

Quick Start Guide to Using the Access & Management Center

# Data Access Rules

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**NSSP**  
National Syndromic  
Surveillance Program  
BioSense Platform



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



**Technical Assistance:** [support.syndromicsurveillance.org](https://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 and Management Center (AMC) Data Access Rules



## Prerequisite: BioSense Platform Site Administrator Account

Here is the URL for AMC: [https://amc.syndromicsurveillance.org/NSSP\\_AdminTool/login](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](https://support.syndromicsurveillance.org) and click on “AMC,” then “Request AMC Site Administrator Account” to open a request ticket.

## 1 Overview

The target audience for this quick start guide is site administrators. If you do not have site administrator privileges or higher, you will not be able to create, delete, or edit data access rules.

The Access & Management Center (AMC) Data Access functionality is used to share syndromic data with federal, state, and local public health organizations using the National Syndromic Surveillance Program (NSSP) BioSense Platform. Access can be granted for individual data sources or all available data sources and for a specific access duration by specifying from and to dates. Data access can be further constrained by specifying:

- Level of data detail.
- Location where data was collected or, in some cases, patient’s residential location, e.g., Facility, State, County.
- Chief Complaint (CC) and Discharge Diagnosis (DD) Category, Chief Complaint Sub Syndrome, and Syndrome.
- Data collected or recorded within specified timeframes.

Additional information is available in the *BioSense Platform User Manual for the Access & Management Center* available at the [NSSP Technical Publications and Standards](#) website.

This Quick Start Guide (QSG) focuses on constructing Data Access Rules so that site administrators can quickly create the rules they need to effectively share data with federal, state, and local jurisdictional sites using the BioSense Platform.

For reference, here is the AMC URL: [https://amc.syndromicsurveillance.org/NSSP\\_AdminTool/login](https://amc.syndromicsurveillance.org/NSSP_AdminTool/login).

Full functionality of Data Access will be described in the next update of the *BioSense Platform User Manual for the Access & Management Center* available at the [NSSP Technical Publications and Standards](#) website.

## 2 Creating, Viewing, and Editing Data Access Rules

The Data Access tab (Figure 1) is only available to site administrators. As a site administrator, you may use this tab to create (Build), view, edit, and delete or suspend 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. In the View/Edit section, you can change the status of a rule to *Active*, *Suspend*, *Delete*, or *Draft*. The reasons for these various statuses are described in the [Rule Status Explained](#) section.

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 in your site, another site, or program staff at the CDC, if they have access to the NSSP BioSense Platform.

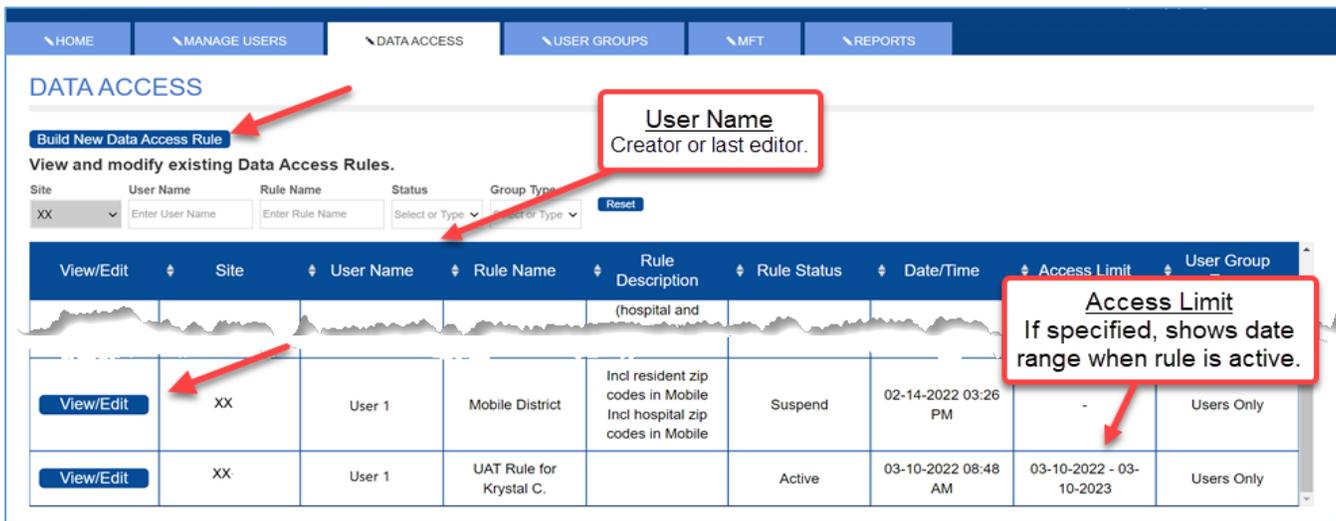


Figure 1. Data Access Tab: View and Modify existing Data Access Rules

The optional Data Access Time Limit fields, if specified, are displayed in the “Access Limit” column of the table. These fields indicate when a rule is active. Outside the Data Access Time Limit dates, the rule will be suspended (i.e., the rule still exists in AMC but does not grant any access to data in ESSENCE). Also note the new User Name column. The AMC user name of the rule’s creator or its last editor appears here.

