

# One Health Harmful Algal Bloom System (OHHABS) Guidance: Navigating Reports in OHHABS

Updated 08/30/2021



**Centers for Disease  
Control and Prevention**  
National Center for Emerging  
and Zoonotic Infectious Diseases

# Table of Contents

1. Creating New Reports/Forms .....	3
1.1 Creating a New Report.....	3
1.2 Creating New Human or Animal Case Forms.....	4
2. Viewing and Editing Reports/Forms .....	6
2.1 Duplicate a Case Form within an OHHABS Report .....	7
2.2 Delete an Existing OHHABS Report.....	9
2.3 Delete an OHHABS Form within a Report.....	9
2.4 Edit an OHHABS Form within a Report .....	9
2.5 Move a Case Form to Another Report.....	10
2.6 Edit the Name, Year, Agency, or Owner of an OHHABS Report .....	11
2.7 Edit the Name of a Case Form .....	12
3. Classifying an Event or Case.....	13
4. Finalizing a Report .....	14
5. Sharing a Report .....	16

This document was prepared by CDC OHHABS staff.

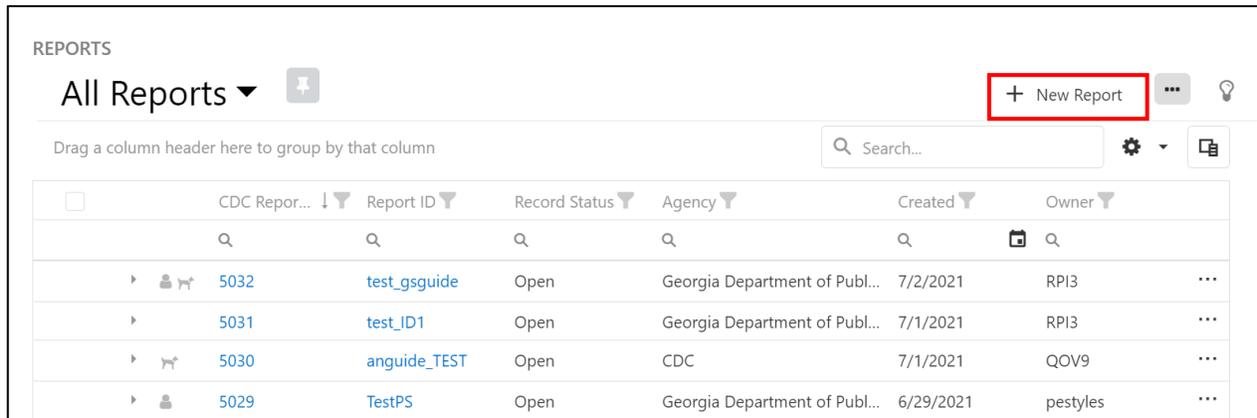
For general questions on reporting or the guidance document, email [OHHABS@cdc.gov](mailto:OHHABS@cdc.gov).

To access more information about OHHABS, visit the OHHABS public website available at <https://www.cdc.gov/habs/ohhabs.html>.

# 1. Creating New Reports/Forms

## 1.1 Creating a New Report

To create a new OHHABS report, click on the “New Report” button at the top right of the OHHABS Reports page (see below).



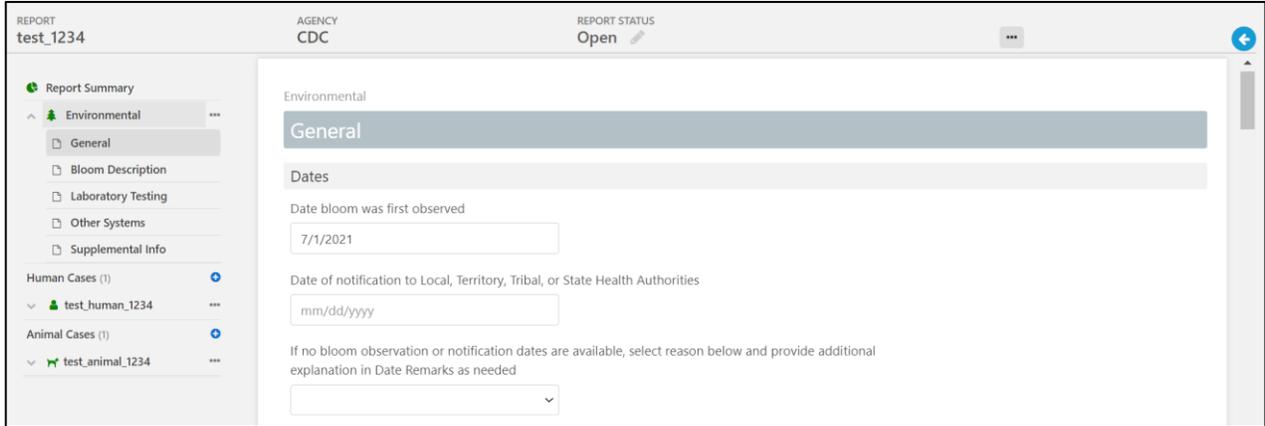
After selecting “New Report,” a pop-up window will appear prompting entry of the following (see below):

The 'New Report' pop-up window has a title bar with 'New Report' and a close button (X). It contains two input fields: 'Agency' with a dropdown menu showing 'CDC' and a 'Report ID' with a text input field. At the bottom, there are 'Cancel' and 'Save' buttons.

