?
- Do you have information about the Animal Business?

If you have permises information follow these steps:

1. Click on **Premises** under **Premises/Producers** in the **Disease Management** navigator and search for the premises that has the investigation that requires the exam.
2. Open the premises record.
3. In the **Premises Form Navigator** select **Investigations** under **Investigations** to display the **Investigation Associatd View**.
4. Select the Investigation record that requires the exam.



You may also click on **Investigations** in the **Disease Management** pane and search for the desired investigation record using Quick Search and select the record from the view.

5. Click on **Invest Follow-up** to display the Follow-ups dialog.
6. Select **Create an Exam**; click **Next** to continue.
7. Click on the Lookup icon to select the name of the **investigator**.

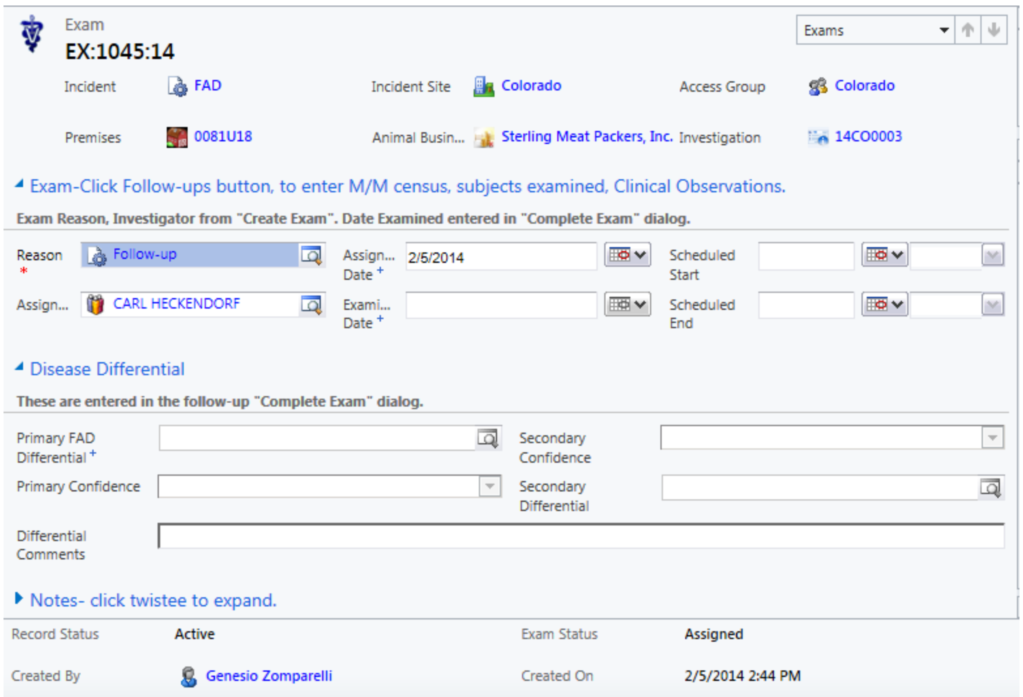
If you know the person's name you may enter the name into the field. If the name is underlined in blue the name is valid. If the name you enter is underlined in red then the name was either entered incorrectly or it is not in the database.

8. You are required to select a **Reason** for the exam (either Follow-up or Sick Call).
9. Click **Next** to continue.
10. The dialog will display the exam id as a link to the Exam record; you may select one of the following options:
    a. Click on the exam id link to open the exam record to review and edit.
    b. Add **Subjects** to the exam; click **Next** to continue.
    c. **Quit** the dialog; click **Next** and then Finish to end the dialog.
    d. Create other Exam follow-ups; click **Next** to continue.
    e. Create other Investigation follow-ups; click **Next** to continue.

Although you could create all exam follow-ups in a single dialog session (if you had all of the necessary information) we will describe each of the follow-ups in different scenarios.

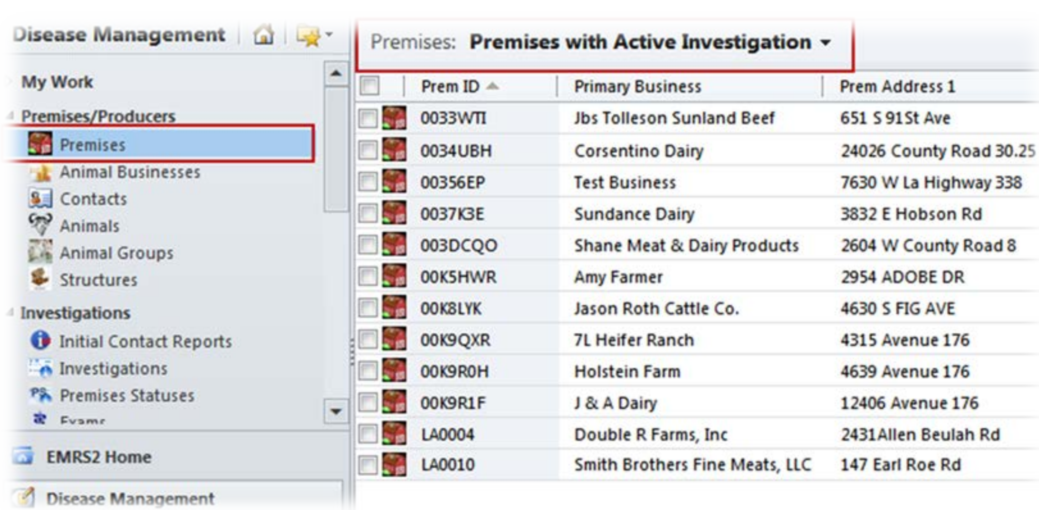
The Exam Form

The Exam form is very simple to complete. The **Disease Differetial** section is not completed when the exam record is created. This is done using a dialog to close the exam. Refer to page 125 to see the scenario for completing an exam.

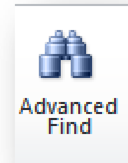


Personal View: Premises with Active Investigations

To make it easier to find your premises that have active investigations you can create a personal view similar to the one shown below. We show you how to create personal views starting on page 106.



Advanced Find and Personal Views



If the views available to you in EMRS 2 do not display the records the way you would like to see them you can create your own personal views. There are two types of views/dashboards and charts in CRM 2011: **Personal** and **System**. The fundamental difference is that personal views are owned by a user or team while system views are owned by the organization. The following table compares the differences between the two types of views:

	Personal	System
Ownership	Can be owned by a user or team	Owned by the organization
Visibility	By default it is only visible to the user who creates it.	By default it is visible to all users.
Privileges	Can be protected using the standard privilege depths for the entity (none, user, BU, BU and child BU, Organization). This can allow you to make a chart/dashboard accessible to some users but not all and be able to select which users can see which charts/dashboards.	User access can only be configured to all or none (if a user has access to a system chart/view then the user will have access to ALL system charts/views.
Sharing	Can be shared with a specific user or team. For example the CEO might want to share a chart only with a VP.	Cannot share system views/ dashboards/ charts since they are at the organization level.
Solutions	Cannot be included in a solution. This is a show stopper if you need to move personal views/ dashboards/ charts across deployments and organizations. You would need to copy them manually. For charts, you can export the XML and import as a system chart.	System views/dashboards are solution aware and are fully supported to be transported in solutions.
CUD operations (Create, update, delete)	Most users will have access to create their own personal views, dashboards and charts.	Only high privileged users and system administrators should have access to CUD operations on system views, charts and dashboards.

To see an example of a personal view, refer to the Personal View: Premises with Active Investigations on page 105 of this user guide. Anyone may change the columns displayed in a view or other view criteria by creating a personal view. Unless the whole organization needs the view, it is not necessary to have a System Administrator or System Customizer security role.

In addition to creating personal views you may also create a personal query using the **Advanced Find** query tools. The difference between a saved query and a personal view is that the saved query does not appear under **My Views** in the view selection droplist. Saved queries are found by clicking on **Saved Views** in the **Advanced Find** dialog. Personal views are created using **the Advanced Find** dialog.

Advanced Find starts with criteria based on the current view. In other words, if you click **Advanced Find** from a view, the criteria for that view preloads.

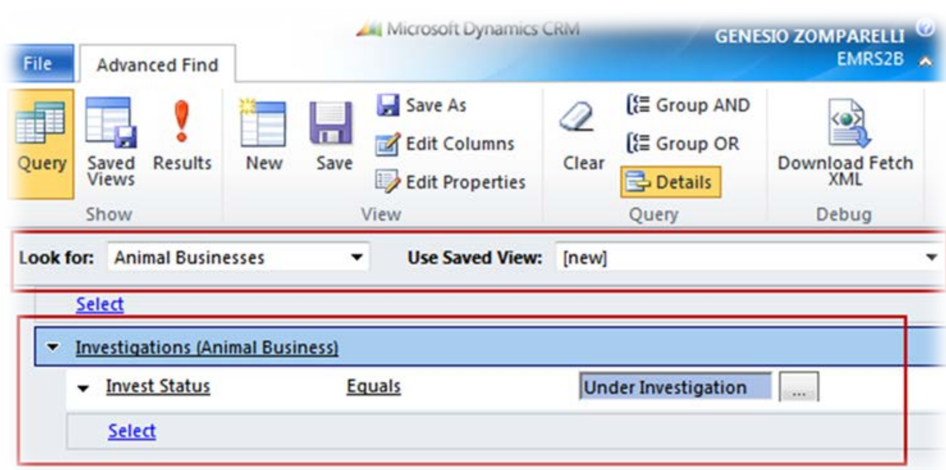
Scenario 30: How to Find Animal Businesses with Active Investigations

Follow these steps to create a personal query using **Advanced Find**:

1. In the **Disease Management** navigator select **Animal Businesses** under **Premises/Producers** to display the **Active Animal Businesses** view.
2. Click on the **Advanced Find** button.

Because you started from the **Active Animal Businesses** view the **Advanced Find** dialog displays the default query used for this view. You will add more parameters to create a new query.

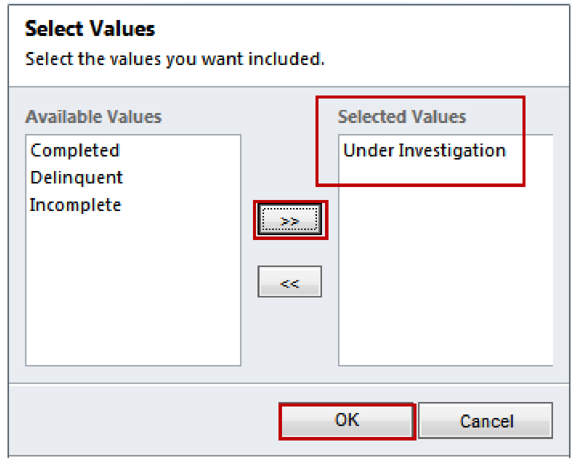
3. In the **Look for** droplist select **Animal Businesses** (it is selected by default).
4. In the **Use Saved View** droplist select **[new]** to create a new query.

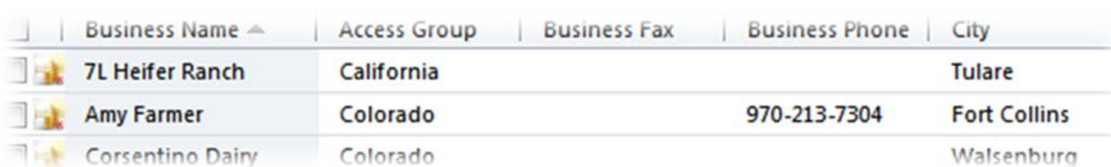


5. Click on **Select** to define the secondary search parameters for this new view.
6. Select **Investigations (Animal Business)** under **Related** in the **Select** droplist.

   This is possible because investigations are connected to animal businesses.
7. Click on **Select** and select **Invest Status** from the droplist.
8. Leave **Equals** in the parameter.
9. Hover over **Enter Values: Invest Status** and click on the button to display **Select Values** dialog.

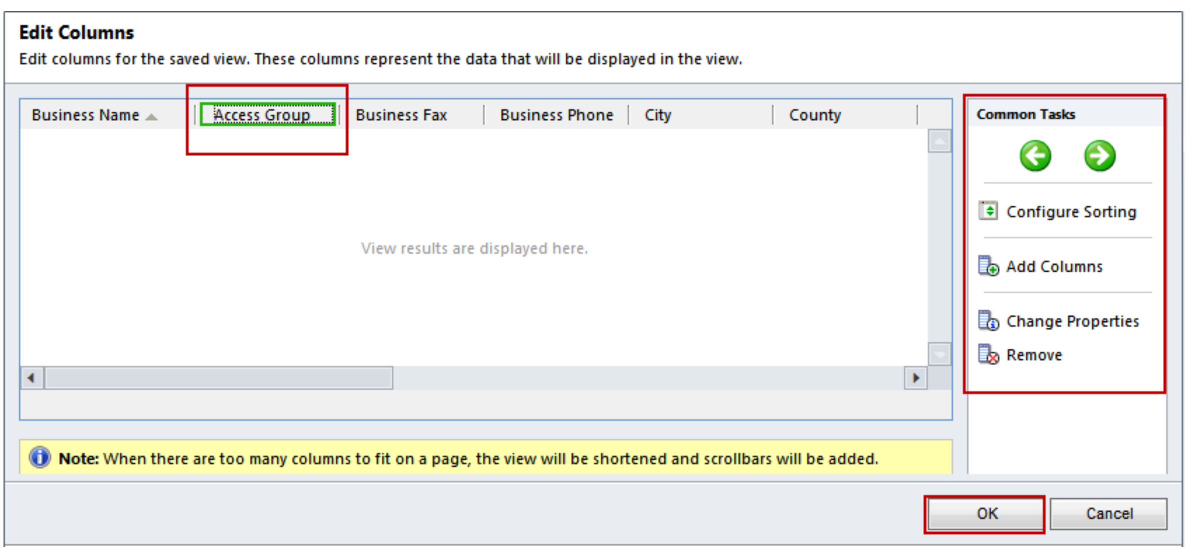
10. Select **Under Investigation** and click on the **>>** button to move the value to the **Selected Values** column
11. Click **OK** to return to **Advanced Find**.
12. Click **Results** to display the results of this query in Advanced Find. This is just to check to see if you are getting the results expected.





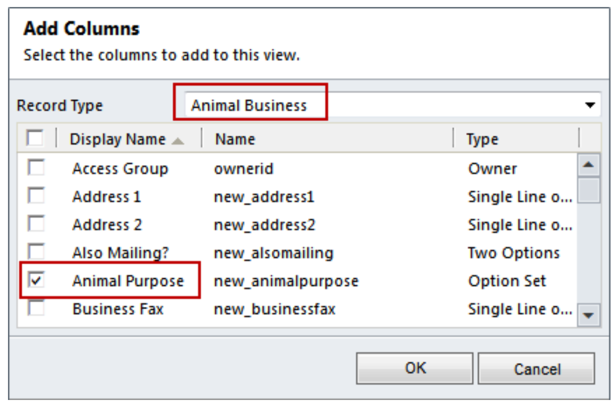
Note how the columns are arranged in the results view. Because the view is based on the Animal Businesses view we see only the columns in the Animal Businesses entity. We will modify this view to change column order and delete some columns to create the desired personal view.

13. Click on the **Advanced Find** tab in the ribbon to return to the view query.
14. Click on **Edit Columns** to display the **Edit Columns** configuration dialog.



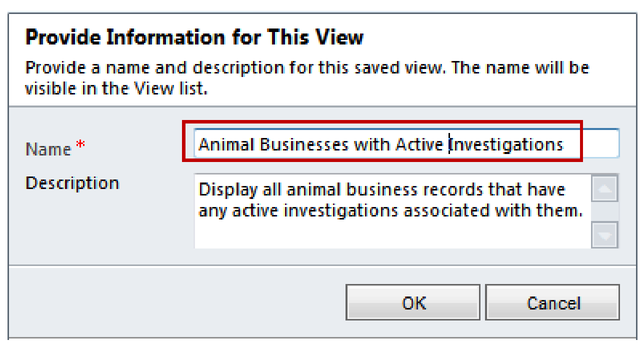
15. Select the **Access Group** column and click on **Remove** and click **OK** to confirm that you want to remove this column from the view.
16. Also remove the following columns:
    - Business Fax
    - Business Phone
    - County
    - Mail Ad1
    - Mail City
    - Mail State
    - Mail Zip
    - Zip
17. Select the **Premises** column and then click on the green left arrow button until the column is on the right of the **Business Name** column.

    Note that the **Business Name** column is sorted in ascending order.



18. Select the **Business Name** column then click on **Add Columns**; the **Record Type** should display **Animal Business** because this view is based on the Animal Business entity.
19. Check the boxes adjacent to **Animal Purpose** and **Primary Contact** to add these columns to the view; click **OK**.

    These columns will appear to the right of the **Business Name** column because this column was selected before you clicked on **Add Columns**. If no column is selected then new columns are added after the last column in the view.
20. Click on **OK** to close the **Edit Columns** dialog to return to the **Advanced Find** dialog.
21. Click **Save As** to display the **Provide Information for This View** dialog and give your personal view the name "Animal Businesses with Active Investigations."



    You may also enter a brief description of the view, as shown in the screenshot.
22. Click **OK** to close the dialog.

    Note that this query will be saved in **Saved Views**. It is <u>not</u> a Personal View.
23. Click on **Saved Views** to display a list of views and queries for the **Animal Businesses** entity.

Active Saved Views for Animal Businesses:

Animal Businesses Saved Views: **Active Saved Views**

Name	Owner	Last Modified
Animal Businesses With Active Investigations	GENESIO ZOMPARELLI	2/14/2013 1:14 PM

Click on the view name in the list to open the **Query** and click on **Results** to display all animal businesses with active investigations:

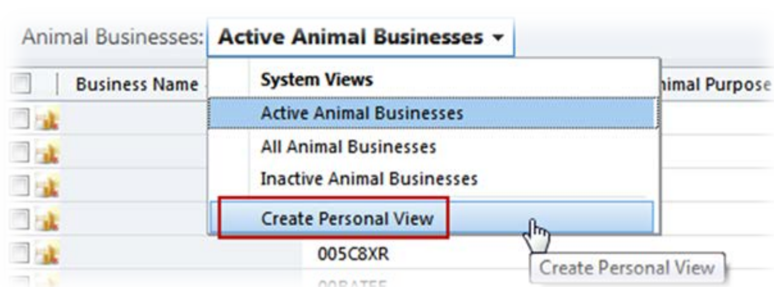
Business Name	Premises	Animal Purpose	Primary Contact	City	Primary Operati...	Species Group
7L Heifer Ranch	00K9QXR	Milk		Tulare	Animal Feeding	Bovine
Amy Farmer	00K5HWR	Meat	Amy Farmer	Fort Collins	Animal Producti...	Bovine
Corsentino Dairy	0034UBH			Walsenburg	Livestock market	
Double R Farms, Inc	LA0004	Mixed Purpose	Mike Foster	Marthaville	Animal Producti...	
Holstein Farm	00K9R0H	Mixed Purpose		Tulare	Dairy Farming	Bovine
J & A Dairy	00K9R1F	Milk		Tulare	Dairy Farming	Bovine
Jason Roth Cattle Co.	00K8LYK	Mixed Purpose		FRESNO	Animal Dealer	Bovine
Jbs Tolleson Sunlan...	0033WTI			Tolleson	Livestock Slaug...	
Shane Meat & Dairy ...	003DCQO	Mixed Purpose		Berthoud	Animal Producti...	Bovine
Smith Brothers Fine ...	LA0010	Mixed Purpose		Marthaville	Animal Producti...	
Sundance Dairy	0037K3F			Roswell	Dairy Farming	

Note: The results will show only the businesses your role allows you to see.

Scenario 31: How to Convert a Query into a Personal View

Follow these steps to make this query a personal view:

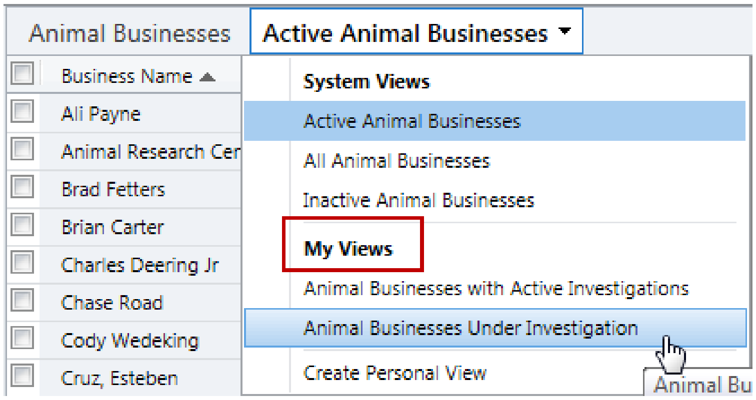
1. In the **Animal Businesses** view select **Create Personal View** from the view selection droplist.