On the View/Edit page, you can set the Rule’s status (Figure 2). The status affects how the rule is treated within AMC and ESSENCE. This will be defined in detail in [Rule Status Explained](#), but just remember that only rules that are Active will affect ESSENCE.

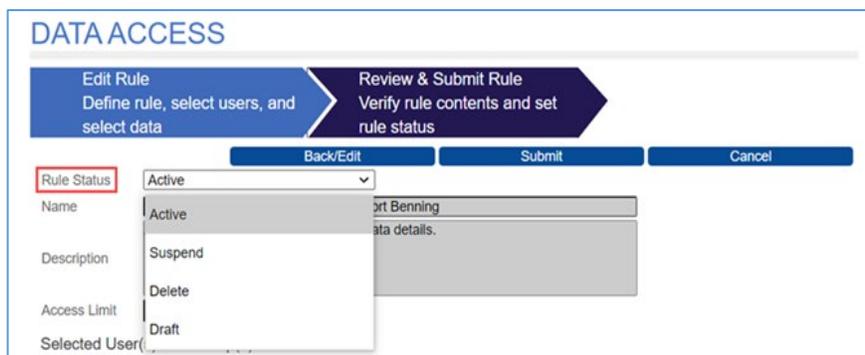


Figure 2. View/Edit: Select Rule Status

### 3 Building a Data Access Rule (Getting Started)

Rule name and description, access time limit, selecting users, and user groups are described in this section. You may use Figure 3 as a guide for getting started. Fields are discussed in greater detail below.

**RULE CHARACTERISTICS**

**Edit Rule**  
Define rule, select users, and select data

**Review & Submit Rule**  
Verify rule contents and set rule status

**Name\***

**Description**

**Select data access time limit**

Predefined  From  To

**OPTIONAL**  
Select data access time limit. Use Predefined duration or select From and To dates.

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

Select Individual Users

Select a User Group

Click the blue + to expand

Next Save Draft Cancel

Figure 3. Building a Data Access Rule: Getting Started.

Nonfederal site administrators may grant access to U.S. Department of Defense (site: DOD) and U.S. Department of Veterans Affairs (site: VET) users or groups in the same way they would grant access to a user or group in a neighboring state or other site.

Simply scroll to the DOD or VET subsection in the Select Individual Users or Select a User Group sections. Under the Available pick list, choose users and groups in either subsection. See [6.3 Sharing County Data with a User in Another Site](#) for a detailed example.



Be aware of the terms of your NSSP Data Use Agreement (DUA).  
**Some data may not be shareable.**

#### 3.1 Rule Name and Description

Name your rule and enter a description as shown in Figure 3. The rule name should be short but contain enough detail to differentiate it from other rules. Use the description field to expand on the rule’s characteristics. This will help you find your rule later.

### 3.2 Data Access Time Limit

The optional fields allow time limits to be set for access to all data sources covered by the rule. These time limits are specified as From and To dates formatted as mm-dd-yyyy.

The Predefined dropdown list allows you to quickly designate the duration of the time limit. The list displays 7 days, 6 months, and 12 months as choices.

After selecting a predefined duration, the From and To fields will autopopulate with the From field containing the current date.

### 3.3 Select Users and User Groups

To select Users and User Groups, click the large blue plus sign **+** (shown in Figure 3) to expand either of these sections. You may open both at the same time as shown in Figures 4 and 5.

The screenshot shows a web interface for selecting users and user groups. It is divided into two main sections: 'Select Individual Users' and 'Select a User Group'. Each section has search filters, an 'Available' list, and a 'Selected' list with arrows for moving items between them.

**Select Individual Users:**

- Search filters: Site (DOD), Last Name (Enter Last Name), First Name (Enter First Name), Epi (checkbox), Privilege Level (Select or Type).
- Buttons: Filter, Reset.
- Available list: Sindhu MAREU, XX, Dan M, Herb, Sindh.
- Selected list: (Empty)

**Select a User Group:**

- Search filters: Site (Select or Type), Group Type (Select group Type).
- Buttons: Filter, Reset.
- Available list: DOD, XX Civilian User Group, XX DoD Project, All DOD Epidemiologists, All DOD Users, DoD Level Users for Pilot.
- Selected list: (Empty)

Figure 4. Selecting Users and User Groups

#### 3.3.1 Data Sharing Considerations

**Share data for specific purposes.** Carefully consider who needs data access and should be included in the Data Access Rule. Keep in mind that any user or user group you select here, whether defined in your site or another site, will receive access to the data you specify in the next step (Figure 5 below).

- You may designate individual users and user groups to be given access.
- Users and user groups can be selected from your site, another site, or from NSSP-maintained users and groups.
- If you select user groups created by other site administrators or by NSSP, be aware that they can add or delete users from their user groups **without your knowledge**.