- **Note:** The “Report ID” is a *unique identification (alpha-numeric) with a 50 character maximum* for the report. Each state, local, or territorial health department decides how to name their reports. The assigned “Report ID” must be unique and can only be used once within a state or territory.

Once the required fields are entered in the “New Report” window, click save. You will then be directed to the Environmental Form page within the report, where environmental data may be entered (see below).

- **Note:** Only one Environmental Form can be present within a report, and this form is created when the report is initiated; therefore, users can only add new Animal Case Forms or Human Case Forms within a report.

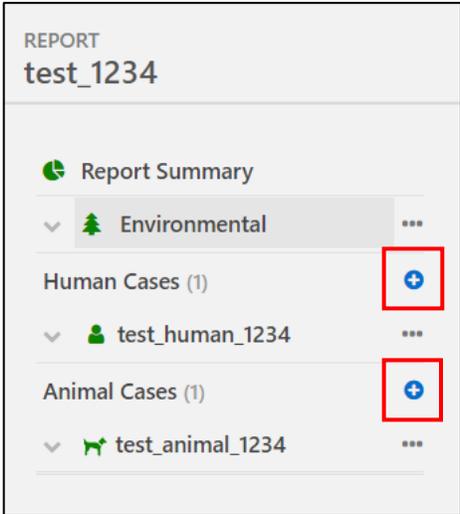


**Note:** While creating a new report prompts users to the Environmental Form first, *it is not required to complete the Environmental Form prior to entering a human case or animal case.* To complete a Human Case Form or Animal Case Form first, see section 1.2 Creating New Human or Animal Case Forms below.

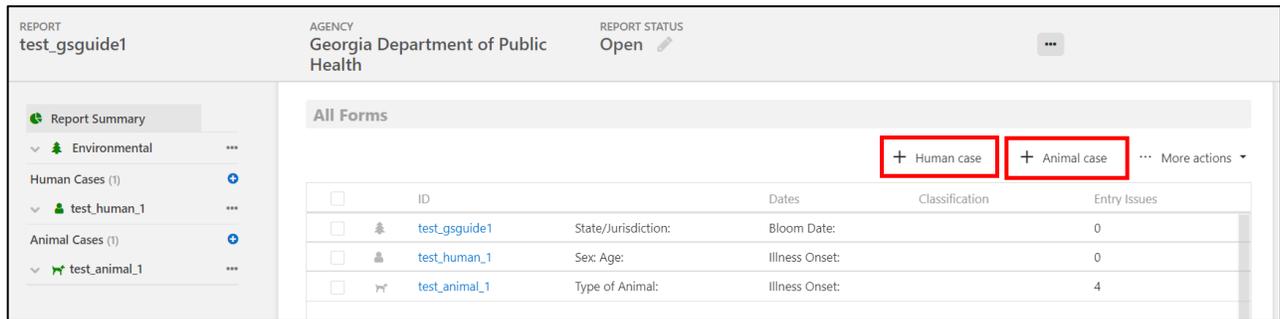
### 1.2 Creating New Human or Animal Case Forms

There are two ways to add Human or Animal Case Forms to report HAB-associated human or animal cases of illness.

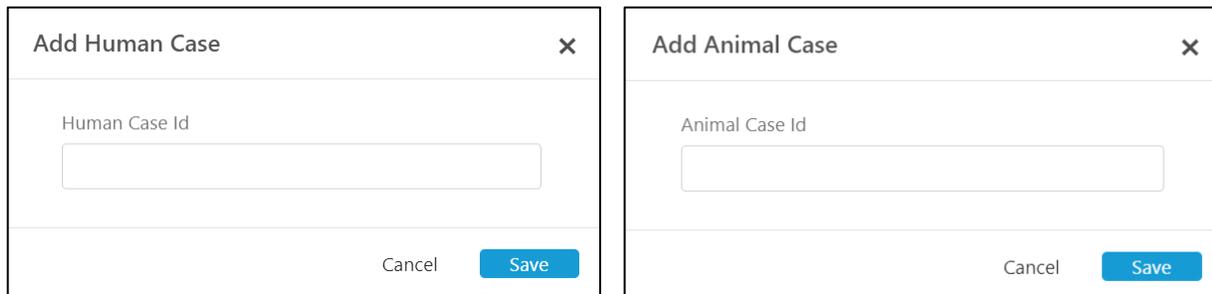
- Within a report, click on the blue add icon next to the “Human Cases” or “Animal Cases” sections on the left side of the page (see below).