2. In the **Use Saved View** droplist select **Animal Businesses with Active Investigations**.
3. Click **Save As** to name the personal view **Animal Businesses Under Investigation**.

If you are basing your new personal view on a saved query you have to save the new view under a different name so it will appear under **My Views** in the view selection droplist.

4. Close the Advanced Find Window.
5. In the Animal Businesses view select the personal view from the droplist.

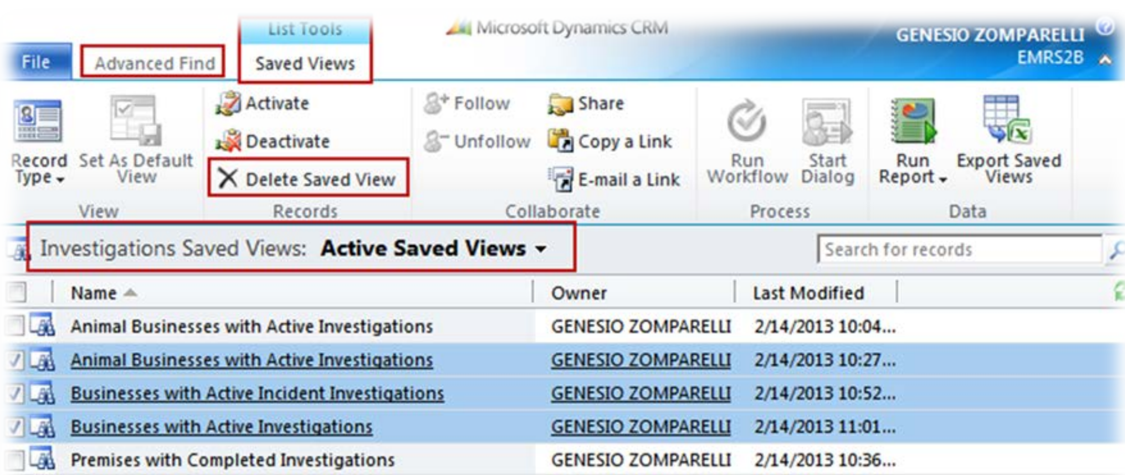


If you are not converting a query into a personal view the procedure for creating a new personal view from scratch is identical to the procedure for creating a query using the **Advanced Find** dialog. In other words, after you select **Create Personal View** the **Advanced Find** dialog is displayed.

Scenario 32: Delete Personal Views

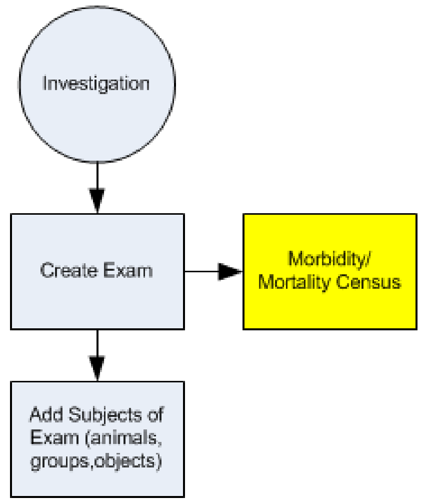
In this example we will delete personal views owned by you in the **Investigations** entity:

1. In the **Disease Management** navigator click on **Investigations** under **Investigations** to display the Active Investigations view.
2. Click on the **Advanced Find** button to display the **Advanced Find** dialog.
3. Click on **Saved Views** to display **Investigations Saved Views** and select **Active Saved Views**.
4. Select the views you want to delete.



5. Click on **Delete Saved View** and click **OK** to confirm the deletion.

Exam Follow-ups



The Exam Follow-ups dialog allows you to create the following types of records:

- Morbidity/Mortality Census
- Subjects (animals/groups/items)
- Clinical Observations for a subject of an exam
- Lab Submissions using subjects on the exam
- Service Activities to schedule an exam

From the dialog you may also complete the exam and create other follow-ups for the investigation.

Scenario 33: How to Report the Number of Sick and Dead Animals

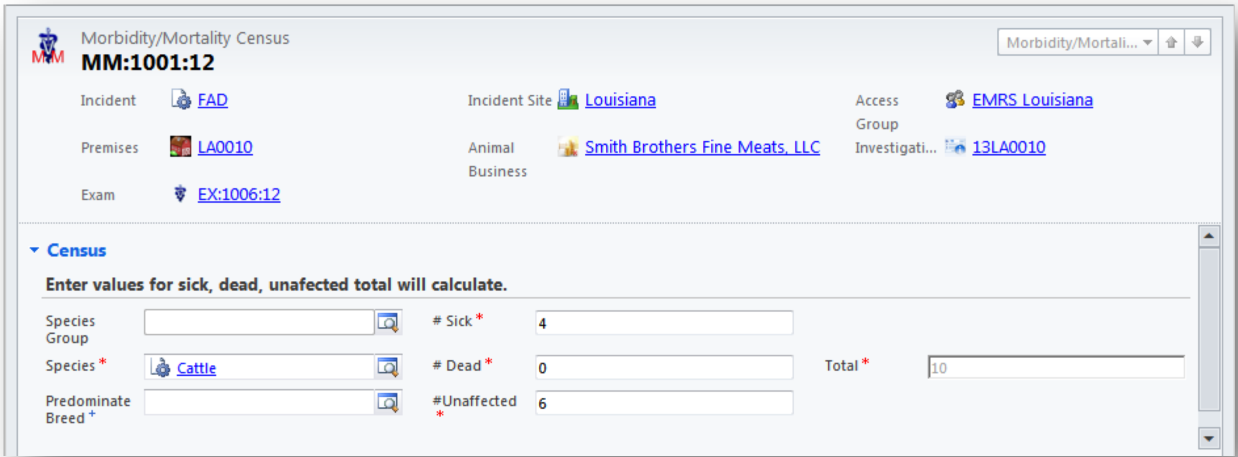
Information about the number of sick and dead animals you find during a premises investigation is stored in the **Morbidity/Mortality Census** entity. The Morbidity/Mortality entity is a child of the Exam entity, which is a child of the Investigation entity.

If you know the Exam id follow these steps to report this information:

1. In **Disease Management** click **Exams** under **Investigations** to display **Active Exams**.
2. Look for the Exam that is part of the investigation you are working on and select the record.
3. Click on **Exam Follow-ups** and select **Add Morbidity/Mortality Census**.
4. Click **Next** to continue.
5. Select **Species** from the droplist.
6. Enter the number sick.
7. Enter the number dead.
8. Enter the number unaffected.
9. Click **Next** to continue.
10. When the **Morbidity/Mortality Census** record is created you may click on the link to review the record or you may select one of the following:

    - Add other follow-ups to this exam; click **Next** to continue.
    - Create another Morbidity/Mortality Census for this exam; click **Next** to continue.
    - Quit this dialog; click **Next** then click **Finish**.

The Morbidity/Mortality Census Form



If you don't remember the Exam ID but you know about the premises under investigation:

1. In the **Disease Management** navigator select **Premises** under **Premises/Producers** to display the **Active Premises** view.

If there are a lot of premises records you can create a personal view that displays only premises with active investigations. Refer to pages 107 — 110 to learn how to use **Advanced Find** to create personal views.

2. Look for the premises record that is under investigation and open the record.
3. In the Premises Main Form navigator click on **Exams** under **Investigations for Business** to display the **Exam v2 Associated View**.
4. Select the **Exam** record.
5. Click on **Exam Follow-ups** in the grid ribbon and select **Add Morbidity/Mortality Census**.
6. Click **Next** to continue.
7. Select Species from the droplist.
8. Enter the number sick.
9. Enter the number dead.
10. Enter the number unaffected.
11. Click **Next** to continue.

12. When the Morbidity/Mortality census record is created you may click on the link to review the record or you may select one of the following:

- Add other follow-ups to this exam; click **Next** to continue.
- Create another Morbidity/Mortality Census for this exam; click **Next** to continue.
- Quit this dialog; click **Next** then click **Finish**.

As you can see, there can be more than one way to create records using dialogs. It all depends on the information you have available to determine whether you run a dialog from a form or a grid view. Sometimes it may be helpful to create personal views to help you find the records you want.


Premises: **Premises with Active Investigation**

Prem ID	Primary Business	Prem Address 1
0033WTI	Jbs Tolleson Sunland Beef	651 S 91St Ave
0034UBH	Corsentino Dairy	24026 County Road 30.25
00356EP	Test Business	7630 W La Highway 338
0037K3E	Sundance Dairy	3832 E Hobson Rd
003DCQO	Shane Meat & Dairy Products	2604 W County Road 8
00K5HWR	Amy Farmer	2954 ADOBE DR
00K8LYK	Jason Roth Cattle Co.	4630 S FIG AVE

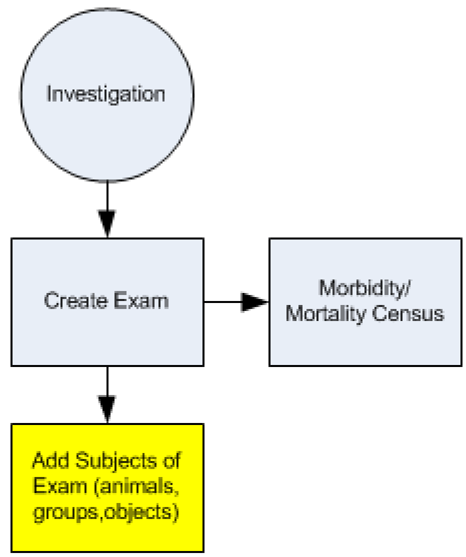
Scenario 34: Add Subjects to an Exam

Subjects are the animals, animal groups, or other items found on a premises that are part of an incident investigation. The subjects are included in an exam record. Specimens are usually taken from selected subjects and shipped to a laboratory for testing and analysis to determine if a FAD exists.

What you should know before you add subjects to an exam record:

- The Exam ID of the exam record that you want to add subjects to.
- The type of subjects you want to include in the exam.
- The identity of the subjects, such as animal ids if the subjects are animals.
- The number of subjects to include in the exam.

If you know the Exam id follow these steps to add subjects:



1. In **Disease Management** click **Exams** under **Investigations** to display **Active Exams**.
2. Look for the Exam that is part of the investigation you are working on and select the record.
3. Click on **Exam Follow-ups** and select **Add Subjects** (animals/groups/items).
4. Click **Next** to continue.
5. Select one of the following types of subjects:
   a. Animal
   b. Animal Group
   c. Other Item (not an animal)
6. If there are a lot of subjects associated with the investigation you may enter an id or partial id to narrow the list of subjects. If you leave this field blank then up to 50 records are displayed, depending on your personal settings.

   You can increase the number of records displayed by changing the number of records displayed per page in your personal options. Refer to page 28 to learn how to do this.
7. Click **Next** to continue.
8. In the droplist select the correct animal you wish to link to this exam as a subject.

   You may select only one subject at a time. If you need to select many subjects you should make a note of the animal ids you selected so you don't try to select the same animal again.
9. Select one of the following options:
   a. **Yes** to link the selected animal as a subject on this exam; click **Next** to continue.
   b. **No** to create new animals to add as subjects; click **Next** to continue.

If there were no subjects found you may either add new subject records now or quit the dialog and add subjects later using a different dialog process. Then you can return to add the subjects to the exam.

10. If you selected “Yes” to link the animal as a subject on this exam a new subject record is created and you may choose one of the following options:
    a. Click on the link to the new subject record to review the record.

       If you select this option remember to Save your changes and Close the form to return to this dialog session. This animal record will now be available on this premises to be linked to future exams or other activities conducted such as Appraisal and E&D.

    b. Create another subject for this exam; click **Next** to continue.

       If you select this option the dialog returns to the page where you may select the type of subject examined by the investigator and enter an id if necessary. The dialog process continues as before so you may select the subject id from the droplist.

    c. Add Clinical or Necropsy observations for subjects of exam; click **Next** to continue.

       The dialog ends.

    d. Add statuses (animal quarantine, etc.) to this subject; click **Next** to continue.
    e. Add other follow-ups to this Exam (lab submission, etc.); click **Next** to Continue.
    f. Quit the dialog; click **Next** to continue and click **Finish** to end the dialog session.

Things You Can Do in the Exam Follow-ups Dialog:

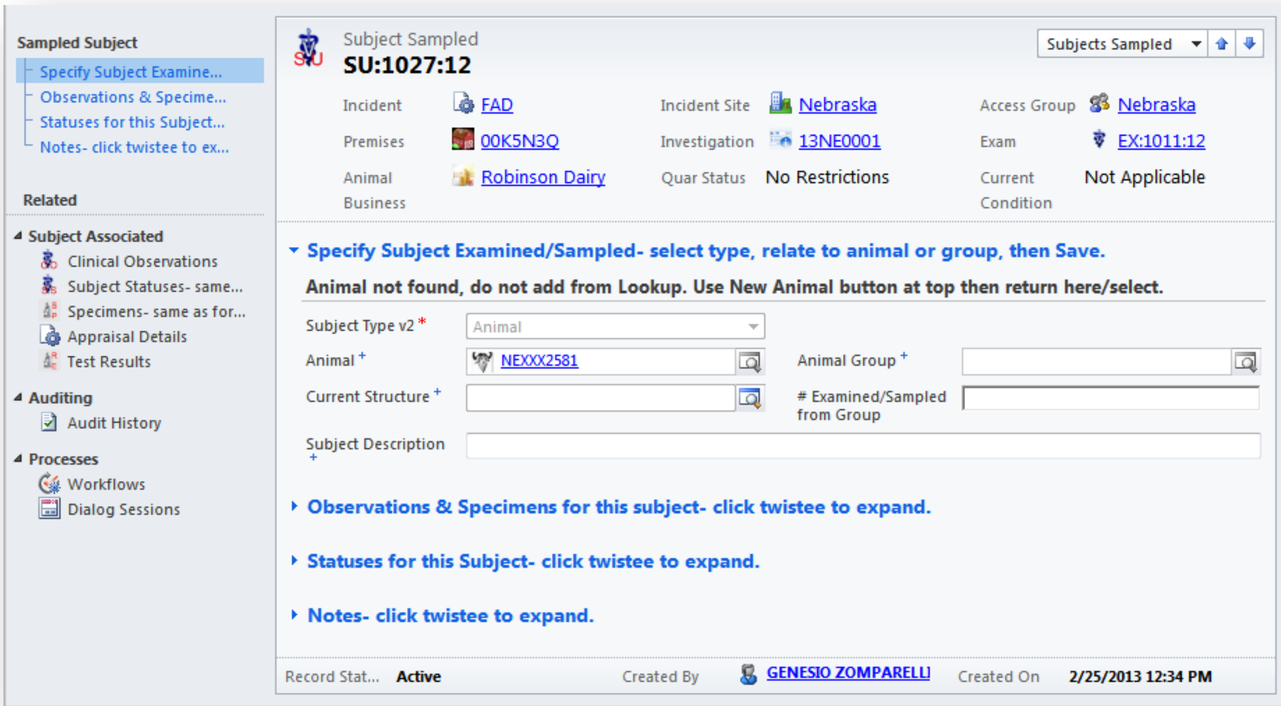
These are the options you may select in the **Exam Follow-ups** dialog:

- You may click on the Exam ID link to display the exam form
- Add a Morbidity/Mortality Census record
- Add Subjects to the exam
- Add Clinical Observations for a subject of this exam
- Add Lab Submissions using subjects on this exam
- Assign/reassign or clear the assignment
- Complete the exam
- Create other follow-ups for this investigation
- Create a field test result

If you have a lot of subjects to add to an exam you may import the records by displaying the **Subjects Sampled** view and clicking on **Import Data** to download a template to use for the import. Then follow the procedure used to import animal records described on page 68.

The Subject Sampled Form

You can see all of the parent entities of the **Subject Sampled** entity in the form header. The Subject Sampled entity is a child of the following entities: Incident, Incident Site, Access Group, Premises, Investigation, Exam, and Animal Business.



You can click on the blue triangles (also called "Twistees") on the left of the section headers in the form to expand and collapse the form sections. When you expand the "Observations & Specimens" sections you will see views of the clinical observations and specimens that were recorded for this subject.

You can expand the "Subject Status" section to see a view of the statuses for this subject.

Scenario 35: Set the Premises Status

If an animal health official decides that it is necessary to flag a premises under investigation to indicate a particular status situation is ongoing for the premises, a premises status record is created.

Do not confuse a **Premises Status** record with a **Premises** record. These are two different entities. The Premises Status entity is a child of the Investigation entity (not the Premises entity). Therefore, you need an investigation record to create a Premises Status record.

To create a premises status record follow these steps:

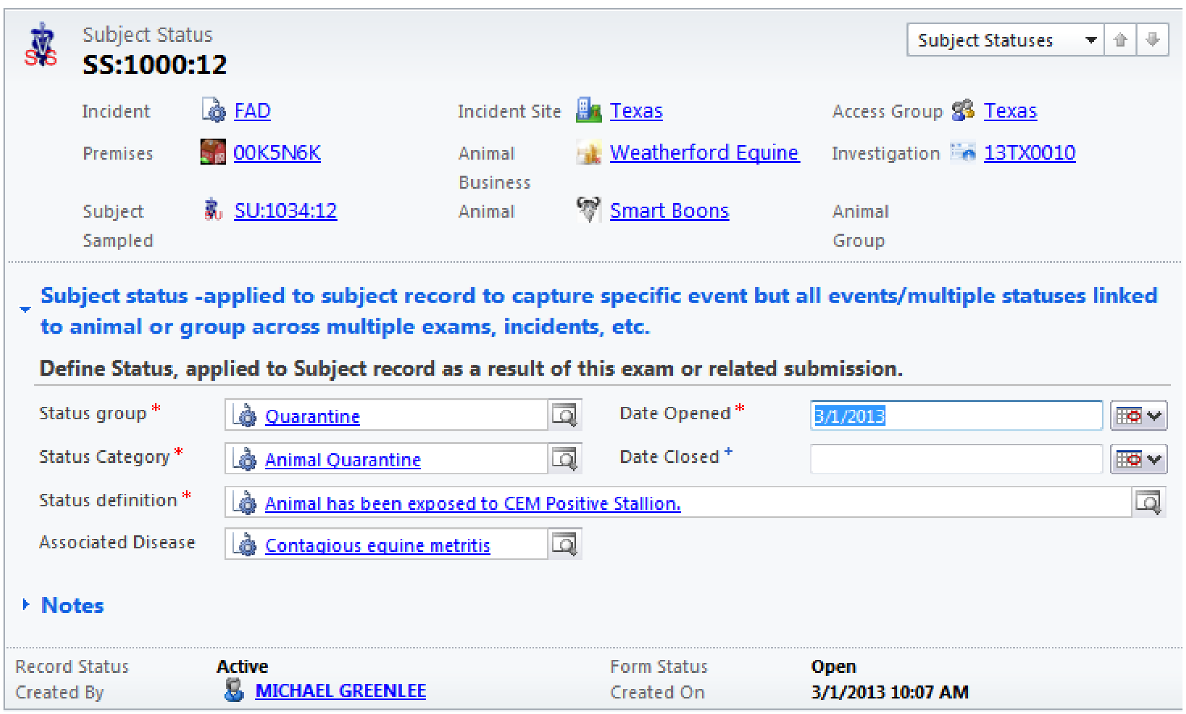
1. In the **Disease Management** navigator select **Investigations** under the **Investigations** tab.
2. Look for the investigation record of interest and select the record.
3. Click on the **Invest Follow-ups** button to run the Add Follow-ups dialog.
4. Select **Create a Prem Status;** click on **Next** to continue.
5. Select a **Status Group**:
    - Program
    - Quarantine
    - Surveillance
    - Zone
6. Click **Next** and select a **Status Category**:
    - If Status Group is Program select Approved Milk Permit; click Next.
    - If Status Group is Quarantine select Premises Quarantine; click Next.
    - If Status Group is Surveillance select Premises Surveillance; click Next.
    - If Status Group is Zone select [error condition; cannot continue]
7. Select a **Status Definition**:
    a. If Status Category is **Approved Milk Permit** select Premises is Approved to conduct permitted movements of milk.
    b. If Status Category is **Premises Quarantine** select one of the following:
        i. All susceptible species on premises are under quarantine until risk level is determined.
        ii. Hold movement on all susceptible animals on premises.
        iii. Premises is quarantined for all susceptible species
    c. If Status Category is **Premises Surveillance** select Premises is under surveillance thru Dead Bird Pickup.
    d. If Status Category is Zone an error condition is returned.
8. You are required to enter a **Start Date for the Premises Status**.
9. Click on the Lookup icon to select an **Associated Disease** (if applicable).