Selecting a user group maintained by another site or NSSP has pros and cons. If you create user groups, then you must maintain them. With small groups, this might not require much time; with large groups, however, this could increase your maintenance load significantly. Obviously, not having to maintain a large user group would

be a plus. But if you use another site’s user group, you will not control membership in that group and may not know when changes are made.

Users and user groups are listed by site. Sites, as well as users and groups within those sites, are sorted alphabetically.

You may use the search fields in **Select Individual Users** and **Select a User Group** to filter the “Available” lists. When searching for the Last Name or First Name of a user, a dynamic search begins when the first character is entered and may cause a slower than expected initial response. Also be aware that results can have the characters that you enter appearing in any contiguous location within the name (e.g., “**an**” will find **Anderson** and Sted**an**, but not **Madden**).

**Note:** If you wish to add your own site-defined user group to a rule, you must go to the User Group tab and create that group before it can be added. More detailed information on adding User Groups is available in the text box [How to Create a User Group](#) below.

User groups cannot be created within the build or edit data access rule process.

Click on your choice in the “Available” pick boxes (or use Ctrl-Click to select multiple choices). This will highlight each choice (see names highlighted in grey in Figure 4 above).

After highlighting users or groups in the “Available” boxes, click the **Right Arrow** button ( **>** ) between the pick boxes to move those to the “Selected” boxes (Figure 5). 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” should circumstances change.

The image shows two sections of a user selection interface. The top section is titled "Select Individual Users" and includes search fields for Site, Last Name, First Name, and Epi. Privilege Level, along with a "Reset" button. Below these are two lists: "Available" and "Selected". The "Available" list contains "XX", "Sindhu Mdoda", and "Sindhu Mmodu". The "Selected" list contains "XX", "Dan Mck", and "Balaji Ney". Two blue arrow buttons, one pointing right and one pointing left, are positioned between the lists. The bottom section is titled "Select a User Group" and includes search fields for Site and Group Type, along with a "Reset" button. Below these are two lists: "Available" and "Selected". The "Available" list contains "XX" (with sub-items "All XX Users") and "YY" (with sub-items "All YY Epidemiologists" and "All YY Users"). The "Selected" list contains "XX" (with sub-items "All XX Epidemiologists" and "Tropical Storm"). Two blue arrow buttons, one pointing right and one pointing left, are positioned between the lists.

Figure 5. Move your chosen Users and Groups to the Selected boxes.

You may change the selected users or groups at any time, but at least one user or user group must be selected before a rule’s status can be set to Active.

You may add a public or private user group to a data access rule that you created for your site, or a public user group created in another site, or by NSSP. If that user group is later modified, your rule will be automatically updated to reflect any changes.

Refer to the text box below for instructions for how to create a user group.

### **How to Create a User Group**

Go to the User Groups tab and click the **Add New User Group** button under Manage User Groups. Enter a unique name for the user group, add a description, and select a type (public or private) for the group—Public User Groups can be selected by any site, whereas Private User Groups are only available in the site that creates it. Provide enough detail in the description so that you can quickly distinguish user groups from each other. Note that Site will show the logged-in user's site and cannot be changed.

In the View & Select Users section, click the **Add/Edit User** button to add users to the group. At least one user is required to submit the group. Note the Search Bar—you may use this to filter the users displayed in the Select Users to add to Group table.

Remember that any users selected here will receive access to the data you specify when you create a data access rule. Add users by clicking the **Add** button next to a user's name.

When you've completed adding users, click the **Submit** button to save the group. Now, your group is active.

Please note that when User Groups are no longer needed, they may be deleted by clicking the Delete button located to the left of the cancel button.

### *3.4 Select Data Sources*

Next, select the data you want to share by including it in the Data Access Rule (Figure 6).

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 by selecting the appropriate radio button. You may also restrict users to only accessing your site's data for certain facilities, by state, county, or by other criteria. The other criteria can be used to restrict which type of data or during which timeframe data are selected. These will be shown later.

## 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\*

Description

Select data access time limit  
 Predefined  From  To

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

Grant access to all XX data sources

Grant access to individual data sources

Select ALL data sources (Can be modified later.).

To choose individual data source(s) select this option..

Next
Save Draft
Cancel

Figure 6. Granting Access to Data Sources to be Included in a Rule

### 3.4.1 What is the difference between Data details and No data details?

After selecting a data source, you are required to select the data layer you will grant access to. The data layers available will grant access to line-level data (Data details) or just count data (No data details). The discussion below explains what these data layers mean.

**Data details** shares line-level data (patient-level data), and **No data details** shares aggregate data (counts of patient data).

In other words, line- or patient-level data, referred to in AMC as **Data details**, provide both aggregate data and information for each reported patient visit. Personally Identifiable Information (PII) of patients is not collected or provided, but important information, such as demographics, diagnosis, and clinical outcomes, is. Note that reporting of some details may lag because it can take longer to collect and report them.