- From the Report Summary page, under the All Forms section, click on the add “Human case” or add “Animal case” buttons (see below).



Another pop-up window will then appear, and you will be prompted to enter either the “Human Case ID” or the “Animal Case ID” (see below).



- Click save on the pop-up to open the Human Case Form or Animal Case Form.
- **Note:** If you create a report that includes a Human Case Form or an Animal Case Form and are prompted to create a “Case ID”, the Case ID **must be a unique identification (alpha-numeric) with a maximum of 50 characters**. The Case ID cannot be the same as the Report ID. The Case ID must be unique within a report, as it differentiates individual human and animal cases within a report. For example, in a report, if a “Case ID” is named Case1, no other Human Case Forms or Animal Case Forms in the report can be named Case1.

For additional guidance on completing Environmental Forms, Human Case Forms and Animal Case Forms, please refer to the OHHABS Form Guidance on the OHHABS website available at <https://www.cdc.gov/habs/using-ohhabs.html>.

## 2. Viewing and Editing Reports/Forms

To view an individual report and the associated Environmental Form, Human Case Forms, or Animal Case Forms, click on either the CDC Report ID or the Report ID from the OHHABS Reports (All Reports) page.

Once on the report page for an individual report, users can view a “Report Summary” (see below), view and edit forms, or add new forms to the report.

The screenshot shows the 'Report Summary' page for report ID 'test\_gsguide'. The header includes the report name, agency 'Georgia Department of Public Health', and report status 'Open'. The main content area is divided into three sections: 'Event', 'Human', and 'Animal'. The 'Event' section shows 'Classification: Confirmed' and 'Water type: Not provided'. The 'Human' section shows '1 human case' and 'Exposure routes: Not provided'. The 'Animal' section shows '1 animal case form' and 'Total animals affected: 1'. Below these sections are two panels: 'Timeline' and 'Location'. The 'Timeline' panel shows a vertical axis with three points: 'Bloom date' on 7/1/2021, 'First animal onset' on 7/1/2021, and 'First human onset' on 7/2/2021. The 'Location' panel shows a map of the Southeastern United States with a red pin over Atlanta, Georgia.

The left side menu of the report lists the Environmental Form first, followed by any Human Case Forms or Animal Case Forms.

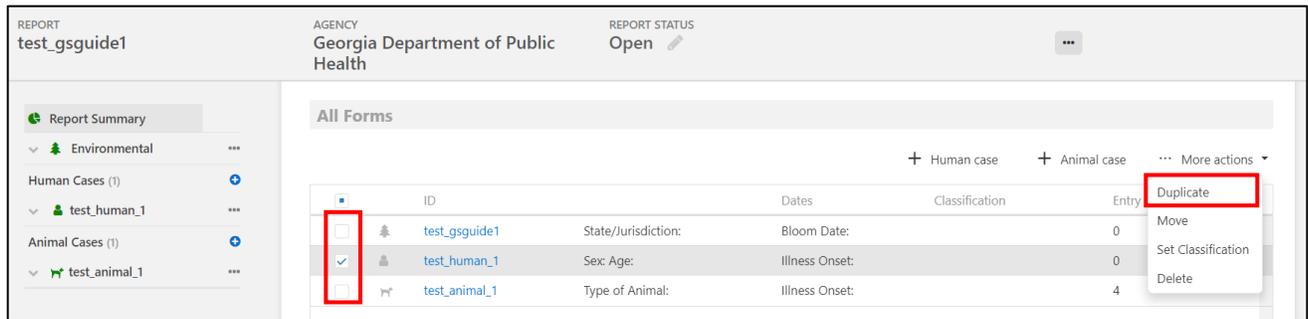
The right side displays a “Report Panel” that contains general information about the report and lists incomplete entry items. The panel also displays functions for sharing the report, commenting, uploading or viewing attachments, and viewing the report history. **Note:** The report panel will only appear once a form has been selected. To hide it, click the blue arrow button on the top right side of the Report page.

