Merlin Case Entering for HBsAg+ Pregnant Women

For questions contact:
Cristina Dusek, Statewide Perinatal Hepatitis B Prevention Program Coordinator
(850) 245-4444 ext. 2396

8/2013
Routine Case Finding Methods

- Perform case finding in Merlin on a weekly basis utilizing:
  - Chronic hepatitis B & C task list search
  - Electronic lab result (ELR) search
  - Follow-up with physicians or laboratories that report a hepatitis B positive woman of child-bearing age
Case Components

- Once a hepatitis B positive pregnant woman has been identified, each individual case must include the following, which is part of the Merlin surveillance system requirements:

  - **Profile:** Each individual added to the Merlin surveillance system has a profile. All labs and disease cases for this individual are added to this profile. The profile includes name, date of birth (DOB), and geographical information. When ELRs are received through Merlin, a profile is auto-created.

  - **Chronic Hepatitis B Case:** Each individual who tests positive for hepatitis B will need one chronic hepatitis B case added to their profile with an associated lab. The chronic hepatitis B case is used to track the individual over time, whereas the HBsAg+ pregnant woman case is used to track a pregnancy and infant. When a hepatitis B ELR is received in Merlin, a chronic hepatitis B case is auto-created and lab is attached. Lab results obtained after the initial chronic case is created auto attach to the chronic case and will show a recent update to the case in the Merlin Hepatitis B and C Task Lists.

  - **HBsAg+ Pregnant Woman Case:** Obstetric providers are required to test women during each pregnancy for HBsAg. Although other hepatitis B positive labs in a pregnant women would indicate the necessity to enter a case, a HBsAg will need to be obtained to meet case definition.
Case Components

- The components of the case you will need to enter will depend on how you were notified of the case and if the individual has an existing profile or chronic hepatitis B case.

- This case entering document is divided into sections based on how you are notified of the case.

- Sections in this document include:
  1. Entering case without an ELR
  2. Entering cases found on the Chronic Hepatitis B & C Task List in Merlin
  3. Entering cases found by ELR search in Merlin
Entering cases without ELR

Cases without an Electronic Laboratory Report (ELR) may include the following:

- Physician or laboratory reported cases that are not reported electronically in Merlin
- Paper reported cases that are not reported electronically in Merlin
Each individual with any labs or disease cases in Merlin will need a single profile. The profile includes name, DOB and geographic information. All disease cases for the individual should be attached to a single profile.

- First search to see if a profile exists by going to the Search tab in Merlin and searching by name
- If profile does not exist, create a profile (See slide on creating a profile)
A. If a profile exists, ensure the name and DOB in Merlin matches the name and date of birth of the reported individual
   - Click on the name to access the profile
B. The profile summary includes all disease cases and labs associated with an individual
   - Picture B illustrates an individual with an existing profile and salmonellosis case attached. In this case a profile will not need to be created
   - If a profile is not found during the search, create a profile (see next slide)
Creating a Profile

A. While on the Search tab notice the left toolbar
   • Under **New Profile** click **Create**

B. Enter Profile Detail-Name, DOB, race, ethnicity, address, phone number
   • Click **Save**
Creating a Chronic Hepatitis B Case

Each individual with a positive hepatitis B test (HBsAg, HBcAb, HBV DNA, HBeAg) will require one chronic hepatitis B case added to the profile.

A. The **Summary** choice under the left toolbar **Profile** heading indicates all cases and labs attached to the individual’s profile.
   - Picture A illustrates an individual profile with a chronic hepatitis B case already attached.
   - If a chronic hepatitis B case already exists in the Profile Summary, do not create another.

