RCKMS Jurisdiction Criteria Collection Training

Council of State and Territorial Epidemiologists

Agenda and Objectives

1. Background
2. Overview of Default Content
3. Default Content for Pertussis
4. Sample Jurisdiction Specific Criteria for Pertussis
5. Collecting Jurisdiction Specific Criteria

The RCKMS Project

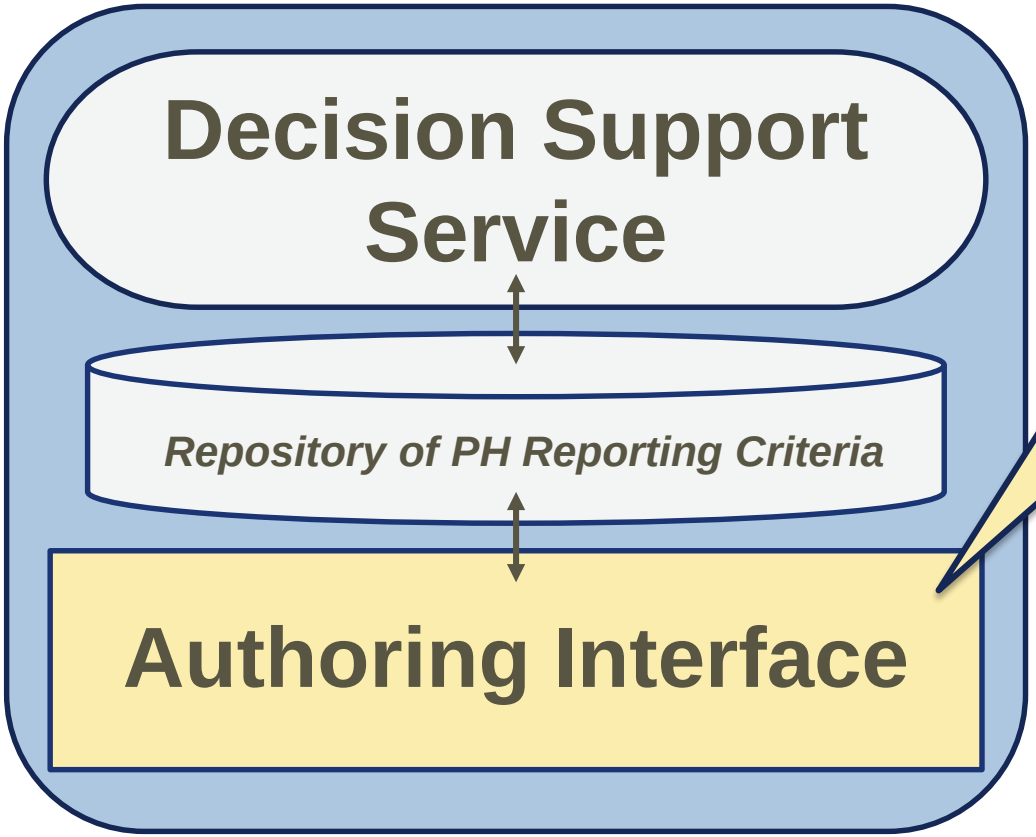
RCKMS stands for:

Reportable Conditions Knowledge Management System

The RCKMS is:

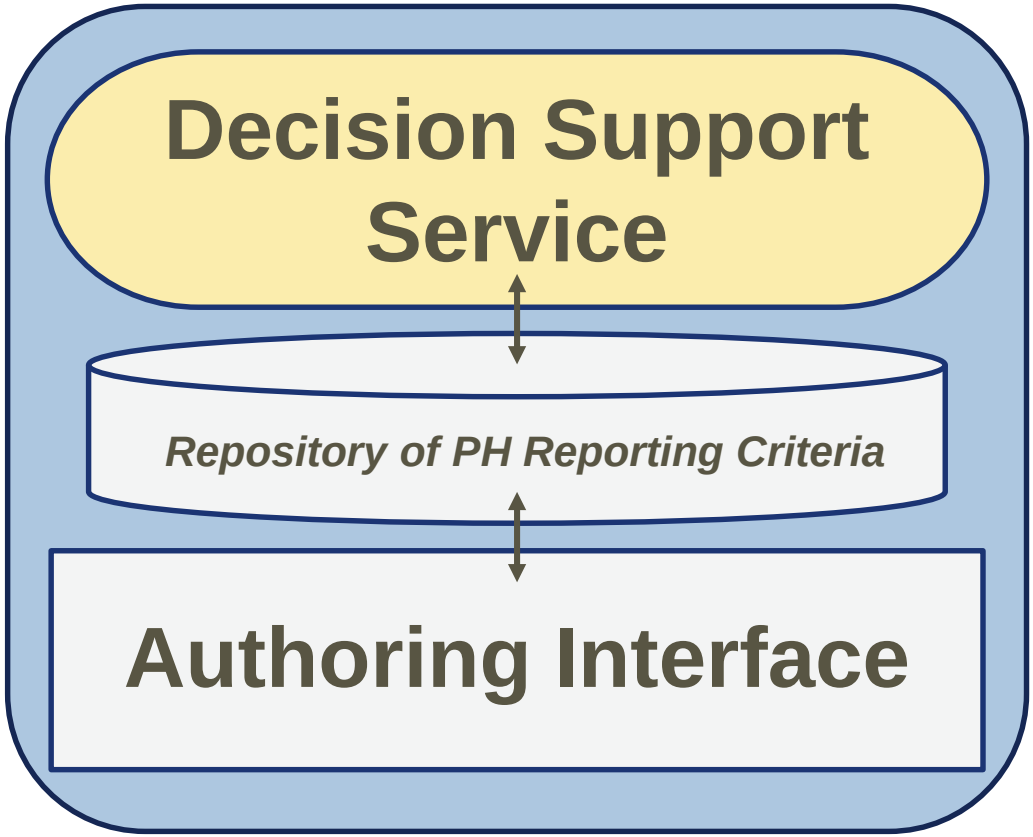
an authoritative, real-time portal to enhance disease surveillance, by providing comprehensive information to reporters (and PH) about the “who, what, where, when, why, and how” of case reporting.