The screenshot shows the 'Report' page for report ID 'test\_gsguide'. The header includes the report name, agency 'Georgia Department of Public Health', and report status 'Open'. The left side menu is visible, showing 'Report Summary', 'Environmental', 'Human Cases (1)', and 'Animal Cases (1)'. The right side panel, titled 'Report', contains the following information: CDC Report ID: 5032, Report ID: test\_gsguide, Reporting Year: 2021, Agency: Georgia Department of Public Health, and Owner: Keri Hall. Below this information is a 'Change' button. The 'Event Classification' is 'Confirmed'. The 'Sharing' section shows 0 shares. The 'Report Status' is 'Open'. At the bottom of the panel, there is a notification: 'There are 9 incomplete entry items for this form.'

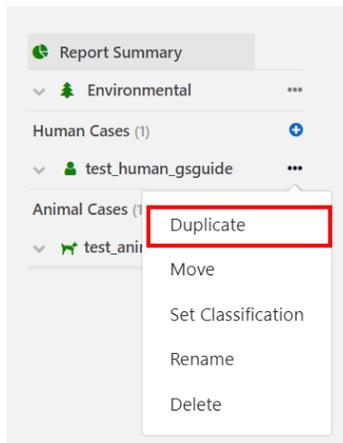
## 2.1 Duplicate a Case Form within an OHHABS Report

When multiple case forms will include the same information (e.g., location, exposure activities), an existing form can be duplicated to reduce data entry. There are two ways to duplicate a case form within an OHHABS report.

- **From the Report Summary page:** Under the “All Forms” section, click on the box to the left of the Human Case Form or Animal Case Form that you want to duplicate. Then click the “More Actions” button on the top right side of the section and click on “Duplicate” (see below).



- **Within a report:** Click on the ellipsis to the right of the case form that you want to duplicate. Click on “Duplicate” (see below).



A series of pop-up windows will then appear, prompting you to complete the following steps:

- **Step 1:** Select the number of duplicates you would like to create from the selected case form.

**Case Duplication: Step 1 of 3** ×

Human case form:  
**test\_human\_gsguide**

How many copies would you like to create?

Cancel Next

- **Step 2:** Select the fields to be duplicated from the original case form.

**Case Duplication: Step 2 of 3** ×

Select which fields to copy

<input checked="" type="checkbox"/>	Field	Value
▼ General Information		
<input checked="" type="checkbox"/>	Residence state	
<input checked="" type="checkbox"/>	Case Classification	
▼ Dates		
<input checked="" type="checkbox"/>	First exposure	
<input checked="" type="checkbox"/>	First exposure time	
<input checked="" type="checkbox"/>	Last exposure	7/2/2021
<input checked="" type="checkbox"/>	Last exposure time	
<input checked="" type="checkbox"/>	Illness onset	7/2/2021
<input checked="" type="checkbox"/>	Interview date	

Cancel Previous Next

- **Step 3:** Create names for the duplicated Case IDs. A base name will be pre-populated using the Case ID of the original form. For example, if the original form ID is “HumanCase”, the proposed base for duplicates would be “HumanCase\_copy” and new forms would be created as “HumanCase\_copy1”, “HumanCase\_copy2”, etc. Users have the option to edit the base name or manually name each duplicate form during this step.

**Case Duplication: Step 3 of 3** ×

Specify names for the new copies

Base name pattern for form copies

Apply

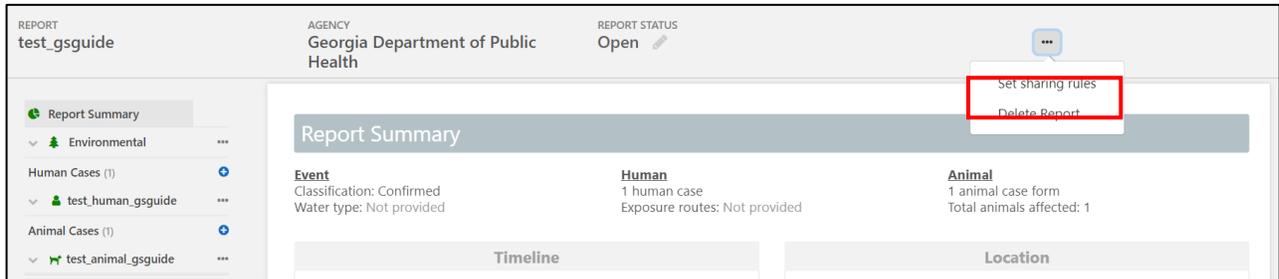
New case names (editable)

#	Name
1	test_human_gsguide_copy1

Cancel Previous Create

## 2.2 Delete an Existing OHHABS Report

To delete an existing OHHABS report, navigate to the individual Report page. Click on the ellipsis toward the top right of the page, and then click on “Delete Report” (see below).