10. Click **Next** to create the **New Premises Status** record.
11. You may do one of the following:
    a. Click on the link to the Premises Status Record to review and/or edit. Save and Close the record to return to this dialog to end the dialog session or add a new status record.
    b. Quit this dialog; click **Next** then click **Finish**.
    c. Create another Premises status for this Investigation; click **Next** to repeat the dialog.
    d. Create Investigation follow-ups.

Scenario 36: Change Premises Status

If the Status Category of a premises changes, you do not change the Premises Status record. Instead you should create a new record with the new status category. This way you can maintain a history of the changing premises statuses. For example, if you created a premises status record and the Status Category was set to Surveillance and you later learned that the status is changed to Quarantine you will have to create a new Premises Status record using the new status category.

The Premises Status Form

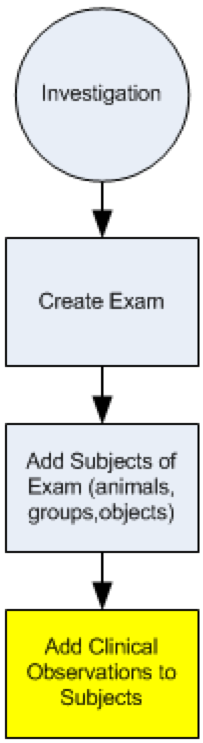


Scenario 37: Add Clinical Observations for Subjects

After you examine the subjects of an investigation you may record your clinincal observations for each subject. Clinical Observations can be added using either the **Exam Follow-ups** or the **Subject Sampled Follow-up** dialog.

If you know the investigation that is associated with the subjects:

1. Click on **Investigations** under **Investigations** in the **Disease Management** navigator.
2. Look for the investigation you want to work with and **open** the record.
3. In the FAD Investigation form navigator click on **Subjects Sampled** to display the **Subject Sampled v2 Associated View.**
4. Select any subject record (you will select a specific subject in the dialog).
5. Click on **Subject Sampled Follow-ups**.
6. Select **Create Clinical Observations for subjects of exam**; click **Next**.



If you know the Exam that is associated with the subjects:

1. Click on **Exams** under **Investigations** in the **Disease Management** navigator.
2. Look for the exam you want to work with and **select** the record.
3. Click on Exam Follow-ups to launch the Follow-ups dialog.
4. Select “Add Clinical Observations for a Subject on this Exam”; click **Next**.

If you know the subject sampled id or the animal id:

1. Click on **Subjects Sampled** under **Investigations** in the **Disease Management** navigator.
2. Select any subject record (you will select a specific subject in the dialog).
3. Click on the **Subject Sampled Follow-up** button to display the **Add Follow-ups** dialog.
4. Note that the the dialog displays the subject sampled id and the animal id of the selected record. You may select one of the following options in the dialog:
    a. Create a Subject Status
    b. Create Clinical Observations for subjects of exam.
    c. Copy Subject to new exam.
    d. Create new subject record.
    e. Delete this subject record.
5. Select **Create Clinical Observations for subjects of exam**; click **Next** to continue.

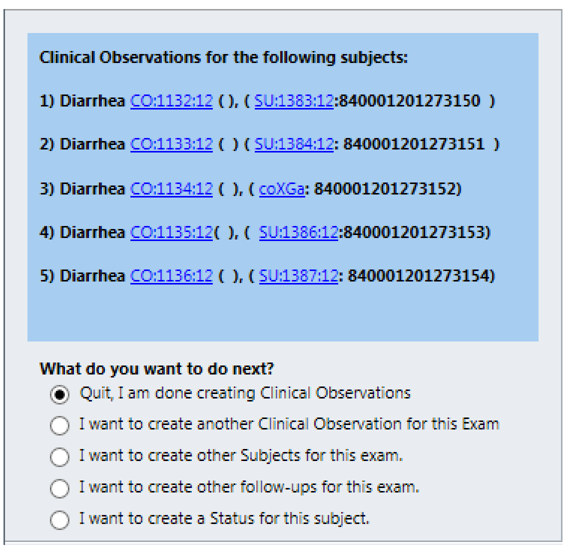
To create clinical observations for the subject continue as follows (you may create clinical observatios for up to 5 subjects; repeat the dialog to do more):

1. Enter a partial or full Subject ID to query on this Exam; and/or click **Next** to continue.
2. Select the fist subject from the droplist.
3. Click on the lookup to select a clinical sign or observation.
4. Specify the date and time of onset.

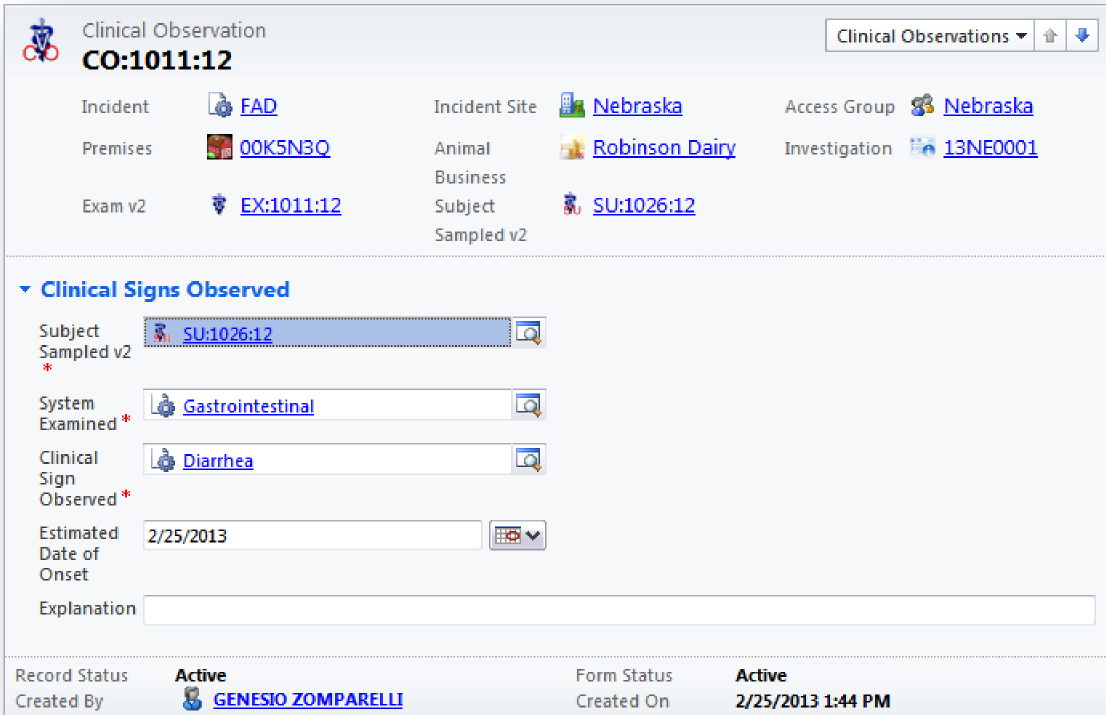
5. Enter additional description, if necessary.
6. You may enter observation data for up to five subjects in this dialog.
7. When you are finished entering observations for each subject, click **Next** to continue.

If you are creating clinical observations for more than one subject allow a few seconds for the records to be generated.

8. When the records are generated links to the new records are displayed in the dialog. You may select one of the following options:
   a. Click on the link to a clinical observation to review and/or edit.
   b. If you are done creating Clinical Observations select **Quit**.
   c. If you have more clinical observations to add, select I want to create another Clinical Observation for this Exam.
   d. If you want to add more subjects for this exam select I want to create other Subjects for this exam.
   e. Select create other follow-ups for this exam.
   f. Select Add statuses (animal quarantine, etc.) to this subject.
9. Click **Next** to continue to display the appropriate dialog.



The Clinical Observation Form



Scenario 38: Using the Same Subject in a Different Exam

In some cases an investigation my require more than one examination. These exams may involve the same subjects that were used in a previous exam. Rather than create new subjects for each exam you can use the same subjects that were used in a previous exam.

If you know the investigation that is associated with the subjects:

1. Click on **Investigations** under **Investigations** in the **Disease Management** navigator.
2. Look for the investigation you want to work with and **open** the record.
3. In the FAD Investigation form navigator click on **Subjects Sampled** to display the **Subject Sampled Associated View.**
4. Select any subject record (you will select a specific subject in the dialog).

If you know the Exam that is associated with the subjects:

1. Click on **Exams** under **Investigations** in the **Disease Management** navigator.
2. Look for the exam you want to work with and **open** the record.
3. In the Exam form navigator click on **Subjects Sampled** to display the **Subject Sampled Associated View.**
4. Select any subject record (you will select a specific subject in the dialog).

If you know the subject sampled id or the animal id:

1. Click on **Subjects Sampled** under **Investigations** in the **Disease Management** navigator to display the **Active Subjects Sampled** view.
2. Select any subject record (you will select a specific subject in the dialog).

To copy subjects to a new exam record:

1. Click on the **Subject Sampled Follow-up** button to display the **Add Follow-ups** dialog.
2. Note that the the dialog displays the subject sampled id and the animal id of the selected record. You may select one of the following options in the dialog:
    a. Create a Subject Status
    b. Create Clinical Observations for subjects of exam.
    c. Copy Subject to new exam.
    d. Create new subject record.
    e. Delete this subject record.
3. Select **Copy subject to new exam**; click **Next** to continue.
4. If the investigation has several exams the dialog will prompt you to select the exam you want to copy subjects to; otherwise you may select the option to create a new exam record.
5. If you are copying the subject to an existing exam record select the exam record from the droplist and click **Next** to continue.
6. The dialog confirms the creation of a new copy of the subject record for the selected exam; click **Next** to continue and **Finish** to end the dialog.
7. Otherwise, if are creating a new exam record you may select an investigator (not required) and you must select either **Follow-up** or **Sick Call** as the **Exam Reason** and click **Next** to continue.
8. When the exam record is created you may select one of the following options:
    a. Click on the exam id to open the record (and return to this dialog after closing the exam record).
    b. Add subjects to the exam record you just created.
    c. Quit this dialog.
    d. Create other exam follow-ups.
    e. Create other investigation follow-ups.
9. Select Add subjects to the new exam record; click **Next** to continue.
10. Select the type of subject (Animal, Animal Group, Other).
11. If you know the primary id of the subject you may enter it and click on **Next** to continue.
12. Select the animal record from the droplist to link it to this new exam record.

13. Select **Yes** and click **Next** to add the animal record to the exam; otherwise, select **No** if you want to create new animal records to add as subjects to the exam.
14. When the records are generated links to the new records are displayed in the dialog. You may select one of the following options:
    a. Click on the link to the animal subject record to review and/or edit.
    b. Create another subject for this exam.
    c. Add clinical or Necropsy observations for subjects of the exam.
    d. Select Add statuses (animal quarantine, etc.) to this subject.
    e. Add other follow-ups tothis Exam (submission, etc.)
    f. Quit the dialog.
15. Click **Next** to display the next dialog based on your selection.

Advanced Follow-ups

In this section we will describe some advanced scenarios that involve using follow-up dialogs from various entities, such as Premises Follow-ups, Investigation Follow-ups, and Exam Follow-ups.

Scenario 39: Complete an Exam

If you completed an exam you can set the record status to "Completed" as follows:

1. In the Disease Management navigator click on **Exams** under Investigations to display the **Active Exams** view.
2. Look for the Exam record you want to complete.
3. Select the desired Exam record and click on **Exam Follow-ups** to launch the Follow-ups dialog.
4. Select "I want to complete this exam" and click **Next** to continue.
5. The dialog shows the name of the current investigator; if the investigator changed select the name of the current investigator using the lookup.
6. Specify the **Date** of the exam.
7. Use the lookup to select the **Primary Differential**; this is required for a FAD investigation.
8. Select the **Primary Differential Confidence** level from the droplist:

   - Not Likely
   - Possible
   - Highly Likely

9. Use the lookup to select the Secondary Differential.
10. Select the Secondary Differential Confidence level from the droplist.
11. Enter optional Differential Comments.
12. Click **Next** to continue.

    Dialog identifies Queue Item found. This will be removed when Herd Exam is completed.
13. Click **Next** to continue.
14. The dialog confirms that you have successfully completed the exam; you may select one of the following options:
    a. Create a lab submission for this exam.
    b. Create exam follow-ups.
    c. Create investigation follow-ups.
    d. Quit this dialog.
15. Select "Quit this dialog" click **Next**, then click **Finish**.

Scenario 40: Animal Appraisals

Determining livestock appraisal values, developing appropriate indemnity rates, and assisting with overall livestock compensation policy and regulation are activities of APHIS' Appraisal-Indemnity-Compensation Specialist (AICS). Included in this work is the training of APHIS employees in the art and science of appraisal and assisting them when they are called upon to valuate livestock. Also the AICS provides guidelines for private appraisers to follow whenever doing appraisal work for APHIS.

In the EMRS 2 application animal appraisals are done during an investigation. Appraisal records are children of the investigation record. Therefore, you will use the Investigation Follow-ups dialog to create appraisal records. Follow this procedure to add appraisals to an investigation:

1. In the Disease Management navigation pane click on **Investigations** under the Investigations tab to display the Active All incident investigations view.
2. Look for the investigation that requires an appraisal.
3. Select the desired investigation and click on the **Invest Follow-up** button to launch the Add Follow-ups dialog.
4. Select **Create an Appraisal** and click **Next** to continue.
5. The dialog will display links to the investigation, premises and animal business records; enter the date of the appraisal.
6. Select the name of the person assigned to do the appraisal; click **Next** to continnue.

   To schedule an appraisal in advance you may click on the Investigation main form and use the follow-up dialog to create a **Service Activity** with the **Service of Appraisal**.

7. The dialog confirms the successful creation of the appraisal record and includes a link to the record; you may do one of the following:

   - Click on the link to open the appraisal record to review or edit the data in the form
   - Quit the dialog
   - Add appraisal details
   - Add investigation follow-ups

8. Select **Add appraisal details**; click **Next** to continue.
9. In the next dialog page select the type of animals or items you are appraising from the droplist:

   - Animal
   - Animal Group
   - Other (explain in description)
   - Milk
   - Eggs
   - Feed
   - Hay/Forage

10. Select the appropriate unit appraised from the droplist:

    - Head
    - Gallons
    - Pounds
    - Tons
    - Bales
    - Dozens
    - Other (explain in description)

11. Enter a description of items or units appraised.
12. Click **Next** to continue.

If you are appraising animals or animal groups the dialog will tell you how many animal or animal group records are on the premises; if you are appraising other types of items the dialog just adds the appropriate appraisal detail to the existing appraisal record.

13. If you are appraising animals you may enter a partial or full primary ID and/or click **Next**.
14. If you are appraising animals or animal groups select the animal or animal group you want to appraise from the droplist.
15. You may choose one of the following options:

    - If you did not find the animal or animal group in the droplist you will have to select "No I need to create new animal records for business" and click **Next** to continue.

    - Select the desired animal or animal group from the droplist and select "Yes, continue" and clcik **Next** to continue; this will launch a different dialog to add new animal records.

16. The dialog will confirm that you successfully created a new appraisal detail and provide a link to the appraisal record and the animal or group. You may select one of the following options:

    a. Create a new Appraisal detail for this appraisal; click **Next** to continue.

    b. Add investigation follow-ups; click **Next** to contiue.

    c. I am done and want to end the dialog; click **Next** then **Finish** to end dialog.

You should open the first detail and add amounts then copy if you have multiple animals with the same amounts. You can create a number of details then use bulk edit to add like amounts.

17. To appraise other animals or items select "Create a new Appraisal detail for this appraisal"; click **Next** to repeat the dialog.
18. If you are done select "I am done and want to end the dialog"; click **Next**; then click **Finish**.

Scenario 41: Euthanasia and Disposal Records

In the EMRS 2 application Euthanasia and Dsiposal (E&D) records are done during an investigation. E&D records are children of the investigation record. Therefore, you will use the Investigation Follow-ups dialog to create these records. Follow this procedure to add E&D records to an investigation:

1. In the Disease Management navigation pane click on **Investigations** under the Investigations tab to display the Active All incident investigations view.
2. Look for the investigation that requires a euthanasia and disposal detail.
3. Select the desired investigation and click on the **Invest Follow-up** button to launch the Add Follow-ups dialog.
4. Select “Create a Euthanasia and Disposal” and click **Next** to continue.
5. Select the name of the local euthanasia reource assignment.
6. Select **Yes** if you are reporting the animals were euthanized; otherwise select **No**.
7. Select **Yes** if the Animal items wre Disposed; otherwise select **No**.
8. Select the name of the person assigned to the disposal; click **Next** to continue.
9. In the Success dialog you may click on the link to the E&D record to open it to edit and/or review; otherwise you may select one of the following options:
    a. Add Details to E&D Created
    b. Add Investigation Follow-ups
    c. Quit
10. Select “Add Details to the E&D Created”; click **Next**.
11. Select what was euthanized or disposed from the droplist:
    a. Animal
    b. Animal Group
    c. Other (explain in description)
    d. Milk
    e. Eggs
    f. Feed
    g. Hay/Forage
12. Select the Item Unit from the dropist:
    a. Head
    b. Gallons
    c. Pounds
    d. Tons
    e. Bales
    f. Dozens
    g. Other (explain in description)
13. Further Item Description
14. Enter Filter for animals or groups (i.e., animal or groupo id)

15. Enter the number of animals euthanized.
16. Enter the number of animals disposed.
17. Click **Next**.
18. Select the animal for the E&D detail from the list; click Next.

    This will add this animal to the detail and change the animal disposition to euthanized and record to Inactive--Confirmed Dead.

19. Click **Next** to create the detail and update the record.
20. When the Success dialog is displayed you may do one of the following:
    a. Click on the E&D link to open the record to review and/or edit
    b. Click on the animal id link to open the record and/or edit
    c. Select “Quit I am done”; click **Next** then **Finish**.
    d. Select “Create more E&D details for this E&D”; click **Next** to repeat the dialog.

Scenario 42: Cleaning and Disinfection Records

In the EMRS 2 application Cleaning and Disinfection (C&D) records are done during an investigation. C&D records are children of the investigation record. Therefore, you will use the Investigation Follow-ups dialog to create these records. Follow this procedure to add C&D records to an investigation:

1. In the Disease Management navigation pane click on **Investigations** under the Investigations tab to display the Active All incident investigations view.
2. Look for the investigation that requires a cleaning and disinfection detail.
3. Select the desired investigation and click on the **Invest Follow-up** button to launch the Add Follow-ups dialog.
4. Select "Create a Cleaning and Disinfection" and click **Next** to continue.

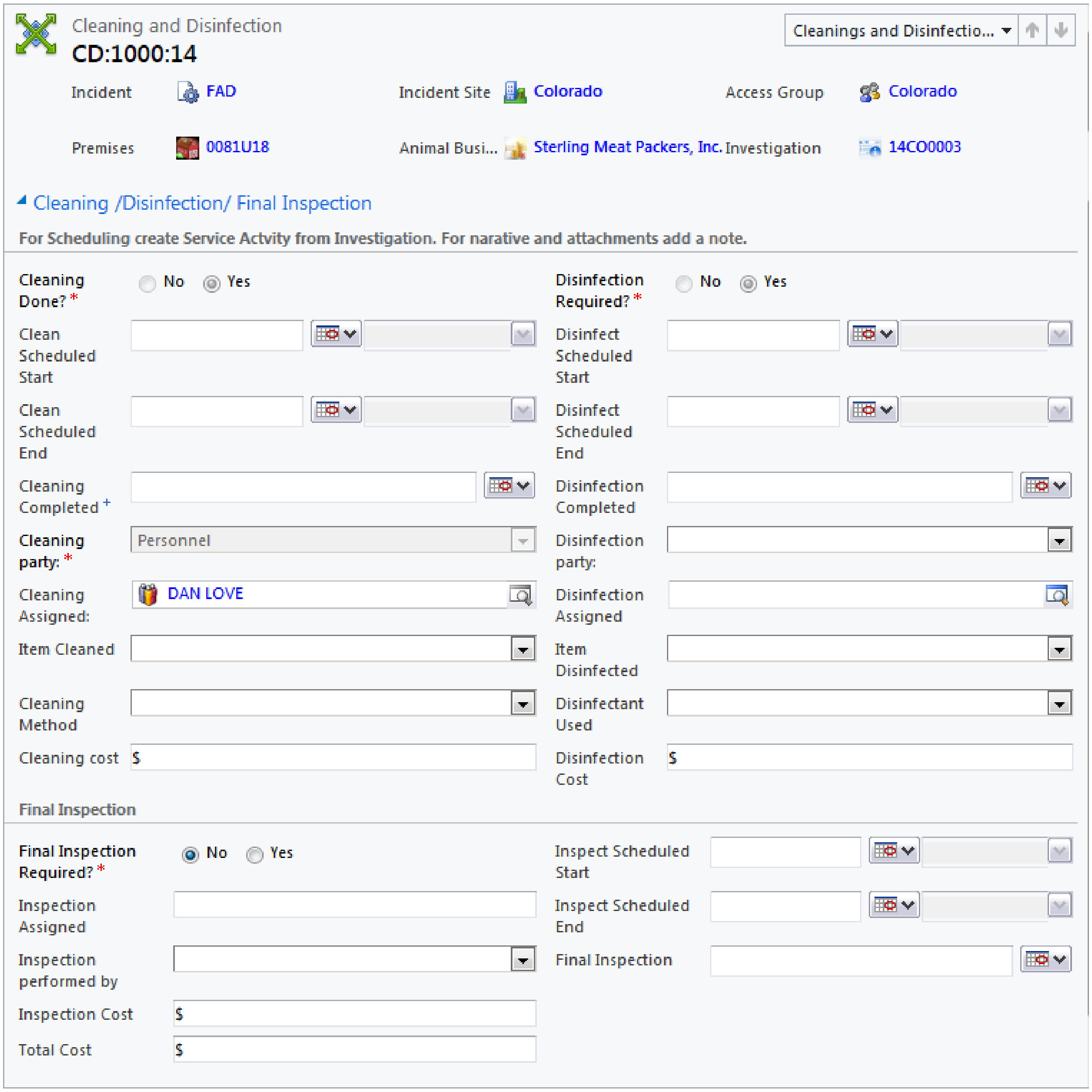
If there is already an open C&D record found for this investigation the dialog will not permit you to create another one.