If **No data details** are shared, then only aggregate data are provided. These data offer high-level information about case and death totals. These data could be used to identify trends in groups of patients and discover characteristics for predicting the course of the disease.

When **No data details** is selected, users are restricted to viewing aggregate counts in ESSENCE via tables, charts, and maps. The user will not have access to line-level data.

### 3.4.2 Access to All Data Sources

Select data to include in the data access rule.

Select Site

Grant access to all XX data sources

- Data details
- No data details

Grant access to individual data sources

Site administrators have the option to grant access to all data sources (Figure 7) in a single step. Do this by clicking the **Grant access to all data sources** radio button, then choosing the data layer, i.e., **Data details** or the **No data details**.

The **Data details** layer allows access to all types of data, whereas the **No data details** selection provides access to summary or aggregated data.

Figure 7. Granting Access to All Data with Data Details

### 3.4.3 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 8). This will expand the data source template and let you select the data layer and apply optional data restrictions, such as State, County, and Facility (multiple choices are allowed for these using Ctrl-Click). In addition, if the Data details layer is selected, a single choice can be selected for CC and DD Category, Syndrome, and Chief Complaint Sub Syndrome.

Timeframe restrictions can also be incorporated in the WHERE clause by selecting Timeframe-From and Timeframe-To. These refer to the dates that data records were collected for a specified data source.

**Select data to include in the data access rule.**

Select Site: XX

Grant access to all XX 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, Location, Timeframe and/or Syndrome (ESSENCE Category)

(Clause 1) Grant Access to data where Syndrome

Syndrome: [Empty] [Reset]

Available: Bot\_Like, Exposure, Fever, GI

Selected: [Empty]

[Add Clause] [Delete Clause]

Facility Syndrome Alert List

Time of Arrival Alert List

Data Quality (Facility Location)

Clinical Lab Data

Mortality Data

**Only one selection is possible for this clause.**

[Next] [Save/Submit] [Cancel]

This note refers to the WHERE clause when a particular category is selected, e.g., Syndrome, and is only displayed when the category is limited to one type.

Figure 8. Data Access Page for General Sites (Grant Access to Individual Data Sources)

Here are descriptions of available data sources for general sites:

#### **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 data set (e.g., by facility, state, or county) will be applied based on the location of the patient. If “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 data set will be applied based on the location of the facility. If “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.
- ***Clinical Lab Data***—Provides access to laboratory test results. These data can be selected by patient state and county, provider state, and timeframe entered.
- ***Mortality Data***—Provides access to mortality data. These data can be filtered by state and county and timeframe entered.

### 3.5 Restrict Patient or Facility Location and View with WHERE Clauses

Once the data source and data layer are selected, you can further restrict the data source by adding a WHERE clause to the rule.

For Patient or Facility Location and View (Full Details)/No data details, only the Facility, State, County, and Timeframe (**From** and **To**) options can be added. Select from the pick list following “Grant Access to data where,” as shown in Figure 9.

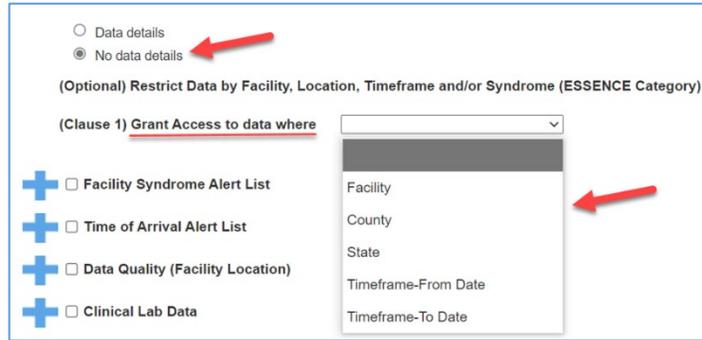


Figure 9. Patient or Facility Location and View: No Data Details

If Patient or Facility Location and View (Full Details)/Data details is selected for either Patient or Facility sources, additional clauses can be set for CC and DD Category, Chief Complaint Sub Syndrome, and Syndrome (Figure 10).

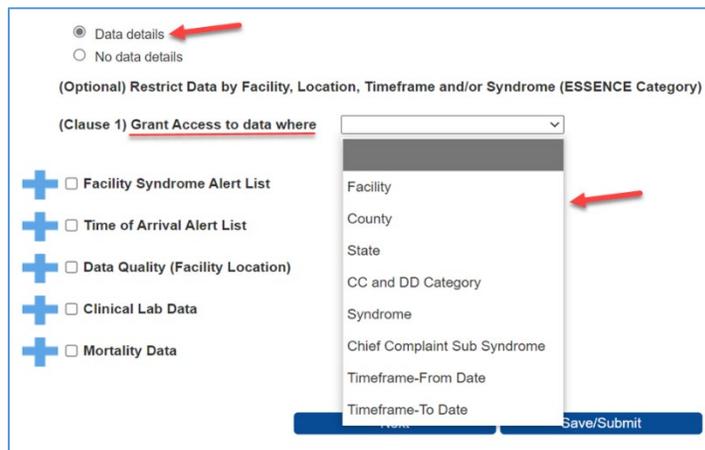


Figure 10. Patient or Facility Location and View: Data Details

**Note:** Certain selections, such as Syndrome, limit filtering to one selection. An advisory message will display at the bottom of the page when this restriction applies: **Only one selection is possible for this clause.**

To apply these optional restrictions, select a filter. Then use the pick boxes to select the desired criteria. 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”](#) section.

