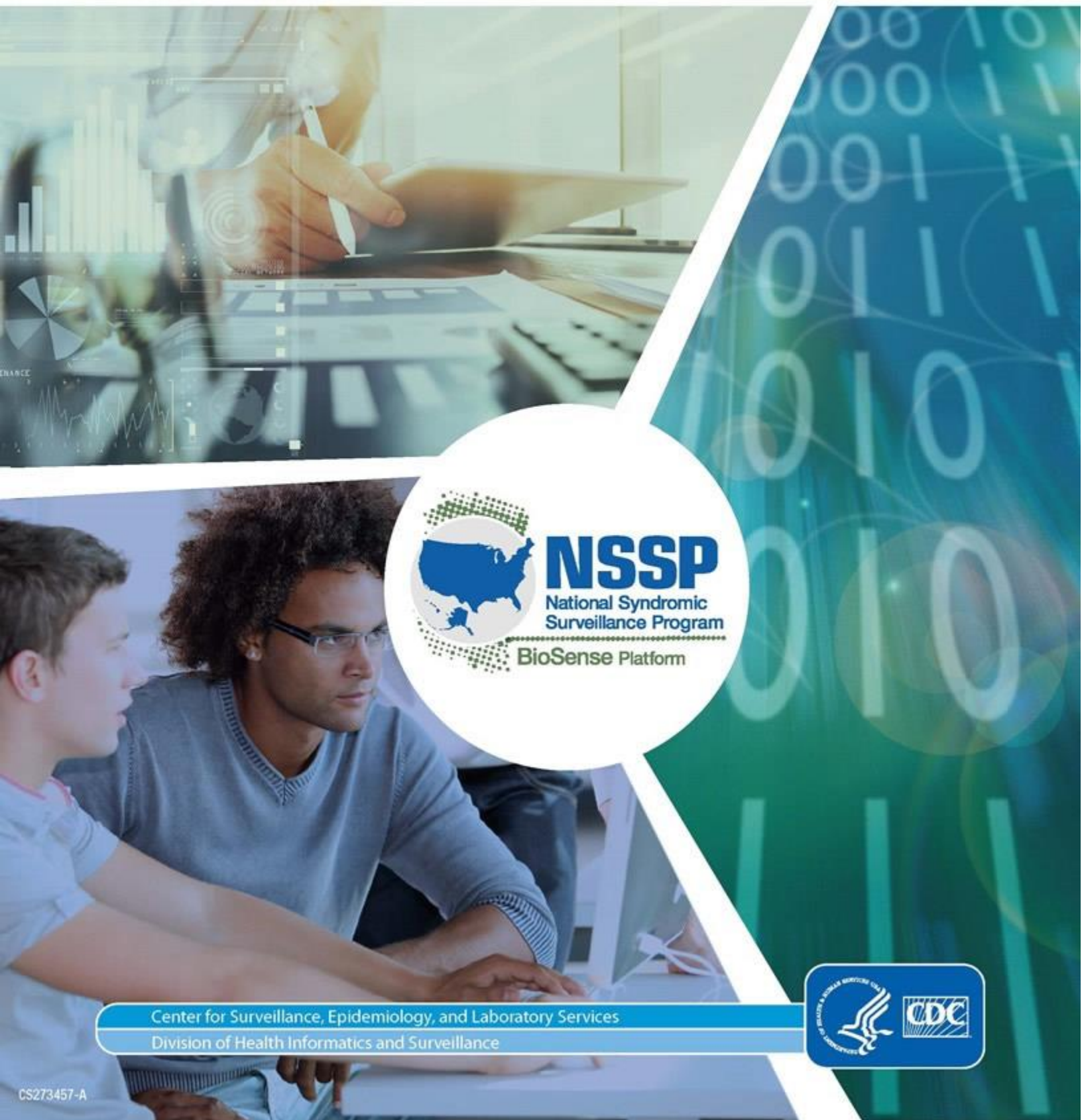


BioSense Platform Quick Start Guide to Using the

Access & Management Center

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Center for Surveillance, Epidemiology, and Laboratory Services
Division of Health Informatics and Surveillance



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Technical Assistance: support.syndromicsurveillance.org

The National Syndromic Surveillance Program (NSSP) promotes and advances development of the cloud-based BioSense Platform, a secure integrated electronic health information system that hosts standardized analytic tools and facilitates collaborative processes. The BioSense Platform is a product of the Centers for Disease Control and Prevention (CDC).

