

Quick Start Guide to Using the Access & Management Center

Data Access Rules

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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).

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Quick Start Guide to Using the Access & Management Center (AMC) Data Access Rules



Prerequisites

Here is the URL: https://amc.syndromicsurveillance.org/NSSP_AdminTool/login.

BioSense Platform Site Administrator Account: If your site does not have a site administrator account, please contact the NSSP Service Desk at support.syndromicsurveillance.org and click on **AMC**, then **Request AMC Site Administrator Account** to open a request ticket.

1. Create a Data Access Rule

Within AMC, the Data Access tab (Figure 1) is only available to site administrators. As a site administrator, you may use this tab to create, review, and edit rules that control access to your site's data. Note the **red** arrows pointing to the **Build New Data Access Rule** and **View/Edit** buttons.

Data access rules can be applied to user accounts across NSSP–ESSENCE. You may create rules to grant data access to analysts and epidemiologists who work at your site, another site, or program staff at CDC.

View/Edit	Site	Rule Name	Rule Description	Rule Status	User Group Type
View/Edit	AL	Data Access Rule Test	cmarderal01	Active	Users Only
View/Edit	AL	Demo 17	Demo #17	Draft	Public
View/Edit	AL	Test 11	Test #11	Active	Mixed
View/Edit	AL	Test15	Created 10/15	Active	Users Only

Figure 1. Data Access Page

1.1 Rule Name and Description

Name your rule and enter a description (Figure 2). This will help you find your rule later.

Note that when selecting Users or User Groups (explained below), click the large blue plus sign (+) to expand the Users or User Group sections.

RULE CHARACTERISTICS

Edit Rule
Define rule, select users, and select data

Review & Submit Rule
Verify rule contents and set rule status

Next Save Draft Cancel

Name* Demo 21
Create Basic Rule

Description

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

+ Select Individual Users
+ Select a User Group

Click the blue "+" sign to Expand

Figure 2. Data Access Page (Rule Characteristics—Name of Rule and Description)

1.2 Select Users or User Groups

Data should be shared with *purpose*. Carefully consider who needs data access and should be included in the Data Access Rule. Keep in mind that any user selected here (Figure 3) will receive access to the data you specify in the next step. You may designate individual users and groups of users. There can be site-defined user groups (public or private) and NSSP user groups to choose from.

Users and User Groups are listed by site. Both sites and their subsections are each sorted alphabetically.

You may use the fields directly below “Select Individual Users” and “Select a User Group” headings to filter the “Available” lists. When searching for the Last Name or First Name of a user, results can have characters that you enter appearing in any contiguous location within the name (e.g., “an” will find **Anderson** and **Stedman**, but not **Madden**).

Click on your choice in the “Available” pick boxes (or use Ctrl-Click for multiple choices within a pick box). This will highlight each choice (see names highlighted in **blue** in Figure 3). **Note:** Site-defined user groups must be created before adding to a data access rule.

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

Select Individual Users

Site: AL | Last Name: Enter Last Name | First Name: Enter First Name | Epi. Privilege Level: Select or Type | Filter | Reset

Available

- AL
- Chris MarderAL
- Chris Marderad02
- Chris UserMarder
- ChrisTest Marder
- Dan McKenzie
- Kalkidan Teklu

Selected

Select a User Group

Site: Select or Type | Group Type: Select group Type | Filter | Reset

Available

- AK
- All AK Epidemiologists
- All AK Users
- Demo Group
- AL
- All AL Epidemiologists
- All AL Users

Figure 3. Data Access Page (Rule Characteristics—Select Users and Groups)

After highlighting users and groups in the “Available” boxes, click the “right” Arrow button (>) between the pick boxes to move them to the “Selected” boxes (Figure 4). You may select more than one individual or group to add (>) from the “Available” pick box or to move them back (<) from “Selected” to “Available.”

You may change the selected users or groups at any time.