The RCKMS Tool

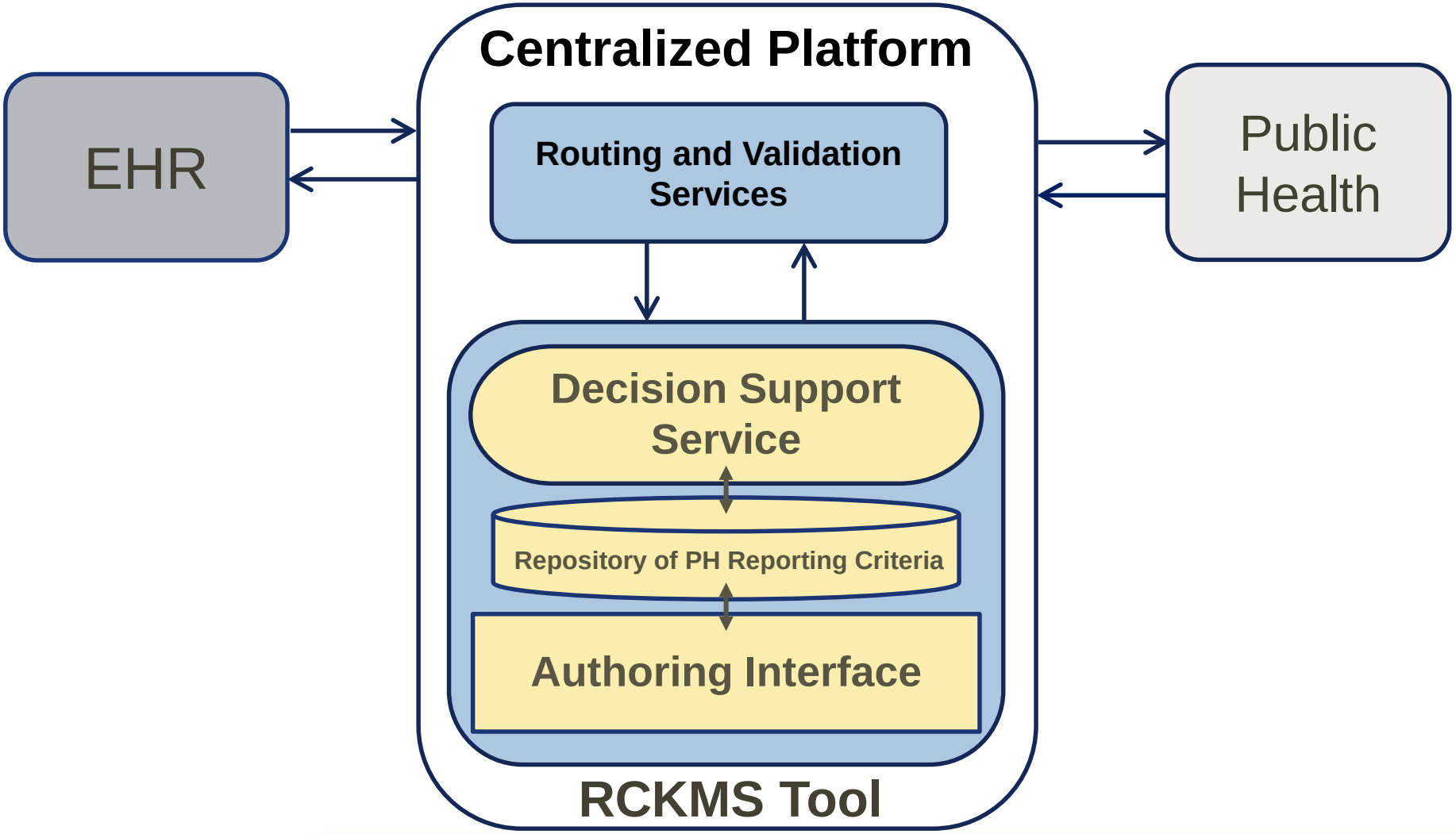


Pre-populated with "Default Content"

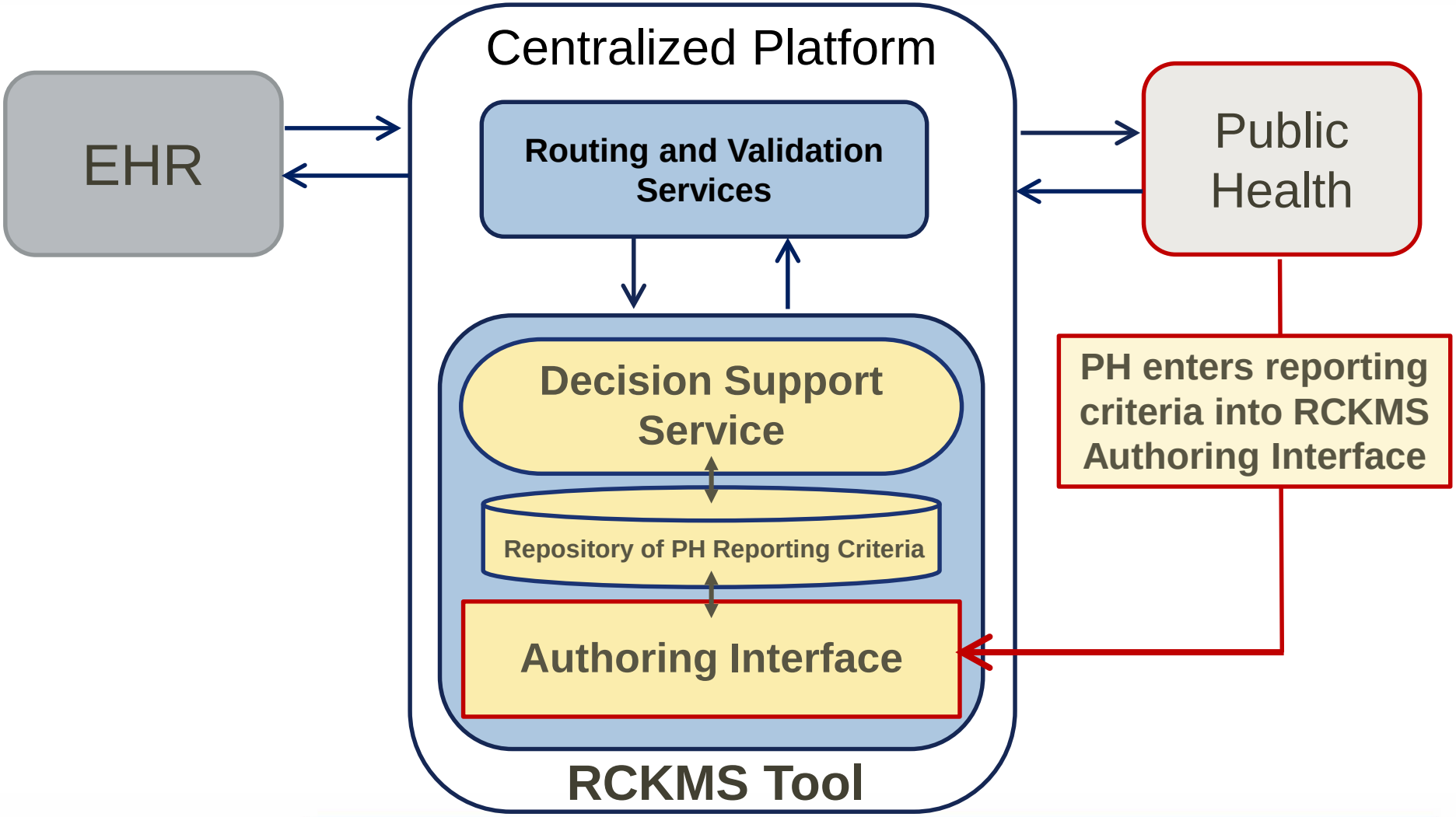
The RCKMS Tool



RCKMS and Electronic Case Reporting (eCR)