B. Picture B illustrates details included in a profile.
   - If no chronic hepatitis B case exists on the individuals profile, create a new chronic hepatitis B case (see next slide).
A. While in the newly created individual profile
   - On left toolbar under **New Case** click **Create**

B. For chronic hepatitis B use Disease Code 07032
   - Add all dates (**CHD Notified Date** and one other date field is required)
   - Click **Continue**
Complete Information (All items with dark blue text are required fields)

- Enter Case Information
- Enter Clinical Information
- Diagnosis (Dx) Status will be completed in another screen
- Profile Information at time of diagnosis
- Sensitive Employment
- Click Save
A. On left toolbar under **Case** heading click **Lab Results**
B. Click on **New Lab Result**
C. Use drop down box to select appropriate lab to attach click **Continue**
- Enter **Merlin Test Information**
- **Items with dark blue text** are required fields
- If it is a physician or paper reported case of hepatitis B, a lab result must be obtained to complete Merlin test information
- Lab results added to chronic hepatitis B cases could also include: HBsAg, HbcAb, HBV DNA, HBeAg
Add Facility and Provider Information to manually entered lab

A. By clicking **Get Lab**, **Get Provider**, or **Get Facility** you may search and add facility and provider to the lab results
B. Enter a facility or physician name and click **Search**.
C. Click on the facility or provider that matches the original lab result
D. Click **Link Resource**
   - Do the same for provider and ordering facility
   - When done click **Save**
E. Enter other labs by clicking **Yes** on the next screen
   - If no more labs to enter click **NO**
Reporting and Submitting a Chronic Hepatitis B Case

A. On left toolbar under Case heading click Basic Data

B. On the left toolbar heading Case Details click Case Definition

C. Scroll to the bottom of the Case Definition page and click Set DX Status

- When Basic Data, Lab results, and DX status are completely documented you may report the case and submit for review (see next slide)
A. On left toolbar under the Case heading click Basic Data

B. At bottom of the Basic Data page click Report

C. Ensure you are submitting the correct data and click Submit
   - The case is now reported to CDC
   - No further investigation is required for chronic hepatitis B cases
A pregnant woman who is found to be hepatitis B positive will need a case and a corresponding lab created with the corresponding profile

A. Under left toolbar **Profile** heading click **Summary**
B. Once in the **Summary** screen on left toolbar under **New Case** click **Create**
C. Use drop down box to select Disease Code 07039
   - Enter dates
   - Click **Continue**
Entering Basic Information for a HBsAg+ Pregnant Woman Case

Complete Information (All items with dark blue text are required fields)
- Enter Case Information
- Enter Clinical Information
- Diagnosis (DX) Status will be completed in another screen
- Profile Information at time of diagnosis
- Sensitive Employment
- Click Save
Adding a Lab Result to a HBsAg+ Pregnant Woman Case

A. On left toolbar under **Case** click **Lab Results**

B. Click **New Lab Result**

C. Use drop down box to select test
   - Click **Continue**
Adding a Lab Result to a HBsAg+ Pregnant Woman Case

• Enter Merlin Test Information
  • All items with dark blue text are required fields
• May re-use test attached to a recently entered chronic case (within 60 days) but lab will need to be re-entered
Add Facility and Provider Information to a manually entered lab:

A. By clicking Get Lab, Get Provider, or Get Facility you may search and add facility and provider to the lab results
B. Enter a facility or physician name and click Search.
C. Click on the facility or provider that matches the original lab result
D. Click Link Resource
   • Do the same for provider and ordering facility
   • When done click Save
E. Enter other labs by clicking Yes on the next screen
   • If no more labs to enter click NO
Reporting a HBsAg+ Pregnant Woman Case

A. On left toolbar under Case heading click Basic Data
   • Under the left toolbar heading Case Details click Case Definition

B. Check boxes if appropriate criteria are met
   • Scroll to the bottom of the Case Definition page and click Set DX Status
Completion of Basic Data, Lab Results, and Dx Status will allow reporting of the case

- On left toolbar under Case click Basic Data
- Scroll to the Bottom of the Basic Data and click Report
- The case is now reported
- The next step is to investigate the case and submit for review
Submitting a HBsAg+ Pregnant Woman Case for Review