### 3.6 Table of Options Available by Data Source/Data Layer

The table below shows the options available to most data sources. Exceptions follow the table.

Option Availability by Data Source/Data Layer						
	General-Data Details*	General-No Data Details*	DOD-Data Details	DOD-No Data Details	VA-Data Details	VA-No Data Details
State	✓	✓	✓	✓	✓	✓
County	✓	✓	✓	✓	✓	✓
Facility	✓	✓	✓	✓	✓	✓
Facility State					✓	✓
Facility County					✓	✓
Timeframe – From	✓	✓	✓	✓	✓	✓
Timeframe – To	✓	✓	✓	✓	✓	✓
CCDD Category	✓		✓		✓	
Chief Complaint Sub Syndrome	✓		✓		✓	
Syndrome	✓		✓		✓	

\*The data access rules for granting access to Clinical Lab Data or Mortality Data data sources are somewhat different. See the text boxes below for those options.

When site administrators create data access rules for their Clinical Lab Data or Mortality Data sources, the choice of options is somewhat different, as shown below:

#### Options for Clinical Lab Data

Clinical Lab Data options are the same for “Data details” and “No data details.” For site administrators, available options are:

- Patient County,
- Patient State,
- Provider State,
- Timeframe-From Date, and
- Timeframe-To Date.

#### Options for Mortality Data

Mortality Data options are the same for “Data details” and “No data details.” For site administrators, available options are:

- County,
- State,
- Timeframe-From Date, and
- Timeframe-To Date.

Remember, select a **filter option**, then use the pick boxes to select the **desired criteria** (see Section 3.7 and Figure 11).

After each optional restriction is completed, click the **Add Clause** button to apply them.



### 3.8 Access to Multiple Data Sources

To add additional data sources (Figure 12), click the checkbox next to the additional data source. This will expand the data source and let you select the data layer and apply optional data restrictions, as needed.

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

The screenshot shows a configuration window for a data access rule. At the top, there is a radio button labeled "Grant access to individual data sources". Below this, there is a list of data sources, each with a blue plus sign icon and a checkbox. Two sources are selected, indicated by checked checkboxes and red rectangular highlights around their respective rows:

- 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)
- Clinical Lab Data
- Mortality Data

Figure 12. Data Access Rule: Selecting Multiple Data Sources

### 3.9 Review and Submit the Rule

Once you name your rule, select users and data source(s) and add any optional constraints. Click the **Next** button.

Now you're ready to review your rule as presented on the summary Review and Submit Rule page (Figure 13). Verify the Data Details value (Y or N) and examine the WHERE clause (if applicable). If you need to make changes, use the **Back/Edit** button to return to the Edit Rule page.

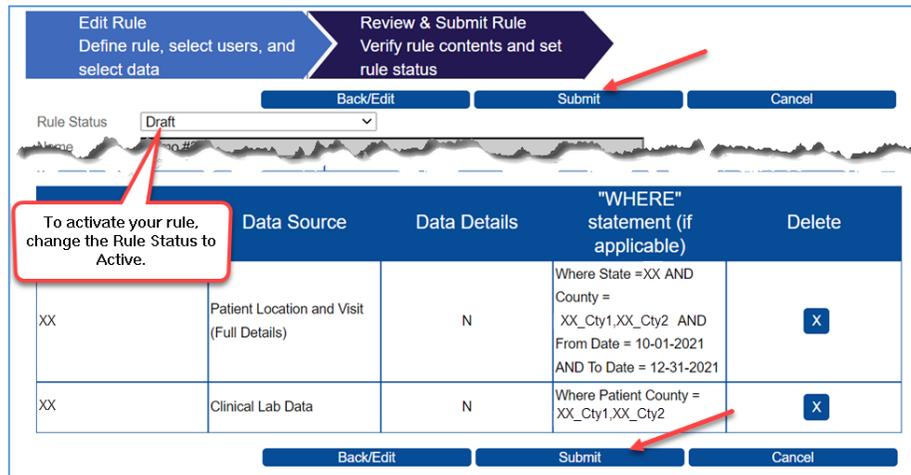


Figure 13. Data Access Page (Review and Submit Rule)

When you're satisfied with your rule and ready to activate it, change the Rule Status to Active, then click the **Submit** button (Figure 13). You'll be returned to the Data Access tab. The AMC will make final checks and transmit the rule to ESSENCE for implementation.

The text box below describes the various statuses and how each is used.