How RCKMS works



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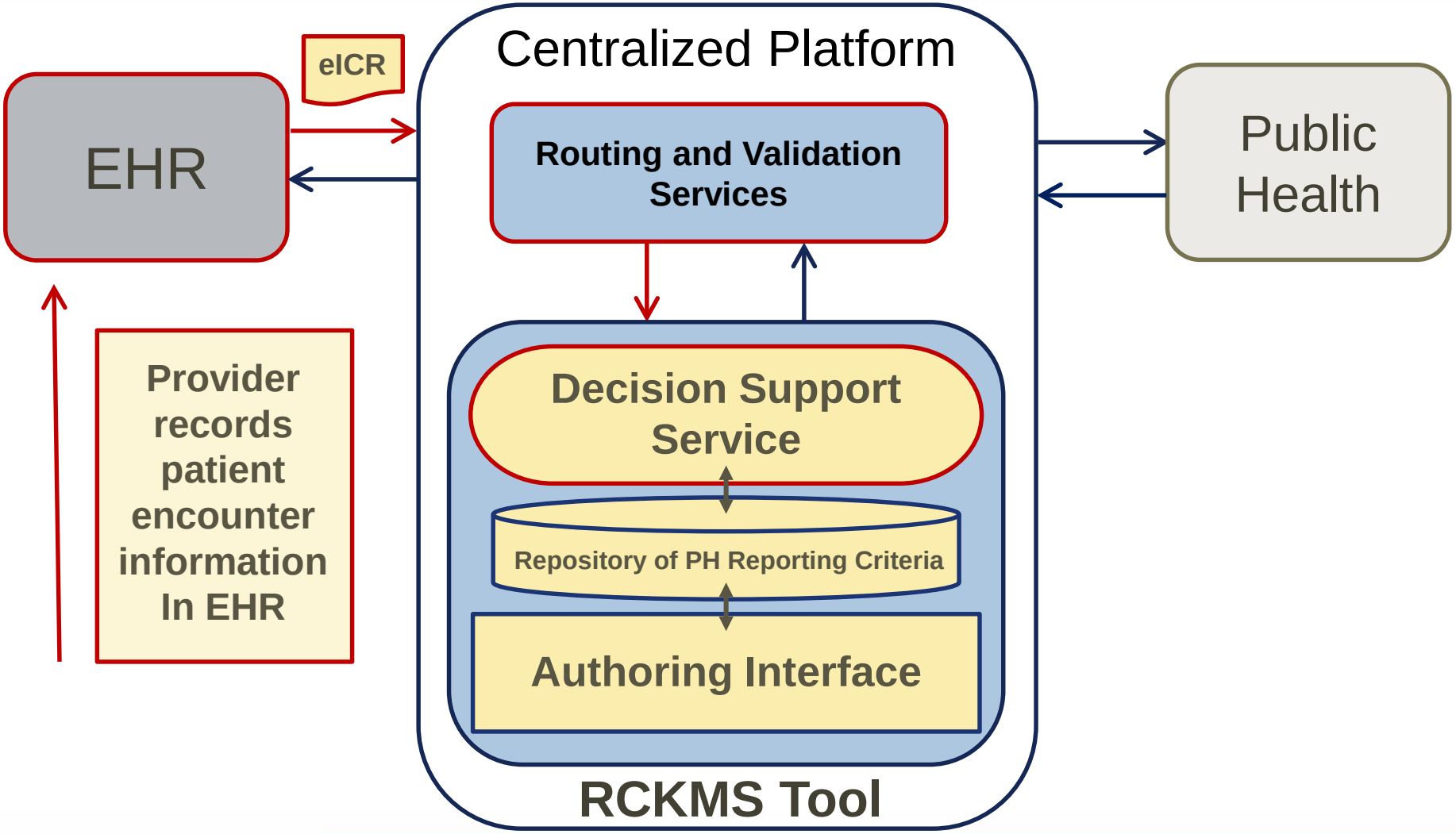

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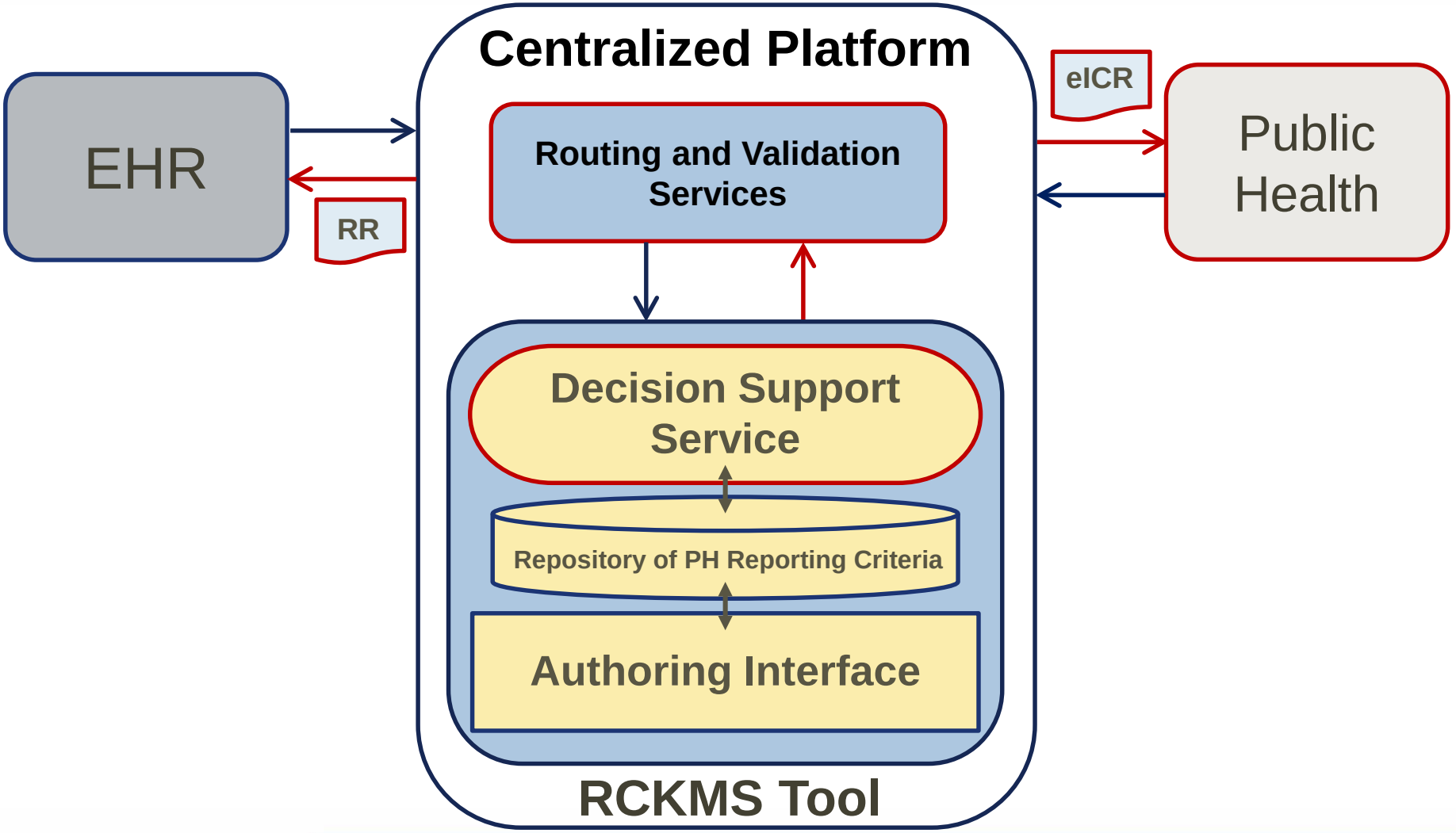