Prerequisites

BioSense Platform Site Administrators Account: If your site does not have a Site Admin account please contact the NSSP Service desk at <http://support.syndromicsurveillance.org> and enter an AMC Site Admin Request ticket.

Access and Share Data

The Data Access tab (figure 1) is only available to site administrators. This tab allows site administrators to create, review, and edit system rules that control access to their site data. These system rules, called Data Access Rules, are applied to user accounts in the ESSENCE application.

Create a New Data Access Rule

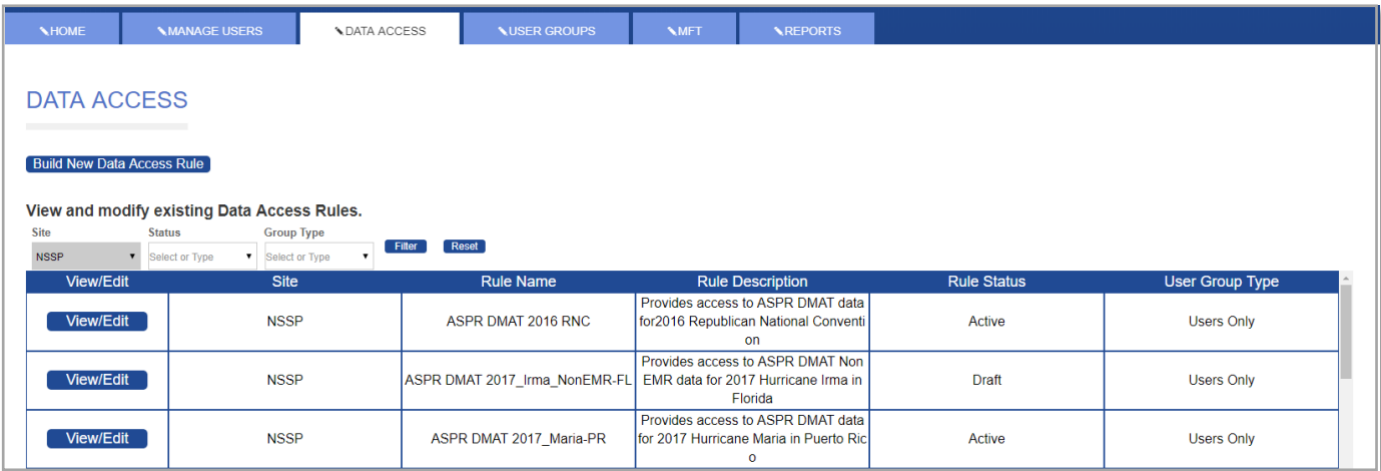


Figure 1. Data Access Page

Step 1: Describe Rule

First, name your rule and enter a description. This will help you find your rule later.



Figure 2. Data Access Page (Rule Characteristics)

Step 2: Select Users

Who should be included in the Data Access Rule? Keep in mind that any user selected here (figure 11) will receive access to the data you specify in the next step.

- Individual users
- User groups (two types)
 1. NSSP user groups
 2. Site-defined user groups (public or private)

For the Data Sharing Workshop

- Set the **Site filter to NSSP** to locate the NSSP **Regional Data Sharing Workshop** group
- Check the **Select** box for the group
- Click the **Next** button

RULE CHARACTERISTICS

Describe Rule

Select Users

Select Data

Review & Save

Save Draft

Back

Cancel

Next

Search for and Select Users or Groups to include in this Data Access Rule

+

Select a User Group

Site

Group Type

NSSP

Filter

Reset

Select	Site	User Group Name	Group Type
☐	NSSP	All Chief Complaint Query Validation Tool Users	Public
☐	NSSP	All National View Aggregate Data Users	Public
☐	NSSP	All National View Data Detail Users	Public
☐	NSSP	All Platform Epis	Public
☐	NSSP	All Platform Users	Public
☐	NSSP	All NSSP Epis	Public
☐	NSSP	All NSSP Users	Public
☐	NSSP	ESOOS CDC User Group	Public
☐	NSSP	Flu CDC User Group	Public
☐	NSSP	Regional NSSP Data Sharing Workshop	Public

Figure 3. Data Access Page

Step 3: Select Data

Next, select the data you want included in the Data Access Rule (figure 13). If you’re a site administrator, be mindful that you can only control access to *your site’s* data. As a site administrator, you may grant user access to multiple data sources and restrict user(s) from accessing your site data by

