ERHMS Info Manager

Information System

User Guide

Draft Version 1.1

06/23/2015

VERSION HISTORY

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.5	ERHMS Team	*<mm/dd/yy>*	*<name>*	*<mm/dd/yy>*	Initial draft

Contents

INTRODUCTION

The **ERHMS Info Manager** system aids in health monitoring and surveillance activities before, during, and after an emergency incident.

For detailed information regarding the practice of Emergency Responder Health Monitoring and Surveillance (ERHMS), see the ***National Response Team Technical Assistance Document (TAD)*** located at http://nrt.sraprod.com/ERHMS/ERHMSDocs/ERHMS_Final_060512.pdf .

AUTOMATED FEATURES

- Create a data repository
- Add/import responder data
- Add incidents and incident locations
- Assign responders to an incident
- Assign forms to responders

EPI INFO

ERHMS Info Manager is integrated with the publically-accessible **Epi Info** software application, available on the internet (http://wwwn.cdc.gov/epiinfo/index.htm). You do not need to install the Epi Info application as ERHMS Info Manager will handle the installation and access for you. However, if you want to create custom forms or surveys, you will need to be familiar with Epi Info. If you are already an Epi Info user, you will be able to import your existing forms with ERHMS Info Manager.

INCIDENT LIFECYCLE

Using ERHMS Info Manager you will be able to:

Pre-deployment

- Enter responder data including contacts and parent organization information
- Use existing form templates or create new forms for collecting health screening information, training and credentials, equipment certifications, check-in lists, and other custom data
- Import responder data
- Track forms and surveys assigned to responders

Deployment

- Enter incident and incident location information
- Create rosters and assign responders from the responder pool
- Use templates or custom-made forms to record site-specific information, responder activities and exposure assessments
- Use dashboards to analyze collected data
- Send reports
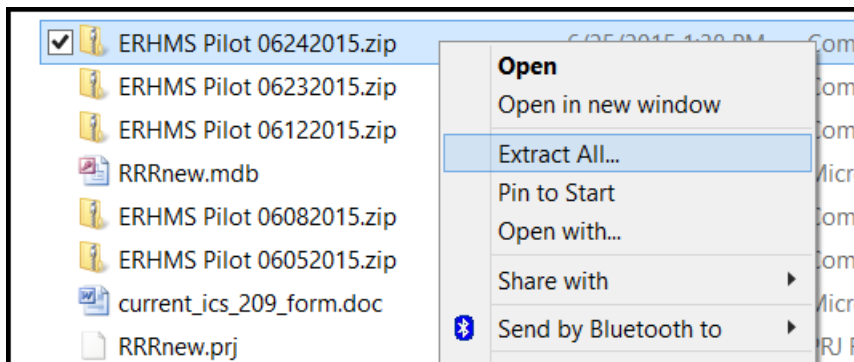- Track forms and surveys assigned to responders

Post-deployment
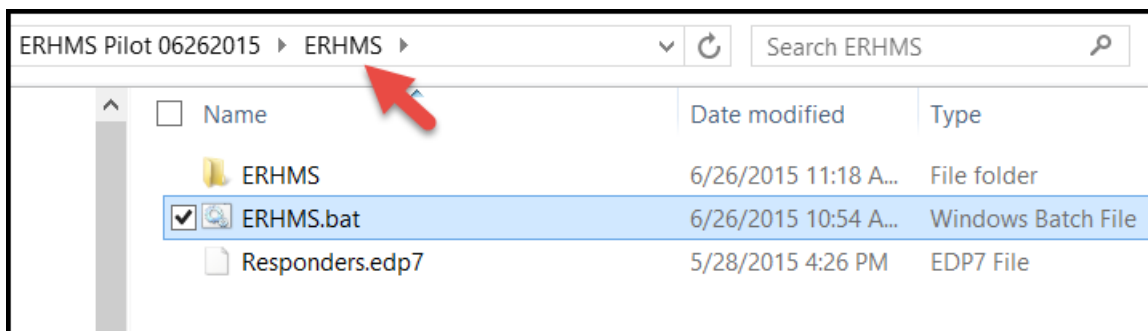
- Record out-processing assessments

- Send follow-up health surveys at regular intervals and track responses
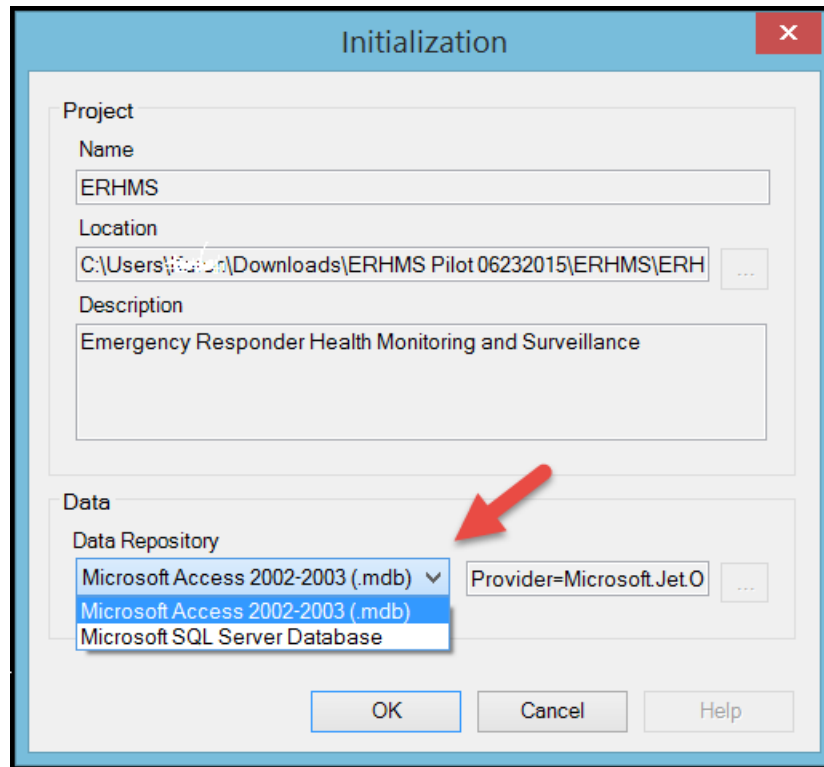
INSTALLING ERHMS INFO MANAGER

To install ERHMS Info Manager (pilot only), save the .zip file to a folder.

Right click on the file name and select **Extract All**.

Once the extract is complete, open the ERHMS folder and double click on the ERHMS.bat file.

Next you'll se the **Initialization** window.

Using the Initialization window, specify the type of **Data Repository** you want to use. At present there are two options:

- **Microsoft Access** – will automatically be created at the default file location
- **Microsoft SQL Server** - check with your database administrator for connection information

Once you click **OK**, it may take it may take some time for the home page to load.

Once the installation is complete, the **Home** page will appear.
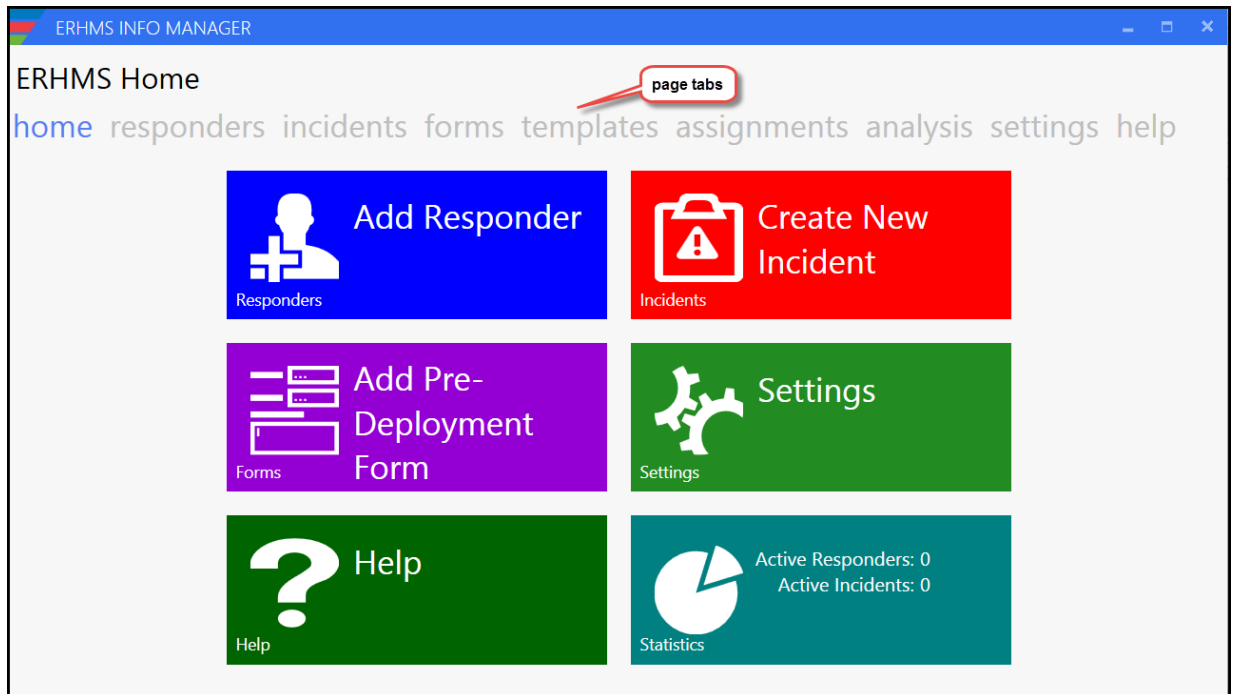
There are tabs across the top for navigation. They are:

- **home**
- **responders**
- **incidents**
- **forms**
- **templates**
- **assignments**
- **analysis**
- **settings**
- **help**

The **home** page displays the number of responders on active assignment and the number of incidents currently active.