5. Select the name of the local cleaning reource assignment.
6. Select **Yes** if Disinfection is required; otherwise select **No**.
7. Select **Yes** if a Final inspection is required; otherwise select **No**.
8. Click **Next** to continue.
9. In the Success dialog you may click on the link to the C&D record to open it to edit and/or review; otherwise you may select one of the following options:
    a. Add C&D Follow-ups
    b. Add Investigation Follow-ups
10. Select "Add C&D Follow-ups"; click **Next**.
11. Select either:
    a. Create a new C&D
    b. Add other follow-ups to Investigation
    c. Delete this C&D
    d. Cancel
12. The person assigned to perform the C&D task is required to open the C&D form assogned to them and complete the fields in the form to indicate the dates the cleaning and disinfection were done.

The C&D form is dhown on the following page.

U N D E R   C O N S T R U C T I O N

Cleaning and Disinfection Form


Cleaning and Disinfection
CD:1000:14
Cleanings and Disinfectio...

Incident FAD | Incident Site Colorado | Access Group Colorado
Premises 0081U18 | Animal Busi... Sterling Meat Packers, Inc. | Investigation 14CO0003

Cleaning /Disinfection/ Final Inspection

For Scheduling create Service Actvity from Investigation. For narative and attachments add a note.

Cleaning Done? * No Yes
Clean Scheduled Start
Clean Scheduled End
Cleaning Completed +
Cleaning party: * Personnel
Cleaning Assigned: DAN LOVE
Item Cleaned
Cleaning Method
Cleaning cost $

Disinfection Required? * No Yes
Disinfect Scheduled Start
Disinfect Scheduled End
Disinfection Completed
Disinfection party:
Disinfection Assigned
Item Disinfected
Disinfectant Used
Disinfection Cost $

Final Inspection

Final Inspection Required? * No Yes
Inspection Assigned
Inspection performed by
Inspection Cost $
Total Cost $

Inspect Scheduled Start
Inspect Scheduled End
Final Inspection

Scenario 43: Communication Activity

Scenario 44: User Defined Scenario

Scenario 45: User Defined Scenario

Scenario 46: User Defined Scenario

Scenario 47: Create a Service Activity

Scenario 48: Change Access Groups for a Record

NOTES

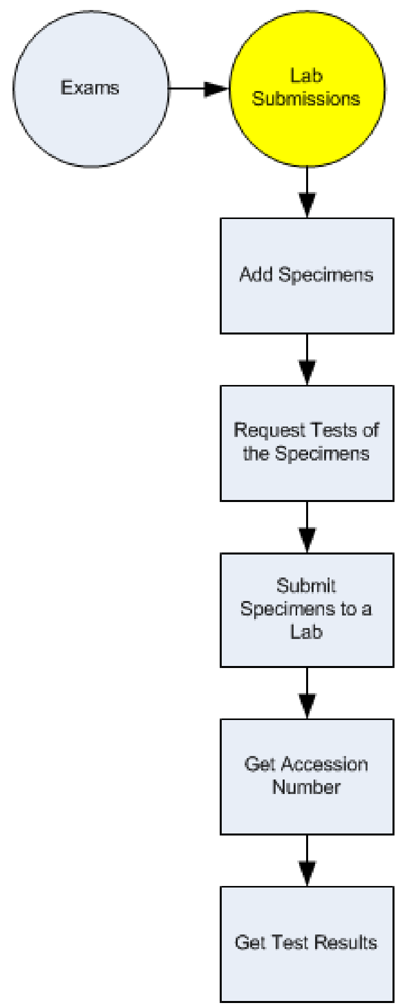
Lab Submissions

After you have examined the subjects of an investigation you may decide to collect specimens and submit these specimens to labs for testing and analysis. Specimen records are children of a lab submission record. Lab submission records are created from an exam record using the **Exam Follow-ups** dialog.

Before you attempt to create a lab submission record you should have the following:

- The Exam and the subjects sampled
- The Subjects from which specimens are taken
- The reason and priority for the lab submission
- The name of the lab where specimens are submitted

Scenario 49: Creating a Lab Submission Record



If you are working on an investigation:

1. Search for the investigation you are working on in the **Active Investigations** view.
2. Open the investigation record.
3. Click on **Exams** to display exam records for the investigation.

If you know the exam record you want to use for the lab submission:

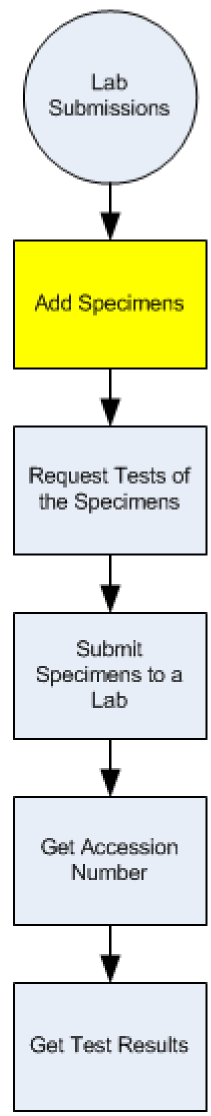
1. Click on **Exams** under **Investigations** in the **Disease Management** navigator to display the **Active Exams** view.
2. Look for the exam you want to use for the lab submission.

Continue as follows:

1. Select the exam record you want to use for the lab submission.
2. Click on **Exam Follow-ups** to display the **Add Follow-ups** dialog.
3. Select “Add a Lab Submission using subjects on this exam”
4. Click **Next** to select a reason for the lab submission.
5. Because this is a FAD incident the default reason is **FAD/EDI**.
6. If this is not a FAD incident, select one of the following reasons:
   a. Surveillance
   b. TB responder Gamma
   c. TB Suspect
7. In the droplist select a lab for this lab submission; click **Next**.

8. Select the FAD Submission priority (1, 2, 3, or A); click **Next** to create the lab submission record.
9. On the lab submission confirmation page you may click on lab submission link to open the record to edit and review the data; then close the record when you are done to return to the dialog; and/or select one of the following options:

    a. Create Specimens for the lab submission
    b. Quit the dialog
    c. Create another lab submission for this exam
    d. Create other follow-ups to this lab submission
    e. Create other follow-ups for the parent exam
10. Select "I want to create Specimens for this Submission"; click **Next**.
11. Select how you would like to create specimens:
    a. One at a time; not all subjects have similar specimens.
    b. Create a similar specimen for all subjects on the exam.



The one specimen at a time method allows you to create a single specimen at a time for a single subject at a time then copy to another subject or repeat the process. This is good for where you have different types of specimens for different subjects or not all subjects have a similar specimen.

The Bulk method allows you to create something like a Blood-Serum specimen for every subject on the current exam. This is good if you took the same type specimens from every subject and can be repeated if you took more than one type for every subject.

12. Select "One at a time…;" click **Next**.
13. You may enter Animal ID, Subject ID or Group ID to filter Subject List and click **Next** to continue; or if there are less than 50 subjects on the exam just click **Next** to continue.
14. Enter a **Sample ID**.

    This is what you wrote on the specimen container and should be unique within this exam. This is <u>not</u> the shipping container. *This is the number that goes in the Sample ID box on the 10-4*.
15. Select the **Subject Specimen** from the droplist of subjects on the exam.
16. Select a **Specimen Type** from the droplist; click **Next** to continue:
    a. Blood
    b. Carcass
    c. Egg
    d. Environmental
    e. Fluid
    f. Germplasm
    g. Parasite
    h. Scraping

   i. Swab
   j. Tissue
   k. Wash

17. If the Specimen Type is **Blood**, select one of the following; click **Next** to continue.
    a. Blood-EDTA
    b. Blood-Plasma
    c. Blood-Serum
    d. Blood-Smear
18. If the Specimen Type is **Carcass**, select **Whole Carcass**; click **Next** to continue.
19. If the Specimen Type is **Egg**, select either **Egg Yolk** or **Whole Egg**; click **Next** to continue.
20. If the Specimen Type is **Environmental**, select one of the following; click **Next** to continue.
    a. Feed
    b. Hay/Forage
    c. Manure/Feces
    d. Swabs
    e. Water
21. If the Specimen Type is **Fluid**, select one of the following; click **Next** to continue.
    a. Allantoic Fluid
    b. Expressed Milk
    c. Lesion Aspirate Fluid
    d. Spinal Fluid
22. If the Specimen Type is **Germplasm**, select [ERROR: NO RECORDS TO DISPLAY].
23. If the Specimen Type is **Parasite**, select one of the following; click **Next** to continue.
    a. Flies
    b. Lice
    c. Maggots
    d. Ticks
24. If the Specimen Type is **Scraping**, select [ERROR: NO RECORDS TO DISPLAY].
25. If the Specimen Type is **Swab**, select one of the following; click **Next** to continue.
    a. Air Sac Swab
    b. Carcass Swab
    c. Choanal Swab
    d. Cloacal Swab
    e. Fecal Swab
    f. Oral Swab
    g. Swab
    h. Tracheal Swab

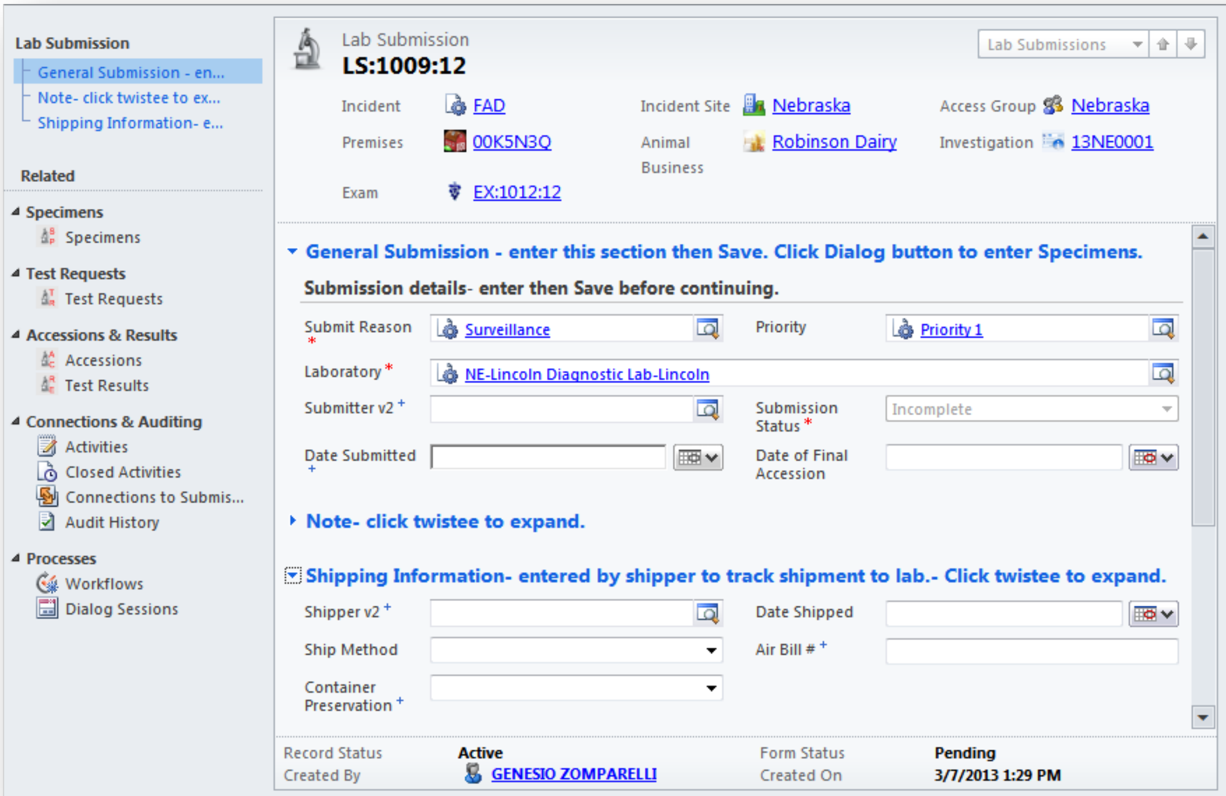
26. If the Specimen Type is **Tissue**, select one of the following; click **Next** to continue.
    a. Air Sac Tissue
    b. Bone Marrow Tissue
    c. Bone Tissue
    d. Brain Tissue
    e. Cecal Tonsil Tissue
    f. Esophageal Tissue
    g. Heart Tissue
    h. Intestinal Tissue
    i. Kidney Tissue
    j. Liver Tissue
    k. Lung Tissue
    l. Lymph Tissue
    m. Lymph Node Tissue
    n. Spleen Tissue
    o. Stomach Tissue
    p. Tissue Pool Specify
    q. Tracheal Tissue
27. If the Specimen Type is **Wash**, select [ERROR: NO RECORDS TO DISPLAY].

    When you click **Next** the system will check for duplicate specimen records; if no duplicates were found it will create a new specimen record; this process may take a few seconds to complete.

28. When the specimen record is created you may click on the link to the specimen record to review and edit the data then close the record when done to return to this dialog; and/or select one of the following options:
    a. Create another specimen for this submission
    b. Copy the specimen created to another subject
    c. Add Submission Follow-ups to another subject (test requests, results)
    d. Quit this dialog
29. Select “Quit this dialog” and click **Next** and then **Finish** to end the dialog.

The Lab Submission Form

The Header of the Lab Submission form displays information about the Incident, Incident Site, Access Group, Premises ID, Animal Business, Investigation ID, and Exam ID. These are the parent entities that are connected or linked to this lab submission record.



In the Lab Submission form navigation pane you can see the entities that are related to the lab submission record. These entities are children of the lab submission record: Specimens, Test Requests, Accessions, and Test Results.

Scenario 50: Add Similar Specimens for Multiple Subjects

In the previous scenario we created a Lab Submission and added one specimen from a single subject. In this scenario we will create a similar specimen for all subjects on the exam.

Specimens are added to lab submission records. If you know the lab submission record to which you want to add specimens:

1. Click on **Lab Submissions** under **Investigations** in **Disease Management**.
2. Look for the desired lab submission and select the record.
3. Click **on Lab Sub Follow-ups**.

If you do not recall the lab submission record but you know the exam record:

1. Click on **Exams** under **Investigations** in **Disease Management**.
2. Look for the desired exam record and open the record.
3. Click on **Lab Submissions** under **Lab Submissions** in the Exam navigation pane to display the **Lab Submission Associated View.**
4. Select the desired Lab Submission record.
5. Click on **Lab-Sub Follow-ups**.

Continue as follows:

1. Select “Create a new Specimen” from the Add Follow-ups dialog.
2. Select “I want to create a similar specimen for all subjects on exam;” click **Next**.
3. Select the **Category** of Bulk specimens

   This process will create a similar specimen for every subject on this exam. For example, if you have 15 horses listed as subjects and you define a Blood -Serum specimen then 1 will be created for all 15 subjects.

4. Are the specimens **Pooled** (Yes or No)?
5. Select the **Quality** of the specimens when taken:
   a. Excellent
   b. Good
   c. Marginal
   d. Poor
6. Select the type of **Preservation** used for the specimens:
   a. None
   b. Alcohol
   c. Brain-heart infusion broth (BH)
   d. Viral Transport Media
   e. Tris-buffered tryptose broth (TBTB)
   f. Nutrient Broth (NB)
   g. Peptone Broth (PB)
   h. Cell culture medium w1%BSA
   i. Formalin

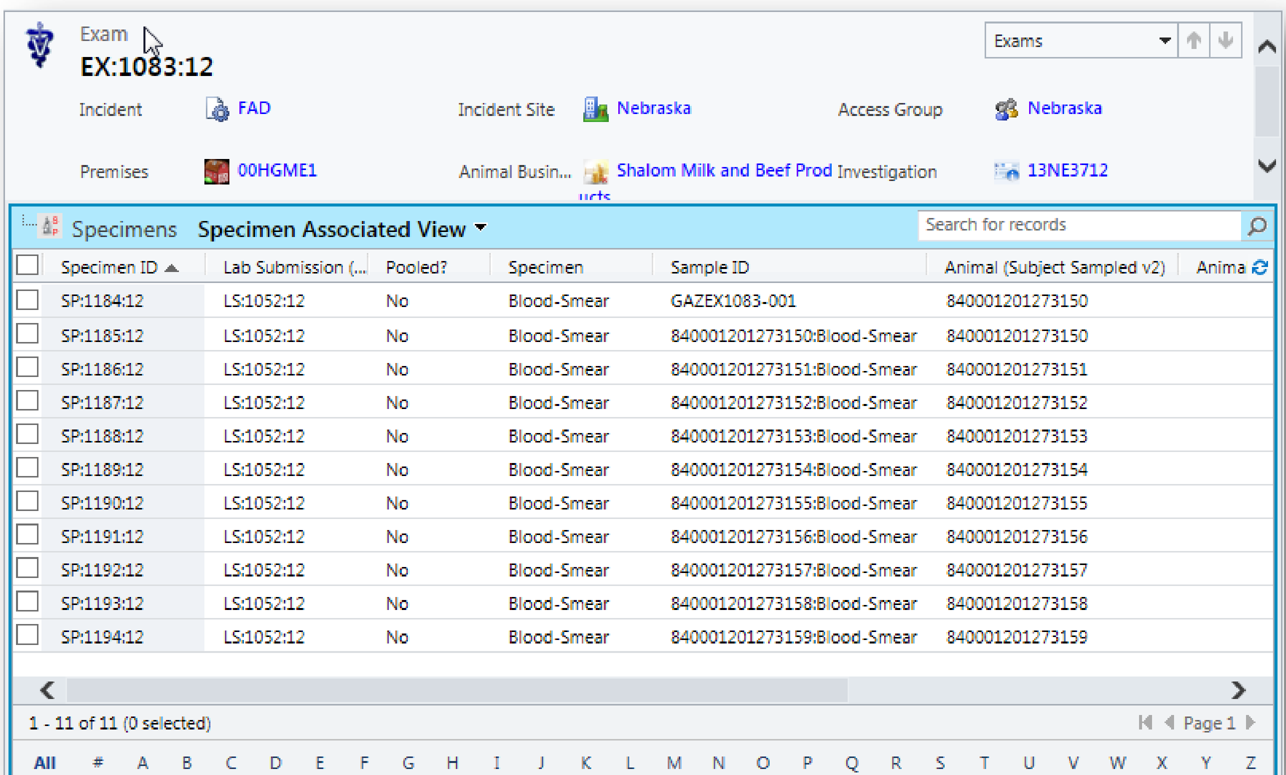
7. Click **Next** to continue.
8. Select specific specimen **Type** for selected category (see step 17 on page 141); click **Next**.
9. A warning message is displayed; click **Next** to continue.

When you click next you will trigger the system to create 1 specimen of the specified category and type for all of the subjects on the exam.

There may be a 15-20 second delay if there are less than 20 specimens; longer delays may occur for a large number of specimens. Please be patient and allow the system to create the specimens before the next page is displayed.