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

Select Individual Users

Site: AL | Last Name: Enter Last Name | First Name: Enter First Name | Epi. Privilege Level: Select or Type | Filter | Reset

Available

- AL
- Chris Marderad02
- Chris UserMarder
- ChrisTest Marder
- Kalkidan Teklu
- Rendi Murphree
- alabama admin

Selected

- AL
- Chris MarderAL
- Dan McKenzie

Select a User Group

Site: Select or Type | Group Type: Select group Type | Filter | Reset

Available

- AK
- All AK Epidemiologists
- All AK Users
- Demo Group
- AL
- All AL Epidemiologists
- All AL Users

Selected

Figure 4. Selected Users and Groups

Next, select the data you want included in the Data Access Rule (Figure 5). Be mindful that you can only control access to *your site's* data. You may grant users access to all your data sources or to individual data sources. You may also restrict users from accessing your site's data by facility or by state and county.

RULE CHARACTERISTICS

Progress bar: Edit Rule (Define rule, select users, and select data) | Review & Submit Rule (Verify rule contents and set rule status)

Buttons: Next, Save Draft, Cancel

Name* Demo 12
Description Create a new Rule

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

+ Select Individual Users
+ Select a User Group

Select data to include in the data access rule.

Select Site AL

Grant access to all AL data sources
 Grant access to individual data sources

Buttons: Next, Save Draft, Cancel

Figure 5. Data Access Page (Select Data)

1.3 Access to All Data Sources

Site administrators have the option to grant access to all data sources (Figure 6) in a single step. Do this by clicking the **Grant access to all data sources** radio button, which will allow you to choose the Data Details or the No Data Details data layer. **Note:** “No Data Details” was formerly called “Aggregate Only.”

Select data to include in the data access rule.

Select Site AL

Grant access to all AL data sources
 Data details
 No data details

Grant access to individual data sources

Figure 6. Data Access Page (Grant Access to All Data Sources)

What is the difference between “Data Details” and “No Data Details”?

By selecting “No Data Details in ESSENCE,” users can view high-level data via charts, graphs, and maps. However, the user will not have access to line-level data. For example, when running a query against a data source where “No Data Details” was selected, a user can view the time series graph but cannot click the graph to view patient information.

1.4 Access to Individual Data Sources

Site administrators have the option to grant access to an individual data source or to multiple data sources. To grant access to individual data sources, click the **Grant Access to Individual Data Sources** radio button and then click the checkbox next to the data source (Figure 7). This will expand the data source and let you select the data layer and apply optional data restrictions.

Select data to include in the data access rule.

Select Site

Grant access to all AL data sources

Grant access to individual data sources

- Patient Location and Visit (Full Details)
- Facility Location and Visit (Full Details)
 - Data details
 - No data details

(Optional) Restrict Data by Facility and/or Location

(Clause 1) Grant Access to data where

- Facility Syndrome Alert List
- Time of Arrival Alert List
- Data Quality (Facility Location)

Figure 7. Data Access Page (Grant Access to Individual Data Sources)

Data Source Definitions

- **Patient Location and Visit (Full Details)** — Provides access to data based on where the patient lives. A user granted “Data details” access to this data source may view a complete list of patient details for all patients visiting your site’s facilities. Restrictions made *after* selecting the dataset (e.g., by facility, state, or county) will be applied based on the location of the patient. If the **No data details** radio button is selected, a restricted view is provided.
- **Facility Location and Visit (Full Details)** — Provides access to data based on the facility (e.g., emergency department) location where a patient sought treatment. A user granted “Data details” access to this data source may view a complete list of patient details for all facilities located in the corresponding site. Restrictions made *after* selecting the dataset will be applied based on the location of the facility. If the **No data details** radio button is selected, a restricted view is provided.
- **Facility Syndrome Alert List** — 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 List** — 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 facility location.
- **Data Quality (Facility Location)** — 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.

1.4.1 (Optional) Restrict Data by Facility or Location

Once the data source and data layer are selected, site administrators can optionally restrict the data source by Facility or Location (state or county) (Figure 8). To apply these optional restrictions, select Facility or Location (state or county). Then use the pick boxes to select the desired facilities or locations. Once the data source and data layer are restricted, click the **Add Clause** button. You can review your rule’s selected data on the “Review & Submit Rule” page (Section 1.5).