Phased Development

- Phase 1, Feasibility Demonstration Pilot
  - Fall 2014 – Fall 2015
  - Proof of concept
  - Processes for content development
- Phase 2, Application and Content Development
  - Fall 2015 – September 2016
  - Deployment of the RCKMS application on centralized platform
  - Default content for a subset of reportable conditions
- Phase 3, Training and Deployment
  - Finalize and implement content into the RCKMS application
  - Pilot release of RCKMS application
  - Train jurisdictions to use the RCKMS application

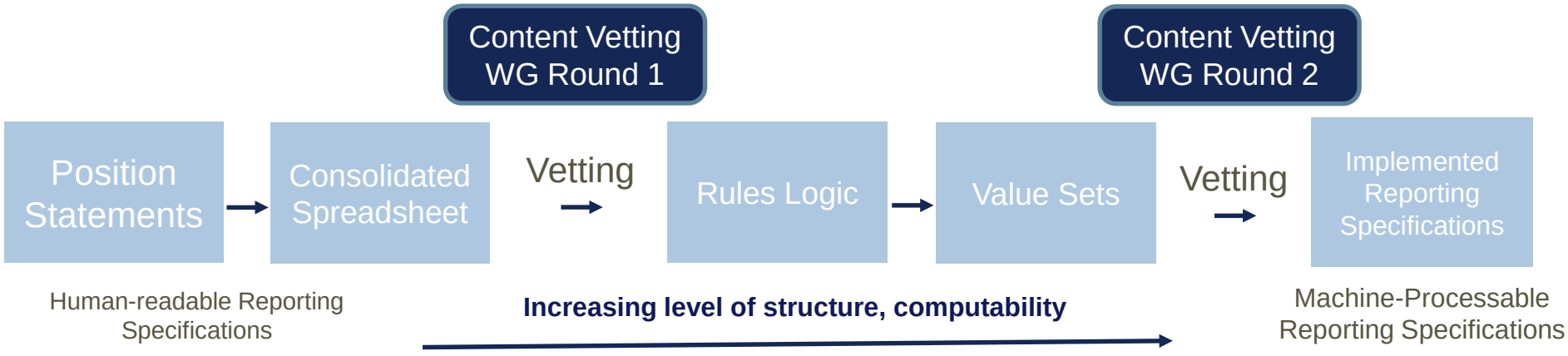
Overview of Default Content

RCKMS Content Development Process

Default Content

- Reporting specifications for each condition that comes pre-populated in RCKMS tool
- Purpose: To ease the burden of entering reporting specifications into tool
- Machine-processable, developed through standardized process

Development Process



Content Development Process: Position Statements

Content Vetting WG Round 1 | Content Vetting WG Round 2

Position Statements → Consolidated Spreadsheet → Vetting → Rules Logic → Value Sets → Vetting → Implemented Reporting Specifications

A. Narrative description of criteria to determine whether a case should be reported to public health authorities

Report any illness to public health authorities that meets any of the following criteria:

1. An acute cough illness of any duration with an inspiratory whoop

2. Any person with isolation of *Bordetella pertussis* from a clinical specimen or a positive PCR test for *B. pertussis*

3. Any cough illness greater than 2 weeks duration in a person who is a contact of a laboratory-confirmed pertussis case.

4. Any cough illness greater than 2 weeks duration in a person who is a member of a defined risk group during an outbreak.

5. A person whose healthcare record contains a diagnosis of pertussis.

6. A person whose death certificate lists pertussis as a cause of death or a significant condition contributing to death.

Other recommended reporting procedures

- All cases of pertussis should be reported.
- Reporting should be on-going and routine.
- Frequency of reporting should follow the state health department's routine schedule.

B. Table of criteria to determine whether a case should be reported to public health authorities

Table VI-B. Table of criteria to determine whether a case should be reported to public health authorities. Requirements for reporting are established under State and Territorial laws and/or regulations and may differ from jurisdiction to jurisdiction. These criteria are suggested as a standard approach to identifying cases of this condition for purposes of reporting, but reporting should follow State and Territorial law/regulation if any conflicts occur between these criteria and those laws/regulations.

