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The Animal Health & Surveillance Management System:

California Pilot Program (CaPP) Management Module

Training Exercises

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Introduction

This *Training Exercises* booklet is not a traditional tutorial or workshop syllabus. Rather, it is a series of exercise sets designed to reproduce a natural work flow process that might happen in any State in recording and monitoring data regarding birds. In each exercise set, you will be presented with a set of circumstances and then asked to use the AHSM program to record your information, with minimal help on the data-entry and data-retrieval process.

Objectives

The training objectives covered in this *Training Exercises* booklet are listed below:

- Installing the Animal Health & Surveillance Management (AHSM) module on your workstation
- Understanding the data flow between the Laboratory Submission System (LSS) module and the AHSM management module
- Filling out and retrieving CaPP data, using the AHSM management webforms
- Completing a Lab Submission (LSS)
- Retrieving and viewing Avian Health records
- Generating Avian Health reports

Exercise Set 1:
Entering/Retrieving/Viewing Premises Data

Scenario

You have a new avian premises that has requested to be part of the CaPP Program. This premises just started business as a Live Bird Market and has not previously been part of your state's monitoring program. You would like to enter it into AHSM so surveillance personnel can go to the field and record visits against it.

Tasks

1. Create a new premises in AHSM. Go to Record New Premises button on the main menu. You will be asked to verify that the premises you want to create is registered with a national prem ID. If you know the ID you may type it in the first page. However, if you do not know the national prem id, you may search for it by address.

2. Click on the 'Search by Address' button. On this screen you will fill out the address of the premises, then press the search button. You should get a message back that indicates that this premises is not in the national prem repository and you must either go to your state premises registration system and register the premises or by-pass this process and enter your premises into AHSM without a national premises ID.

3. Create a premises contact.

4. Create a flock/bird contact.

Lesson 1 Summary: Skills Learned

- Recorded a new premises using the State Premises Allocation System.
- Looked up an existing premises.
- Searched for Prem ID by address.
- Searched for address by Prem ID.

Exercise Set 2:
Entering Lab Submission Information During a Site Visit

Scenario

There are several different methods of entering a lab submission. All of these devices/methods have their own distinctions, but have the same basic flow and collect the same data elements.

1. Paper Form
   A paper form which allows for written observations. This form will generally be used in conjunction with the web formset. In the field, the user will apply a barcoded tracking number and fill in the form as the visit progresses. After arrival at the lab, office, or home, the user will log into the Web formset, transfer the information, and submit the information for transmittal to the appropriate lab and AHSM.

2. Web Formset
   This is the set of forms that can be found at the Lab Submission website home. It is generally where paper form data will be entered. The computer will likely be equipped with a barcode reader for reading Tracking Numbers and Sample Numbers.

3. Digital Pen
   This method involves a paper form, using a special paper which will transmit everything that's written into the digital pen that produced the writing. This pen, in turn will be plugged in to the host computer at home, lab, or office, and the information downloaded and distributed to lab and AHSM after appropriate validation.

4. Tablet PC
   This device works in a manner similar to the digital pen, however, the user writes on prefabricated forms which appear on the screen of the tablet pc. After connection with the host machine, the data is also downloaded and distributed to lab and AHSM after validation.

   This device will generally have a Bluetooth enabled Barcode reader attached in the field.

Tasks 1 – Enter General Submission information

1. Attach the blue labeled tracking number to the paper form

2. Fill in Surveillance information
   a. Reason for visit – Generally “Routine Surveillance”
   b. External Reference # is for use only in an emergency situation and not routine surveillance.

3. Fill out information about the collection site premises, including its address, name, and premises_id.
   a. Operation type indicates the type of facility which is operating at this particular premises and which is currently being sampled.

4. Fill in Contact information for the premises.
   a. Note that this may be the same address as the official premises_id address. If so, no need to fill it in.
   b. If the contact is also the animal owner, check “Yes” next to that question and a record will be created associating the person with the animal(s).
   c. If the contact is also the premises owner, a similar record will be created associating the person with the premises as owner.
   d. If the person is to be delivered a copy of the lab results, mark “Yes” next to the “Send Report?” question.

5. Fill in Submitter Information. If an ID type is used, it will generally be issued by GDB. Before using an ID, make sure that you know the source.

6. Comments/Remarks can be entered, however, they are generally not seen by the lab. They would only become relevant during an emergency or an investigation.

7. Lab Submission Information
   a. In California, CAHFS will be the most common lab
   b. Bill to AHG routinely
   c. Check any number of conditions for testing.
   d. Leave priority unchecked
   e. The container ID will be any identification provided on the cooler or box in which the specimens are shipped.
   f. If the specimens will be hand delivered, check “Yes” next to the “Hand Delivered?” box and enter the deliverer name and date delivered.
   g. If specimens are delivered via courier, enter the Courier name and tracking number from the package.
   h. Sign and date the form.