- Investigation should be done prior to submitting a case for review (Make sure to save all information entered)
- Contacts (Includes type of contact, follow-up, vaccination and disease status)
- Mother Information (Includes treatment, background, delivery)

A. On the left toolbar under **Case Details** click **Mother Information**
- Although only EDC is required to submit, complete other information if known
- To enter contact information go to left toolbar, under **Case Details** click **Contact Information**
- Enter as much information as possible

B. Click in box to **Submit CRF**
- Click **Submit**

C. Case will be reviewed and sent back for more information if necessary
Case Entering for a Pregnant Woman Found On the Chronic Hepatitis B and C Task List

- Hepatitis B cases reported by ELR
  - Merlin will automatically create a profile for individuals with an ELR
  - Merlin will auto-create a chronic hepatitis B case or add an updated lab to the existing profile if a chronic hepatitis B case is already attached
A. Go to Task Tab
B. Under Cases click Chronic Hepatitis B & C
   • Do not skip this search because there are no numbers next to the search, there will not be a number next to this option even if cases exist
C. On left toolbar click on Common Criteria
D. Narrow your search to only the Chronic Hepatitis B Disease Code (07032)
E. Apply Additional Filter: Females, child-bearing age, Show activity for Both Cases and Labs
When an ELR is received for HBsAg, HBV DNA, HBeAg or HBcAb, Merlin will auto-create a chronic hepatitis B case and attach the lab to the case.

When an ELR is received for HBsAg, HBV DNA, HBeAg or HBcAb, and the individual profile already has a chronic hepatitis B case, Merlin will attach the lab to the existing chronic case and notify you of the recent lab in the task list.

The ordering provider and facility indicated will be from the original lab when the chronic case was first created.

Make sure to click on the case number and view the most recent lab and ordering facility to help determine pregnancy status.

Any women of child-bearing age who presents on this task list should be investigated to determine pregnancy status.
A. When you click on a Case # from the task list you will be taken directly to the Case Information screen

B. To view the profile information and summary of cases and labs, click on Summary under left toolbar heading Profile
   - Picture B illustrates a profile that has an auto-created chronic hepatitis B case and labs attached
   - The individual will need to be investigated to verify pregnancy status
   - Each lab will need to have a corresponding HBsAg+ Pregnant Woman case if pregnant
• Investigate pregnancy status by contacting ordering provider of hepatitis B lab
• If the woman is pregnant, add a HBsAg+ Pregnant Woman case
• If a lab other than HBsAg was done, obtain required HBsAg result from provider
  • Providers are required to test for HBsAg at initial pregnancy visit and again at 28 to 32 weeks gestation for every pregnancy regardless of past test results
A pregnant woman who is found to be hepatitis B positive will need a case and corresponding lab created under the profile

A. Under left toolbar Profile heading click Summary
   - Once in the Profile Summary screen on left toolbar under New Case click Create
B. Use drop down box to select Disease Code 07039
   - Enter dates
   - Click Continue
Entering Basic Information for HBsAg+ Pregnant Woman Case

Complete Information (All items with dark blue text are required fields)

- Enter Case Information
- Enter Clinical Information
- Diagnosis (Dx) Status will be completed in another screen
- Profile Information at time of diagnosis
- Sensitive Employment
- Click Save
Adding a Lab Result to HBsAg+ Pregnant Woman Case

A. On left toolbar under **Case** click **Lab Results**
B. Click **New Lab Result**
C. Use drop down box to select test
   - Click **Continue**
Adding a Lab Result to HBsAg+ Pregnant Woman Case

Enter Merlin Test Information
- All items with dark blue text are required fields
- May re-use test attached to a recently entered chronic case (within 60 days) but lab will need to be re-entered.
Add Facility and Provider Information to manually entered lab

A. By clicking on **Get Lab**, **Get Provider**, or **Get Facility** you may search and add facility and provider to the lab results