The screenshot displays a web interface for configuring data access. At the top, there is a radio button for "Grant access to individual data sources". Below this, two data sources are listed: "Patient Location and Visit (Full Details)" (unchecked) and "Facility Location and Visit (Full Details)" (checked). Under the checked source, there are two radio buttons: "Data details" (selected) and "No data details" (unselected). A section titled "(Optional) Restrict Data by Facility and/or Location" contains a dropdown menu set to "Facility" (highlighted with a red box). Below the dropdown is a "Facility" input field with a red arrow pointing to a list of available facilities. The list is divided into "Available" and "Selected" columns. The "Available" list includes "1001.31TESTa - 1.31T", "8581003260488 - Broc", "8581003814971 - Spri", and "858100396000 - Nort". There are right and left arrow buttons between the lists. Below the lists are "Add Clause" and "Delete Clause" buttons, both highlighted with red boxes. At the bottom, there are three more data sources with plus icons: "Facility Syndrome Alert List", "Time of Arrival Alert List", and "Data Quality (Facility Location)".

Figure 8. Data Access Page (Grant Access to All Data Sources)

How many clauses may I add, and how do I remove a clause?

Site administrators may add up to three (3) clauses per data source—one for state, county, and facility. To remove a clause, click the **Remove Clause** button under that Data Restriction’s pick box.

1.4.2 Access to Multiple Data Sources

To add additional data sources (Figure 9), click the checkbox next to the data source. This will expand the data source and let you select the data layer and apply optional data restrictions.

RULE CHARACTERISTICS

Edit Rule
Define rule, select users, and select data

Review & Submit Rule
Verify rule contents and set rule status

Next **Save/Submit** **Cancel**

Name* Demo 17

Description Demo #17

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

- + Select Individual Users
- + Select a User Group

Select data to include in the data access rule.

Select Site AL

Grant access to all AL data sources

Grant access to individual data sources

- + Patient Location and Visit (Full Details)
- + Facility Location and Visit (Full Details)
- + Facility Syndrome Alert List
- + Time of Arrival Alert List
- + Data Quality (Facility Location)

Figure 9. Data Access Page (Grant Access to Individual Data Sources)

After all selections have been made, click the **Next** button. **Note:** You may click the **Save Draft** button to save your work and return later.

1.5 Review and Submit the Rule

Once you name your rule and select users and data, you're ready to submit and implement your Data Access Rule. First, confirm that your selections are as expected. If you need to make changes, use the **Back/Edit** button to return to the Edit Rule page. Next, select the appropriate status for your rule (note that the default status value is "Draft"):

Data Access Rule Status

Each status provides the current state of the rule and indicates if the rule is being used in ESSENCE.

- **Draft:** This is the initial status when you first create a rule in AMC. At this point, it has not been sent to ESSENCE. If you change its status to **Active** and submit it, it will be sent to and activated in ESSENCE. This will affect the user(s) and groups that you included in the rule.
- **Active:** This indicates that the rule has been submitted to ESSENCE and is being used to filter ESSENCE data based on the rule's parameters.
- **Delete:** If you change a rule status to *Delete* and submit the change, the rule will be deleted from the AMC and ESSENCE, and the rule will no longer be available.
- **Suspend:** Suspending a rule removes it from ESSENCE but *does not* delete it from AMC. Functionally, it has the same effect as setting a rule back to Draft. However, Suspend can be used to indicate that the rule was once an **Active** rule in the system.

Note: Changing the status from Active to Draft will have the same result as changing it from Active to Suspend in that the rule will be removed from ESSENCE and will remain in AMC. It can be activated from either the Draft or Suspend state.

When you're done, click the **Submit** button (Figure 10). You'll be returned to the Data Access tab.

DATA ACCESS

Review & Submit Rule
Verify rule contents and set rule status

Rule Status: Draft

Buttons: Back/Edit, Submit, Cancel

Name: Demo 17
Demo #17

Description:

Selected User(s) and Group(s)

Site	User Type	Name
AL	Group	All AL Epidemiologists

Site	Data Source	Data Details	"WHERE" state ment (if applicab le)	Delete
AL	Patient Location and Visit (Full Details)	Y		X
AL	Facility Location and Visit (Full Details)	Y		X