#### Data Access Rule Status Explained

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, the rule has not been sent to ESSENCE. If you change the rule's status to Active and submit it, it will be sent and activated in ESSENCE. This will affect the user(s) and groups that you have 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's status and submit the change, the rule will be deleted from both AMC and ESSENCE, and it will no longer be available.
- **Suspend**—Suspending a rule removes it from ESSENCE but does not delete it from AMC. Functionally, this has the same effect as setting back to **Draft**. However, **Suspend** can be used to indicate that the rule was once an **Active** rule in AMC and ESSENCE.

**Note:** Changing a rule's 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 but will remain in AMC. It can be reactivated from either **Draft** or **Suspend** status.

## 4 Edit a Rule

### 4.1 Select a Rule to Edit

On the Data Access tab, “View and modify existing Data Access Rules” section of the Review & Submit Rule page, click the **View/Edit** button beside the rule you want to edit (Figure 14).

### DATA ACCESS

**Edit Rule**  
Define rule, select users, and select data

**Review & Submit Rule**  
Verify rule contents and set rule status

Back/Edit
Submit
Cancel

Rule Status Draft

Name Demo #3

Description Example Data Access Rule using Timeframe Options

Access Limit   to  

Selected User(s) and Group(s)

Site	User Type	Name
YY	Group	All YY Epidemiologists

**View and modify existing Data Access Rule**

Site XX User Name Enter User Name Rule Name Enter Rule Name Status Select or Type Group Type Select or Type Reset

View/Edit	Site	User Name	Rule Name	Rule Description	Rule Status	Date/Time	Access Limit	User Group Type
<span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 5px;">View/Edit</span>	XX		Demo #3	Example Data Access Rule using Timeframe Options	Draft	12-08-2021 01:26 PM	12-01-2021 - 11-30-2022	Public
<span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 5px;">View/Edit</span>	XX		Grant DOD Access to Counties near Fort Benning	Access to Lee and Russel Counties. Data details.	Active	12-07-2021 09:33 AM	-	Public
<span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 5px;">View/Edit</span>	XX		City District	Incl resident zip codes in the City Incl hospital zip codes in the City	Suspend	04-19-2021 10:58 AM	-	Users Only

Figure 14. Data Access Page: Use the View/Edit Button to Edit a Rule

This is another place you can use the “Rule Status” drop-down menu to change a rule’s status (e.g., from *Active* to *Suspend*).

## 4.2 Modify Rule Characteristics and Save

After you click “View/Edit,” you’ll be directed to the DATA ACCESS > Edit Rule page (Figure 15) where you can view more detailed information about the rule. Here is 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

Back/Edit Submit Cancel

Rule Status: Draft

Name: Demo #3

Description: Example Data Access Rule

Access Limit: [ ] to [ ]

Selected User(s) and Group(s)

Site	User Type	Name
YY	Group	All YY Epidemiologists

Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
XX	Patient Location and Visit (Full Details)	N	Where State =XX AND County = XX_Cty1,XX_Cty2 AND From Date = 10-01-2021 AND To Date = 12-31-2021	X
XX	Lab Data	N	Where Patient County = XX_Cty1,XX_Cty2	X

Back/Edit Submit Cancel

Click "X" to delete Data Source, but leave other information.

Back/Edit access detail edits page.

Figure 15. Click X to delete, or click the **Back/Edit** button to modify the rule.

Here, the data source can be deleted from a rule by clicking on the **X** in the Delete column.

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 and any specific restrictions.

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, as it is in the example in Figure 16.

**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	>	ME
AL	>	NH
AR	<	
AZ	<	

Update Clause Delete Clause

**(Clause 2) and where** ▼

Figure 16. Data Source Details: Modifying the State Restriction

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 to save your changes.

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

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

## 5 Stop Using a Rule

There are two options when you want to stop using a rule. You may **Suspend** it, which removes it from ESSENCE but keeps it in the AMC for possible later use. Or you may **Delete** it, which removes it from ESSENCE and AMC.



Any data that the rule provided access to will no longer be accessible; any queries or API calls will fail to fetch those data the rule gave access to. When a rule is suspended or deleted in AMC, the access granted in ESSENCE is completely removed. However, any methods, queries, or myESSENCE dashboards will remain. If they are run after data access is removed, no data will be returned.

If a user has multiple rules governing data access and only one rule is suspended or deleted, the querying features in ESSENCE will continue to display the data made available by the remaining active rules.

**REMEMBER:** The **Draft** status and the **Suspend** status have the same effect when switching from the Active status to either the **Draft** or **Suspend** status. The rule is removed from ESSENCE but remains in AMC and can be reactivated later. Any access granted, when the rule was previously **Active**, will be removed from ESSENCE.

### 5.1 How to Suspend a Rule

Follow these steps to suspend a rule and deactivate it in ESSENCE:

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*.  
*Note: You may also set the rule status to Draft and achieve the same results.*
3. Click **Submit**.

### 5.2 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 want to delete an individual data source from that rule, use the **X** button in the Delete column on the Data Access > Edit Rule page (Figure 17).