Criterion	Reporting			
Clinical Evidence				
Cough (any duration)	N			
Cough > 2 weeks duration			N	
Inspiratory whoop	N			
Healthcare record contains a diagnosis of pertussis				S
Death certificate lists pertussis as a cause of death or a significant condition contributing to death				S
Laboratory Evidence				
Isolation of *Bordetella pertussis* from a clinical specimen		S		
Positive PCR for *B. pertussis*		S		
Epidemiologic Evidence				
Contact with a laboratory-confirmed pertussis case			O	
Member of a defined risk group during an outbreak			O	

Content Development Process: Consolidated Spreadsheet

Content Vetting WG Round 1

Content Vetting WG Round 2

Position Statements → **Consolidated Spreadsheet** → Vetting → Rules Logic → Value Sets → Vetting → Implemented Reporting Specifications

			PROPOSED DEFAULT - LOGIC SETS					
			Lab Reporting	Provider / Facility Reporting				Vital Records
				(1)	(2)	(3)	(4)	
Patient record being evaluated contains evidence of:				LAB	DX	CLIN	CLIN + EPI	
Criterion Description	Sta							
Clinical	C							
Pertussis (i.e., as a Diagnosis or active Problem or mentioned in text as a cause of death or a significant condition contributing to death)	P				S			
Cough (any duration)	N;P					N	N	
At least one of the following symptoms: Inspiratory Whoop, paroxysmal cough, or post-tussive vomiting	P					N		
Laboratory	C							
Isolation of Bordetella pertussis by any method from a clinical specimen	P		S	S				
Detection of Bordetella Pertussis nucleic acid by any method in a clinical specimen	P		S	S				
Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	P		S	S				
Detection of *Bordetella pertussis* antibodies by any method in a clinical specimen	P		S	S				

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Laboratory	C						
Isolation of Bordetella pertussis by any method from a clinical specimen	P	S	S				
Detection of Bordetella Pertussis nucleic acid by any method in a clinical specimen	P	S	S				
Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	P	S	S				
Detection of *Bordetella pertussis* antibodies by any method in a clinical specimen	P	S	S				

Criteria

Standardized reporting criteria are listed in the left hand column and organized by category (i.e., Clinical, Laboratory)

Logic Set

Criteria are grouped into **logic sets** that indicate when a given reporter type should report to PH

Content Development Process: Content Vetting WG Round 1

Content Vetting WG Round 1

Content Vetting WG Round 2

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Laboratory	C						
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Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	P	S	S				
Detection of *Bordetella pertussis* antibodies by any method in a clinical specimen	P	S	S				

Consolidated Spreadsheet → **CSTE Content Vetting WG for Vetting**

Content Development Process: Rules Logic Development

Content Vetting WG Round 1

Content Vetting WG Round 2

Position Statements → Consolidated Spreadsheet → Vetting → **Rules Logic** → Value Sets → Vetting → Implemented Reporting Specifications

	PROPOSED DEFAULT - LOGIC SETS				
	Lab Reporting	Provider / Facility Reporting			
		(1)	(2)	(3)	(4)
Patient record being evaluated contains evidence of:		LAB	DX	CLIN	CLIN + EPI
Criterion Description					
Clinical					
Pertussis (i.e., as a Diagnosis or active Problem or mentioned in text as a cause of death or a significant condition contributing to death)			S		

The patient record being evaluated contains evidence of:

1. **Pertussis (i.e., as a Diagnosis or active Problem or mentioned in text as a cause of death or a significant condition contributing to death)**

IF

- Patient has a diagnosis of [VS:Pertussis]

  OR
- Patient has an active problem list entry of [VS:Pertussis]

  OR
- Patient has a death recorded as [VS:Pertussis_Literal]

THEN report

Vetted Consolidated Spreadsheet → **Rules Logic**

Content Development Process: Value Set Creation

Content Vetting WG Round 1

Content Vetting WG Round 2

Position Statements → Consolidated Spreadsheet → Vetting → Rules Logic → **Value Sets** → Vetting → Implemented Reporting Specifications

The patient record being evaluated contains evidence of:

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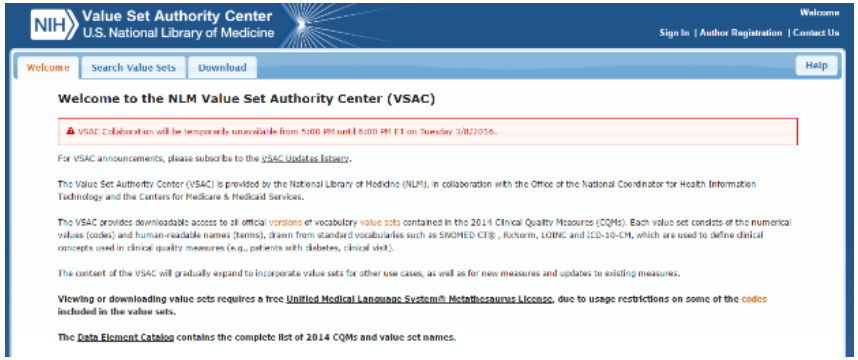
THEN report



Rules Logic

Value Set Creation

Content Development Process: Implementation

Content Vetting WG Round 1

Content Vetting WG Round 2

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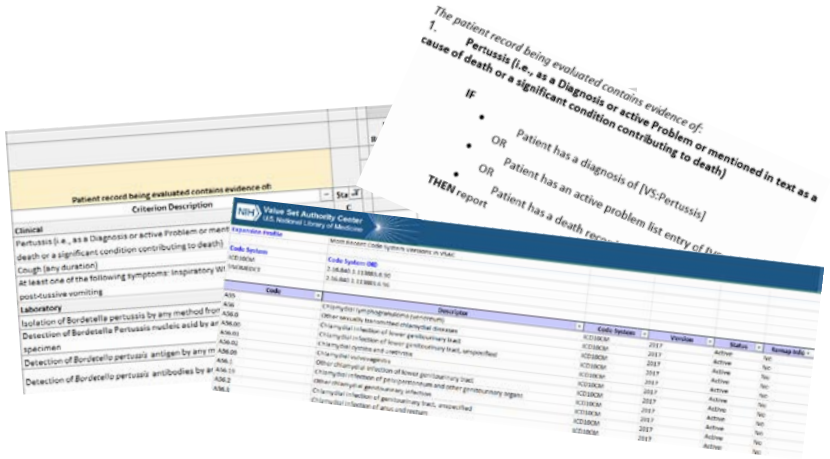

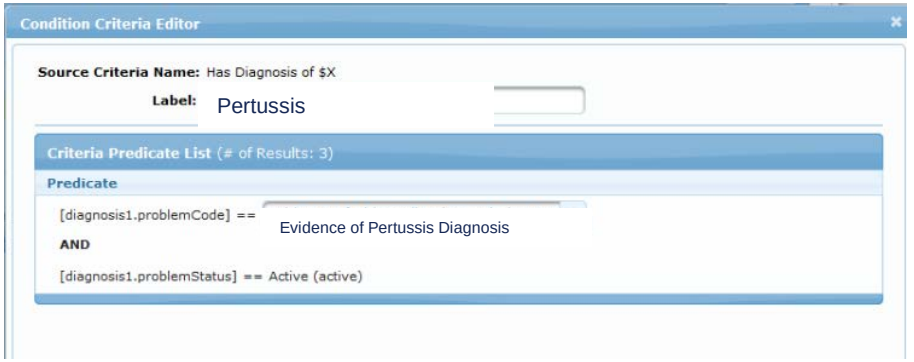

Vetted Reporting Specifications → **Logic Implemented in Decision Support Tool (RCKMS)**

*Please note – all screenshots used in this presentation are in **mock-up, design,** or **draft** stages.