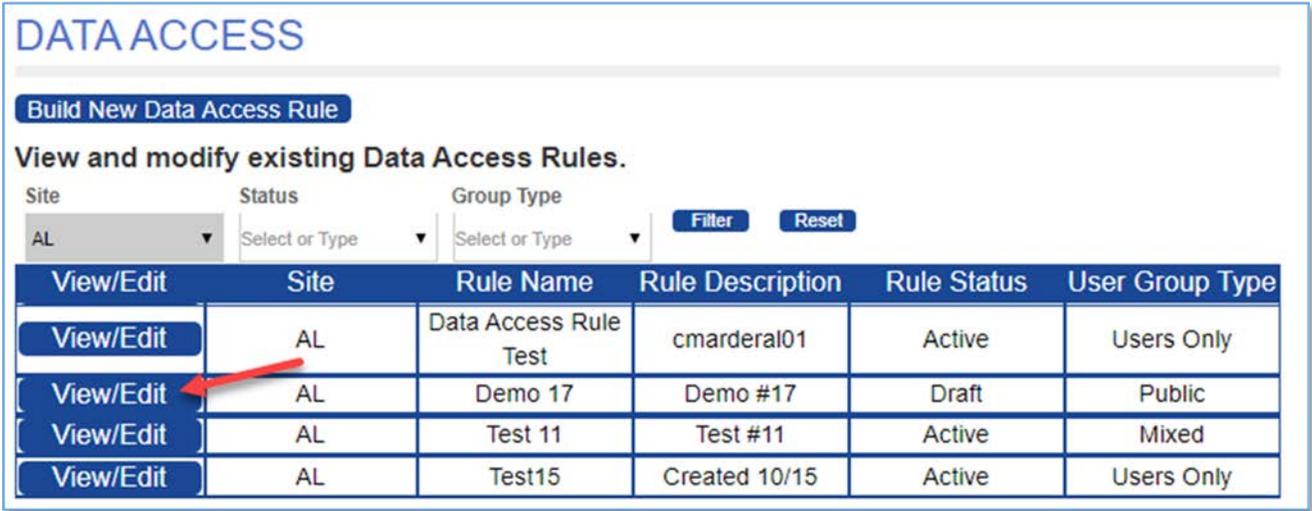
Buttons: Back/Edit, Submit, Cancel

Figure 10. Data Access Page (Review and Submit Rule)

2. Edit a Rule

2.1 Select a Rule to Edit

On the Data Access tab, View and modify existing Data Access Rules section, click the **View/Edit** button beside the rule you want to edit (Figure 11).



The screenshot shows the 'DATA ACCESS' interface. At the top, there is a 'Build New Data Access Rule' button. Below it, the text reads 'View and modify existing Data Access Rules.' There are three dropdown menus for 'Site' (set to 'AL'), 'Status' (set to 'Select or Type'), and 'Group Type' (set to 'Select or Type'). To the right of these are 'Filter' and 'Reset' buttons. Below the filters is a table with columns: 'View/Edit', 'Site', 'Rule Name', 'Rule Description', 'Rule Status', and 'User Group Type'. The table contains four rows of data. A red arrow points to the 'View/Edit' button in the second row, which corresponds to the rule 'Demo 17'.

View/Edit	Site	Rule Name	Rule Description	Rule Status	User Group Type
View/Edit	AL	Data Access Rule Test	cmarderal01	Active	Users Only
View/Edit	AL	Demo 17	Demo #17	Draft	Public
View/Edit	AL	Test 11	Test #11	Active	Mixed
View/Edit	AL	Test15	Created 10/15	Active	Users Only

Figure 11. Data Access Page (Editing Rules)

2.2 Modify Rule Characteristics and Save

After you click **View/Edit**, you'll be directed to the DATA ACCESS > Edit Rule page (Figure 12) where you will click on the **Back/Edit** button to modify the rule.