B. Enter a facility or physician name and click **Search**.

C. Click on the facility or provider that matches the original lab result

D. Click **Link Resource**
   - Do the same for provider and ordering facility
   - When done click **Save**

E. Enter other labs by clicking **Yes** on the next screen
   - If no more labs to enter click **NO**
A. On left toolbar under Case heading click Basic Data
   • Under the left toolbar heading Case Details click Case Definition
B. Check boxes if appropriate criteria are met
   • Scroll to the bottom of the Case Definition page and click Set DX Status
Completion of Basic Data, Lab Results, and Dx Status will allow reporting of the case:

- On left toolbar under **Case** click **Basic Data**
- Scroll to the Bottom of the Basic Data and click **Report**
- The case is now reported
- The next step is to investigate the case and submit for review
Submitting a HBsAg+ Pregnant Woman Case for Review

- Investigation should be done prior to submitting case for review (Make sure to save all information entered)
- Contacts (Includes type of contact, follow-up, vaccination and disease status)
- Mother Information (Includes treatment, background, delivery)

A. On the left toolbar under Case Details click Mother Information
- Although only EDC is required to submit, complete other information if known
- To enter contact information on left toolbar under Case Details click Contact Information
- Enter as much information as possible

B. Click in box to Submit CRF
- Click Submit
- Case will be reviewed and sent back for more information if necessary
Entering Cases Found by ELR Search
Performing an ELR Search to Find HBsAg+ Pregnant Women

A. Perform an ELR search
   - Go to the Search tab in Merlin

B. On left toolbar under Labs click ELR Search

C. Select county

D. Select date range and
   - Use Disposition drop down box to select ALL labs

E. Click Search
Performing an ELR Search to Find HBsAg+ Pregnant Women

A. An ELR search will create a line list of all ELRs reported
   - Be watchful of hepatitis B lab results in women of child-bearing age that may not have appeared on the Chronic Hepatitis B and C Task List

B. Click on the accession number to go directly to the lab result
C. Test information and ordering facility and provider can be found in the Lab Details
   - Investigate positive hepatitis B labs in women of child-bearing age to obtain pregnancy status
Creating a Chronic Hepatitis B Case

Each individual with a positive hepatitis B test (HBsAg, HBcAb, HBV DNA, HBeAg) will require one chronic hepatitis B case added to their profile.

A. The **Summary** choice under the left toolbar **Profile** heading indicates all cases and labs attached to the individual's profile.
   - Picture A illustrates an individual profile with a chronic hepatitis B case already attached.
   - **If a chronic hepatitis B case already exists in the Profile Summary, do not create another.**

B. Picture B illustrates details included in a profile.
   - If no chronic hepatitis B case exists on the individual's profile, create a new chronic hepatitis B case (see next slide).
Creating a Chronic Hepatitis B Case

A. While in the individual profile
   - On left toolbar under **New Case** click **Create**

B. For Chronic Hepatitis B use Disease Code 07032
   - Add all dates (**CHD Notified Date and one other date field is required**)
   - Click **Continue**
Entering Basic Case Information for a Chronic Hepatitis B Case

Complete Information (All items with dark blue text are required)
- Enter Case Information
- Enter Clinical Information
- Diagnosis (Dx) Status will be completed in another screen
- Profile Information at time of diagnosis
- Sensitive Employment
- Click Save
Adding a Lab Result to a Chronic Hepatitis B Case

A. On left toolbar under Case heading click Lab Results
B. Click on New Lab Result
C. Use drop down box to select appropriate lab to attach click Continue
Adding a Lab Result to a Chronic Hepatitis B Case

- Enter Merlin Test Information
- Items with dark blue text are required fields
- If it is a physician or paper reported case of hepatitis B, a lab result must be obtained to complete Merlin test information
- Lab results added to chronic hepatitis B cases could also include: HBsAg, HBcAb, HBV DNA, HBeAg
Add Facility and Provider Information to manually entered lab