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

Back/Edit      Submit      Cancel

Figure 17. Deleting a Rule for a Single Data Source

## 6 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.

### 6.1 Facility Location Examples

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

Figure 18. 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	<input type="checkbox"/>

Figure 19. Site Shares "Facility Location and Visit (Full Details)" Data for a Specific State (Site) and 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	<input type="checkbox"/>

Figure 20. Site Shares "Facility Location and Visit (Full Details)" Data for a Specific State (Site) and Facility

## 6.2 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 21. Site Shares "Patient Location and Visit (Full Details)" Data with Data Details

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 22. Site Shares "Patient Location and Visit (Full Details)" Data Where the Patient Lives in a Specific County (based on patient's 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 23. Site Shares "Patient Location and Visit (Full Details)" Data for Facilities 333, 555, and 666 Where the Patient Lives in State "State\_Name"

### 6.3 Sharing County Data with a User in Another Site (Detailed Steps)

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 between sites.

Similarly, data from your site cannot be seen by the U.S. Department of Defense (DOD) or U.S. Department of Veterans Affairs (VET) users unless you set up rules to share your data with them. If you decide to share data with these entities, you can create data access rules in the same way you would build rules to share with users in other sites. The U.S. Departments of Defense and Veterans Affairs sites have site codes (DOD or VET) that you can use to designate select users or user groups to share data with.

For example, the sites with counties around a military base may choose to share aggregate data with select DOD users to identify anomalies and monitor evolving trends. Site administrators could set up data access rules to share these data with DOD or VET users in the same way that they currently share data with bordering states.

Here is a scenario where Maine may choose to share selected data with New Hampshire:

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.

Shown below are the steps that the Maine site administrator can take to create a rule to share Patient Location data with New Hampshire (similar steps could be taken to share data with the DOD or VET sites):

1. Log in to AMC, and click 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 24).



Figure 24. Select State for Clause 1 of the WHERE clause.

When you select State, the State pick list is displayed (Figure 25):

(Clause 1) Grant Access to data  
where State

State  Reset

Available Selected

AK  
AL  
AR  
AZ

>

<

Add Clause Delete Clause

Figure 25. Select your state from available pick list.

- Using the “Available” pick list or using the “State” search field above it, highlight the state for which you want to share data (NH for New Hampshire) and, using the button with 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 26).

(Clause 2) and where County

County  Reset

Available Selected

AK\_...\_County  
AL\_...\_County  
AR\_...\_County  
AZ\_...\_County

>

<

Add Clause Delete Clause

Figure 26. Select the second clause to filter by County or Counties.

11. If you want to limit the counties that can be accessed, 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). Counties 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 27).

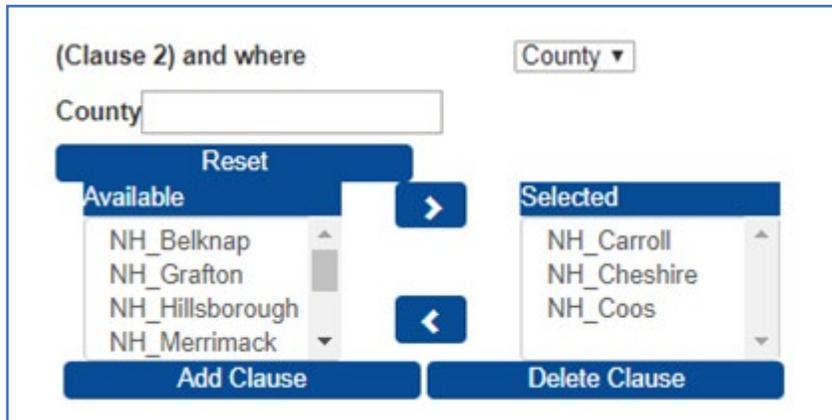


Figure 27. Chosen Counties will be moved to Selected pick list.

12. 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.
13. 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.

## 6.4 Limiting Access to Data with Data Access Time Limit and Timeframe Options

The Data Access Time Limit applies to the whole rule and specifies when the rule is to be active, whereas the Timeframe Options are applied to individual data sources and specify the dates that the accessible data was collected.

### 6.4.1 Data Access Time Limit

Access to a rule can be restricted to a specific date range, to all data before a date, or to all data after a date. This optional feature is provided at the rule level and controls when the rule is active.

There is a Predefined access limit duration dropdown that can be used to set the limit to 7 days, 6 months, or 12 months. If this option is used, the **From** date is automatically set to today's date. Figure 28 shows the dates selected on December 6, 2021, for a duration of 12 months.

The screenshot shows a two-step process for editing a rule. Step 1 is 'Edit Rule: Define rule, select users, and select data'. Step 2 is 'Review & Submit Rule: Verify rule contents and set rule status'. Below this are 'Next', 'Save/Submit', and 'Cancel' buttons. The form contains the following fields:

- Name\***: Demo #2
- Description**: Demo Data Sharing with another Site
- Select data access time limit**: A dropdown menu is open, showing options for '7 days', '6 months', and '12 months'. The '12 months' option is highlighted with a red box.
- From**: 12-06-2021
- To**: 12-06-2022

Below the date fields is a search bar with the text 'Search for all users or Groups to include in this Data Access Rule'.