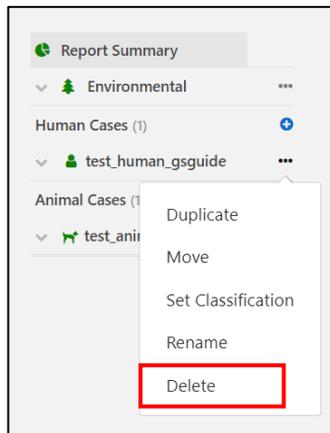


A pop-up window will then appear, and users must click on “Delete” to complete report deletion.

- Note: All forms, information, and attachments will be deleted when the report is deleted.

## 2.3 Delete an OHHABS Form within a Report

To delete a Human Case Form or an Animal Case Form, navigate to the individual Report page. Next, navigate to the left side menu where the case forms are listed. Click on the ellipses button next to the case form that you would like to delete, and then click “Delete” (see below).



A pop-up window will then appear, and users must click on “Delete” to complete the case form deletion.

## 2.4 Edit an OHHABS Form within a Report

To edit an existing Environmental Form, Human Case Form, or Animal Case Form, click on the form name tab on the left side of the individual Report page. This opens the form, and sections of the form may be edited as needed.

- **Note:** For more information about completing Environmental Forms, Human Case Forms, and Animal Case Forms, please review the OHHABS Form Guidance on the OHHABS website available at <https://www.cdc.gov/habs/using-ohhabs.html>.

## 2.5 Move a Case Form to Another Report

There are two ways to move a case form to a different report.

- **From the Report Summary page:** Once on the Report Summary page, navigate to the “All Forms” section. Click the box on the left side of the case form that you would like to move. Next, click the “More actions” button toward the upper right side of the section and click on “Move” (see below).

The screenshot shows the OHHABS interface for report 'test\_gsguide1' at the Georgia Department of Public Health. The 'All Forms' section contains a table with the following data:

ID	Dates	Classification	Entry
test_gsguide1	State/Jurisdiction: Bloom Date:		0
test_human_1	Sex: Age: Illness Onset:		0
test_animal_1	Type of Animal: Illness Onset:		4

A red box highlights the checkbox for 'test\_human\_1'. A 'More actions' dropdown menu is open, showing options: Duplicate, Move, Set Classification, and Delete. The 'Move' option is highlighted with a red box.

- **In the left side menu for the report:** Click on the ellipsis button next to the form that you want to move. Click on “Move” (see below).

The screenshot shows the left side menu for the report. The menu items are: Report Summary, Environmental, Human Cases (1), test\_human\_gsguide, and Animal Cases (1). A dropdown menu is open for 'test\_animal\_1', showing options: Duplicate, Move, Set Classification, Rename, and Delete. The 'Move' option is highlighted with a red box.

A pop-up window will appear, prompting the user to enter either the Report ID or the CDC ID to which the form will be reassigned. After entering this information, click “Move” to finish moving the case form.

## 2.6 Edit the Name, Year, Agency, or Owner of an OHHABS Report

To edit the Report ID, Agency, or Owner of an individual report, navigate to the Report page for the report. In the Report Panel on the right side, click on “Change” (see below).

*Note: These actions will be restricted to administrative users and may not be available.*

Report	
CDC Report ID:	5035
Report ID:	test_1234
Reporting Year:	2021
Agency:	CDC
Owner:	Keri Hall
<a href="#">Change</a>	

A pop-up window will appear, allowing the user to change the Report ID, Year, Agency, or Owner. Users can then edit the fields and click “Save” to finalize the changes (see below).

- **Note:** The Report ID must be unique and can only be used once within a state or territory. The Environmental Form for a report is automatically assigned the same name as the Report ID. When the Report ID is changed, the associated Environmental Form name will be changed as well.

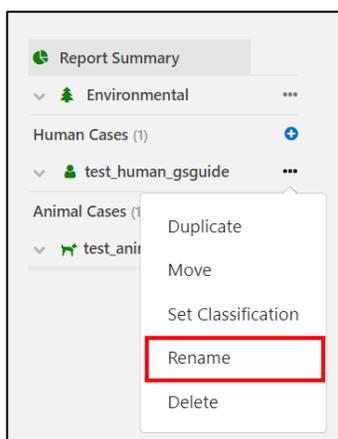
The image shows a 'Record' form with the following fields:

- Report ID:** A text input field containing 'test\_edit\_1234'.
- Reporting Year:** A dropdown menu showing '2021'.
- Owner:** A dropdown menu showing 'Keri Hall (RPI3, CDC)'.
- Agency:** A dropdown menu showing 'CDC (CDC)'.

At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

## 2.7 Edit the Name of a Case Form

To edit the name of a Human Case Form or Animal Case Form, navigate to the Report page for the report associated with the case form. In the left side menu for the report, click on the ellipsis to the right of the form that you want to rename. Click on “Rename” (see below).