ADD RESPONDERS
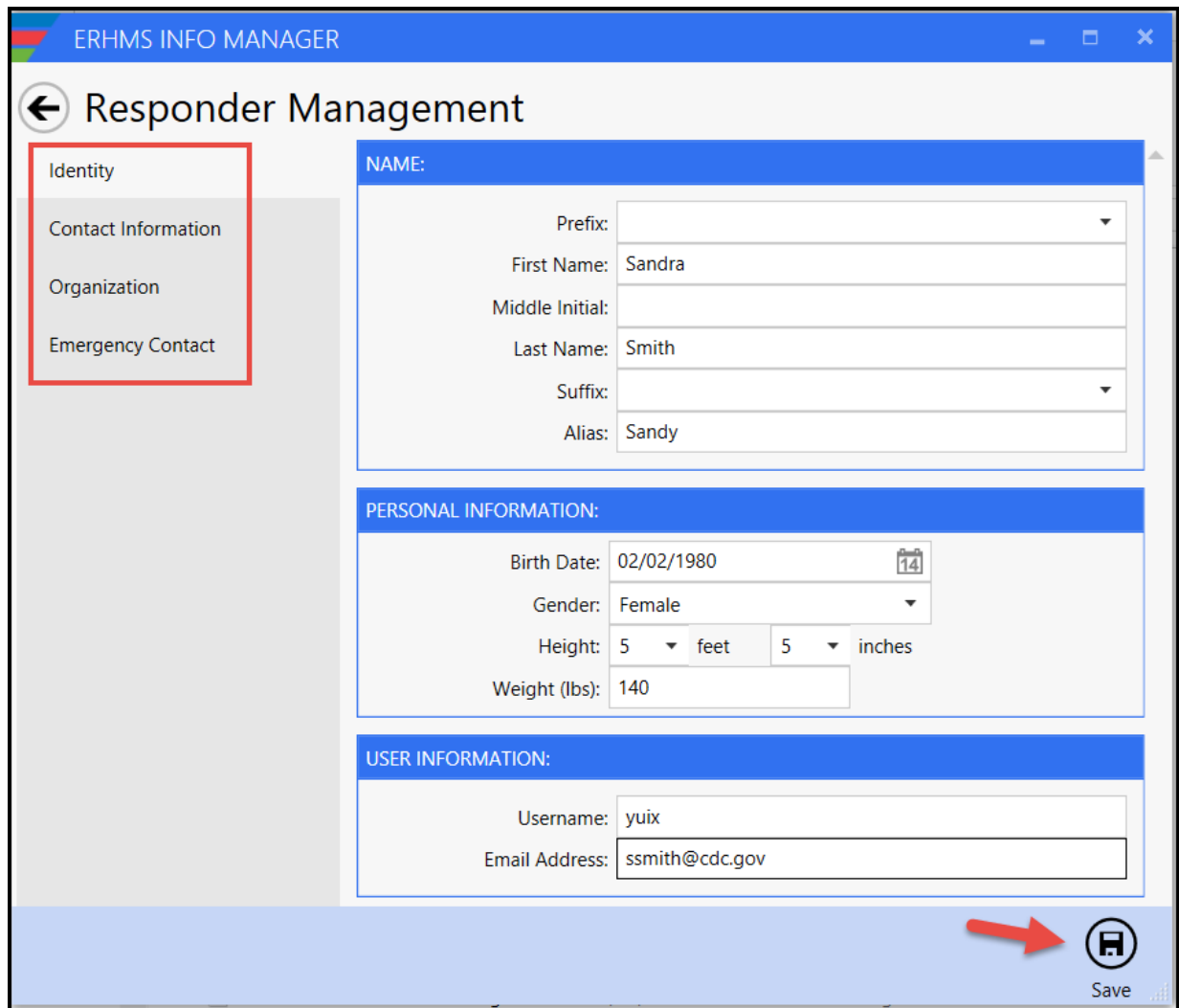
ERHMS Info Manager automates the process of adding responders individually or using a file import.

> For importing a responder file, refer to the **Forms Management** section.

To enter responders individually, select the **responders** tab.
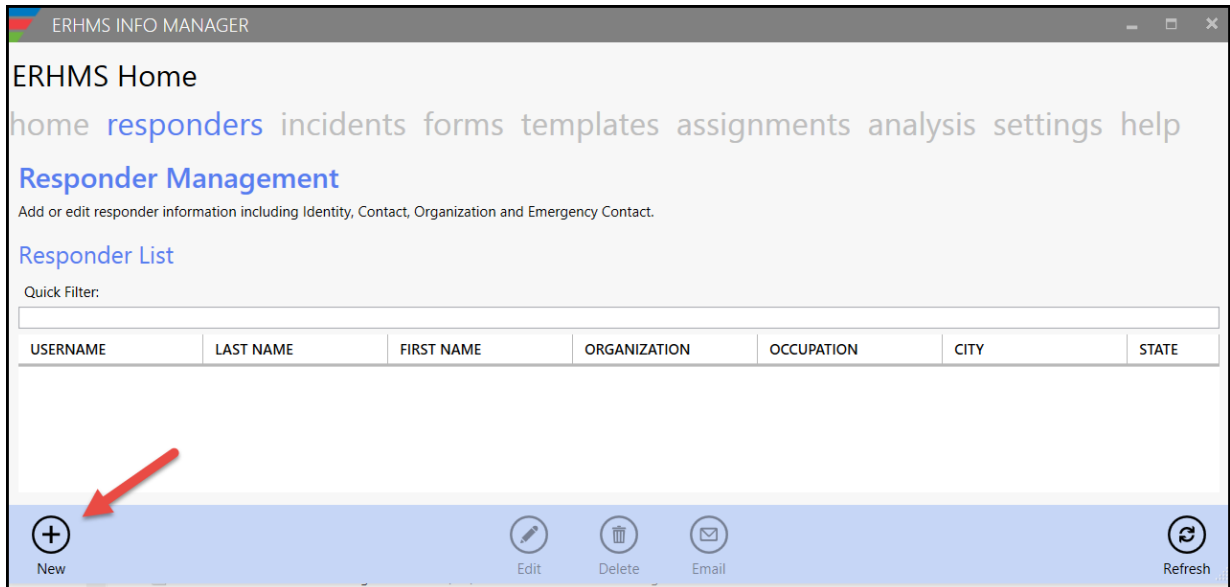
Select the **New** icon.

There are 4 pages of responder information. Navigate by clicking on a page listed in the sidebar.

When finished, click the **Save** icon**.**

When you are done entering responders, click the **Back** navigation arrow.

Back on the **responders** page, you may need to use the **Refresh** button occasionally to bring all the entries up to date.

RECORD AN INCIDENT AND CREATE A ROSTER
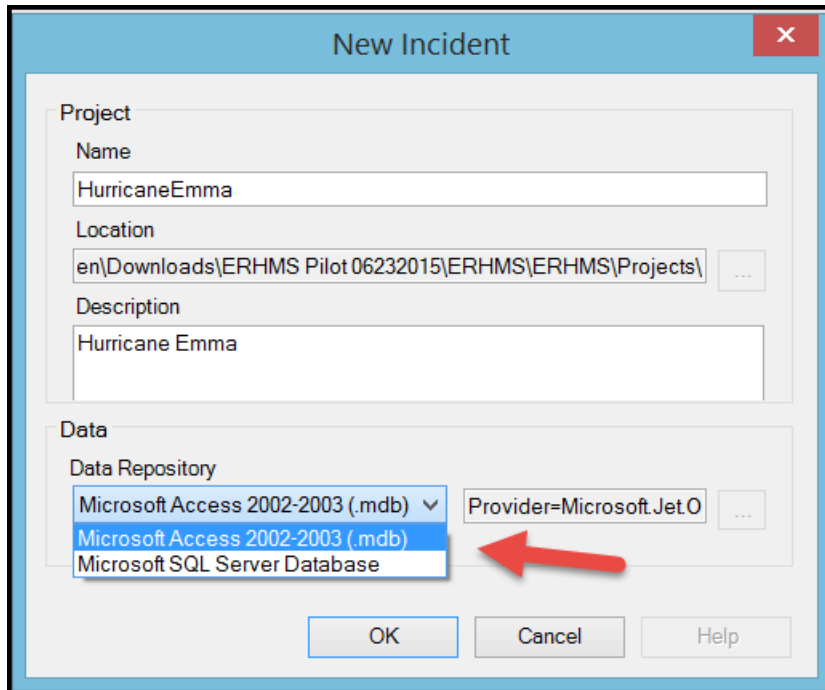
Navigate to the **incidents** page.

From here you can create a new incident or open an existing one.

NEW INCIDENT

First ERHMS Info Manager will create a data repository.