Default Content Pertussis

Patient record being evaluated contains evidence of:

Criterion Description	Status	DEFAULT - LOGIC SETS						OPTIONAL - LOGIC SETS			
		Lab Reporting	Provider / Facility Reporting			Vital Records		Lab Reporting	Provider / Facility Reporting		
			(1)	(2)	(3)	(4)			(1)	(2)	(3)
			LAB	DX	CLIN	CLIN + EPI			LAB	SYMP	DEM + CLIN
Clinical	**C**										
Pertussis (i.e., as a diagnosis or active problem)	D			S							
Healthcare record contains diagnosis of pertussis	*N*										
Cough (any duration)	N;D				N	N				N	N
Cough > 2 weeks duration	*N*										
Inspiratory Whoop	D				N						
Inspiratory Whoop	*N*										
Paroxysmal cough or post-tussive vomiting	J									N	
	J										N
Laboratory	**C**										
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D	S	S								
Isolation of B Pertussis from a clinical specimen	*N*										
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D	S	S								
Positive PCR for Pertussis	*N*										
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D	S	S								
Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	J							S	S		
Lab test ordered for identification of *Bordetella pertussis* by organism-specific culture method in a clinical specimen, including identification tests performed on an isolate (i.e., diagnostic tests)	J							S	S		
Lab test ordered for detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen (i.e., diagnostic tests)	J							S	S		
Lab test ordered for detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	J							S	S		
Demographic	**C**										
Epidemiologic	**C**										
Contact of a person diagnosed with pertussis	D					O					
Contact with a laboratory-confirmed pertussis case	*N*										
Member of a defined risk group during an outbreak	N;D					O					
Vital Records	**C**										
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D						S				

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds | Jurs. Options

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Positive PCR for Pertussis	*N*										
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Contact of a person diagnosed with pertussis	D					O					
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Member of a defined risk group during an outbreak	N;D					O					
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Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D						S				

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- Paroxysmal cough or post-tussive vomiting and apnea made optionals
- Removal of general antibody test from default, addition of B. pertussis toxin antibody test
- Infant cut off changed to <1yo to reflect official infant designation
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Key for Status Column:

C = Category: Category of criteria, ex., clinical, laboratory, demographic, epidemiologic, vital records

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds | Jurs. Options

			DEFAULT - LOGIC SETS						OPTIONAL - LOGIC SETS			
			Lab Reportin g	Provider / Facility Reporting				Vital Records	Lab Repor ting	Provider / Facility Reporting		
				(1)	(2)	(3)	(4)			(1)	(2)	(3)
Patient record being evaluated contains evidence of:				LAB	DX	CLIN	CLIN + EPI			LAB	SYMP	DEM + CLIN
Criterion Description	**Status**											
Clinical	**C**											
Pertussis (i.e., as a diagnosis or active problem)	D				S							
Healthcare record contains diagnosis of pertussis	*N*											
Cough (any duration)	N;D					N	N				N	N
Cough > 2 weeks duration	*N*											
Inspiratory Whoop	D					N						
Inspiratory Whoop	*N*											
Paroxysmal cough or post-tussive vomiting	J										N	
	J											N
Laboratory	**C**											
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D		S	S								
Isolation of B Pertussis from a clinical specimen	*N*											
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D		S	S								
Positive PCR for Pertussis	*N*											
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D		S	S								
Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	J								S	S		
Lab test ordered for identification of *Bordetella pertussis* by organism-specific culture method in a clinical specimen, including identification tests performed on an isolate (i.e., diagnostic tests)	J								S	S		
Lab test ordered for detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen (i.e., diagnostic tests)	J								S	S		
Lab test ordered for detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	J								S	S		
Demographic	**C**											
Epidemiologic	**C**											
Contact of a person diagnosed with pertussis	D						O					
Contact with a laboratory-confirmed pertussis case	*N*											
Member of a defined risk group during an outbreak	N;D						O					
Vital Records	**C**											
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S				

- **Created and reviewed with RCKMS Feasibility Demonstration Pilot**
- **Updated as part of RCKMS Phase II**
- **Vetted with Content Vetting WG on 3/5/16**
- **Second round vetting with Content Vetting WG on 2/7/17**

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds | Jurs. Options

Jurisdictional-Specific Criteria for Pertussis

Patient record being evaluated contains evidence of:		DEFAULT - LOGIC SETS						OPTIONAL - LOGIC SETS			
		Lab Reporting	Provider / Facility Reporting			Vital Records		Lab Reporting	Provider / Facility Reporting		
			(1)	(2)	(3)	(4)			(1)	(2)	(3)
Criterion Description	**Status**		LAB	DX	CLIN	CLIN + EPI			LAB	SYMP	DEM + CLIN
Clinical	**C**										
Pertussis (i.e., as a diagnosis or active problem)	D			S							
Cough (any duration)	N;D				N	N				N	N
Inspiratory Whoop	D				N						
Paroxysmal cough or post-tussive vomiting	J									N	
Apnea	J										N
Laboratory	**C**										
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D	S	S								
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D	S	S								
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D	S	S								
Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	J							S	S		
Lab test ordered for identification of *Bordetella pertussis* by organism-specific culture method in a clinical specimen, including identification tests performed on an isolate (i.e., diagnostic tests)	J							S	S		
Lab test ordered for detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen (i.e., diagnostic tests)	J							S	S		
Lab test ordered for detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	J							S	S		
Demographic	**C**										
Epidemiologic	**C**										
Contact of a person diagnosed with pertussis	D					O					
Member of a defined risk group during an outbreak	N;D					O					
Vital Records	**C**										
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D						S				

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | **Jurs. Options**

Patient record being evaluated contains evidence of:		DEFAULT - LOGIC SETS						OPTIONAL - LOGIC SETS			
		Lab Reporting	Provider / Facility Reporting			Vital Records		Lab Reporting	Provider / Facility Reporting		
			(1)	(2)	(3)	(4)			(1)	(2)	(3)
			LAB	DX	CLIN	CLIN + EPI			LAB	SYMP	DEM + CLIN
Criterion Description	**Status**										
Clinical	**C**										
Pertussis (i.e., as a diagnosis or active problem)	D			S							
Cough (any duration)	N;D				N	N				N	N
Inspiratory Whoop	D				N						
Paroxysmal cough or post-tussive vomiting	J									N	
Apnea	J										N
Laboratory	**C**										
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D	S	S								
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D	S	S								
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D	S	S								
Detection of *Bordetella pertussis* antigen by any method in a clinical specimen	J							S	S		
Lab test ordered for identification of *Bordetella pertussis* by organism-specific culture method in a clinical specimen, including identification tests performed on an isolate (i.e., diagnostic tests)	J							S	S		
Lab test ordered for detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen (i.e., diagnostic tests)	J							S	S		
Lab test ordered for detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	J							S	S		
Demographic	**C**										
Epidemiologic	**C**										
Contact of a person diagnosed with pertussis	D					O					
Member of a defined risk group during an outbreak	N;D					O					
Vital Records	**C**										
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D						S				

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OptAv= This option is available for a jurisdiction to include in their jurisdictional rules. It is not required to select all or none.

INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

Collecting Jurisdiction-specific Criteria

			DEFAULT - LOGIC SETS					
			Lab Reporting	Provider / Facility Reporting				Vital Records
				(1)	(2)	(3)	(4)	
Patient record being evaluated contains evidence of:				LAB	DX	CLIN	CLIN + EPI	
Criterion Description	**Status**							
Clinical	**C**							
Pertussis (i.e., as a diagnosis or active problem)	D				S			
Cough (any duration)	N;D					N	N	
Inspiratory Whoop	D					N		
Laboratory	**C**							
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D		S	S				
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D		S	S				
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D		S	S				
Demographic	**C**							
Epidemiologic	**C**							
Contact of a person diagnosed with pertussis	D						O	
Member of a defined risk group during an outbreak	N;D						O	
Vital Records	**C**							
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S

Key for Status Column:

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OptAv= This option is available for a jurisdiction to include in their jurisdictional rules. It is not required to select all or none.

USE DEFAULT?
Indicate Y/N in Box

Jurisdiction:

Instructions:

1. Review Types of Reporters

Default Reporter Types:
- Lab reporting (stand alone labs)
- Provider/Facility Reporting (includes hospitals/ambulatory and onsite labs)
- Vital Records (future implementaion)

For the purposes of this exercise, we recommend jurisdictions use these three default reporter types. Are there other reporter types your jurisdiction would want?

2. Review list of criteria available (Column A) for each category (ie. clinical, laboratory, demographic, etc.)

3. Review default logic sets

4. **Identify any missing criteria or combinations of criteria (i.e., logic sets) needed** - *Are there any clinical, laboratory, demographic, epidemiologic or vital records criteria missing from this list, that are needed for your jurisdiction reporting criteria?*
   - *Are there any new combinations of criteria (i.e., logic sets) needed? Ex. New logic set needed for a combination of DEM+CLIN criteria*

5. Navigate to your jurisdiction specific tab and complete the following:

6. If your jurisdiction would like to use the DEFAULT criteria, indicate a Y in the peach box above next to "Use Default?"

7. If your jurisdiction would like to edit the default criteria, make edits as needed
   - Indicate all edits by highlighting the cell in YELLOW
     Types of Edits
     - Edit existing logic sets
     - Add new row of criteria
     - Add new logic set
   - Indicate all changes under "Notes"
   - Answer applicable questions for your jurisdiction in the the yellow boxe or notes box.
   - See EXAMPLE (Completed) tab for example

INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

			DEFAULT - LOGIC SETS					
			Lab Reporting	Provider / Facility Reporting				Vital Records
				(1)	(2)	(3)	(4)	
Patient record being evaluated contains evidence of:				LAB	DX	CLIN	CLIN + EPI	
Criterion Description	**Status**							
Clinical	**C**							
Pertussis (i.e., as a diagnosis or active problem)	D				S			
Cough (any duration)	N;D					N	N	
Inspiratory Whoop	D					N		
Laboratory	**C**							
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D		S	S				
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D		S	S				
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D		S	S				
Demographic	**C**							
Epidemiologic	**C**							
Contact of a person diagnosed with pertussis	D						O	
Member of a defined risk group during an outbreak	N;D						O	
Vital Records	**C**							
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S

Key for Status Column:

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

			DEFAULT - LOGIC SETS					
			Lab Reporting	Provider / Facility Reporting				Vital Records
				(1)	(2)	(3)	(4)	
Patient record being evaluated contains evidence of:				LAB	DX	CLIN	CLIN + EPI	
Criterion Description	**Status**							
Clinical	**C**							
Pertussis (i.e., as a diagnosis or active problem)	D				S			
Cough (any duration)	N;D					N	N	
Inspiratory Whoop	D					N		
Laboratory	**C**							
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D		S	S				
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D		S	S				
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D		S	S				
Demographic	**C**							
Epidemiologic	**C**							
Contact of a person diagnosed with pertussis	D						O	
Member of a defined risk group during an outbreak	N;D						O	
Vital Records	**C**							
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

			DEFAULT - LOGIC SETS						
			Lab Reporting	Provider / Facility Reporting					Vital Records
				(1)	(2)	(3)	(4)	(5)	
Patient record being evaluated contains evidence of:				LAB	DX	CLIN	CLIN + EPI	DEM + CLIN	
Criterion Description	**Status**								
Clinical	**C**								
Pertussis (i.e., as a diagnosis or active problem)	D				S				
Cough (any duration)	N;D					N	N	N	
Inspiratory Whoop	D					N		O	
Paroxysmal cough or post-tussive vomiting	J							O	
Apnea	J							O	
Laboratory	**C**								
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D		S	S					
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D		S	S					
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D		S	S					
Demographic	**C**								
Age < 1 year	J							N	
Epidemiologic	**C**								
Contact of a person diagnosed with pertussis	D						O		
Member of a defined risk group during an outbreak	N;D						O		
Vital Records	**C**								
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D								S

USE DEFAULT? *Indicate Y/N in Box* N

Jurisdiction: Jurisdicti

Example Reporting Specifications for Jurisdiction X

Notes:
- Chose not to use default
- Needed new logic set (Infant reporting) - Highlight in Yellow

Example reporting specifications
- Diagnosis of Pertussis
- Pertussis as a significant condition contributing to death
- Pertussis as a cause of death

- Isolation of B. Pertussis by any method
- Detection of B. Pertussis nucleic acid by PCR
- Detection of B. Pertussis by antigen detection methods
- Detectinon of B. Pertussis IgM antibody by any methods

Clinical presentation of Pertussis (Symptoms only)
- Cough (any duration) - Necessary
- Inspiratory whoop - Necessary

Clinical presentation of Pertussis, Infant
- Infant <= 1 years of age
- Cough (any duration) - Necessary
- Apnea, Post-tussive vomiting, Paroxysmal Cough, Inspiratory whoop - optionals

Logic set for combination of DEM + CLIN not present in default; new logic set needed

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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

	Patient record being evaluated contains evidence of:		DEFAULT - LOGIC SETS						
			Lab Reporting	Provider / Facility Reporting					Vital Records
				(1)	(2)	(3)	(4)	(5)	
	Criterion Description	Status		LAB	DX	CLIN	CLIN + EPI	DEM + CLIN	
	Clinical	**C**							
	Pertussis (i.e., as a diagnosis or active problem)	D			S				
	Cough (any duration)	N;D				N	N	N	
1	Inspiratory Whoop	D				N		O	
3	Paroxysmal cough or post-tussive vomiting	J						O	
4	Apnea	J						O	
5	**Laboratory**	**C**							
5	Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D	S	S					
8	Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D	S	S					
0	Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D	S	S					
5	**Demographic**	**C**							
5	Age < 1 year	J						N	
7	**Epidemiologic**	**C**							
8	Contact of a person diagnosed with pertussis	D					O		
0	Member of a defined risk group during an outbreak	N;D					O		
1	**Vital Records**	**C**							
2	Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S

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OptAv= This option is available for a jurisdiction to include in their jurisdictional rules. It is not required to select all or none.