10. After the specimens are created you may select one of the following options:
    a. Create another set of bulk specimens for the same submission.
    b. Create single specimens for the same submission.
    c. Create Follow-ups for the same submission.
    d. Quit this dialog.
11. Select "Quit this dialog"; click **Next** then **Finish** to end the dialog.

If the Exam record is open you may verify the creation of the specimen records by clicking on Specimens under Lab Submission in the Exam navigator to display the Specimen Associated View.



Specimen ID	Lab Submission (...	Pooled?	Specimen	Sample ID	Animal (Subject Sampled v2)	Anima
SP:1184:12	LS:1052:12	No	Blood-Smear	GAZEX1083-001	840001201273150	
SP:1185:12	LS:1052:12	No	Blood-Smear	840001201273150:Blood-Smear	840001201273150	
SP:1186:12	LS:1052:12	No	Blood-Smear	840001201273151:Blood-Smear	840001201273151	
SP:1187:12	LS:1052:12	No	Blood-Smear	840001201273152:Blood-Smear	840001201273152	
SP:1188:12	LS:1052:12	No	Blood-Smear	840001201273153:Blood-Smear	840001201273153	
SP:1189:12	LS:1052:12	No	Blood-Smear	840001201273154:Blood-Smear	840001201273154	
SP:1190:12	LS:1052:12	No	Blood-Smear	840001201273155:Blood-Smear	840001201273155	
SP:1191:12	LS:1052:12	No	Blood-Smear	840001201273156:Blood-Smear	840001201273156	
SP:1192:12	LS:1052:12	No	Blood-Smear	840001201273157:Blood-Smear	840001201273157	
SP:1193:12	LS:1052:12	No	Blood-Smear	840001201273158:Blood-Smear	840001201273158	
SP:1194:12	LS:1052:12	No	Blood-Smear	840001201273159:Blood-Smear	840001201273159	

Scenario 51: Add Specimens for Subjects Selected During an Exam

Specimens are taken from the subjects in an examination during an investigation. Specimens are included with the lab submission. If you want to keep a record of the specimens you took from the subjects you sampled during an exam you may do this from either an open investigation record, a lab submission record, or an open exam record. You may create new specimen records from scratch or make copies of existing specimen records to use for other subjects in the exam.

If you know the investigation has a lab submission where you want to add specimen records follow these steps:

1. Click on **Investigations** under **Investigations** in the **Disease Management** navigator.
2. Look for the investigation you want to work with and **open** the record.
3. In the **FAD Investigation** form navigator click on **Specimens** to display the **Specimens Associated View.**
    a. If you see specimens in the view:
        i. Select a specimen record and then click on **Specimen Follow-ups** to display the **Follow-ups** dialog with data about the selected specimen; select one of the following options:
            1. Create a new specimen for subjects of exam; click **Next**
            2. Copy this specimen to subjects of exam; click **Next**
            3. Create a Test result for specimens on submission; click **Next**
            4. Add other follow-ups to Lab Submission; click **Next**
                a. If you select “Create a new specimen for subjects of exam” the **Create Specimens** dialog is displayed; create the new specimen record as described in step 10 on page 140.
                b. If you select “Copy this specimen to subjects of exam” the **Copy Specimens** dialog is displayed; create the copy of the specimen as described on page 148.
                c. If you select “Create a Test Result for specimens on submission” the **Create Test Result** dialog is displayed; continue to create a test result as described on page XXX (you will need an Accession Number to do this).
                d. If you select “Add other follow-ups to Lab Submission” Lab Submission Follow-ups is displayed; see step b below.
    b. If you do not see any specimens in the view click on **Lab Submissions** in the **FAD Investigation** form navigator to display the **Lab submission Associated View**.
        i. Select the lab submission record that requires specimen records.
        ii. Click on **Lab Sub Follow-ups**.
        iii. The following options are available in the **Add Follow-ups** menu:
            1. Create a new specimen
            2. Create a new Test Request
            3. Create a new Accession

4. Create a new Test Result
5. Submit this submission to the lab
6. Complete this submission
7. Create a new submission or other exam follow-ups
8. Delete this Lab Submission

iv. Select "Create a new Specimen"; click **Next** to continue.

v. Follow step 10 on page 140 to create a ew specimen.

If you know the Exam that is associated with the subjects:

1. Click on **Exams** under **Investigations** in the **Disease Management** navigator.
2. In the **Active Exams** view look for the exam you want to work with and **open** the record.
3. In the **Exam** form navigator click on **Subjects Sampled** to display the **Subject Sampled Associated View.**
4. Open any subject record (you will select a specific subject in the dialog).
5. Click on **Specimens** under **Subject Associated** in the **Sampled Subject** form navigator.
6. In the Specimen Associated View select any specimen record.
7. Click on Specimen Follow-ups to launch the Follow-ups dialog.
8. Select "Create a new specimen for subjects of exam"; click **Next** to continue.
9. Follow step 10 on page 140 to create a new specimen record.

If you know the subject sampled id or the animal id:

1. Click on **Subjects Sampled** under **Investigations** in the **Disease Management** navigator to display the **Active Subjects Sampled** view.
2. Look for the Subject Sampled record you want to add a specimen record to.
3. Open the selected Subject Sampled record.
4. Click on **Specimens** under **Subject Associated** in the **Sampled Subject** form navigator.
5. In the **Specimen Associated View** select any specimen record.
6. Click on **Specimen Follow-ups** to launch the Follow-ups dialog.
7. Select "Create a new specimen for subjects of exam"; click **Next** to continue.
8. Follow step 10 on page 140 to create a new specimen record.

Scenario 52: Use the Same Specimen Record for Other Subjects

Specimens are taken from the subjects in an examination during an investigation. Specimens are included with the lab submission. If you already added specimen records to a lab submission for a subject in an exam and you want to use the same specimen data for other subjects in the same exam you can copy a specimen record and specify which subjects in the exam to apply the specimen record.

Before you attempt to add specimens for the subjects of an exam make sure there are subjects already added to the exam (to add new subjects to an exam see “Scenario 34: Add Subjects to an Exam” on page 115).

If you know which investigation has the specimens that you want to copy:

1. Click on **Investigations** under **Investigations** in the **Disease Management** navigator.
2. Look for the investigation you want to work with and **open** the record.
3. In the **FAD Investigation** form navigator click on **Specimens** to display the **Specimens Associated View.**
4. Select the specimen record you want to copy and click on **Specimen Follow-ups** to display the **Follow-ups** dialog (data about the selected specimen is displayed in the dialog).
5. Select “Copy this specimen to subjects of exam” and click **Next** to continue.
6. Enter a subject, animal, or group id and/or click **Next** to continue.
7. Enter a unique Sample ID and select the subject from the droplist.

You may enter up to five Sample IDs for up to five subjects in this dialog. Each sample will be a copy of the sample you selected in the view. Each sample id must be unique. If there are more than five samples or subjects you want to add speciments to you may repeat this dialog as often as needed.

8. Select “Yes, continue” and click **Next**.

If there are more subjects needed for this exam you may select “No, I need to create more subjects on this exam” and click **Next**. If you choose this option specimens for the subjects you selected will not be created; instead the dialog to add new subjects is launched to allow you to add more subjects, as described on page 115.

9. Select “I am done, end the dialog” and click **Next** and **Finsih** to end the dialog.

If you know the lab submission that has the specimens you want to copy:

1. Click on **Lab Submissions** under **Investigations** in the **Disease Management** navigator.
2. Look for the lab submission you want to work with and **open** the record.
3. In the **Lab Submission** form navigator click on **Specimens** under **Specimens** to display the **Specimens Associated View.**
4. Select the specimen record you want to copy and click on **Specimen Follow-ups** to display the **Follow-ups** dialog (data about the selected specimen is displayed in the dialog).
5. Select “Copy this specimen to subjects of exam” and click **Next** to continue.
6. Enter a subject, animal, or group id and/or click **Next** to continue.

7. Enter a unique Sample ID and select the subject from the droplist.
8. You may add up to five samples for up to five subjects.
9. Select “Yes, continue”; click **Next**.
10. Select “I am done, end the dialog” and click **Next** and **Finish** to end th edialog.

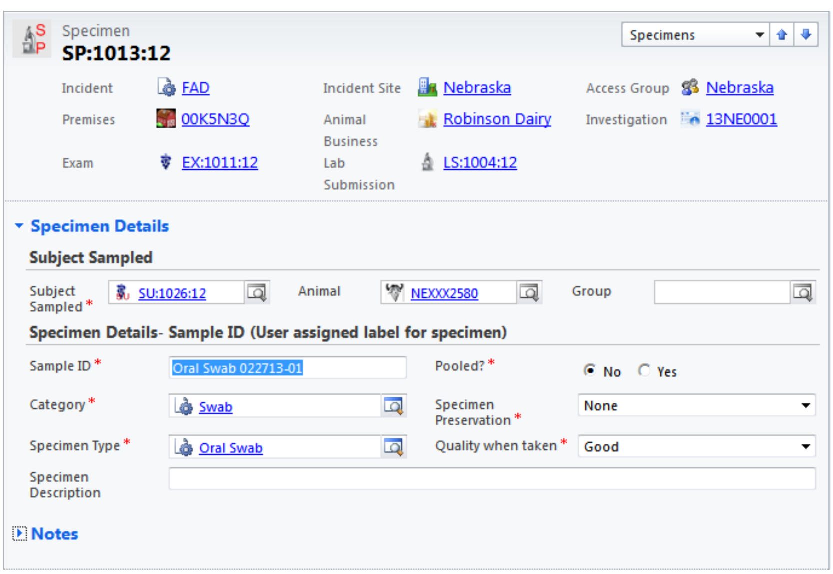
If you know the Exam with the subjects that have specimens you want to copy:

1. Click on **Exams** under **Investigations** in the **Disease Management** navigator.
2. In the **Active Exams** view look for the exam you want to work with and **open** the record.
3. In the **Exam** form navigator click on **Subjects Sampled** to display the **Subject Sampled Associated View.**
4. Open any subject record (you will select a specific subject in the dialog).
5. Click on Specimens under Subject Associated in the Sampled Subject form navigator.
6. In the Specimen Associated View seledt any specimen record.
7. Click on Specimen Follow-ups to launch the Follow-ups dialog.
8. Select “Create a new specimen for subjects of exam” and click Next to continue.
9. Follow the steps on page 140 to create a new specimen record.

If you know the subject sampled id or the animal id:

9. Click on **Subjects Sampled** under **Investigations** in the **Disease Management** navigator to display the **Active Subjects Sampled** view.
10. Look for the Subject Sampled record you want to add a specimen record to.
11. Open the selected Subject Sampled record.
12. Click on **Specimens** under **Subject Associated** in the **Sampled Subject** form navigator.
13. In the **Specimen Associated View** select any specimen record.
14. Click on **Specimen Follow-ups** to launch the Follow-ups dialog.
15. Select “Create a new specimen for subjects of exam” and click **Next** to continue.
16. Follow the steps on page 140 to create a new specimen record.

The Specimen Form

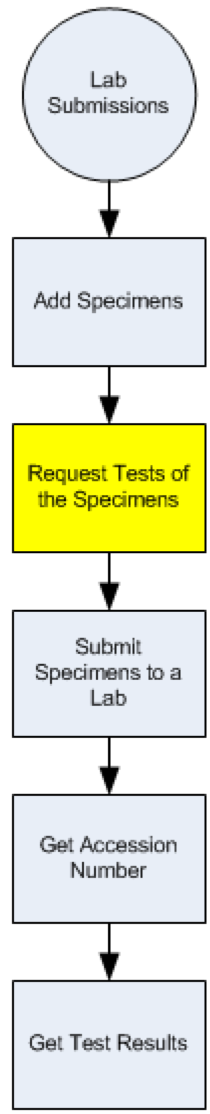


Scenario 53: Request Tests for My Specimens

After you collect your specimens it is necessary to specify the kinds of tests you want the lab to perform on the specimens. Like specimens, test requests are children of a lab submission record. Therefore, you will most likely add test requests using the lab submission follow-up dialog.

A test request is for one or many specimens of the same type for one specific test or screening. You create the test request from the lab submission and specify a type of specimen on the test request. Right now associating the specimens to a test request is a manual process that is done at the end of the test request dialog or from the Test Request Follow-up.

Custom Workflow Processes



Eventually we will use a custom workflow that would automatically associate all specimens of the given type without user interaction. For example, if you want to add 25 Blood-serum specimens to the lab submission these would be created using a custom workflow, which runs a bulk process. Then you would create a test request from the lab submission to test blood-serum for Vesicular screening and a second custom workflow would kick off and create a “Specimen to test request” many to many association for all 25 specimens and the given test request.

A test result is for one specimen; other specimens may have similar results. So when you receive results for the 25 specimens you submitted you would likely have one test for vesicular stomatitis and a second for FMD on each specimen. You would specify the type test and result. This would kick off the third bulk process that creates a similar result for all 25 specimens for vesicular stomatitis. Then you would specify the FMD results and kick off the workflow to apply this result to all 25 specimens. This should work the same whether you had 5 or 5000 specimens. If there were 24 negative and one positive you would create all 25 negative and then edit one negative record to change it to positive.

To summarize this example, you would create one lab submission record with 25 Blood-serum specimens from 25 different subjects. You would create 1 Test request for Vesicular Disease Screening for each of the 25 specimens. Then you would process 50 Test results (25 Vesicular Stomatitis – CF-negative results (1 for each specimen)), and 25 FMD, CF-negative results (1 for each specimen).

We describe the manual process on the following pages but this procedure will be updated when we complete the custom workflows with bulk processes.

There are three things you should be aware of when creating test requests:

1. Only one type of Specimen is permitted on a single test request
2. Up to three Diseases and Test Categories can be specified on a single request
3. If all specimens of the same type will be tested the same way create a request with 1-3 diseases to screen and all specimens of type specified to make the associations in bulk

Follow this procedure if you know the lab submission you want to add test requests to:

1. Click on **Lab Submissions** under **Investigations** in the **Disease Management** navigator to display the **Active Lab Submissions** view.
2. Look for the lab submission record that requires test requests, select the record and click on **Lab Sub Follow-ups** to launch the Follow-ups dialog.

   The dialog will display information about the lab submission record and the Specimen Type for the test requests. The following options are available in the **Lab Sub Follow-ups** dialog:

   - Create a new Specimen
   - Create a new Test Request
   - Create a new Accession
   - Create a new Test Result
   - Submit this submission to Lab
   - Complete this submission
   - Create a new submission or other exam follow-ups
   - Delete this Lab Submission

3. Select "Create a new Test Request"; click **Next** to continue.
4. Select one of the following options:
   a. Create a request with 1-3 diseases to screen specified Specimen type.
   b. Create a request with 1-3 diseases then make individual associations–not all the same.
5. Select option a; click **Next**.

The dialog will display a link to the lab submission record and the name of the laboratory that will process the specimens using the test requests specified. You must specify a specimen type and at least 1 disease or condition and test category. The second and third diseases are optional but if included a test category is required. All specimens of the type selected will be associated to this request.

If you do not want to test all specimens of the same type the same way select option b for the test request. It could take up to a minute for the process to complete and display the final page. Be patient.

6. You may include up to three test requests; for each test request the following data is required:
    a. Disease
    b. Test Category
7. Click **Next** to continue.
8. When the Success dialog is displayed you may select one of the following options:
    a. Quit this dialog
    b. Create more test requests
    c. Add other lab submission follow-ups
9. Select "Quit this dialog"; click **Next** then click **Finish**.

If you do not want to test all specimens of the same type the same way follow these steps:

Scenario 54: Test Specimens of the Same Type Using Different Methods

Follow this procedure if you know the lab submission you want to add test requests to:

10. Click on **Lab Submissions** under **Investigations** in the **Disease Management** navigator to display the **Active Lab Submissions** view.
11. Look for the lab submission record that requires test requests, select the record and click on **Lab Sub Follow-ups** to launch the Follow-ups dialog.

    The dialog will display information about the lab submission record and the Specimen Type for the test requests. The following options are available in the **Lab Sub Follow-ups** dialog:

    - Create a new Specimen
    - Create a new Test Request
    - Create a new Accession
    - Create a new Test Result
    - Submit this submission to Lab
    - Complete this submission
    - Create a new submission or other exam follow-ups
    - Delete this Lab Submission
12. Select "Create a new Test Request"; click **Next** to continue.
13. Select one of the following options:
    a. Create a request with 1-3 diseases to screen specified Specimen type.
    b. Create a request with 1-3 diseases then make individual associations–not all the same.
14. Select option b; click **Next**.
15. You may include up to three test requests; for each test request the following data is required:
    a. Disease
    b. Test Category

16. Click **Next** to continue.

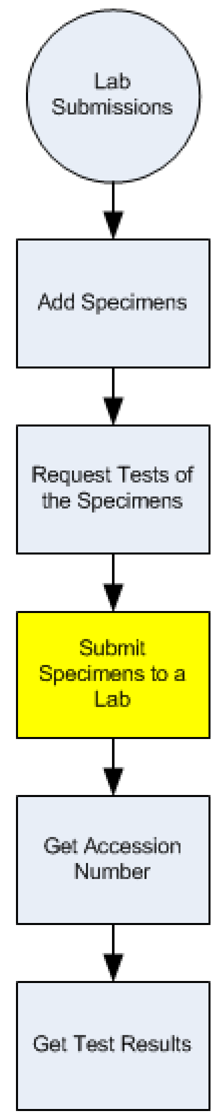
    The dialog will confirms the creation of test requests for the specified specimen type and diseases and informs the requester that no associations with specimens have been made; the user is required associate specimens to test request manually by selecting the option “Associate Specimens to these Test Requests.”

17. The user may select one of the following options:
    a. Quit this dialog.
    b. Associate Specimens to these Test Requests.
    c. Create more test requests for this submission.
    d. Add other Lab Submission follow-ups.
18. Select “Associate Specimens to these Test Requests”; click **Next** to continue.
19. Select one of the following options:
    a. Create a request with 1-3 diseases to screen specified Specimen type.
    b. Create a request with 1-3 diseases then make individual associations¬–not all the same.
20. Select option a; click **Next**.
21. Repeat this process until you have added all of your individual test requests
22. Quit the dialog when you are finished.

Scenario 55: Submit Specimens to a Lab

Before you submit specimens to a lab each specimen must be associated with a Test Request (see page 150). After you select the specimens to use in the test requests you are ready to submit the specimens to the lab. This process is recorded in the lab submission record.

If you know what lab submission has the specimens you want to submit to the lab follow these steps:



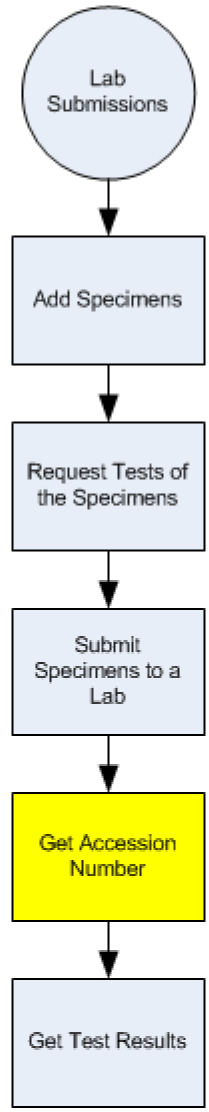
1. Click on **Lab Submissions** under **Investigations** in the **Disease Management** navigation pane to display the **Active Lab Submissions** view.
2. Look for the desired lab submission record.
3. Select the desired lab submission record and click on **Lab Sub Follow-ups** to display the Follow-ups dialog.
4. Select “Submit this submission to lab” and click **Next** to continue.
5. Respond to the following prompts in the dialog:
    a. Select **Yes** if the Submitter and Shipper are the same as the collector on the exam; otherwise select **No**.

       If Submitter and shipper are the same then no action is required. If not, you will be given an opportunity to enter a different person for each.
    b. Specify the **Submission Date**.
    c. Specify the **Shipment Date**.
    d. Select the **Shipping Method** from the droplist.
    e. Enter the **Airbill #** (required if shipping method is not hand carried)
    f. Select the **shipping container preservation method** from the droplist.
6. Click **Next** to continue.

   If the submitter and shipper are not the same as the collector you will be prompted to enter a Submitter and a Shipper if different from Collector; then click **Next** to continue.
7. The lab submission status is changed to “Submitted” and the dialog summarizes the submission information. You may select one of the following options:
    a. Quit, I am done for now.
    b. Add follow-ups to this Submission.
    c. Add follow-ups to this Exam.
    d. Add follow-ups to this Investigation.
8. Select the desired option and click **Next** to continue to the desired dialog; or click **Finish** to end.