- Add a **Name**
- Add a **Description**
- Select the type of **Data Repository** you want to create
- Select the **OK** button
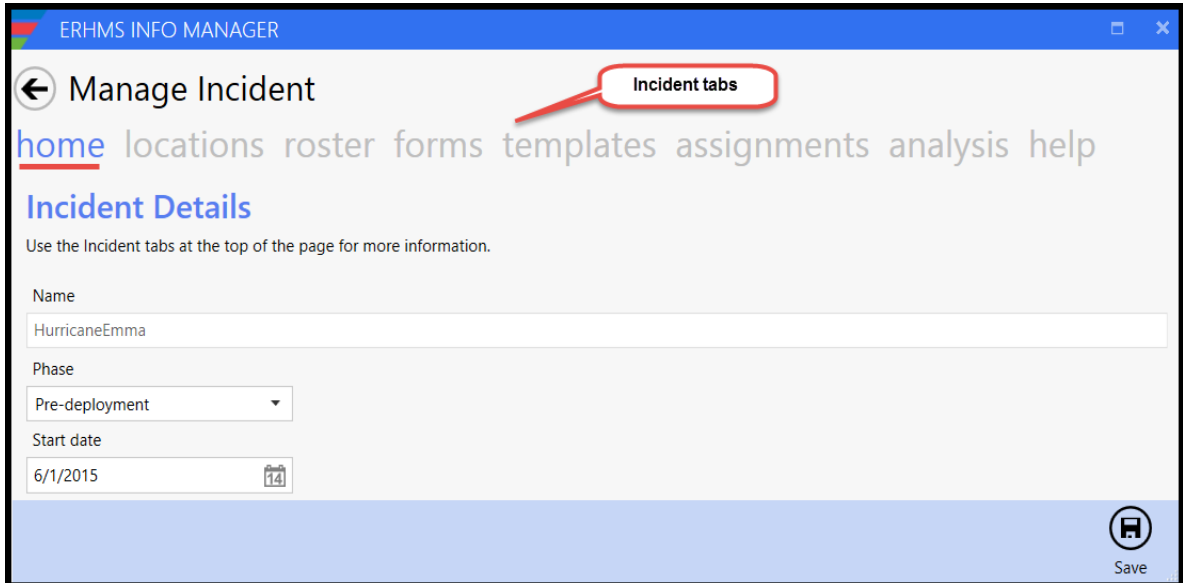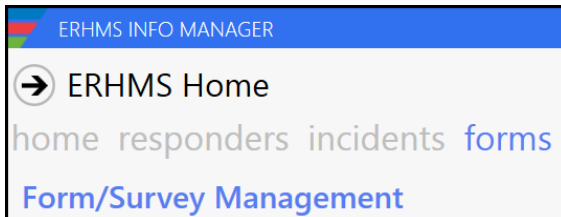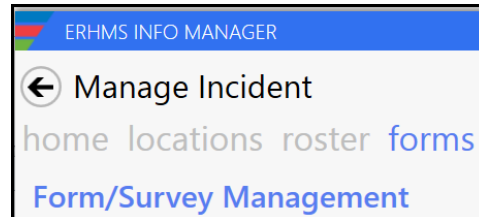
The **Incident Details** window contains a new set of navigation tabs for information specific to the incident.

> You can always tell if you are on a page from the **primary menu** or the **incident menu** by looking at the header.

Exit the Incident menu by clicking on the "**back**" arrow.
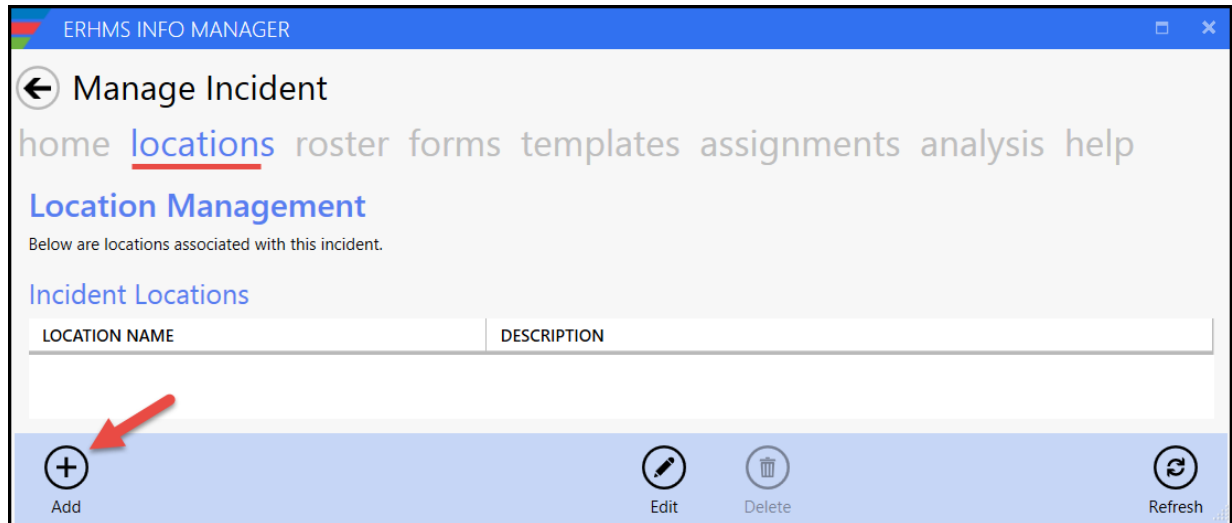
On the Incident **home** page, enter the **Phase** and **Dates** as needed, then click the **Save** button.

OPEN AN EXISTING INCIDENT

On the **incidents** page, highlight an **Incident Name** and click on the **Open** icon.

ENTER LOCATIONS

Select the **locations** tab.

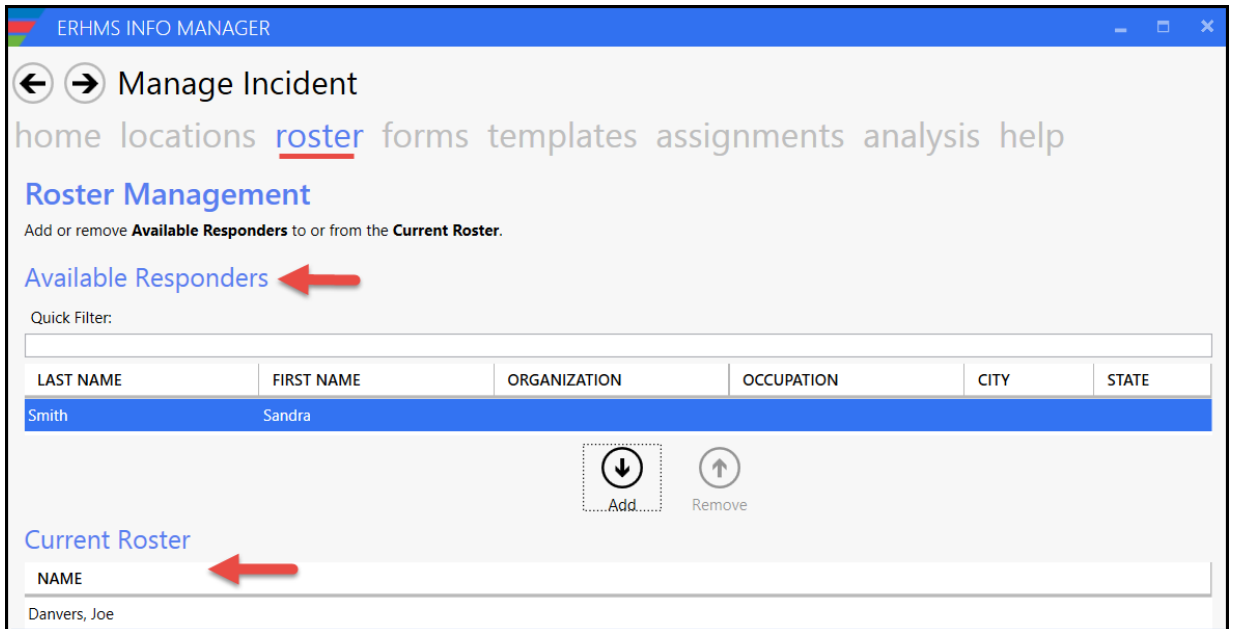Select the **Add** icon to add one or more incident locations.

You can use the interactive map on the **Location Management** page to find an exact location. Enter **Latitude** and **Longitude** manually or double click on the map.

CREATE A ROSTER

The **roster** page shows a list of all **Available Responders** previously entered into the system.