USE DEFAULT? *Indicate Y/N in Box* N

Jurisdiction: Jurisdicti

Example Reporting Specifications for Jurisdiction X

Notes:
- Chose not to use default
- Needed new logic set (Infant reporting) - Highlight in Yellow

Example reporting specifications
- Diagnosis of Pertussis
- Pertussis as a significant condition contributing to death
- Pertussis as a cause of death

- Isolation of B. Pertussis by any method
- Detection of B. Pertussis nucleic acid by PCR
- Detection of B. Pertussis by antigen detection methods
- Detectinon of B. Pertussis IgM antibody by any methods

Clinical presentation of Pertussis (Symptoms only)
- Cough (any duration) - Necessary
- Inspiratory whoop - Necessary

Clinical presentation of Pertussis, Infant
- Infant <= 1 years of age
- Cough (any duration) - Necessary
- Apnea, Post-tussive vomiting, Paroxysmal Cough, Inspiratory whoop - optionals

Logic set for combination of DEM + CLIN not present in default; new logic set needed

INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

		DEFAULT - LOGIC SETS						
		Lab Reporting	Provider / Facility Reporting					Vital Records
			(1)	(2)	(3)	(4)	(5)	
Patient record being evaluated contains evidence of:			LAB	DX	CLIN	CLIN + EPI	DEM + CLIN	
Criterion Description	**Status**							
Clinical	**C**							
Pertussis (i.e., as a diagnosis or active problem)	D			S				
Cough (any duration)	N;D				N	N	N	
Inspiratory Whoop	D				N		O	
Paroxysmal cough or post-tussive vomiting	J						O	
Apnea	J						O	
Laboratory	**C**							
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D	S	S					
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D	S	S					
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D	S	S					
Demographic	**C**							
Age < 1 year	J						N	
Epidemiologic	**C**							
Contact of a person diagnosed with pertussis	D					O		
Member of a defined risk group during an outbreak	N;D					O		
Vital Records	**C**							
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S

Key for Status Column:

C = Category: Category of criteria, ex., clinical, laboratory, demographic, epidemiologic, vital records

N = National Criteria: National criteria for case reporting, taken from Section 6/Table 6B of CSTE Position Statement

D = Default Criteria: Reporting criteria induded in Default

J = Jurisdiction Specific Criteria: Reporting criteria not in the Default, but available for jurisdictions to use

Key for Reporting Criteria (taken from PS)

S = Sufficient: Criterion alone is sufficient to report a case

N = Necessary: Criteria in conjunction with all other "N" and any "O" criteria in the same column is required to report a case

O = Optional: At least one of these "O" criteria in each category in the same column-- in conjunction with all other "N" criteria in the same column-- is required to report a case

OptAv= This option is available for a jurisdiction to include in their jurisdictional rules. It is not required to select all or none.

USE DEFAULT? *Indicate Y/N in Box* N

Jurisdiction: Jurisdicti

Example Reporting Specifications for Jurisdiction X

Notes:
- Chose not to use default
- Needed new logic set (Infant reporting) - Highlight in Yellow

Example reporting specifications
- Diagnosis of Pertussis
- Pertussis as a significant condition contributing to death
- Pertussis as a cause of death

- Isolation of B. Pertussis by any method
- Detection of B. Pertussis nucleic acid by PCR
- Detection of B. Pertussis by antigen detection methods
- Detectinon of B. Pertussis IgM antibody by any methods

Clinical presentation of Pertussis (Symptoms only)
- Cough (any duration) - Necessary
- Inspiratory whoop - Necessary

Clinical presentation of Pertussis, Infant
- Infant <= 1 years of age
- Cough (any duration) - Necessary
- Apnea, Post-tussive vomiting, Paroxysmal Cough, Inspiratory whoop - optionals

Logic set for combination of DEM + CLIN not present in default; new logic set needed

INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

Patient record being evaluated contains evidence of:		DEFAULT - LOGIC SETS						
		Lab Reporting	Provider / Facility Reporting					Vital Records
			(1)	(2)	(3)	(4)	(5)	
			LAB	DX	CLIN	CLIN + EPI	DEM + CLIN	
Criterion Description	**Status**							
Clinical	**C**							
Pertussis (i.e., as a diagnosis or active problem)	D			S				
Cough (any duration)	N;D				N	N	N	
Inspiratory Whoop	D				N		O	
Paroxysmal cough or post-tussive vomiting	J						O	
Apnea	J						O	
Laboratory	**C**							
Identification of *Bordetella pertussis* by culture method in a clinical specimen, including identification tests performed on an isolate	D	S	S					
Detection of *Bordetella pertussis* nucleic acid by any method in a clinical specimen	D	S	S					
Detection of antibodies to *Bordetella pertussis* toxin by any method in a clinical specimen	D	S	S					
Demographic	**C**							
Age < 1 year	J						N	
Epidemiologic	**C**							
Contact of a person diagnosed with pertussis	D					O		
Member of a defined risk group during an outbreak	N;D					O		
Vital Records	**C**							
Death certificate lists pertussis as a cause of death or a significant condition contributing to death	N;D							S

criteria

status

logic sets

USE DEFAULT? *Indicate Y/N in Box* N

Jurisdiction: Jurisdicti

Example Reporting Specifications for Jurisdiction X

notes

Notes:
- Chose not to use default
- Needed new logic set (Infant reporting) - Highlight in Yellow

Example reporting specifications
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Clinical presentation of Pertussis, Infant
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INSTRUCTIONS | EXAMPLE (Completed) | WORKSHEET (Fill out) | Default Logic Sets (Ds) | Jurs. Options

Wrap-Up and Questions

Wrap-Up and Questions

Next Sessions

- Collection Training Part 1.5 Office Hours
  - Tuesday August 8, 2017
  - Thursday August 10, 2017
    - Bring your Questions, Comments & Suggestions
- RCKMS Training Part 2

Thank You!

CSTE National Office
2872 Woodcock Boulevard, Suite 250
Atlanta, Georgia 30341

T 770.458.3811
F 770.458.8516