- Facility
- State and county

Select data to include in the Data Access Rule [Need Help Understanding Data Sharing?](#)

Select Site: FL

Select Data Source: Facility Location (Full Details) & Visit

Select Data Layer:

☐ Aggregate Data

☐ Aggregate Data and Data Details

(Optional) Restrict data by Facility and/or Location

Select Facility: All Facilities
Arnold Palmer Hospital for Children
Brooksville Regional Hospital
Dr. P. Phillips Hospital
Florida Hospital Altamonte

Select State: All States

Select County: AR_Baxter
AR_Benton
AR_Boone
AR_Bradley

Add

Selected Data

ESSENCE Data Source	Data Source Description	ESSENCE Data Layer	Site	State	County	Facility	Delete
Patient Location (Full Details) & Visit	Provides access to syndrome and visit data by patient location	va_er; va_erbv; va_er_hosp; va_erbv_hosp;	884;	*	FL_Duval; FL_St. Johns;	*	X

Save Draft Back Cancel Next

Figure 4. Data Access Page (Select Data)

You must select one or more ESSENCE data sources to include. These data sets map directly to the data source names within the ESSENCE application.

Available Data Sources:

- **Patient Location (Full Details) Visit**—Provides access to data based on where the patient lives. A user granted access to this data source may view a complete list of patient details for all patients residing in the corresponding site. Any restrictions made after selecting the data set (e.g., by facility, state, or county) will be applied based on the location of the patient.
- **Facility Location (Full Details) Visit**—Provides access to data based on the hospital location where a patient sought treatment. A user granted access to this data source may view a complete list of patient details for all facilities located in the corresponding site. Any restrictions made after selecting the data set will be applied based on the location of the facility.
- **Facility/Syndrome Alert**—Provides access to public health event alerts by facility or syndrome for the corresponding site. A site administrator may control the alerts based on the location of the facility.

- **Time of Arrival Alert**—Provides access to public health event alerts by time of arrival for the corresponding site. A site administrator may control the alerts based on the location of the facility.
- **Data Quality**—Provides access to multiple data quality metrics, including completeness of data (by variable, by location, etc.), whether data are mapped to known values, and status of data processing by facility.

Use caution when applying the optional restrictions by facility, state, or county. Such restrictions might limit data visibility, especially for the Patient Location data source.

As part of your Data Access Rule, you **must select data**. Users assigned to the rule can view the selected data when they use the ESSENCE application.

Step 4: Review and Save the Rule

Do's and Don'ts of Data Sharing Rules in the AMC

1. You *can* share data with other users in your site and restrict by a patient's location using the "By Patient Location" data sources.
2. When sharing data with users outside your site, we recommend you *do not* share by patient location because ESSENCE will consolidate that rule with other patient location access controls, and you might share more than intended (for details, see section titled "[Translate AMC Data Access Rules to ESSENCE](#)").

Once you name your rule and select users and data, you're ready to save and implement your Data Access Rule (figure 14).

First, confirm that your selections are as expected. Use the edit buttons to modify the information displayed. Next, **select the appropriate status for your rule** (note that the default status value is "draft"):

- Active = rule will be saved and applied.
- Draft = rule will be saved but not applied.
- Suspend = rule will be saved but not applied.

DATA ACCESS

Describe Rule → Select Users → Select Data → Review & Save

Status* Active

Edit Rule Description

Name Data Sharing Workshop

Description NSSP Data Sharing Workshop Rule

Cancel Back Submit

Edit Selected Users

Site	User Name	First Name	Last Name	User Type (Groups/Individuals)
NSSP	Regional NSSP Data Sharing Workshop	N/A	N/A	Group

Edit Selected Data

Data Description	Data Layer	Site	States	Counties	Facilities
Provides access to syndrome and visit data by facility location	va_hosp_er; va_hospbv_er; va_hosp; va_hospbv; dd_va_hosp_er; dd_va_hospbv_er; dd_va_hosp; dd_va_hospbv;	861;	-	-	-

Cancel Back Submit

Figure 5. Data Access Page (Review and Save)

When you're done, click "Submit." You'll be returned to the Data Access tab.

Edit a Rule

Step 1: Select a Rule

On the Data Access tab under View/Edit, click the View/Edit button beside the rule you want to edit (figure 6).