Select a name and click on the **Add** icon. The name will be appended to the **Current Roster** list and below and will be removed from the list of Available Responders. Multiple responders can be selected by holding the Ctrl key.
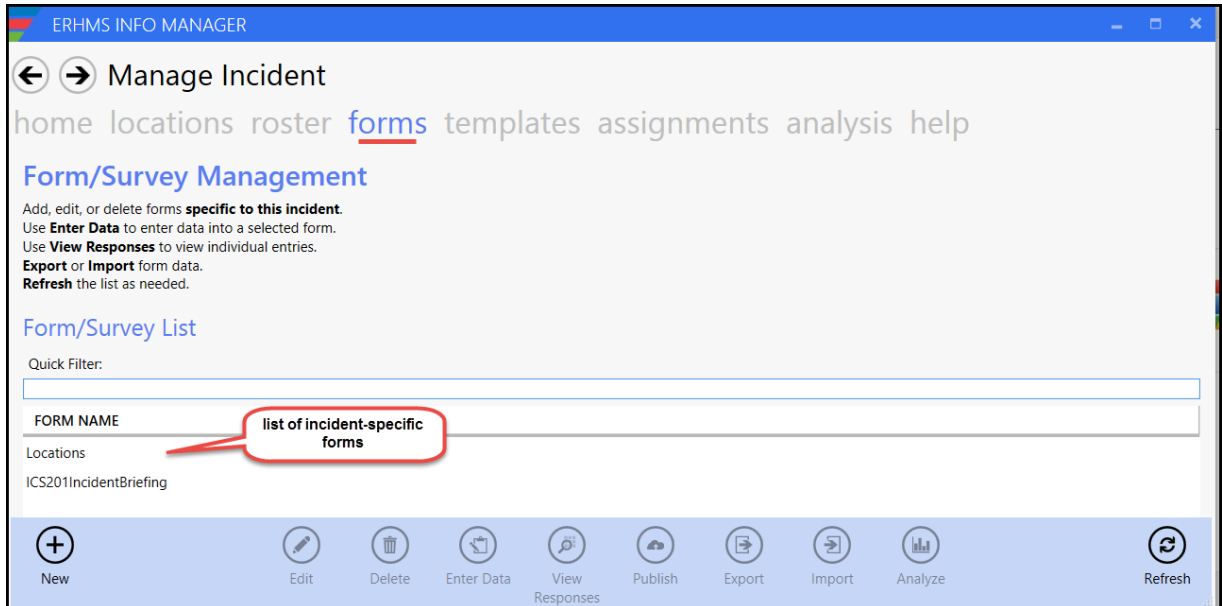

To remove a responder from the Current Roster, highlight the name and click on the **Remove** icon. The name is removed on the list and is added back to the list of Available Responders.

ADD FORMS TO THE INCIDENT

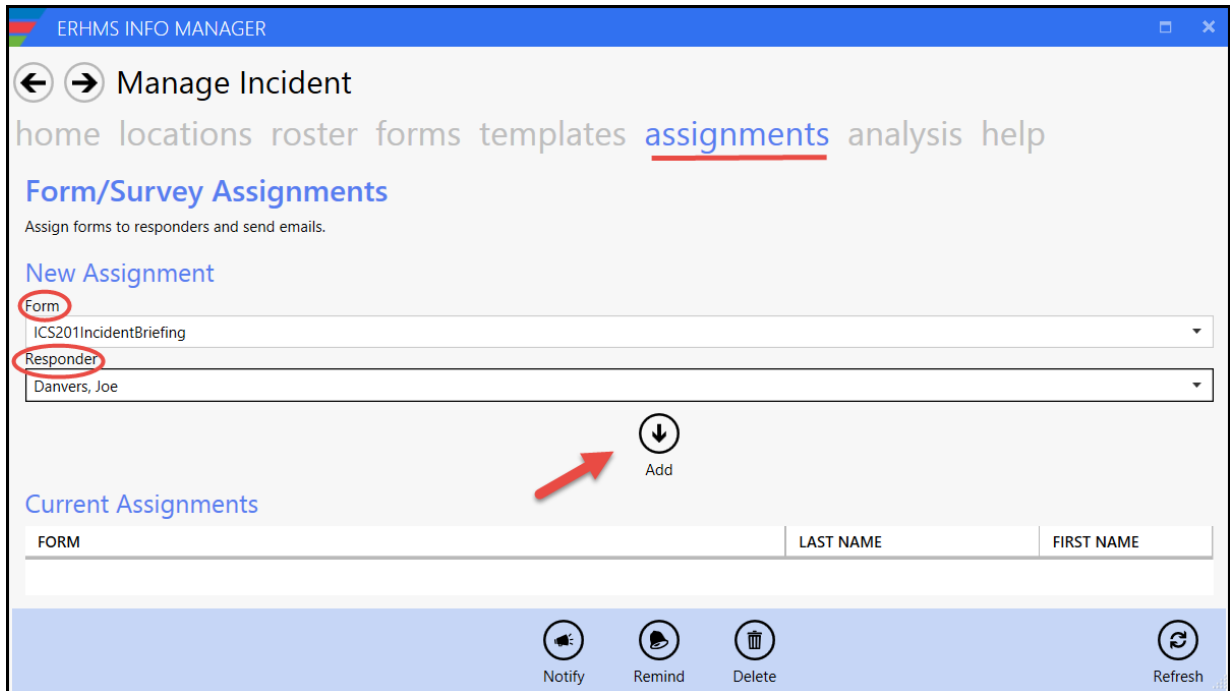You can create a new form, create a form from the standardized form templates, or use a template from Epi Info.

Keep in mind these forms are specific to the incident. You can have other forms on the main forms page.

For additional information on forms, refer to the **Form/Survey Management** section and the Templates section.

ASSIGN FORMS TO THE RESPONDERS ON THE ROSTER

On the **assignments** page, use the **Form** dropdown list to choose a form from the Incident forms list. Use the **Responder** dropdown list to choose a responder from the Roster list.
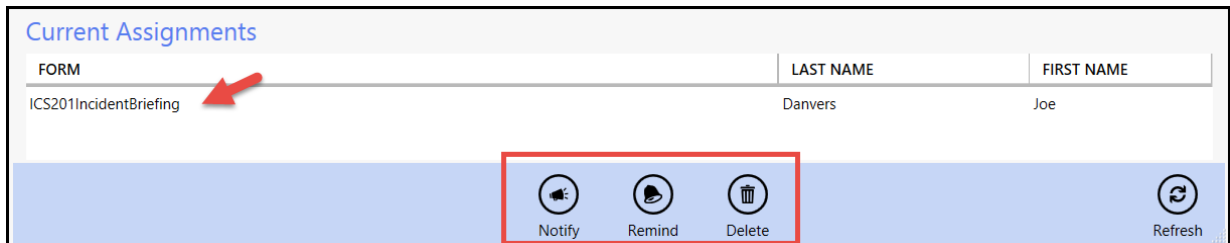
Click on the Add icon and the assignment will appears in the list below.
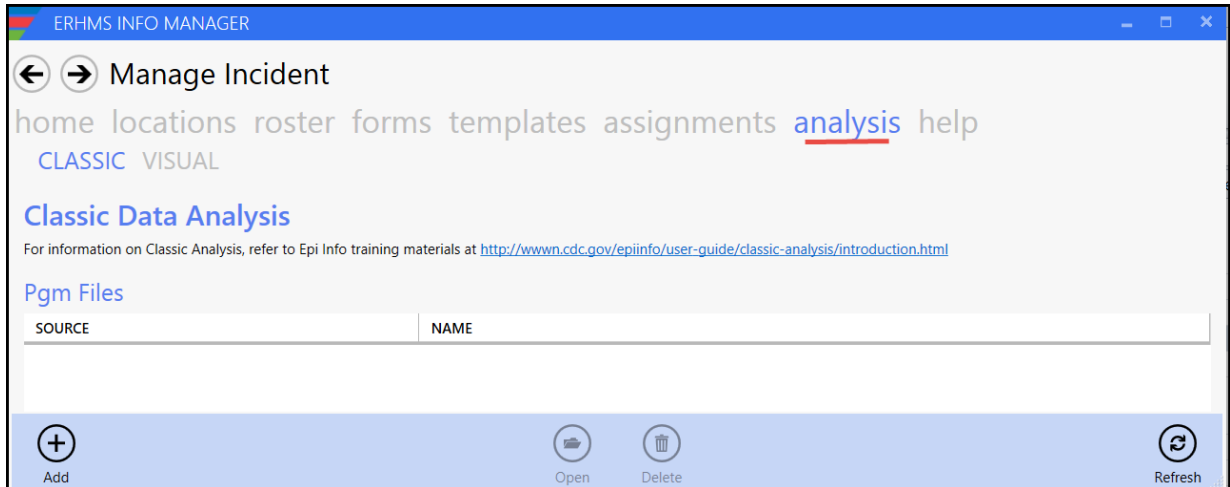
Use the **Notify** function to send an email notification to the selected responders with the form information populated.

Use the **Remind** function to automatically create an email reminder.

ANALYZE INCIDENT DATA
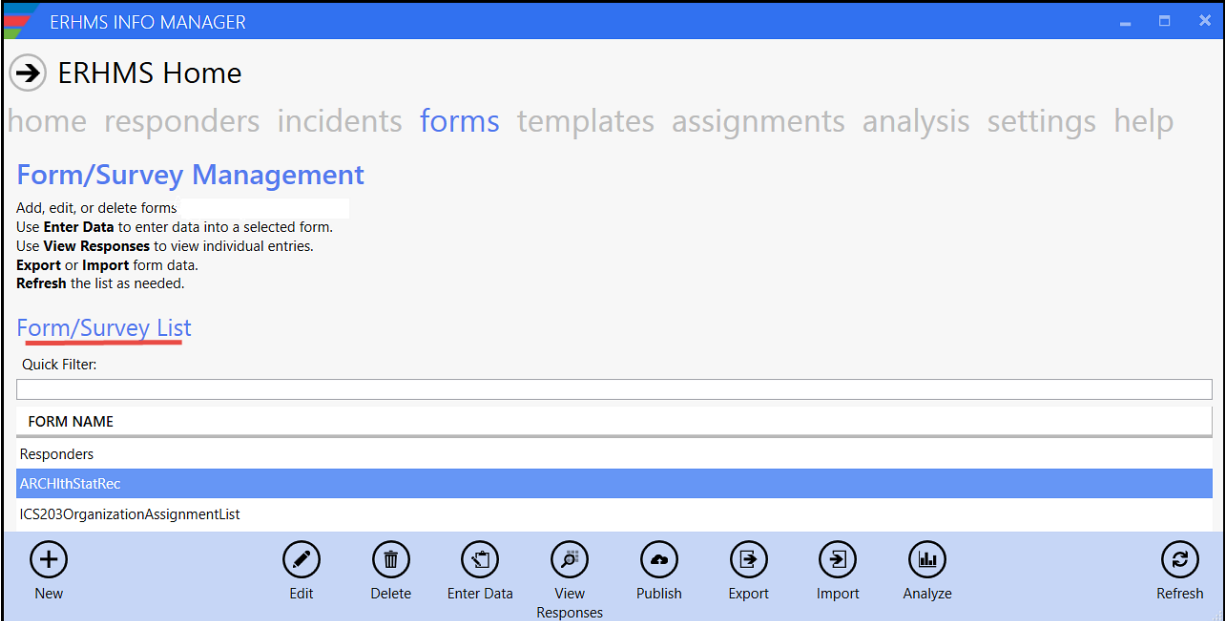

Refer to the **Analysis** section for information on conducting analysis of form data.