DATA ACCESS

Edit Rule
Define rule, select users, and select data

Review & Submit Rule
Verify rule contents and set rule status

Rule Status: Active

Back/Edit Submit Cancel

Name: Test ME11

Description: Test #11

Selected User(s) and Group(s)

Site	User Type	Name
ME	Group	All ME Epidemiologists

Site	Data Source	Data Details	"WHERE" state ment (if applica ble)	Delete
ME	Facility Location and Visit (Full Details)	Y	Where State = ME	X

Back/Edit Submit Cancel

Figure 12. DATA ACCESS > Edit Rule Page

The **Back/Edit** button will take you to the "Edit Rule" section on the Rule Characteristics page. There you can change the rule name and description; add or delete users and groups; and add, delete, or modify data sources. You can also use the "Rule Status" drop-down menu to change a rule's status (e.g., from Active to Draft).

In addition, the rule can be deleted entirely by clicking on the **X** in the Delete column.

On this page, you can also modify or delete Where clauses. To do this, first expand the Data Source that the Where clause is associated with by clicking on the blue plus sign (+) next to it. The Data Sources details will be displayed (Figure 13).

Facility Location and Visit (Full Details)

Data details
 No data details

(Optional) Restrict Data by Facility and/or Location

(Clause 1) Grant Access to data
where State ▾

State Reset

Available ➤ **Selected**

AK
AL
AR
AZ

ME
NH

⬅

Update Clause Delete Clause

(Clause 2) and where ▾

Figure 13. Data Source Details

Here, values from the Available pick list may be added to or Selected values may be removed from the Where clause. After changes are completed, click the **Update Clause** button.

You may completely delete this Where clause by clicking on the **Delete Clause** button.

When you finish modifying your Data Access Rule, click the **Next** or the **Save/Submit** button.

2.3 Stop Using a Rule

There are two options when you want to stop using a rule. You may suspend it, which deactivates it but keeps it in the system, or you may delete it, which completely removes it.

2.3.1 How to Suspend or Deactivate a Rule

Follow these steps to suspend or deactivate a rule:

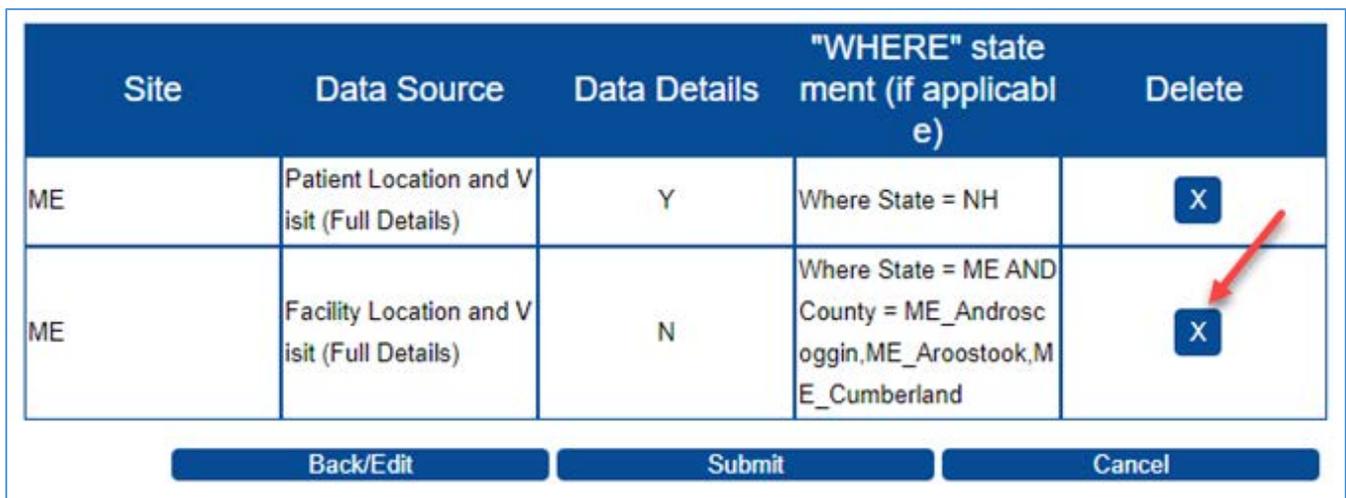
1. Select the rule from the Data Access tab and click **View/Edit**.
2. In the Status drop-down menu, change the value to "Suspend."
3. Click **Submit**.

2.3.2 How to Delete a Rule

Follow these steps to completely remove a rule:

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

If you have a rule containing multiple data sources and need to delete an individual data source from that rule, use the **X** button in the Delete column on the Data Access > Edit Rule page (See Figure 14 below).