Scenario 56: Enter the Lab Accession Number

The lab will perform the specified tests on the specimens you submitted and send the results to you. The results will have an **Accession Number**. An example of a lab report with an accession number can be found in the Appendix on page 185. Before you can enter the test results you have to provide the Accession number that is associated with the results. Then you will look for the lab submission record that has the test requests you want to apply the results to.



For now this is a manual process, but in the future we will develop a web service connection to the labs to make it possible to automate the entire lab submission process.

If you have the accession number, follow these steps to enter the test results into a lab submission record; otherwise follow the alternate process described on page 156.

1. In the **Disease Management** navigation pane under **Investigations** click on **Lab Submissions** to display the **Active Lab Submissions** view.
2. Look for the lab submission record that you will add the test results to.
3. Select the desired record and click on **Lab Sub Follow-ups** to launch the dialog.
4. Select "Create a new Accession" and click **Next** to continue.

   The dialog displays a link to the current lab submission record and the name of the lab you sent the specimens to.
5. Enter the Accession number; click **Next**.

   The dialog displays a link to the Accession record you created and summarizes the number of test requests you submitted to the lab.
6. Select one of the following options:
   a. If you want to link these test requests to the lab's accession number select **Yes;** click **Next** to continue
   b. Select **No** to quit the dialog
7. Select the test requests for the specified lab submission to link to the specified accession number; click **Next**.
8. The dialog confirms that you have successfully linked the specified Test Request to the specified accession and displays the remaining number of Test Requests from this Submission that are not linked to this Accession; click **Next**.
9. If there are more Test Requests that should be linked to this accession number click on **Previous** to return to the list of Test Requests, select the next Test Request in the list and click **Next** to continue.
10. Repeat this process until all of the Test Requests are linked to the Accession number.
11. When finished click **Next** to continue and click **Finish** to end the dialog session.

Scenario 57: Enter Test Results for Single Specimens

If you entered the accession numbers from the labs you are now ready to add the test results to the test requests. Alternatively, you can add test results without entering accession numbers first. The dialog will prompt you to enter an accession number; if you do not have an accession number you may continue to add the test results to a specific test request. Accession numbers are not required to enter test results.

If Accession Numbers were already added to the lab submission follow this procedure to add test results to a test request:

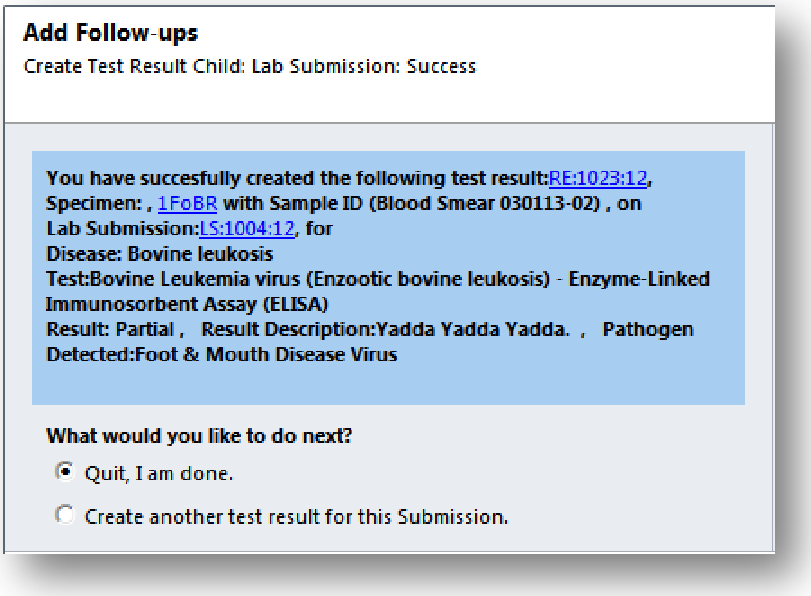
1. In the **Disease Management** navigation pane under **Investigations** click on **Lab Submissions** to display the **Active Lab Submissions** view.
2. Look for the lab submission record that you will add the test results to.
3. Select the desired record and click on **Lab Sub Follow-ups** to launch the Follow-ups dialog.
4. Select "Create a new Test Result" and click **Next** to continue.
5. Select which option to use to create test results:
    a. Create Single Test Results for Single Specimens.
    b. Create a similar result for all specimens of 1 type.
6. Select "Create Single Test Results for Single Specimens"; click **Next**.
7. The dialog will display a list of accession numbers; select the accession number you want and click **Next** to continue.
8. If you have a large number of specimens enter an identifier to narrow choices presented.

   You may enter a full or partial sample id, specimen id, subject id, an animal or group id to wild card search; or just leave the field blank.
9. Click **Next** to continue.
10. In the droplist select the Specimen to link to the test results.
11. You are required to specify the **Disease Screened**.

    The disease screened will be used to filter the appropriate test type.
12. You are required to specify **the Date Resulted**; click **Next** to continue.
13. Select the **Test Conducted** for the specified specimen from the drop list; click **Next**.
14. Select the **Result Interpretation** from the droplist.
15. Choose the **Proper Comparator** for result or select N/A from the droplist.
16. Choose the **Proper Dilution** for the test or select N/A from the droplist.
17. You may enter a Test Result Additional Description or write-up if needed.
18. You may select the **Pathogen Detected** from the lookup (this is not required).
19. Click **Next** to display dialog to confirm the creation of the final result using the options specified for the specified specimen.

20. Click **Next** to create the **Final Result**; if you need to make corrections click **Previous**; if you decide not to create a Final Result click **Cancel** to end the dialog session.

    The dialog displays a summary of the Test Result you created.



21. You may select one of the following options:
    a. If you are done adding test results select "Quit, I am done" and click **Next** and **Finish** to end the dialog.
    b. Select "Create another test result for this Submission" and click **Next** to continue.
22. To add more test results repeat this process from step 5 above; otherwise **Quit** the dialog.

Scenario 58: Enter Test Results for All Specimens of One Type

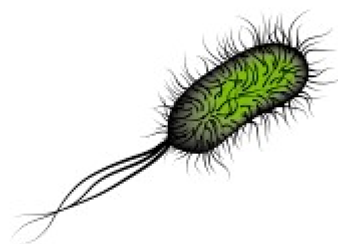
If you entered the accession numbers from the labs you may add the test results to the test requests. In this scenario you will trigger a bulk process to create a similar result for all specimens of a single type. Follow this procedure to add test results to a test request:

1. In the **Disease Management** navigation pane under **Investigations** click on **Lab Submissions** to display the **Active Lab Submissions** view.
2. Look for the lab submission record that you will add the test results to.
3. Select the desired record and click on **Lab Sub Follow-ups** to launch the Follow-ups dialog.
4. Select “Create a new Test Result” and click **Next** to continue.
5. Select which option to use to create test results:
    a. Create Single Test Results for Single Specimens.
    b. Create a similar result for all specimens of 1 type.
6. Select “Create a similar result for all specimens of 1 type”; click **Next**.
7. The dialog will display a list of accession numbers; select the accession number you want and click **Next** to continue.
8. Select a specimen type from this lab submission from the droplist.
9. You are required to select the **Disease Screened** from the lookup.
10. You are required to specify the Date Resulted; click Next.
11. Select the **Test Conducted** for the specified specimen from the drop list; click **Next**.
12. Select the **Result Interpretation** from the droplist.
13. Choose the **Proper Comparator** for result or select N/A from the droplist.
14. Choose the **Proper Dilution** for the test or select N/A from the droplist.
15. You may enter a Test Result Additional Description or write-up if needed.
16. You may select the **Pathogen Detected** from the lookup (this is not required).
17. Click **Next** to display dialog to confirm the creation of the final result using the options specified for the specified specimen.
18. Click **Next** to continue with creating the **bulk test results**; otherwise, go back to change values or click Cancel to Quit the dialog session.

    Be patient while the process runs. When you click **Next** it could take from 30 seconds to several minutes to create all of your results depending on the number you have. When the bulk process is complete a dialog displays the total number of test results you created for the specified disease and test specifications.

19. In the “Bulk Process Ran” dialog click **Next** to continue; then click **Finish** to end the session.

Scenario 59: Enter Test Results without an Accession Number



If you do not have the accession numbers from the labs you may add the test results to the test requests. In this scenario you will trigger a bulk process to create a similar result for all specimens of a single type. Follow this procedure to add test results to a test request:

1. In the **Disease Management** navigation pane under **Investigations** click on **Lab Submissions** to display the **Active Lab Submissions** view.
2. Look for the lab submission record that you will add the test results to.
3. Select the desired record and click on **Lab Sub Follow-ups** to launch the Follow-ups dialog.
4. Select "Create a new Test Result" and click **Next** to continue.
5. Select which option to use to create test results:
    a. Create Single Test Results for Single Specimens.
    b. Create a similar result for all specimens of 1 type.
6. Select "Create a similar result for all specimens of 1 type"; click **Next**.
7. The dialog will display a list of accession numbers; select the accession number you want and click **Next** to continue.
8. An Accession Number is required. If no Accession Numbers were found for these results you are prompted to enter an accession number.
9. Select a specimen type from this lab submission from the droplist.
10. You are required to select the **Disease Screened** from the lookup.
11. You are required to specify the **Date Resulted**; click **Next**.
12. Select the **Test Conducted** for the specified specimen from the drop list; click **Next**.
13. Select the **Result Interpretation** from the droplist.
14. Choose the **Proper Comparator** for result or select N/A from the droplist.
15. Choose the **Proper Dilution** for the test or select N/A from the droplist.
16. You may enter a Test Result Additional Description or write-up if needed.
17. You may select the **Pathogen Detected** from the lookup (this is not required).
18. Click **Next** to display dialog to confirm the creation of the final result using the options specified for the specified specimen.
19. Click **Next** to continue with creating the **bulk test results**; otherwise, go back to change values or click Cancel to **Quit** the dialog session.

NOTES

Movements and Tracing

Traceability is the ability to follow an item or group of items – animals, plants, food products or ingredients – from one point in the supply chain to another. Tags, tattoos, brands and logbooks are all elements of traceability that have been used for years by both industry and government. Traceability systems are based on three basic elements: animal/product identification, premises identification, and animal/product movement.

Animal disease traceability is about knowing where diseased and at-risk animals are, where they've been, and when. Effective traceability is important to ensure a rapid response when animal disease events take place. An efficient and accurate animal disease traceability system helps reduce the number of animals involved in an investigation, reduces the time needed to respond, and decreases the cost to producers and the government.

Click here to see the Federal Register about USDA policy regarding Animal Disease Traceability.

Animal movement and Tracing records are found in the Movements and Tracing tab in the Disease Management navigation area. There are five entities associated with Movements and Tracing:

- Permits
- Movements
- Traces
- Global Animal Records
- Animal IDs

Permits

Permits are added to the origin access group default queue where they can be reviewed by a responsible person at the origin who has the “Permit Reviewer” role. Permits must be reviewed and receive a favorable recommendation to be routed to the Destination access group default queue where they can be approved or denied. Only approved permits can have permitted movements added.

Permit records may be found in the Permits views:

- Approved Permits Pending Movements
- Completed/Expired Permits
- Inactivated Permit Records
- Permits Denied
- Permits in Process
- Permits pending Review
- Reviewed/Pending Dest Approval

A permit must be created from an active investigation record using the **Invest Follow-up** dialog.

Scenario 60: Creating a Permit

Before you can create a permit you should have the following information:

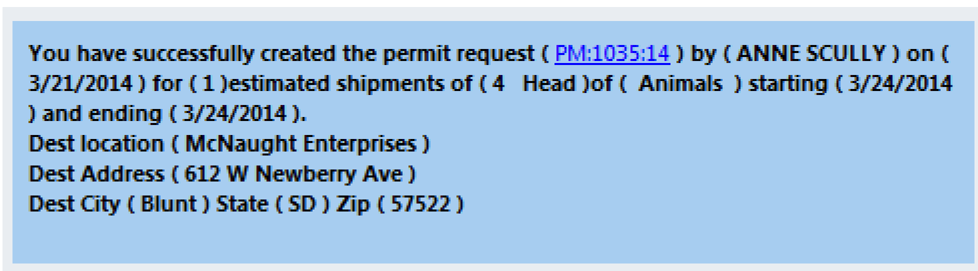
- The Investigation ID; or other information about the investigation
- The incident for the destination investigation must be the same as the incident for the origin investigation
- A valid premises id for the destination is required to approve a permit
- The destination premises must have a business associated with it
- A reason for the permit
- The number of animals (or other items) being shipped
- Estimated shipping dates
- Estimated number of shipments
- The name of the premises and/or business where the items will be moving to
- Physical address of requested destination

Follow these steps to create a permit:

1. Display **the Active All incident Investigations** view under **Investigations** tab in the **Disease Management** navigator.
2. Search for the investigation record that requires the permit.
3. Select the investigation record in the view and click on **the Invest Follow-up** dialog button.
4. Select **Create a Permit**; click **Next** to continue.
5. Enter a date of Request (or accept default date).
6. Select a Reason for the Permit Request.
7. Specify the name of the requestor; click **Next**.
8. Select the items that you are creating the permit for:
    - Animals
    - Animal Groups
    - Milk
    - Eggs
    - Feed
    - Hay/Forage
    - Other
9. Select the units of the items permitted:
    - Head
    - Gal.
    - Lbs.
    - Tons
    - Bales
    - Doz.
    - Other

10. Specify the estimated number of units per shipment.
11. Specify the estimated start date of the shipments.
12. Specify the estimated end date of the shipments.
13. Specify the estimated total number of shipments.
14. Click **Next**.
15. You are required to specify the requested destination location name.
16. Specify the physical address of the destination.
17. Specify the destination city.
18. Specify the destination state.
19. Specify the destination zip.
20. Click **Next**.

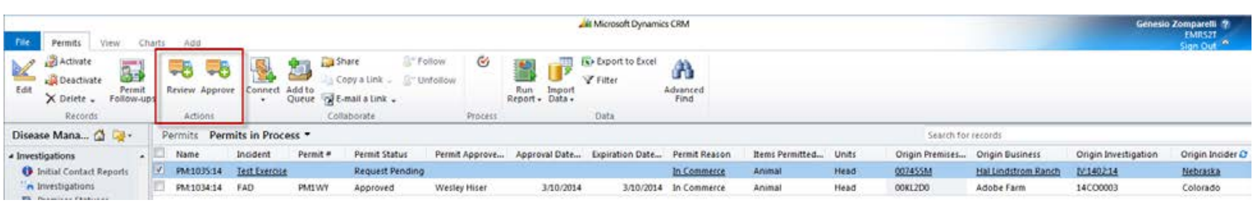
    The dialog confirms the creation of the permit record.



21. You may do one of the following:
    - Click on the permit number hyperlink to open the permit record
    - Quit the dialog; click Next and click Finish
    - Return to Investigation Follow-ups dialog; click Next

Permits are added to the origin access group default queue where they can be reviewed by a responsible person at the origin who has the "Permit Reviewer" role.

To verify that the permit was created you may click on **Permits** under the **Movements and Tracing** tab and search for the permit record in the **Permits Pending** view.

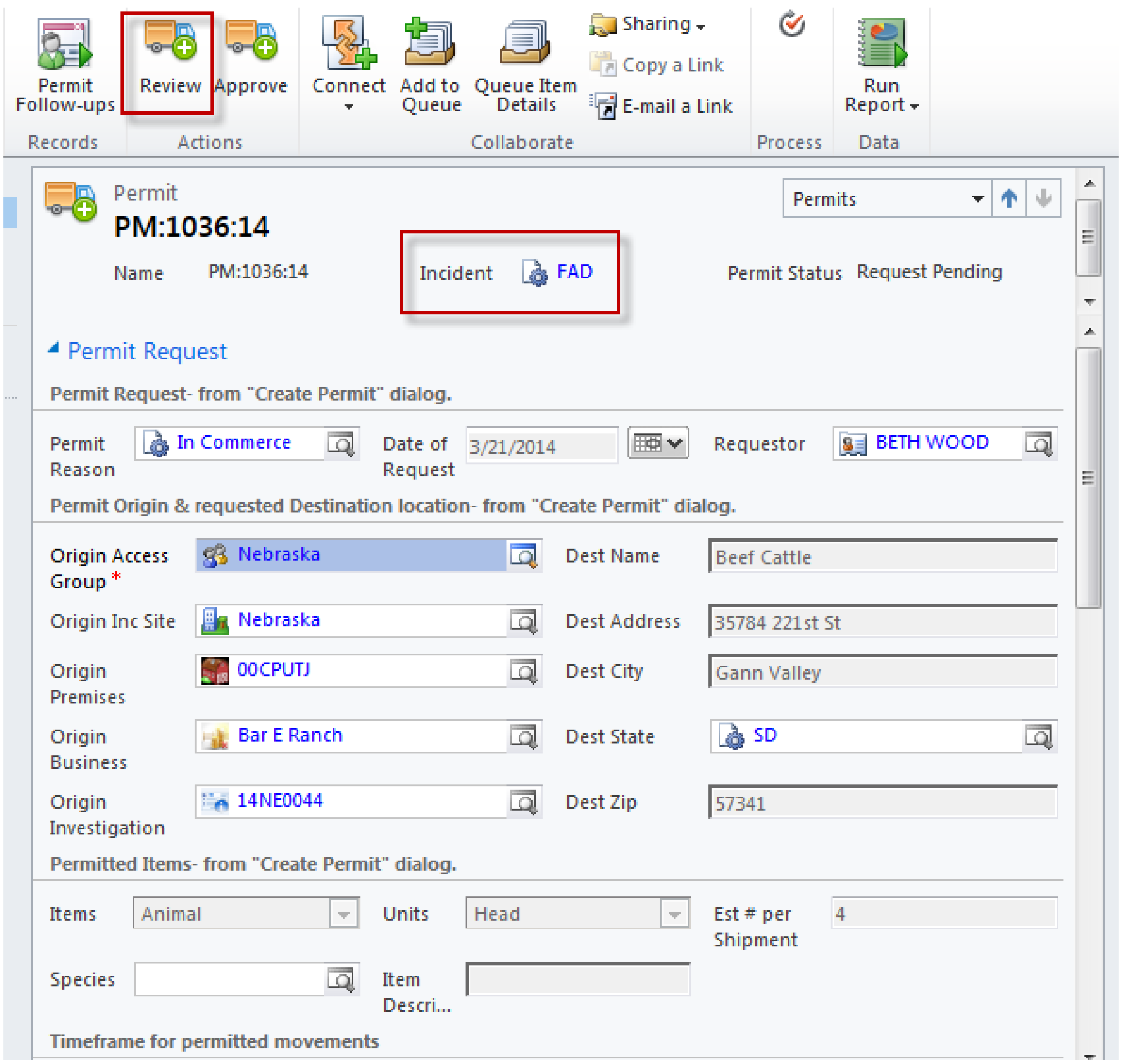


Scenario 61: Reviewing a Permit

If you have the **Permit Reviewer** role you can click on **Permits** under **Movements & Tracing** to display the **Permits in Process** view. Select the desired permit and open the form to review it.

You must have the appropriate “Permit Reviewer” and “Permit Approver” roles to be able to review and/or approve a permit.

Permit Record form



<u>Before a permit request can be approved it has to be reviewed</u>. This process will allow you to review the permit from the origin perspective and make a recommendation for approval. It will also prepare the permit for transfer if the destination premises is out of state by allowing you to enter the state destination access. The system will update the permit as reviewed and move it to the destination access group queue for their approval.

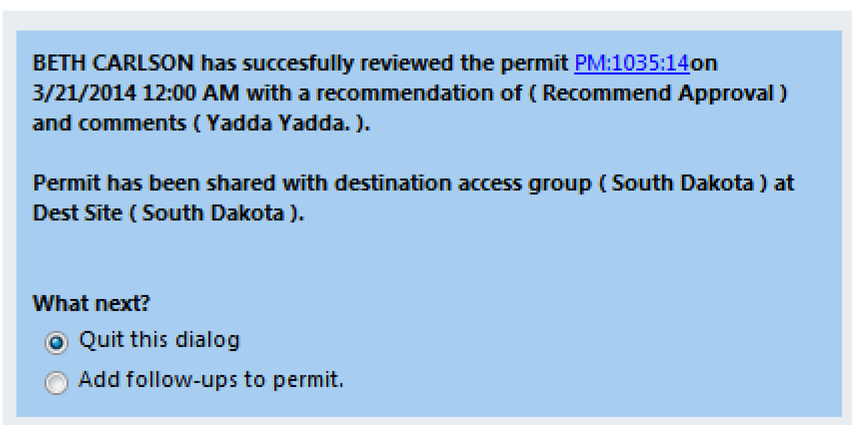
To review a permit request:

1. In the **Permits in Process** view select the permit you want to review.
2. Click the **Review** dialog button (this can be done from the permit form or by selecting the permit in Permits in Process view and clicking on Review).
3. Enter the Date Reviewed.
4. Enter the name of the permit reviewer.
5. Select Recommend Approval (the other option is Recommend Denial)
6. Enter comments, if necessary.