When you are finished entering information on the **Incident** pages, click the "back" navigation arrow to return to the parent ERHMS Info Manager site.

FORM/SURVEY MANAGEMENT

Regardless of whether you are on the parent ERHMS Info Manager pages or on the Incident pages, the **forms** functions will be the same.

This page lists all current forms.

Using the icons shown at the bottom of the page, you will be able to:

- **New** – create new forms
- **Edit** – modify a form
- **Delete** – delete a form
- **Enter Data** – enter data into a form
- **View Responses** – view the responses to a form
- **Publish** – publish a form to collect responses
- **Export** – export a form's response data
- **Import** – import data
- **Refresh** – bring the form list up to date

For adding the American Red Cross, FEMA, and ATSDR forms using templates, refer to the Templates section below.

CREATE A NEW FORM / EDIT A FORM

To create a new form, ERHMS Info Manager will integrate with the Epi Info application.

Select the **New** icon at the bottom of the **forms** page.

Enter a **Form Name**.

Epi Info shows a blank page on which you can drag and drop different field types such as text boxes, dropdown lists, and checkboxes.
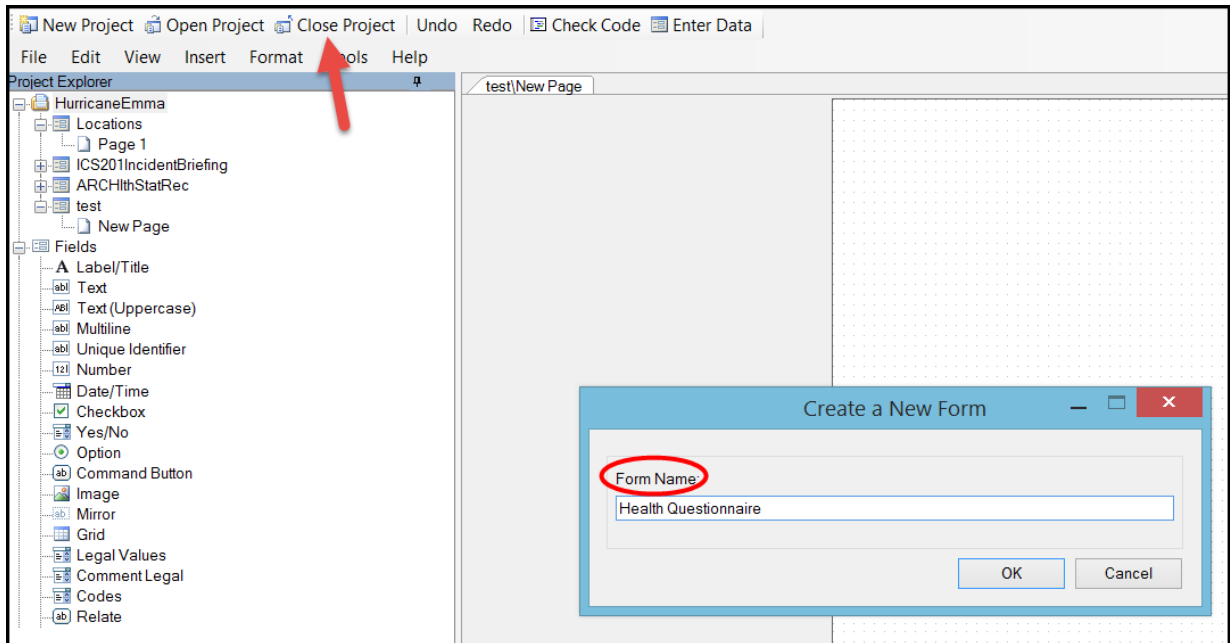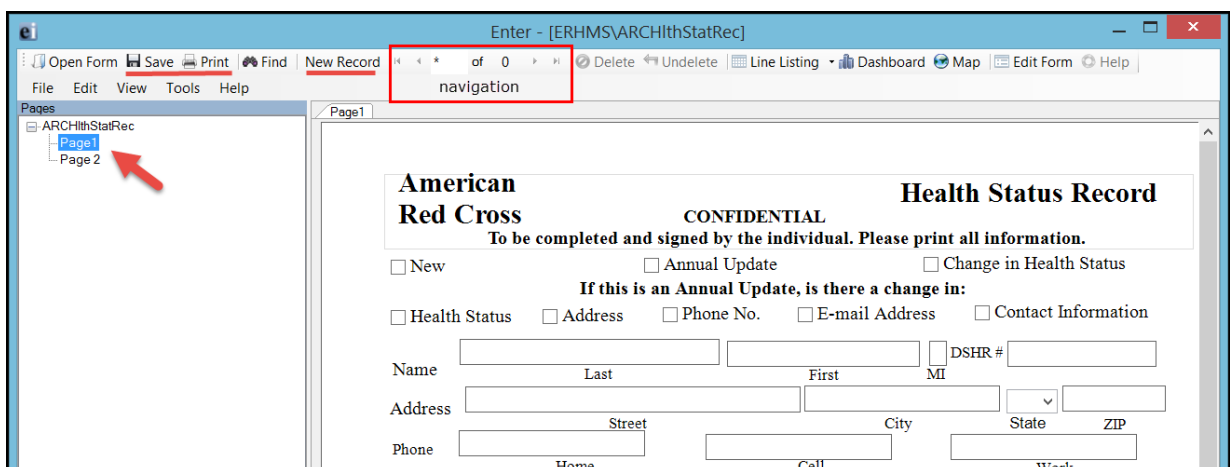
For more information on using Epi Info to build forms, see the Epi Info Training Resources on the internet at http://wwwn.cdc.gov/epiinfo/html/training.htm.

Returning to the **forms** page, edit a form by selecting it and clicking on the **Edit** button. You will be taken directly to the form in Epi Info.

Changes in Epi Info are saved automatically. When you are finished, select the **Close Project** button at the top of the page, then close the window.

ENTER DATA

Use the **Enter Data** icon to enter data into the highlighted form or to **Print** a form.

Fill out the form and select **Save** at the top of the page.

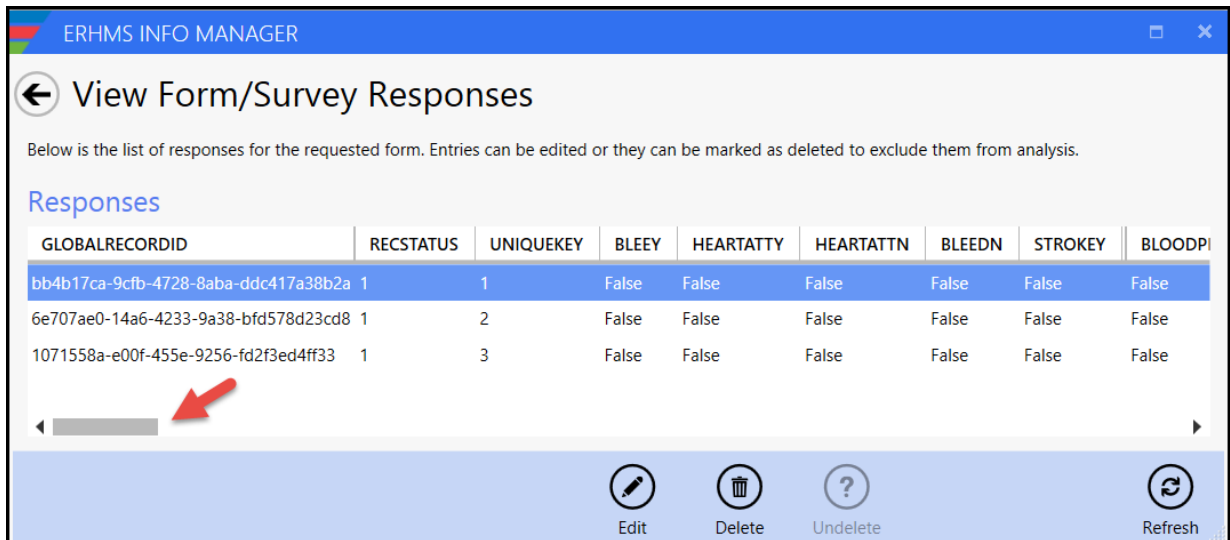To begin a new entry, click on **New Record** at the top of the page.

Use the **Print** button to print a blank or a completed version of the form.

Use the **navigation arrows** or click on the **page number** on the left for forms with multiple pages.