Task 2 – Enter Flock and Sample Information

1. Flock ID – A barcode or name. Any id or name, such as Polly, will do as long as it is unique within this submission.
2. ID Type - Note whether this is a flock, an individual tag or name, a house, a cage, or something else.
3. Note the number of Sick, Dead, and Unaffected birds
4. Enter the Species – required
5. Breed and Strain are not required
6. Note the production class of the birds, if known.
7. General Flock Information and Clinical Signs
   a. It is usually good practice to mark each question as Yes or No. If a question is not marked, it is recorded as Unknown.
   b. If the bird(s) exhibit no clinical signs, the box at the top can be checked and all clinical signs will be marked No.
   c. The onset date, though not required, is available if necessary.
8. Enter Sample Information for each sample.
   a. Each line of sample information must contain the sample type of sample, and the birds involved must be in the same category, i.e: alive, same age, same vaccination age.

Task 3 – Enter Final General Submission Information

a. The final page is available for additional contact information. Unlike the contact information on the first page, these contacts are not categorized and as many as possible can be added to either the Accession, premises, or flock, as necessary.

Lesson Two Summary...Skills Learned

- How to properly fill out the paper form.
- The intended uses of the different methods of Lab Submission.

Exercise Set 3:
Creating a New Organization

Task 1 – Build New Organization

1. The Org ID will automatically generate, so enter the Organization Name first.
2. Enter the primary language for this organization or use the drop-down list to pick a language.
3. Fill in a description for this organization.
4. Remarks can be anything you would like. Enter that if necessary, before moving to the "Organization's Addresses" block.

Task 2 – Add Organization Addresses

1. Use the drop-down list to enter an Address Type.
   a. There can be several types of Addresses, including the Home Office, Billing, Shipping, etc. Pick one. Every organization should have at least a Home Office address.
2. Fill in the main address information
3. Enter secondary address information if necessary.
4. Enter the City.
5. Enter the State – Always CA.
6. Enter the Zip Code
7. Pick a country from the drop-down list if it does not default to United States.
8. Enter Latitude and Longitude information if necessary. It will generally not be required for this application.
9. Organizations can have multiple addresses, so if there is another address such as a Billing Address, go to the next line and enter another address using the exact same steps as were used to enter the first address.

Task 3 – Add Organization Communication Information

1. Use the drop-down list to enter Comm Type.
   a. There can be several types of Communication. Various phones and email addresses are the main examples.
2. Fill out the priority. There should always be a Priority 1.
3. Enter the Comm Type information. This will be a phone number or email address.

Task 4 – Add Organization Communication Information

1. Press “Save” to save the record or “Exit” to leave the form without saving.

Lesson Three Summary...Skills Learned

- How to enter organizational information.
- Use of drop-down lists to select different types of addresses and different primary languages spoken in the organization.

Exercise Set 4:
Associating a Person with a Flock

When creating a contact for either the premises or the flock you need to first create a premises contact person record. After the person record is created you may use that contact to associate with any premises or flock thereafter. There are 3 ways to associate a person with a flock, depending on the situation.

Method 1 – Use the Create Flock Contact Person button

1. Add the person.
2. Save the record.
3. Verify the information is displayed in the Flock Contacts fields.

Method 2 – Use the Same Contact button

1. If the person contact for the flock is the same as the person contact for the premises you can click on the Same Contact button.
2. Verify the values displayed in the Premises Contact fields have copied over into the Flock Contact fields.

Method 3 – Use the List of Values (LOV) button

1. If the person exists in the system, but they are not the Premises Contact, use the List of Values button to select the person.
2. Verify the information is displayed in the Flock Contacts fields.

Exercise Set 5:
Associating an Organization with a Flock

When associating an Organization with either the premises or the flock you need to first create a stand-alone Organization record. After the organization record is created you may use that organization to associate with any premises or flock thereafter. There are 3 ways to associate an organization with a flock depending on the situation.

Method 1 – Use the Create Flock Organization button

1. If the organization is not in the system, use the Create Flock Organization button to add the organization.
2. Save the record.
3. Verify the information is displayed in the Flock Organizations fields.

Method 2 – Use the Same Organization button

1. If the organization for the flock is the same as the organization for the premises you can click on the Same Organization button.
2. Verify the values displayed in the Premises Organization fields have copied over into the Flock Organization fields.

Method 3 – Use the List of Values (LOV) button

1. If the organization exists in the system, but it is not the same as the Premises Organization, use the List of Values button to select the organization.
2. Verify the information is displayed in the Flock Organization fields.