Figure 28. Data Access Time Limit Set for 12 Months

When you use the Predefined (7 days, 6 months, 12 months) durations, the **From** date will always be the current date and the **To** date is calculated from that date. If you are not satisfied with the predefined dates, you can change or enter them manually. The dates must be entered using a **mm-dd-yyyy** format. Dates in any other format will produce an error and will have to be corrected before saving or submitting the rule.

Also note that a popup calendar will be displayed if you click into either the **From** or **To** date field. You may select from these calendars or type the date directly in the fields.

The significance of using this feature is that AMC handles switching the rule's status from **Suspend** to **Active** during the **From–To** period, then back to **Suspend** after the **To** date. In other words, before the **From** date, the rule's status will be **Suspend**. Then, as of the **From** date, the rule will become **Active** until the **To** date passes when it will be returned to the **Suspend** status.

For example, the snapshot for Figure 29 was taken on December 6, 2021, just after this rule was created. Note that this rule was automatically set to the **Suspend** status on December 6, 2021, when it was created or last edited (left red arrow), because that was prior to the date that access was first allowed, i.e., the data access time limit does not start until December 8, 2021 (right red arrow). On December 8, 2021, the rule's status will automatically be set to Active.

**DATA ACCESS**

Build New Data Access Rule

View and modify existing Data Access Rules.

Site: XX | User Name: Enter User Name | Rule Name: Enter Rule Name | Status: Suspend | Group Type: Select or Type | Reset

View/Edit	Site	User Name	Rule Name	Rule Description	Rule Status	Date/Time	Access Limit	User Group Type
<a href="#">View/Edit</a>	XX		Demo #2	Demo Data Sharing with another state	<u>Suspend</u>	12-06-2021 01:17 PM	12-08-2021 - 12-06-2022	Users Only

Figure 29. Rule is Automatically Suspended Outside of Access Limit Dates

### 6.4.2 Timeframe Options

Unlike the Data Access Time Limits, the Timeframe Options are applied to individual data sources. In other words, while a rule's Data Access Time Limits constrain the entire rule and specify when it will be Active, the Timeframe Options apply to the actual data to be made available based on when it was collected. If you set the Timeframe Options, only data collected in that timeframe will be viewable by users and groups named in the rule.

If you select Facility Location and Visit (Full Details) as a data source, you can specify which data can be viewed by setting the Timeframe-From and Timeframe-To options in the WHERE clause. If more than one data source is specified in an access rule, separate Timeframe-From and Timeframe-To options must be set for each data source.

Figure 30 shows an example where a Site YY user is granted access to one of your facility's data sources (with No data details) from December 8, 2021, to December 6, 2022, for data collected during the year 2021.

## DATA ACCESS

Edit Rule  
Define rule, select users, and select data

Review & Submit Rule  
Verify rule contents and set rule status

Back/Edit
Submit
Cancel

Rule Status: Draft

Name: Demo #3

Description: Example Data Access Rule using Timeframe Options

Access Limit:   to  

Selected User(s) and Group(s)

Site	User Type	Name
YY	Group	All YY Epidemiologists

Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
XX	Patient Location and Visit (Full Details)	N	Where State =XX. AND County = XX_Cty1,XX_Cty2 AND From Date = 10-01-2021 AND To Date = 12-31-2021	<span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 3px;">X</span>

Figure 30. Example Using Timeframe Options

**6.4.3 Limiting Access with a Combination of Data Access Time Limits and Timeframe Options**

Data Access Time Limit and Timeframe Options may be used in combination. This can be helpful when you want to tailor access rules for sharing data from specific time periods for special projects.

For example, if you are working with the DOD on a special project dealing with a facility in your site and the data of interest spans 2021, you could set up a Data Access Time Limit. You could set this limit to allow a DOD user to access all aggregate data (No data details) for that facility from December 8, 2021, to December 6, 2022, but make available only the data collected from January 1, 2021, to December 31, 2021.

By allowing access starting in December, you could provide time to get your shared project set up and tested by the end of 2021, so that the project could move forward by the time all 2021 data becomes available.

Figure 31 shows what the data access rule would look like in this scenario.

# DATA ACCESS



Back/Edit
Submit
Cancel

Rule Status:   
 Name:   
 Description:   
 Access Limit:  to



Selected User(s) and Group(s)

Site	User Type	Name
DOD	Individual	DanDOD

Site	Data Source	Data Details	"WHERE" statement (if applicable)	Delete
XX	Facility Location and Visit (Full Details)	N	Where Facility = 1379 AND From Date = 01-01-2021 AND To Date = 12-31-2021	<input type="button" value="X"/>



Back/Edit
Submit
Cancel

Figure 31. Use a combination of Access Limit and Timeframe Dates to control access. Shown here is one year's access to 2021 data for Facility No. 1379.