When finished, close the window.

VIEW RESPONSES

Highlight a form and select **View Responses**.

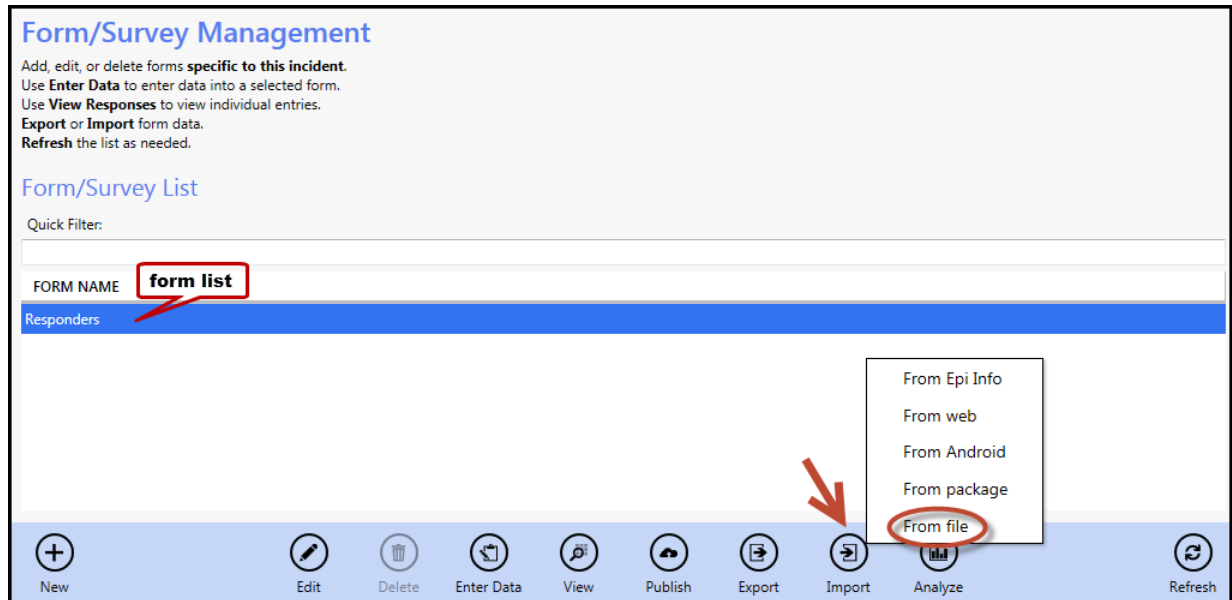Use the scroll bar to view fields on the right.

To view or modify a response record, highlight it and select the **Edit** icon.

You will see the form in Epi Info.

Use the navigation arrows at the top of the page to view other records.

IMPORT A RESPONDER FILE

Select the **forms** tab.

This is where you will manage your forms.

The **Responders** form is automatically provided when you install the ERHMS Info Manager software.

It is an Epi Info form which uses the same fields as the **responders** data entry window.

Highlight the Responders form and select the **Import** button.

The pop up shows several options for importing data:

- From Epi Info
- From web
- From Android
- From package – data in Epi Info which has been saved to an encrypted file
- **From file – for Excel (.xls) or comma-separated files (.csv)**

The first 4 import types are functions within the Epi Info application. Refer to the Epi Info training site for more information and examples (http://wwwn.cdc.gov/epiinfo/html/training.htm).

Select **From file**.
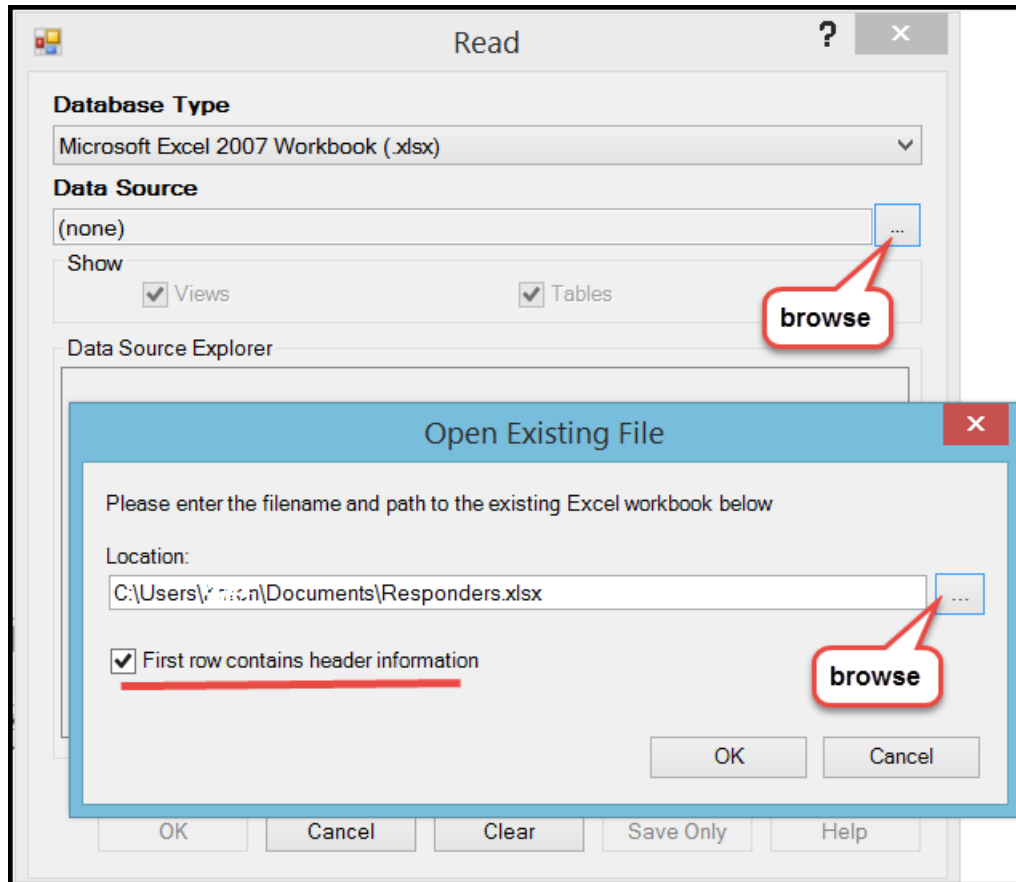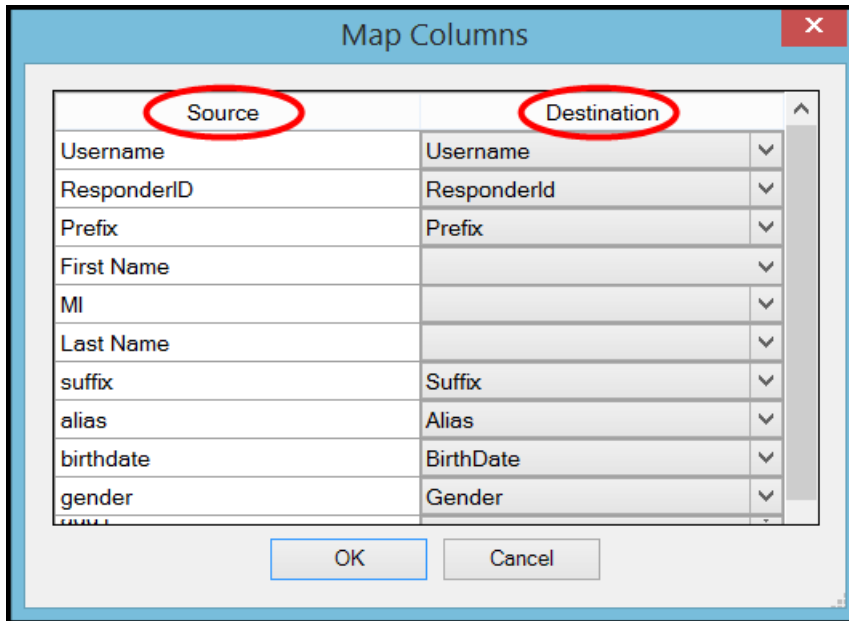
Use the **Read** window to select:

- **Database Type** – Epi Info Project, Microsoft Access, Excel, SQL Server, and others
- **Data source** – includes a browse feature for locating the source; check the box for first row if you want the import tool to bypass the first record
- **Show Views** and **Tables** are used or importing from Epi Info projects
- **Data Source Explorer** – if your source file has more than one data location, they will be listed here; for example, with Excel it shows all worksheets; choose the appropriate source.
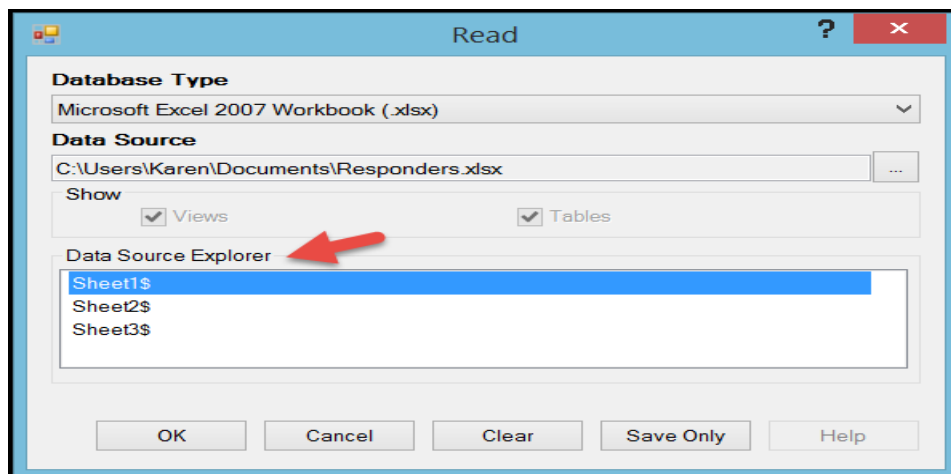
After selecting your options, click **OK**.