Site	Data Source	Data Details	"WHERE" state ment (if applicable)	Delete
ME	Patient Location and Visit (Full Details)	Y	Where State = NH	X
ME	Facility Location and Visit (Full Details)	N	Where State = ME AND County = ME_Androscoggin, ME_Aroostook, ME_Cumberland	X

Buttons: Back/Edit, Submit, Cancel

Figure 14. Deleting a Rule for a Single Data Source

Note: If a rule is suspended, the rule will be removed from the user account(s) in ESSENCE. However, the AMC will preserve the Data Access Rule with a status of "Suspend," and you may reactivate it later.

If a rule is deleted in the AMC, it will be removed from both AMC and ESSENCE.

3. Examples of AMC Data Access Rules

The AMC uses rules to control access to ESSENCE data sources, most of which have two access controls: facility location and patient location. Shown below are some typical ways in which rules govern data being shared.

3.1 Facility Location Examples

Selected Data				
Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
Site Name	Facility Location and Visit (Full Details)	Y		X

Figure 15. A Site Shares "Facility Location and Visit (Full Details)" Data for All Facilities

Selected Data				
Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
Site Name	Facility Location and Visit (Full Details)	N	Where State = Site AND County = St_Cty	X

Figure 16. A Site Shares "Facility Location and Visit (Full Details)" Data for a Specific County

Selected Data				
Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
Site Name	Facility Location and Visit (Full Details)	N	Where State = Site AND Facility = 333	X

Figure 17. A Site Shares "Facility Location and Visit (Full Details)" Data for a Specific Facility

3.2 Patient Location Examples

Selected Data				
Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
Site Name	Patient Location and Visit (Full Details)	Y		<input type="checkbox"/>

Figure 18. A Site Shares "Patient Location and Visit (Full Details)" with Data Details for Your Site

Selected Data				
Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
Site Name	Patient Location and Visit (Full Details)	Y	Where State = Patient_State AND County = Patient_Cty_1, Patient_Cty_2	<input type="checkbox"/>

Figure 19. A Site Shares "Patient Location and Visit (Full Details)" Data Where the Patient Lives in a Specific County (based on patient ZIP code)

Selected Data				
Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
Site Name	Patient Location and Visit (Full Details)	Y	Where State = State_Name AND Facility = 333, 555, 666	<input type="checkbox"/>

Figure 20. A Site Shares "Patient Location and Visit (Full Details)" Data for Facilities 333, 555, and 666 Where the Patient Lives in State "State_Name"

3.3 Sharing County Data with a User in Another State

When data are reported for a patient who resides in another state, those data cannot be viewed by the resident’s state health authorities unless a Data Access Rule is set up to enable data sharing across sites.

For example, a New Hampshire resident who lives in a county bordering Maine is visiting in Maine when an event occurs requiring a visit to a local (Maine) emergency department. This event and others like it may be of interest to New Hampshire state health authorities, but for them to see data for events like this, the Maine site administrator must create a Data Access Rule to share these data.

Below are the steps that the Maine site administrator can take to create a rule to share Patient Location data with New Hampshire:

1. Log in to AMC, and select the “Data Access” tab.
2. Click on the **Build New Data Access Rule** button.
3. Name the rule and enter a short description.
4. In the “Search for and Select Users or Groups to include in this Data Access Rule” section, click the **blue** plus sign (+) to expand the “Select Individual Users” pick list or, if you want to choose a group, the plus sign (+) by “Select a Group” to see the Groups pick list.
5. Scroll down or use the filter field(s) above the pick list to locate the individual(s) or group(s) in New Hampshire. Highlight those you want to allow to access the data, and use the greater than symbol (>) to move them to the Selected list.
Note: Your state (site) will be preselected under the “Select data to include in the data access rule” section.
6. Check the **Grant access to individual data sources** radio button.
7. Click on the checkbox next to the “Patient Location and Visit (Full Access)” source.
8. Next, choose **Data details** or **No data details** radio button for the level of access.
9. In the “(Optional) Restrict Data by Facility and/or Location” section, choose the “(Clause 1) Grant Access to data where” dropdown and select State (Figure 21).