A. By clicking on **Get Lab**, **Get Provider**, or **Get Facility** you may search and add facility and provider to the lab results

B. Enter a facility or physician name and click **Search**

C. Click on the facility or provider that matches the original lab result

D. Click **Link Resource**
   - Do the same for provider and ordering facility
   - When done click **Save**

E. Enter other labs by clicking **Yes** on the next screen
   - If no more labs to enter click **NO**
Reporting and Submitting a Chronic Hepatitis B Case

A. On left toolbar under Case heading click Basic Data
B. On the left toolbar heading Case Details click Case Definition
C. Scroll to the bottom of the Case Definition page and click Set DX Status
   - When Basic Data, Lab results and DX status is complete you may report the case and submit for review (see next slide)
Reporting and Submitting a Chronic Hepatitis B Case

A. On left toolbar under the **Case** heading click on **Basic Data**

B. At bottom of the Basic Data page click **Report**

C. Ensure you are submitting the correct data and click **Submit**
   - The case is now reported to CDC
   - No further investigation is required for chronic hepatitis B cases
A pregnant woman who is found to be hepatitis B positive will need a case and a corresponding lab created under the profile.

A. Under left toolbar **Profile** heading click on **Summary**
B. Once in the **Summary** screen on left toolbar under **New Case** click **Create**
C. Use drop down box to select Disease Code 07039
   - Enter dates
   - Click **Continue**
Entering Basic Information for a HBsAg+ Pregnant Woman Case

Complete Information (All items with dark blue text are required fields)

- Enter Case Information
- Enter Clinical Information
- Diagnosis (Dx) Status will be completed in another screen
- Profile Information at time of diagnosis
- Sensitive Employment
- Click Save
Adding a Lab Result to a HBsAg+ Pregnant Woman Case

A. On left toolbar under Case click Lab Results
B. Click New Lab Result
C. Use drop down box to select test
   - Click Continue
Adding a Lab Result to a HBsAg+ Pregnant Woman Case

- Enter Merlin Test Information
  - All items with dark blue text are required fields
- May re-use test attached to a recently entered chronic case (within 60 days) but lab will need to be re-entered.
Add Facility and Provider Information to manually entered lab result:

A. By clicking on **Get Lab**, **Get Provider**, or **Get Facility** you may search and add facility and provider to the lab results.

B. Enter a facility or physician name and click **Search**.

C. Click on the facility or provider that matches the original lab result.

D. Click **Link Resource**
   - Do the same for provider and ordering facility
   - When done click **Save**

E. Enter other labs by clicking **Yes** on the next screen
   - If no more labs to enter click **NO**
Reporting a HBsAg+ Pregnant Woman Case

A. On left toolbar under **Case** heading click **Basic Data**
   - Under the left toolbar heading **Case Details** click **Case Definition**

B. Check boxes if appropriate criteria are met
   - Scroll to the bottom of the **Case Definition** page and click **Set DX Status**
Reporting a HBsAg+ Pregnant Woman Case

Completion of Basic Data, Lab Results and Dx Status will allow reporting of the case

- On left toolbar under **Case** click **Basic Data**
- Scroll to the Bottom of the Basic Data and click **Report**
- The case is now reported
- The next step is to investigate the case and submit for review
Submitting a HBsAg+ Pregnant Woman Case for Review

- Investigation should be done prior to submitting case for review (Make sure to save all information entered)
- Contacts (Includes type of contact, follow-up, vaccination and disease status)
- Mother Information (Includes treatment, background, delivery)

A. On the left toolbar under **Case Details** click **Mother Information**
   - Although only EDC is required to submit, complete other information if known
   - To enter contact information on left toolbar under **Case Details** click **Contact Information**
   - Enter as much information as possible

B. Click in box to **Submit CRF**
   - Click **Submit**
   - Case will be reviewed and sent back for more information if necessary