Next the **Map Columns** window will appear.

On the left all of the Excel file column names are listed.

On the right are the matching destination fields.

In this example, ERHMS Info Manager was able to map some fields automatically, those that have the same name in both the **Source** and **Destination**.
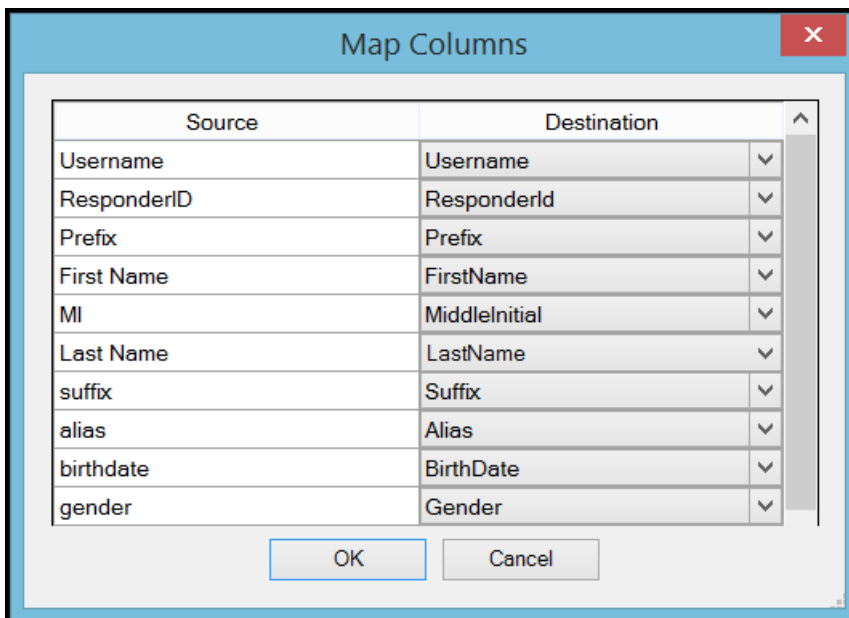
For the other fields, use the down arrows to select the correct destination fields.

Click **OK**.

If there is an error in the mapping, ERHMS Info Manager will identify the field that is causing the error. For best results, name the import file column headers exactly the same as the destination field names.

TEMPLATES

Several templates are automatically provided by ERHMS Info Manager. They include American Red Cross, FEMA, and ATSDR forms.
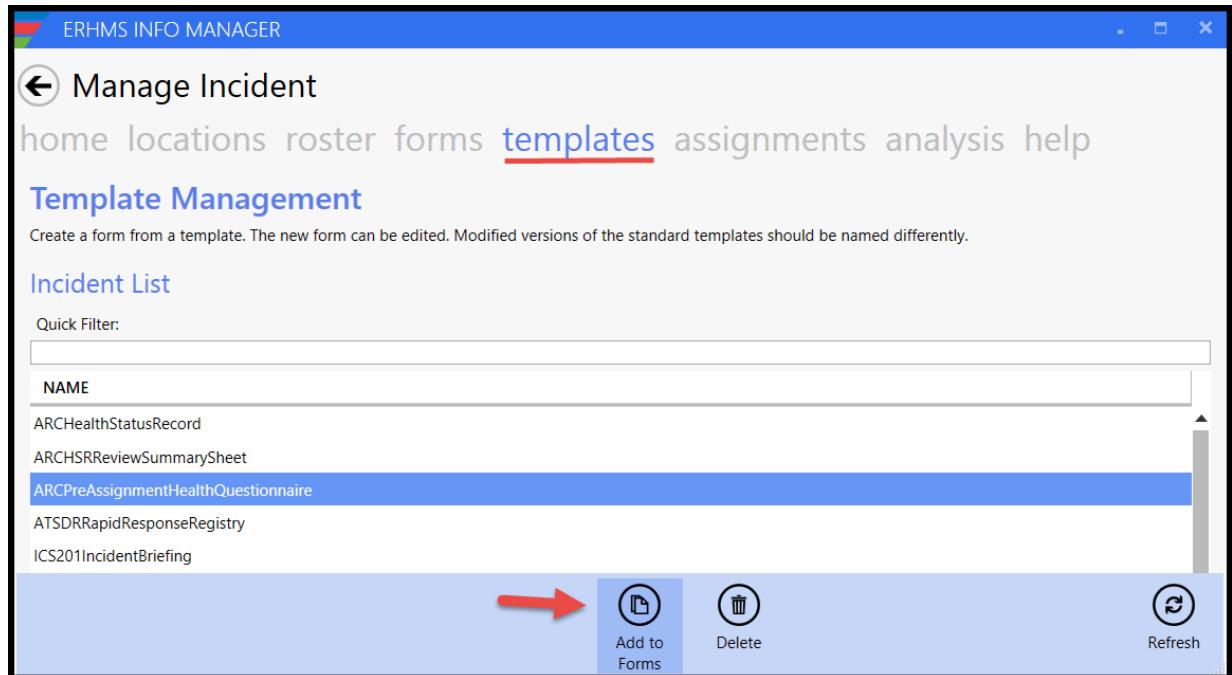
Create a form from a template using the **Add to Forms** icon.
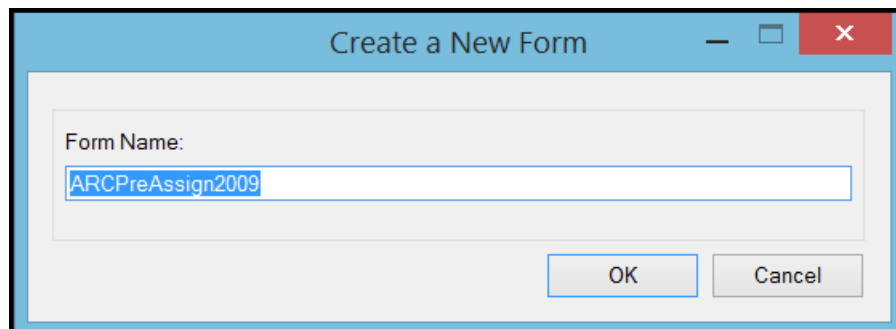
Enter a name for the new form and select **OK**.

This will open up the form in the Epi Info editing window.
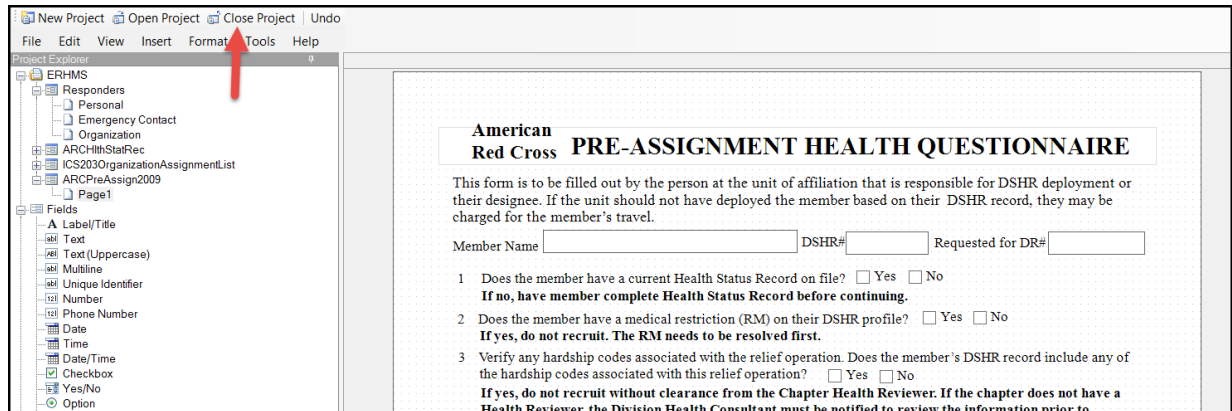
To save the form as is, select **Close Project,** then close the window.

The new form will be displayed in the **forms** window. If not, click the **Refresh** icon.

If you choose to edit one of the standardized forms, use a different name for the form.

Use the **Delete** icon to delete a template.

ASSIGNMENTS

Forms can be assigned to responders both from the ERHMS Info Manager parent **assignments** page and from the Incident **assignments** page.