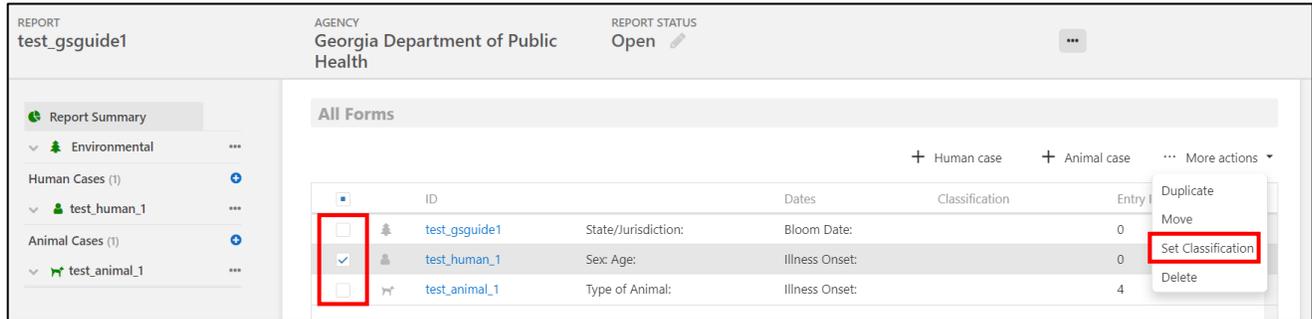


A pop-up window will appear, prompting the user to enter a new Human Case ID or Animal Case ID. Once the new name is entered, click save.

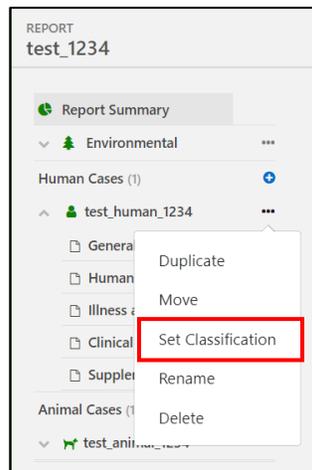
### 3. Classifying an Event or Case

There are two ways to classify a HAB-event or HAB-associated illness within an OHHABS report.

- **From the Report Summary page:** In the All Forms section, click on the box to the left of the form name that you want to classify. Click on the “More Actions” button in the upper right corner of the section, and then click on “Set Classification” (see below).



- **In the left side menu for the report:** Click on the ellipsis button next to the form that you want to classify. Click on “Set Classification” (see below).



- A pop-up window will then appear, with specific fields to complete based on the form type being classified. Users can fill out this OHHABS classification worksheet to receive a suggested classification for the event or case, based on the information submitted. Users can choose to use the suggested classification or select their own classification and may choose to provide a comment (see below).

- Environmental events may have a classification as either Suspected or Confirmed.
- Human and Animal cases may have a classification as Suspected, Probable or Confirmed.
- **Note:** HAB events or cases must be classified before a report can be finalized in OHHABS.

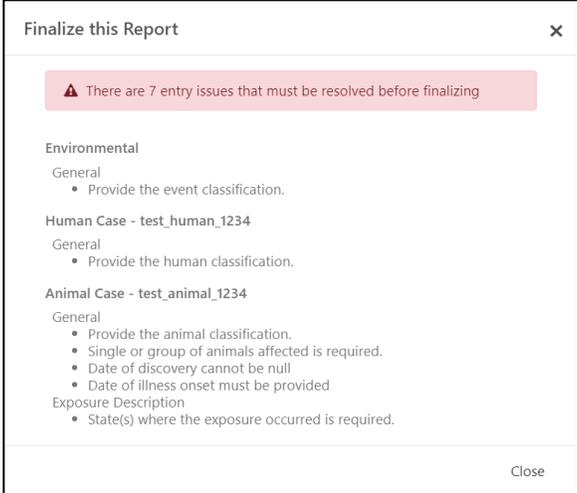
For more information about classification criteria, please see the event and case definitions document on the OHHABS website available at <https://www.cdc.gov/habs/using-ohhabs.html>.

## 4. Finalizing a Report

To finalize a report in OHHABS, navigate to the individual Report page. In the top header for the report, under “Report Status,” click on the pencil icon.