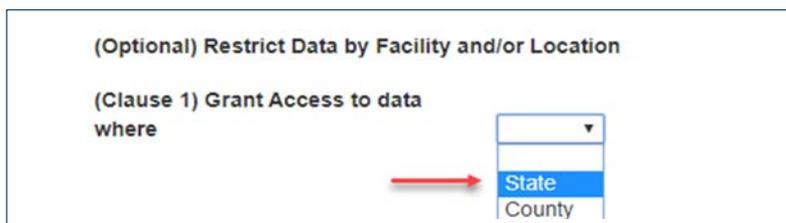


Figure 21. Select State for the First Where Clause

When you select State, the State pick list is displayed (Figure 22):

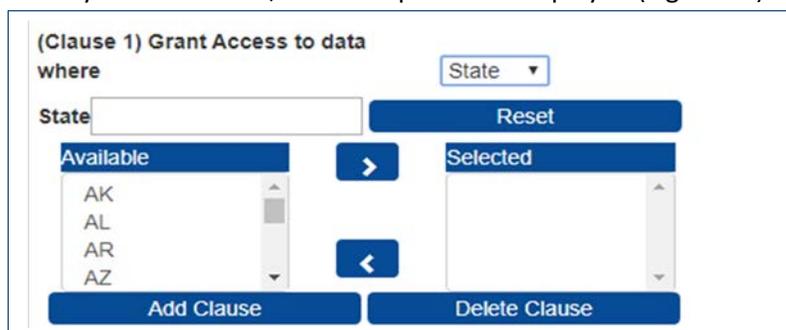


Figure 22. Select your State from Available Pick List

- Using the “Available” pick list or using the “State” search field above it, highlight the state (site) for which you want to share patient data (New Hampshire) and, using the greater than symbol (>), move the state abbreviation (NH) to the “Selected” list, then click on the **Add Clause** button. When you do, you will be given an input dropdown for a second Where clause (Figure 23).



Figure 23. Select the Second Clause to Filter by County or Counties

- If you want to limit the counties they can access, then use “Clause 2” and select “County” from the input dropdown. This will display all the counties in New Hampshire (the state for which you want to share data). They will be displayed in the “Available” pick list. Highlight the counties for which you want to grant data access, and then use the greater than symbol (>) to move them to the “Selected” pick list (Figure 24).

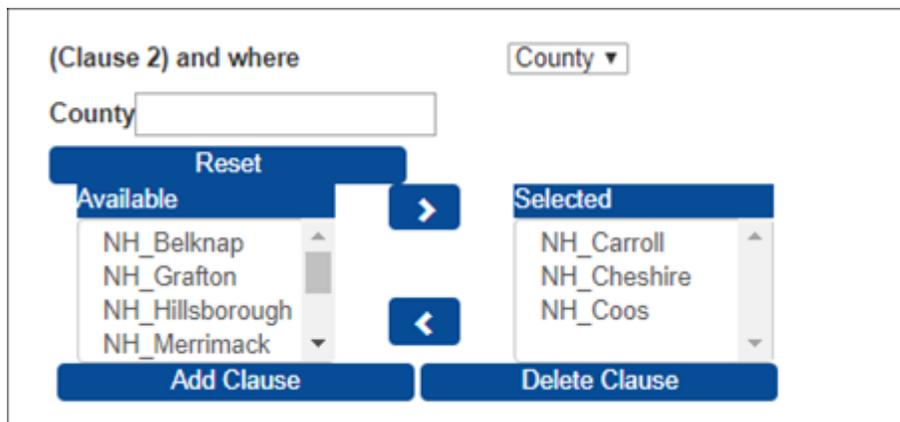


Figure 24. Chosen Counties moved to Selected Pick List

- Once you have moved these counties to the “Selected” pick list, click the **Add Clause** button. This will create the Where Clause to grant the data access (e.g., *Where State = NH AND County = NH_Carroll, NH_Cheshire, NH_Coos*). This rule should be saved using the **Save Draft** or **Next > Submit** button.
- When satisfied, set the rule to Active and click the **Submit** button. The user or users in New Hampshire will be able to view the data based on the source and data level in the county or counties you selected.