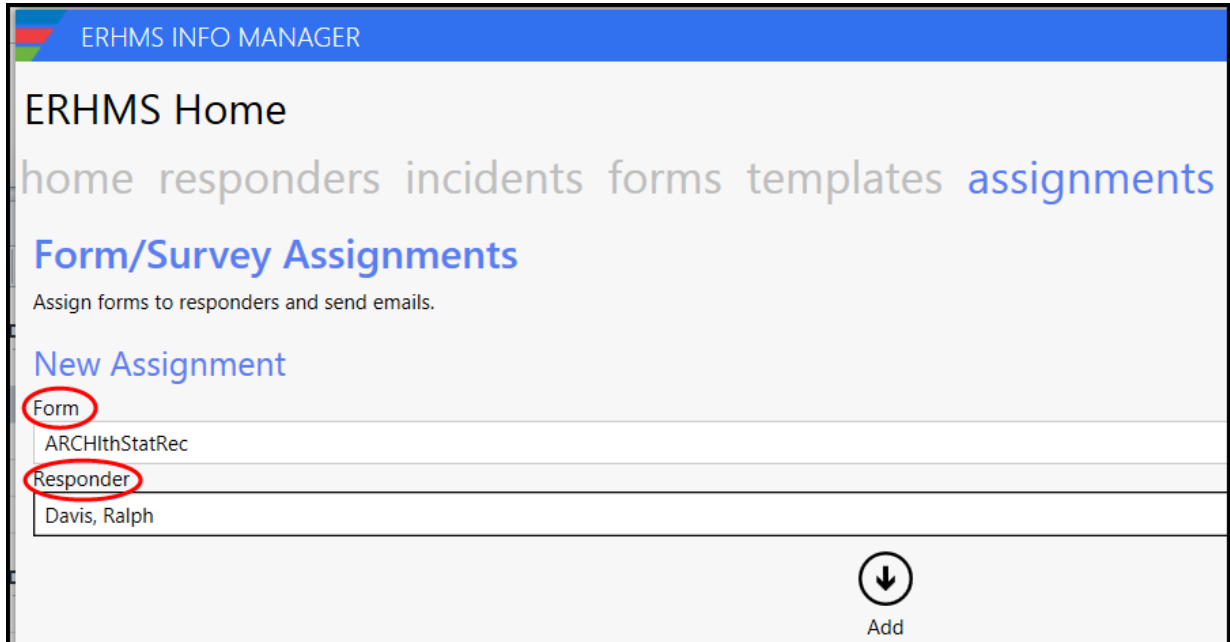On the **assignments** page, use the **Form** dropdown list to choose a form such as a health questionnaire, check-in list, or a list of assigned tasks.

Use the **Responder** dropdown list to select a responder from the roster.

The assignment appears in the list below.
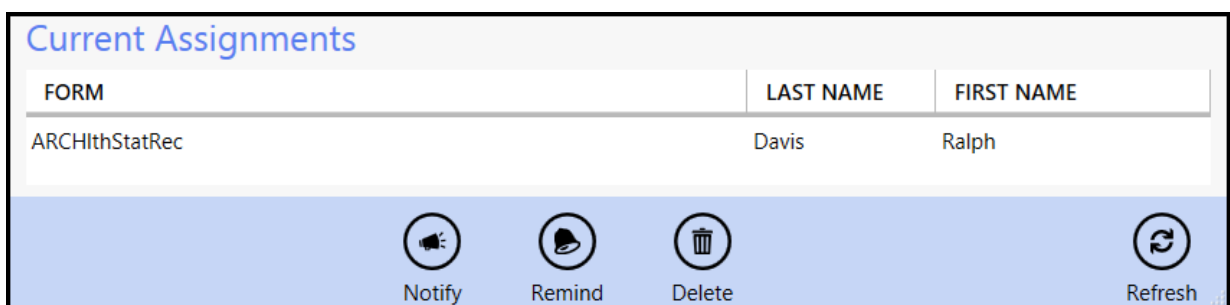
Use the **Notify** function to automatically format an email addressed to the responder with a link to the form.
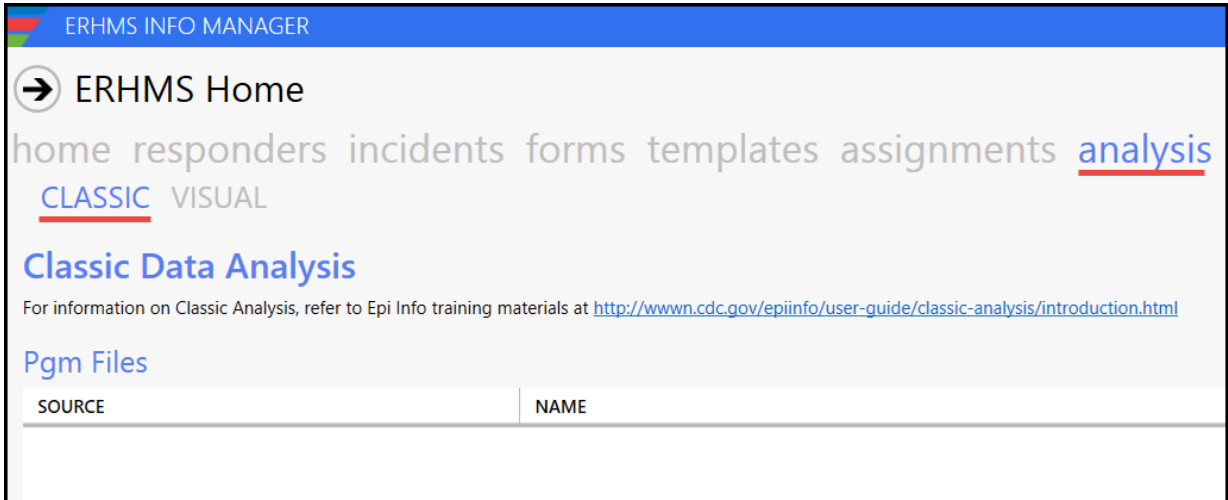
Use **Remind** to send a reminder email with the link to the form.

ANALYSIS

Once data has been entered using forms, you can perform 2 types of data analysis:

- Classic
- Visual
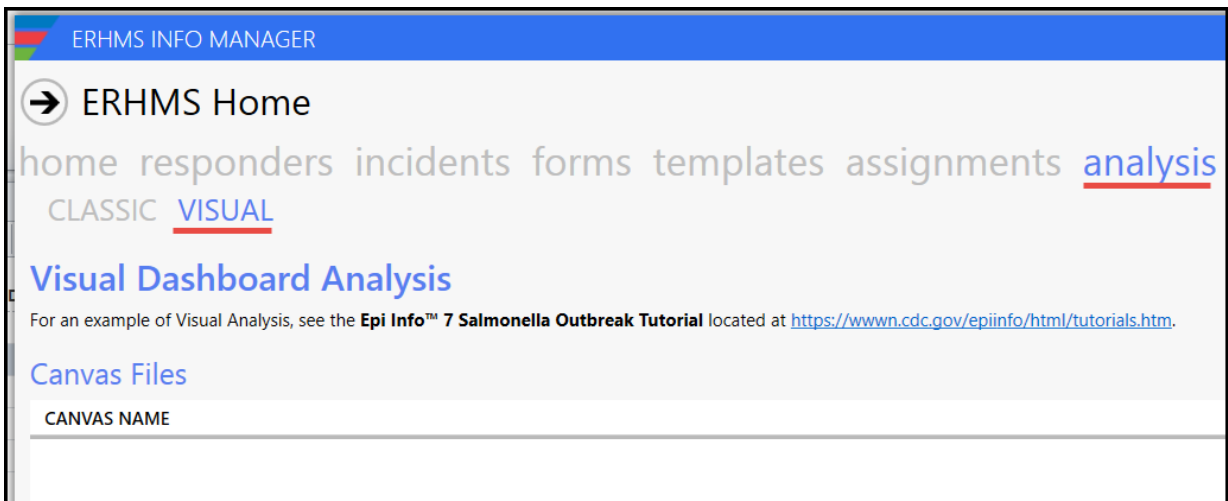
The functionality for both types lies within the Epi Info application. For more information on how to use these functions, refer to the following training materials:

CLASSIC DATA ANALYSIS

Online User Guide located at http://wwwn.cdc.gov/epiinfo/user-guide/classic-analysis/introduction.html.

VISUAL DASHBOARD ANALYSIS

On the Epi Info website there are several excellent tutorials including the **Epi Info™ 7 Salmonella Outbreak Tutorial** located at https://wwwn.cdc.gov/epiinfo/html/tutorials.htm.

Use the section on **Data Analysis using the Dashboard** for a detailed explanation.

ADVANCED FEATURES

PUBLISH A FORM TO THE WEB

Epi Info users can publish a form to the web or to Android mobile devices. The collected responses are extracted into a data-encrypted package. For more information, refer to the Epi Info website (http://wwwn.cdc.gov/epiinfo/index.htm).

IMPORT A FORM FROM A DIFFERENT EPI INFO PROJECT

If you are working with other Epi Info projects and want to import a template into ERHMS Info Manager:

1. From your other project, right click on the form name and select **Save Form As Template**.
2. Right click on the new template and select **View Containing Folder**. Make a note of where the template is stored.
3. In ERHMS Info Manager, go to the **forms** page and select **New.**
4. Enter a **Form Name** and select **OK.**
5. Within Epi Info, select **File** at the top of the page, and **Get Template.**
6. Navigate to the location of the template file you want to import.
7. Select the file and click the **Open** button.
8. The template will appear in the list of templates at the bottom of the left sidebar in Epi Info.
9. Drag the template onto the blank page of your new form.
10. When you close Epi Info, the new form will be listed on the ERHMS Info Manager **forms** page. If you don't see it, select the **Refresh** icon.

SETTINGS

Organizations should customize the Email and Bing Map values as necessary on initial setup.

HELP

ERHMS INFO MANAGER SUPPORT

EPI INFO SUPPORT

Appendix A: Key Terms

The following table provides definitions for terms relevant to this document.

Term	Definition
ERHMS	Emergency Responder Health Monitoring and Surveillance