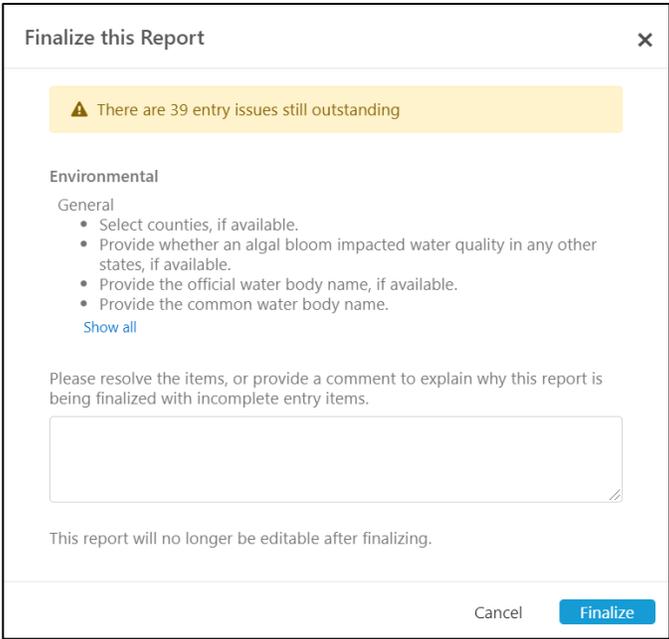
- **Open:** All OHHABS reports are automatically assigned an Open status when they are created. These reports are editable by administrative and designated read/write users. The workflow for changing a report from “Open” to “Finalize” within a state may vary.
- **Submit for Review:** If your OHHABS administrator has implemented this report review process, click on “Submit for Review”. This will update the report status to notify the reviewer(s) that a report is ready for approval. It is up to individual states to determine whether or not to use this report status.
- **Finalize:** If your state does not use the “Submit for Review” status or you are an administrative user approving a report, click on “Finalize” (see below).

A pop-up window will appear. If all required information has been entered into the report, the report can be finalized. If any required information is outstanding from the report, a red warning message will appear, and required outstanding fields will be listed in the pop-up window (see below). A report can be finalized only when all the required fields within each form are filled in.

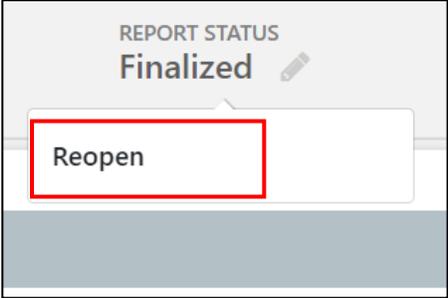


Exit the finalization pop-up window, return to each form, and complete the missing information. Once all the missing information has been entered, return to the finalization process to complete report finalization.

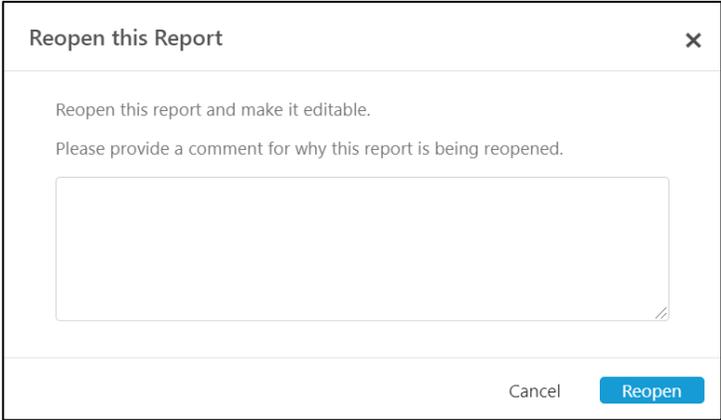
If all required information is entered in the report, but some preferred information is outstanding, the finalization pop-up window will display a yellow warning message, and preferred outstanding fields will be listed (see below). Preferred outstanding fields are not required to be entered for report finalization. However, CDC uses many of these fields in data management and analysis of OHHABS data.



Once a report is finalized, it cannot be edited unless the status is reset to "Open." To reopen a finalized report, click on the pencil icon under "Report Status" and then click on "Reopen" (see below).'



A pop-up window will appear, prompting users to enter an optional comment explaining why the report is being reopened (see below). Click "Reopen" to confirm action.



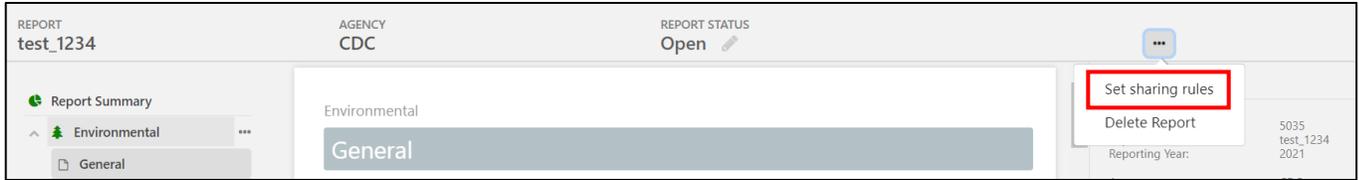
- **Note:** Finalized reports that are reopened need to be refinalized manually after the report has been updated.