   Comments are useful if you need to explain why you recommend denial or if there are concerns or stipulations for the approval.

7. Click **Next** to continue.
8. Select the **Destination Incident Site**. This is the site that would be responsible for approving the permit in the destination state.
9. Select the **Destination Access Group**. This will be the access group the permit will be shared with and the queue it will be routed to for approval.
10. Click **Next** to continue.

    The dialog indicates you have successfully reviewed the permit and the permit has been shared with the destination access group.

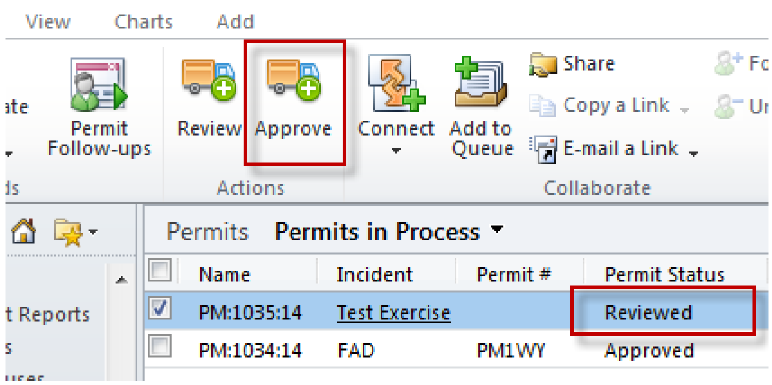


11. Select **Quit this dialog**; click **Next**; click **Finish**.

Scenario 62: Approve a Permit

The person with the **Permit Approver** role in the appropriate **Access Group** may click on the **Approve** button in the **Permits in Process** view to approve the permit. Only permits that have been reviewed can be approved.

1. Select the permit you want to approve and click on the **Approve** button.



2. Select **Approve this permit request**; click **Next**.
3. The approved destination premises id is required. If you have it, you may type it in the field; or you may search for it in the lookup.
4. Click **Next**.

Carefully select the destination premises. You cannot approve a permit request without a valid premises id. If the premises does not exist in then you must cancel this dialog and create a premises record and then run the Approve dialog after the premises record is created. An animal business and an investigation are also required to approve a permit. The investigation incidents have to be the same. In other words, if the source investigation is a FAD incident then the destination investigation must also be a FAD incident.

5. Select the destination business.
6. Select the destination investigation.
7. Click Next.
8. Enter the Approval Date (required).
9. Enter the Expiration date (required).
10. Enter the Permit Approval Number (required).
11. Enter the approving official name (required).
12. Click Next.
13. The dialog confirms the approval.
14. Click Next. Click Finish.

Scenario 63: Create a Movement Record

Movements may be created from an investigation, permit or traces. Movements can be restricted (1-27), permitted (permit associated), trace movements (trace associated) or in commerce (sales, purchases etc.) and they can be associated with 1 or more animals, groups, items. Movements can also be in or out of the Origination premises. After a permit is approved the animals (or other items specified in the permit record) can be moved to the specified destination.

In this scenario you will learn how to use the dialogs to accomplish the following tasks:

- Create an animal movement record for the selected approved permit
- Associate the animals (or other items) to the movement record
- View the movement record in the **Active Movements** view
- Run the **Movement Follow-ups** dialog to load the animals or Group onto the transport vehicle
- Change the movement status to loaded
- Prepare the transfer
- Transfer the items to the destination premises
- Unload the animals or groups at the destination premises
- Complete the movement record.

To start a movement record:

1. Select an approved permit record and click on the **Permit Follow-ups** dialog button in the **Permits in Process** view under the **Movements and Tracing** tab in **Disease Management**.
2. In the **Permit Follow-ups** dialog select **Add a movement to this permit**.
3. Click Next.
4. Enter the Date of the Movement.
5. Enter the number of items moved in this shipment.

6. Click Next.

   The dialog confirms that you have successfully created a new movement record against the selected permit record.

7. In the dialog you may do one of the following:
   a. Click on a hyperlink to display a movement or permit record.
   b. Quit the dialog. Click Next. Click Finish.
   c. Associate animals or Groups to this movement.
   d. Add another movement to this permit.
   e. Add Follow-ups to origin investigation.
8. Select **Associate animals or groups to this movement**.
9. Click Next.
10. Click Next to associate animals (or other items specified in the permit) from the origin premises to this forward movement.
11. Enter a partial ID of the animal record (or click next if there are less than 50 animals).
12. Select the animal status (active or inactive).
13. From the drop list select the desired animal.
14. Select Load animal selected to movement.
15. Click Next.
16. The dialog confirms the animal ID you selected to add to this movement and warns that there is no global animal record associated with this animal.

Note: If the animal has a unique id it is recommended that you consider adding a global record before proceeding with this movement record. Global animal records make it easier to track animals across premises.

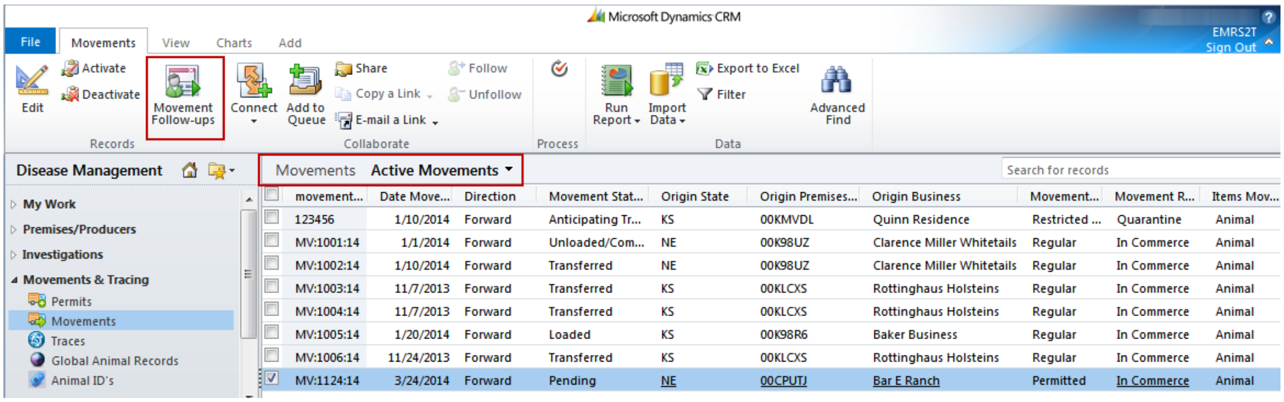
1. Click Next.
2. The dialog adds the animal record to the movement record.
3. Select one of the following options:
   a. Add more animals to this movement
   b. Add follow-ups to movement.
   c. Process this movement to loaded status.
   d. Quit, I am done.
4. If you have more animals to add to the movement select Add more animals to this movement and repeat this dialog until you added the number of animals specified in the permit.

If you have a lot of animals to add to the movement you may have to keep a tally on a piece of paper to keep track of the number of animals you are adding to the movement.

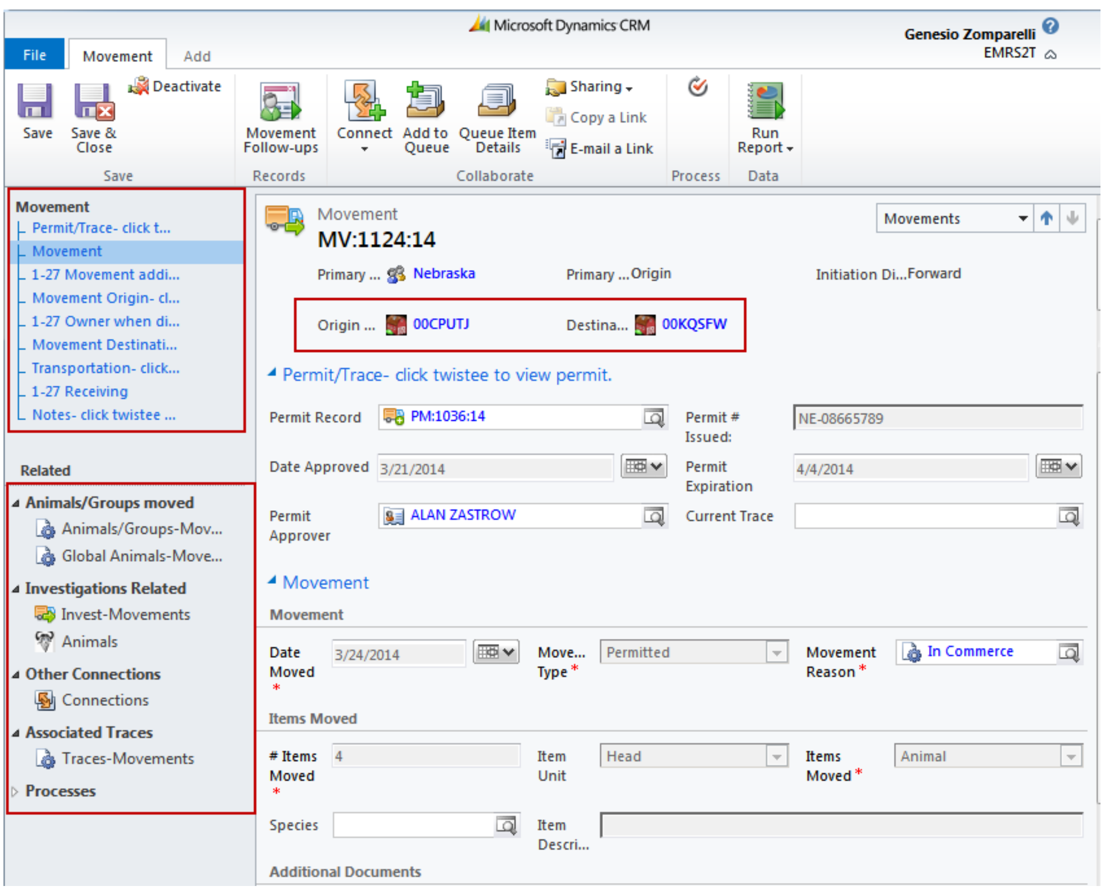
5. When you are done selecting all of the animals you want to add to this movement select Quit, I am done; Click Next. Click Finish.

The animal movement record can be viewed by clicking on **Movements** under the **Movements & Tracing** tab in the **Disease Management** navigator. The movement is in **Pending** status. When the animals (or other items specified in the permit) have been loaded onto the truck a person with the appropriate role must select the movement record and run the dialog to indicate that the items have been loaded.

Active Movements View

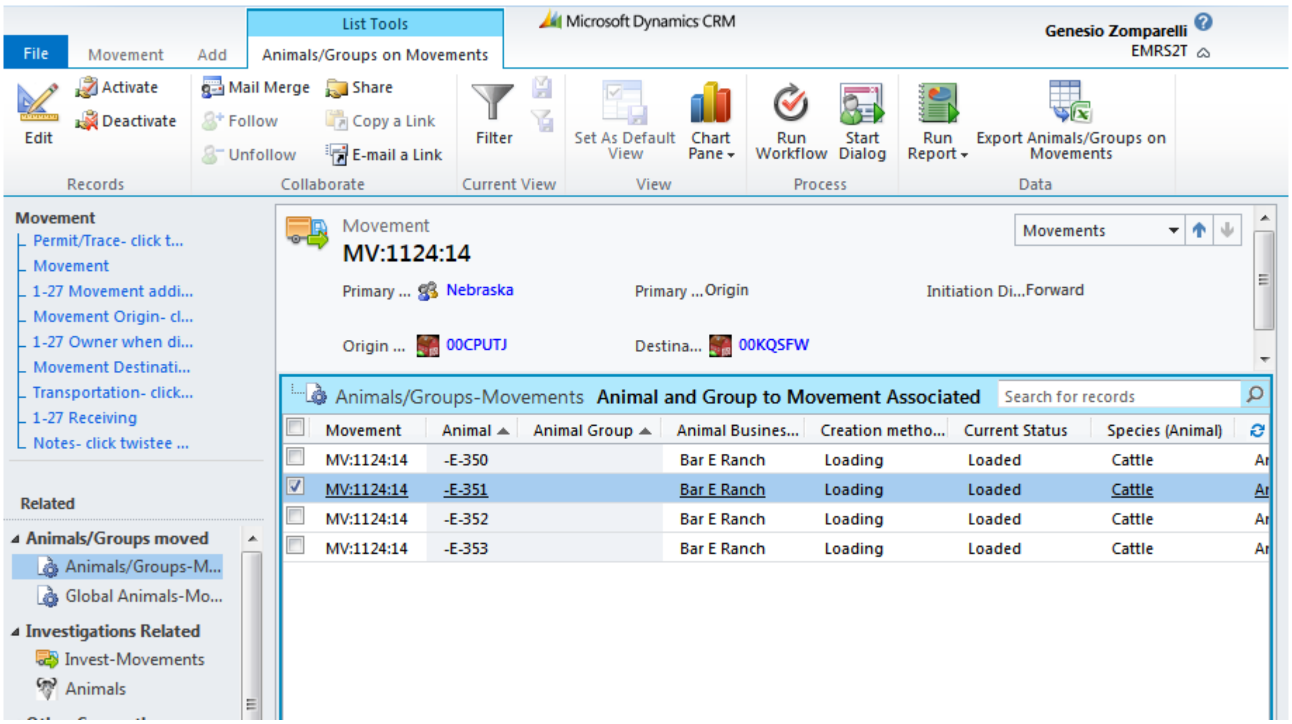


Animal Movement Form



Animals Added to a Movement

Click on Animals/Groups on Movements under the Animals Groups moved tab to display the Animal and Group to Movement Associated View. A list of the animals that will be moved to the specified destination is shown in this view.



Confirm That the Animals Were Loaded

After the animals are loaded onto the transport vehicle run the dialog to confirm that the animals are on the vehicle. Follow these steps to confirm the animals have been loaded:

1. Under Movements & Tracing in Disease Management click on Movements to display the Active Movements view.
2. Select the movement that has the animals that have been loaded.
3. Click on the movement Follow-ups button to launch the dialog.
4. Select Change Status to Loaded; click on Next.

The dialog tells you the number of animals on the movement and how many were loaded. You may view the animals in the droplist.

If the number of animals to move does not match the number indicated then either change the number of animals by entering the correct number or add more animals to the movement.

5. Select one of the following:

    a. # is correct change status of movements to Loaded
    b. # is incorrect, update the movement and then change to Loaded.
    c. I need to add more animals to be correct.

    To make corrections on # listed on the movement enter it in the new total items field, and indicate your choice.

6. Select # is correct change status of movement to loaded
7. Click on Next to update the movement and change status to "Loaded"

    The movement is now ready to "Prepare for Transfer" if it is a restricted 1-27 or Permitted movement.

8. In the dialog you may select one of the following:
    a. Prepare movement for Transfer
    b. Quit, I am done.
9. Select Quit, I am done; click on Next; click on Finish.

Prepare Movement for Transfer

After the animals have been loaded onto the transport vehicle it will be necessary to prepare to make the transfer. This may involve entering information about the transport vehicle into the movement form. You should have the following information available before you launch the dialog:

- Receiving Access Group
- Receiving Site Premises ID

Follow these steps to prepare the movement for transfer:

1. Under Movements & Tracing in Disease Management click on Movements to display the Active Movements view.
2. Select the movement that you want to prepare for transfer.
3. Click on the movement Follow-ups button to launch the dialog.
4. Select Prepare for Transfer; click on Next.
5. Select the Receiving Access Group State in the Lookup.
6. Select the Receiving Site State in the Lookup.
7. Click Next.

The dialog tells you that you have successfully prepared this movement for transfer and updated the status to "Anticipating Transfer".

You can now transfer the movement to the receiving premises if you have access to the premises. Otherwise it has been routed to the receiving access group queue to be transferred to the premises indicated.

8. Select one of the following:
    a. Transfer this movement to another premises in my state.
    b. Quit, I am done.
9. Select Quit, I am done; click on Next; click on Finish.

Transfer to Premises

As soon as the transport vehicle is on the way to the destination premises an authorized user can run the dialog to change the status of the movement to "Transfer to Premises."

Follow these steps to set the status of the movement to "Transfer to Premises":

1. Under Movements & Tracing in Disease Management click on Movements to display the Active Movements view.
2. Select the movement that you want to prepare for transfer.
3. Click on the movement Follow-ups button to launch the dialog.
4. Select Transfer to Premises; click on Next.
5. Select Premises to Transfer (this is the destination premises) from the Lookup.
6. Click Next.
7. Select the Investigation to transfer movement (the destination investigation).
8. Click Next.

    The dialog tells you that you have successfully transferred the movement of the specified number of animals from the origin premises to the destination premises.

9. You may select one of the following options:
    a. Unload animals on movement to destination business.
    b. Complete this movement if non-animal
    c. Quit, I am done for now.
10. Select Quit, I am done for now; click on Next; click on Finish.

When the animals arrive at the destination and they are unloaded from the transport vehicle. A person with the appropriate role and Access Group for the destination will run the dialog to set the status of the movement to "Unloaded."

Unload the Animals and Complete the Movement

Follow these steps to set the status of the movement to “Transfer to Premises”:

1. Under Movements & Tracing in Disease Management click on Movements to display the Active Movements view.
2. Select the movement that has the status “Transferred” to set the status to “Unloaded”.
3. Click on the Movement Follow-ups button to launch the dialog.
4. Select Unload animals/groups to receiving premises; click on Next.
5. Select the first animal in the droplist and select one of the following options:
    a. This animal was received, unload.
    b. This animal was never received, reject.
6. Click Next.
7. Select the Investigation to transfer movement (the destination investigation).
8. Click Next.

    The dialog tells you that you have successfully copied the animal record (ID) on this movement from the movement origin business to the destination business as new animal record. It will show you the total animals on the movement and the total unloaded. You will repeat this dialog until all of the animals have been either unloaded or rejected.

9. You may select one of the following options:
    a. Continue unloading to a destination
    b. Complete movement, all unloaded
    c. Quit, I am done
10. Select Continue unloading to destination until all animals are unloaded; click on Next.
11. When you are finished unloading the animals select complete movement; click on Next.

    The dialog tell you that you have successfully changed the movement to the status “Unloaded/Completed”.
12. Click on Next; click on Finish.

This completes the movement portion. The status of the permit associated with the movement must also be set to “Completed”. Also, if this movement is a trace movement then you must status the animal records on the premises they were transferred to in order for the trace to be completed.

Complete the Permit

When a movement is in “Unloaded/Completed” status the permit associated with that movement should be completed.

Only users with the appropriate role and access group may complete a permit. This is typically the same person who approved the permit.

Follow these steps to complete a permit:

1. Under Movements & Tracing in Disease Management click on Movements to display the Active Movements view.
2. Look for the movement that has the status “Unloaded/Completed”.
3. Scroll to the right of the selected movement record to find the permit #.
4. Make a note of the permit #.
5. Click on Permits under the Movements & Tracing tab to display the Permits in Process view.
6. Look for the permit with the permit # you found in the movement record.
7. Select the permit record.
8. Click on the Permit Follow-ups button to launch the dialog.
9. Select “Complete this permit (all movements and items completed)”; click on Next.

   The dialog tells you that the queue item was found. Click next to change permit status to Active-Movements completed and inactivate the queue item to remove the permit from the “Permits in Process” queue.

10. If more than one permit is displayed in the dialog be sure you select the permit that is associated with the completed movement.
11. Click on Next.

    The dialog tells you that the permit (premises name and permit #) has been changed to “Active - Movements Completed” and removed from the origin queue.

12. Click on Next; click on Finish.

The permit no longer appears in the Permits in Process view. Users with the appropriate role may see the permit in the Completed/Expired Permits view.

Trace Animal Movements in an Active Investigation

During an active investigation it may be necessary to trace animal movements from one investigation to another to keep track of the status of the animals that may be subjects in the investigation.

You must start a new trace segment from an active investigation. Normally you will only create a new index trace from an infected/affected premises; otherwise you would continue or split a trace you received from another premises, unless you are creating a placeholder trace starting somewhere in the traceline other than the index herd.

Index segments will show the current premises as the index premises, current trace segment as the traceline and will not have a link to a previous trace since they should be the first in the series.

Placeholder segments will not have an index premises, previous segment, traceline filled in so they can later me matched to traces from the index premises thru other premises.

Before you start a trace you should have the following information:

Which type of trace segment are you creating?