DATA ACCESS

[Build New Data Access Rule](#)

View and modify existing Data Access Rules.

Site: FL | Status: Select or Type | Group Type: Select or Type | [Filter](#) | [Reset](#)

View/Edit	Site	Rule Name	Rule Description	Rule Status	User Group Type
View/Edit	FL	Example		Active	Users Only
View/Edit	FL	Example 2	This is a rule used for screen shots and other testing purposes	Active	Users Only

Figure 6. Data Access Page (Editing Rules)

Step 2: Modify Rule Characteristics and Save

After you click View/Edit, you'll be directed to the Review & Save page (figure 7). Use the "Edit" buttons to change rule information, users, or data. You can also use the status drop-down menu to change a rule's status. When you're done modifying your Data Access Rule, click "Submit."

How do I deactivate a rule?

Follow these steps to remove or deactivate a rule:

1. Select the rule from the Data Access tab, and click "Edit."
2. In the Status drop-down menu, change the value to "Suspend."
3. Click "Submit."

Permissions for the rule will be removed from user accounts in ESSENCE. However, the AMC will preserve the Data Access Rule with a status of "Suspend." You may reactivate this rule again later.

DATA ACCESS

Describe Rule | Select Users | Select Data | **Review & Save**

Status* Draft

[Edit Rule Description](#)

Name Jessie's Rule

Description This is Jessie's testing rule

[Edit Selected Users](#)

Site	Username	First name	Last name	User Type (Groups/Individuals)
GA	zz-test01	ZFaith	Z- Test	Individual
WY	zz_test01		z_Test	Individual
GA	zztestnwpivint01	z_testpiv	z_testnwpivint	Individual
FL	zztestba3746admin01	z_test	z_testba3746Admin	Individual
NSSP	zztestba374501	z_testba3745	z_testba3745	Individual

[Edit Selected Data](#)

Data Description	Data Layer	Site	States	Counties	Facilities
Provides access to syndrome and visit data by patient location	.va_er; .va_erbv; .va_er_hosp; .va_erbv_hosp;	.885;	*	*	*

[Cancel](#) [Back](#) [Submit](#)

Figure 7. Editing Rules (Review & Save)

Translate AMC Data Access Rules to ESSENCE

The AMC uses rules to control access to ESSENCE data sources. Most ESSENCE data sources have two access controls: patient location and facility location.

Suppose you want to share the “Patient Location (Full Details)” data source for your site. You can use the AMC to create a Data Access Rule to share all of your site’s data for the “Patient Location (Full Details)” data source.

The AMC will translate these selections into ESSENCE as demonstrated in the table below.

I want to...	Site	State	County	Data source (ESSENCE Variable Name)	Facility
<i>Share all of the data from my site</i>	;SiteID;	*	*	;va_er_hosp;	*
<i>For patients that live anywhere (but were seen in my site)</i>	*	*	*	;va_er;	*

ESSENCE manages data access for each user account by consolidating all data selected in rules that include that user and assigns the highest level of access for any given data source.

Suppose you want to share data from your site, Site X (where the patient lives in Alaska), with another user, John Doe. John already has access to all data by patient location for a different site, Site Y.

His current data access would be as follows:

John Doe can access...	Site	State	County	Data source (ESSENCE Variable Name)	Facility
<i>All data from site Y</i>	;SiteY ID;	All	All	;va_er_hosp;	All
<i>For patients that live anywhere (but were seen in site Y)</i>	All	All	All	;va_er;	All

Your rule in the AMC to share your site’s data by patient location of Alaska would be as demonstrated below:

Your rule grants access to...	Site	State	County	Data source (ESSENCE Variable Name)	Facility
<i>All data from site X</i>	;SiteX ID;	All	All	;va_er_hosp;	All
<i>For patients that live in Alaska (but were seen in site X)</i>	All	Alaska	All	;va_er;	All

If you include John in your rule, he will be able to access *all of your site's data* because **ESSENCE combines data access and defaults to the highest permission available** for the “Patient Location (Full Details)” data source.

John's combined data access would be:

John's access after the rule...	Site	State	County	Data source (ESSENCE Variable Name)	Facility
<i>All data from these sites</i>	;SiteX ID; SiteY ID;	All	All	;va_er_hosp;	All
<i>For patients that live in Alaska</i>	All	All Alaska	All	;va_er;	All