## 5. Sharing a Report

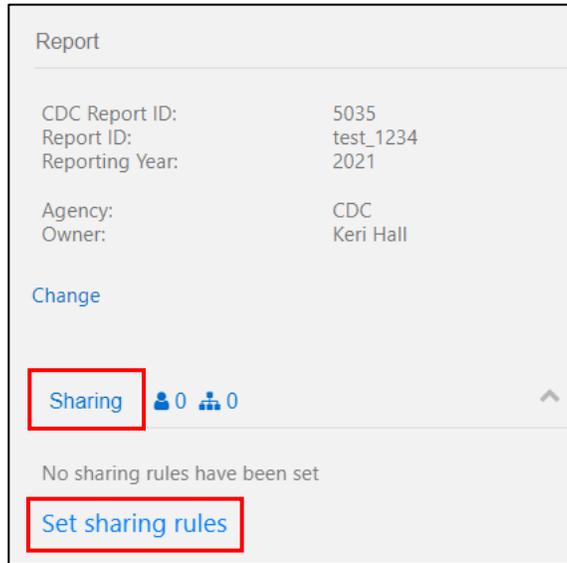
Users can share a report with another jurisdiction for multi-state events to support data entry, review, or use of report data. Only users from the authoring agency that have administrative rights can share a report. There are no expiration dates to how long reports are shared and users can un-share a report at any given point.

There are two ways to share a report with another user or another agency. For both, navigate to the Report page for the report you want to share.

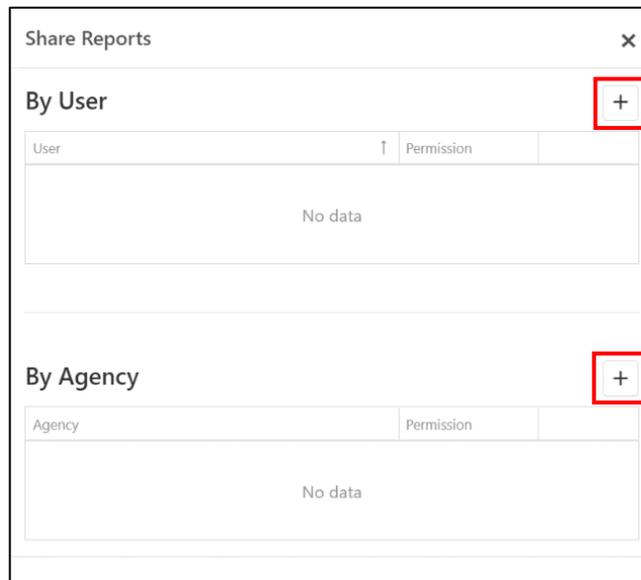
- **In the top right corner of the page:** Click on the ellipsis, and then click on "Set sharing rules" (see below).



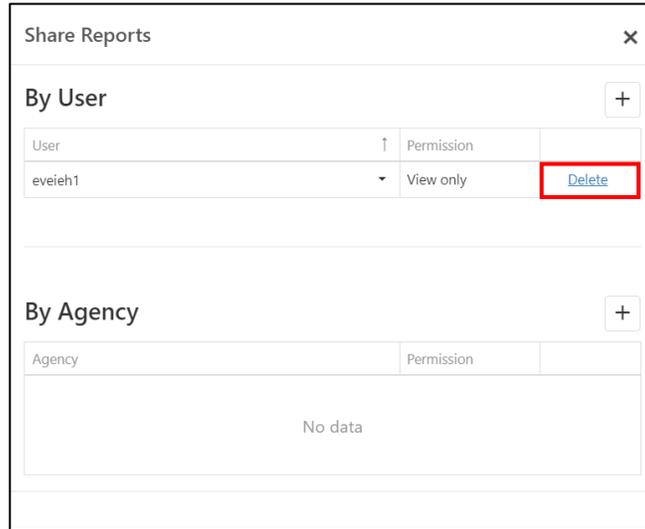
- **In the Report Panel on the right side of the Report page:** Click on “Sharing,” and then click on “Set sharing rules” (see below).



A “Share Reports” pop-up window will appear. Click on an addition button on the right side of the pop-up window. Next, select the user or the agency to share the report with. Then, specify sharing permissions as either “View only” or “Can edit” (see below). Click anywhere on the pop-up window to save your entries.



- To un-share a report with a user or agency, click on the delete button next to the sharing permission (see below).



**Note:** Reports that have been shared with other users or agencies will display the number of users or agencies next to either a human icon (users) or a sharing network icon (agencies) in the Report Panel (see below).



## Create a New Report Workflow