- Index trace from an infected/affected herd.
- Placeholder trace somewhere else in the traceline.

What is the status of the premises?

You cannot create an index trace from a Premises and Investigation that does not have a current positive premises status. Only premises that are positive should have index traces created. Otherwise the traceline is extended or a new trace is started as a placeholder within the traceline where it can later be matched to other traces in the traceline.

Scenario 64: Start an Index Trace for a Positive Premises Investigation

In this scenario you will look for an investigation that is associated with a premises with a status of positive for a disease.

Before starting an index trace you should have the following information handy:

- Information about the investigation that is associated with a premises with a positive status
- The name of the trace coordinator
- The trace-line type (trace out of a positive herd, etc.)
- The trace segment direction (forward or backward)
- An explanation about the trace activities
- Origin trace priority (regular, high, low, etc.)
- The number of items you want to trace
- The actual items you are tracing (animals, eggs, milk, etc.)
- If tracing animals, the primary species of the animals
- Additional information about the items being traced
- The number of shipments between the origin and destination
- The beginning and ending dates of the shipments
- The name of the destination premises
- The primary phone number for the trace destination premises or contact
- Trace destination address, city, state, and zip

Follow these steps to start the trace:

1. Under Investigations in Disease Management click on Investigations to display the “Active All Incident investigations” view (see tips below about creating a personal view).
2. Look for the investigation record you know is associated with a premises that has been identified with a “positive status”.

Tips: Refer to Scenario 35: Set the Premises Status” for more information.

Refer to Scenario 30: How to Find Animal Businesses with Active Investigations” to learn how to create a personal view to display only active investigations that are associated with premises that have a positive status, as shown below.

Personal View: Investigations with Positive Premises Status

Investigations **Investigation with Positive Premises Status** ▾

InvestID ▲	Incident	Incident Site	Animal Business	Prem ID	Prem Name (Prem ID)
☑ 14KS0011	FAD	Kansas	Quinn's Beef Herd	00KQR8D	Quinn's Beef Herd
☐ 14KS9989	FAD	Kansas	Evans South Place	00KQRXZ	South Place
☐ 14ND0001	FAD	Nebraska	Hatzenbuhler Ranch	006F0WP	Hatzenbuhler Ranch
☐ 14ND0004	FAD	North Dakota	Van Dedof Dairy Herd	00JBW9G	Van Bedaf Dairy
☐ 14NE0001	FAD	Nebraska	Doc's Deer	00BY3YS	Doc
☐ 14NE0044	FAD	Nebraska	Bar E Ranch	00CPUTJ	Bar E Ranch
☐ 14NE0088	FAD	Nebraska	Toms Turkeys	003E5ZQ	Green Acres
☐ 14NE0094	FAD	Nebraska	Gunnar's Stables	003C9T1	Gunnar's Stables
☐ 14NE1200	FAD	Nebraska	Gothenburg Feedyard	00KQRZV	Gothenburg Feedlot
☐ 14NE1234	FAD	Nebraska	Stump Cattle	00K99KG	Stump Cattle
☐ IV:1135:14	TB Tracing	Kansas	Baker Business	00K98R6	Baker Premise
☐ IV:1163:14	BR Tracing	Kansas	Big Baby Cows	00K9AZH	Big Baby Cows

3. Select the investigation and click on the **Invest Follow-ups** button.
4. Select “Create a Trace”; click on Next.
5. Select “Index trace from an infected/affected herd”; click on Next.
6. Specify the **Trace Coordinator**.

This is the person responsible for gathering the trace information and making sure the trace is properly prepared at the origin. If this is a trace being managed at an ICP then leave blank and use the trace assignment dialog to assign to incident based resources.

7. You must select one of the following **Traceline Types**:
    a. Direct Contact
    b. Indirect Contact
    c. Neighboring Herd
    d. Slaughter Traceback
    e. Trace into Positive Herd
    f. Trace out of Positive Herd
8. You must select the **Trace Segment Dire**ction as either:
    a. Forward
    b. Backward
9. You must enter a **short narrative** about trace origination and activities.
10. Click Next.

11. Select the **Origin Trace Priority**:
    a. None Determined
    b. Extreme
    c. High
    d. Regular
    e. Low
12. Specify the **number of items you want to trace**.
13. Select the **Items to trace** (determines selection later):
    a. Individual Animals
    b. Animal Groups
    c. Milk
    d. Eggs
    e. Feed
    f. Hay/Forage
    g. Other

    This will be inherited to the movement and will determine if you can add individual animals or groups of animals on the movement or trace. They cannot be mixed so you must select one or the other. If both individuals and groups were sent between two premises use separate traces.
14. If individual animals, select the **primary species**.

    Traces can include more than one species which will be determined by looking at associated animals or groups; primary species should represent the most common species being traced.
15. If necessary, enter **additional information** about the items.
16. You must specify the **number of shipments** between the trace origin and the trace destination.
17. You must specify the approximate **beginning and ending dates of the shipments**.
18. Click Next.
19. You must enter the **name of the destination premises**.
20. Enter the **primary phone number** for the trace destination premises.
21. Click next.
22. Enter the **trace destination address, city, state, and zip**.
23. Click Next.

    When you click next it may take 5-10 seconds for the next page with the new trace to appear. The dialog tells you that you are about to create a Index trace from an infected/affected herd of type (the type you specified previously) for the number of Individual Animals you specified; the species you specified to the destination you specified with the number of specified shipments that began on the date specified and ended on the date specified.

24. Click Next to create the trace.

    The dialog tells you that you have successfully created the trace based on the information you specified in the dialog.

25. In the dialog you may select one of the following:

    a. Click on the trace hyperlink to open the trace form

       You may need to do this if you want to attach documents to the trace.

    b. Select Quit, I am done creating traces for this premises

       In this case you will quit. You will add movements to the trace later.

    c. Create Movements for the Trace I just created

    d. Create another trace for this premises

26. Select "Quit…;" click on Next; click on Finish.

The new trace record should appear in the Active Traces view under Traces in the Movements & Tracing tab of the Disease Management navigator.

Trace Movements

When an investigation was assigned a trace the trace record will appear in the Active Traces view.

Traces **Active Traces** ▾ Search for records

☐	TracesName ▲	Incident	Incident Site	Trace Status	Investigation	Origin Priority	Premises	Traceline Type	Segment Directi...
☐	TC:1000:14	FAD	Nebraska	Awaiting Transfer	14NE0099	Regular	00K98UZ	Trace out of Positive Herd	Forward
☐	TC:1001:14	TB Tracing	Kansas	Under Investigation	IV:1133:14	Regular	00KLCXS	Trace out of Positive Herd	Forward
☐	TC:1002:14	TB Tracing	Kansas	Awaiting Transfer	IV:1135:14	High	00K98R6	Trace out of Positive Herd	Forward
☐	TC:1003:14	TB Tracing	Kansas	Under Investigation	IV:1133:14	Regular	00KLCXS	Trace out of Positive Herd	Forward
☐	TC:1064:14	FAD	Colorado	Transferred	14CO0003	Regular	00KL2D0	Trace out of Positive Herd	Forward
☑	TC:1066:14	FAD	Kansas	Assigned	14KS0011	Regular	00KQR8D	Trace out of Positive Herd	Forward

The next step in the trace process is to create a movement record for the trace.

Before you launch the dialog to create a movement for the trace you should have the following information handy:

- The date the movement occurred
- The number of items on the movement
- Units of items moved (head, gallons, etc.)
- Additional item description
- Movement type
- Movement reason

Follow these steps to create a movement record for the trace:

1. In the Disease Management navigator open the Movements & Tracing tab and click on Traces to display the Active Traces view.
2. Look for traces with a Trace Status of “Assigned” and then look for the specific trace for the investigation you are working on.
3. Select the trace record and click on the Trace Follow-ups button to launch the dialog.
4. Select “Create a Trace Movement for this segment”; click on Next.

Things You Can Do in the Trace Follow-ups Dialog
Create a Trace Movement for this segment
Assign/Reassign Trace Coordinator
Continue/Split this traceline
Review/Prepare trace segment for Transfer
Transfer trace segment
Redirect Transferred Trace
Assign/reassign destination investigator
Complete this trace segment or edit completed
Change Trace Relationships
Delete this trace

The dialog tells you the direction specified for the trace segment and the traceline type you specified.

If the trace segment is forward then this movement will also be forward and the trace origin will be the movement origin. If the segment direction is backwards then the movement will be backwards and the trace origin will be the movement destination.

5. Enter a date that the movement occurred.
6. Specify the number of items on this movement.
7. Specify the item units.
8. Enter additional information about the items.
9. Click Next.
10. Select the Movement Type (Regular, Permitted, or Restricted).

11. Select the Movement Reason:
    a. Direct to Processor
    b. Direct to Slaughter
    c. In Commerce
    d. Quarantine
    e. Temporary Relocation
12. Click Next.
13. The dialog tells you that you created a movement that is associated with a specified trace and investigation. You may choose one of the following:
    a. Click on the movement hyperlink to open the record and add animals and details
    b. Create more movements for this trace
    c. Associate animals/groups to the movement just created
    d. Quit the dialog
14. Select "associate animals/groups to the movement just created"
15. Click Next.

    The dialog tells you to click next to associate the specified item from the origin primary premises to this forward movement (specified ID) occurring on specified date.
16. Click Next.
17. Enter ID of animals (click next if less than 50).
18. Select Record Status (Active or Inactive).
19. Click Next.
20.

Appendix

Lab Report with Accession Number

National Veterinary Services Laboratories
PO Box 844
Ames, Iowa 50010
Phone: 515-337-7514 **Fax:** 515-337-7938
FEDERAL RELAY SERVICE (Voice/TTY/ASCII/Spanish) 1-800-877-8339
The USDA is an equal opportunity provider and employer.

AMENDED REPORT

Laboratory Test Report

****** This is a confidential report intended for official use only. ******

Owner

Lonoke, AR

Animal Location
Lonoke County AR

Submitter - 3239
AR Livestock & Poultry Commission
Veterinary Diagnostic Lab
#1 Natural Resources Dr.
Little Rock, AR 72205
FAX# 501-907-2410
PH# 501-907-2430

Accession Number: 09-032010

Date Collected: 11/27/2009
Date Received: 12/02/2009
Date Completed: 12/28/2009
Collected By: Dr.
Purpose: FAD EP -

Country Origin/Destination:

This is not a billable case.

NOTE: Condition of the sample(s) was adequate unless otherwise noted.

Sample: 18571-09 **Specimen Type:** Serum **Animal ID:** 88 **Animal Status:** **Species:** Cattle, Domestic (No breed specified)

Bovine Piroplasmosis (Babesia bigemina) - Complement Fixation (CF) Test	Negative@1:5
Bovine Piroplasmosis (Babesia bovis) - Complement Fixation (CF) Test	Negative@1:5

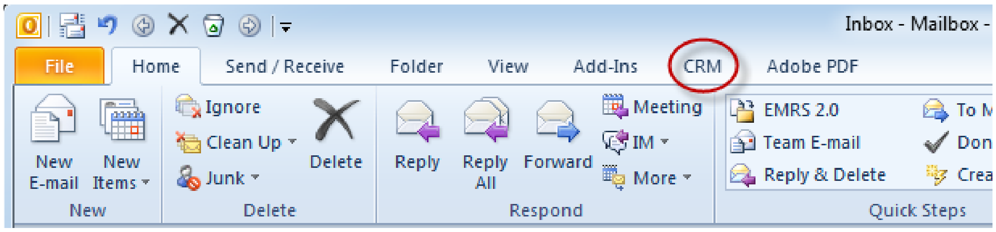
Sample: 18571-09 **Specimen Type:** Blood **Animal ID:** 88 **Animal Status:** **Species:** Cattle, Domestic (No breed specified)

Bovine Piroplasmosis (Babesia bigemina) - Polymerase Chain Reaction (PCR) Test	Negative
Bovine Piroplasmosis (Babesia bovis) - Polymerase Chain Reaction (PCR) Test	Negative

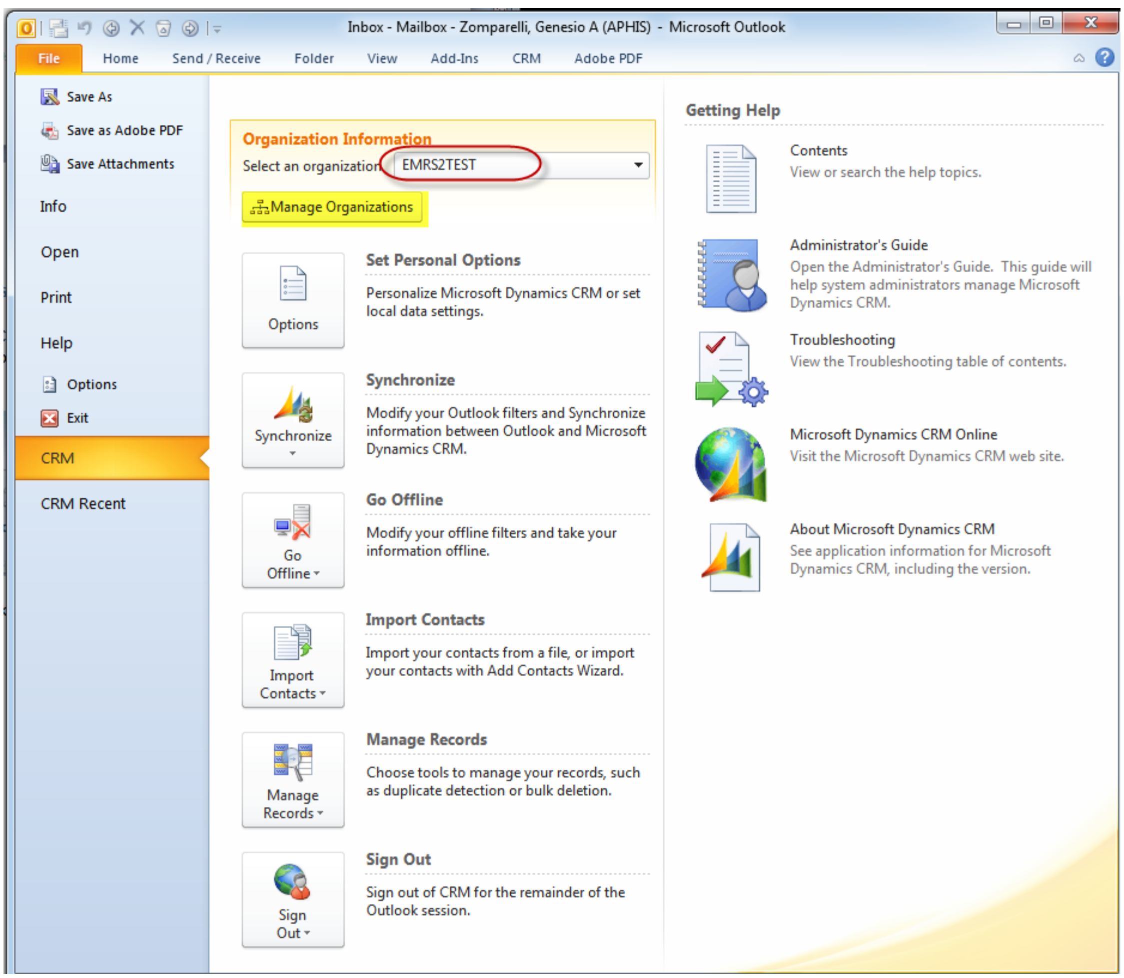
DNA was extracted from a whole blood sample. PCR was performed for both Babesia bovis and bigemina, however no DNA specific to either organism was detected.

Configure Outlook to Connect to Dynamics CRM

To access Dynamics CRM from Outlook make sure the CRM for Outlook application was installed on your computer. If Dynamics CRM for Outlook was installed on your computer you should see the CRM tab in the Outlook ribbon.

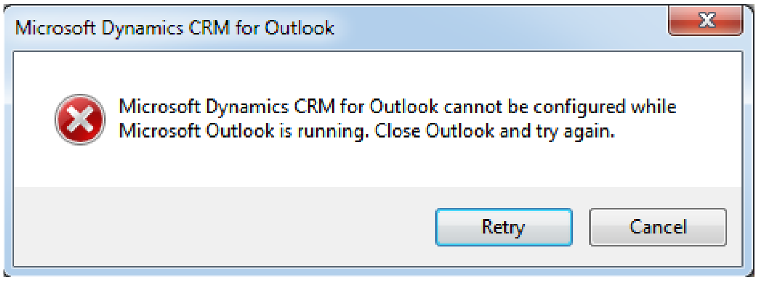


Click on the File menu and click on CRM to display the CRM settings screen.

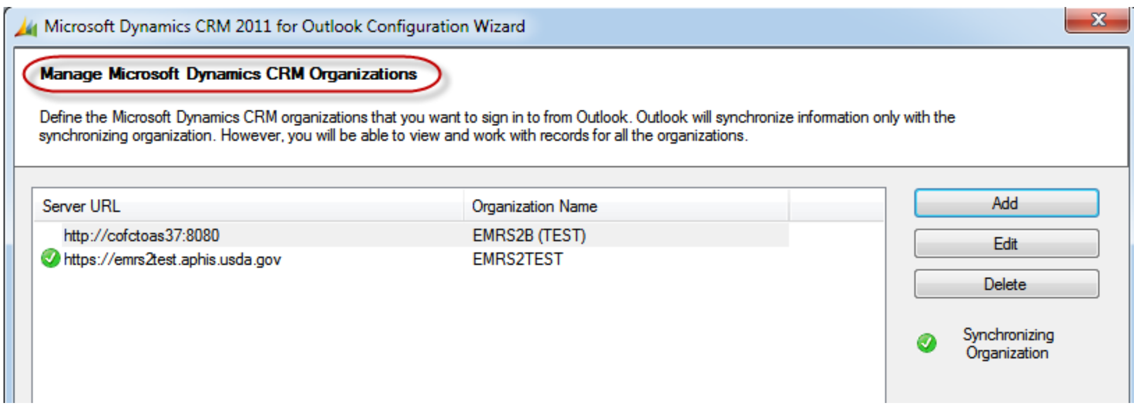


The organization you are connected to is shown in the Organization information area. In this case we are connected to the EMRS2TEST organization. If the desired organization is not displayed make sure you are already logged into the desired organization in Dynamics CRM then click on the **Manage Organizations** button to connect to the desired organization.

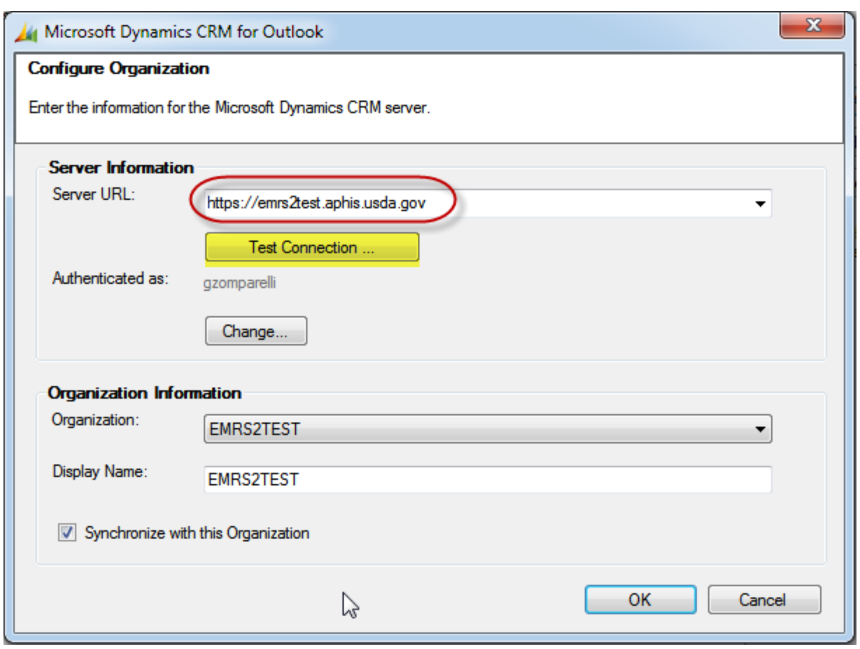
When the following message is displayed do not click on Cancel. Close the Outlook application and then click on Retry.



The Manage Microsoft Dynamics CRM Organizations screen is displayed.



If your organization is not shown I the list click on **Add** to display the **Configure Organization** screen.



Enter the URL provided by your CRM administrator; click on **Test Connection**.

When the connection is successful the Organization name is displayed in the droplist and in the Display name field. You may change enter whatever you desire for the Display Name.

Click OK when done.

Restart the Outlook application.

You should see the Dynamics CRM button in your Outlook shortcuts bar.