Swine Health Information Center

Standardized Outbreak Investigation Program User Support Guide

December 2025

Swine Health Information Center

Made possible by pork checkoff

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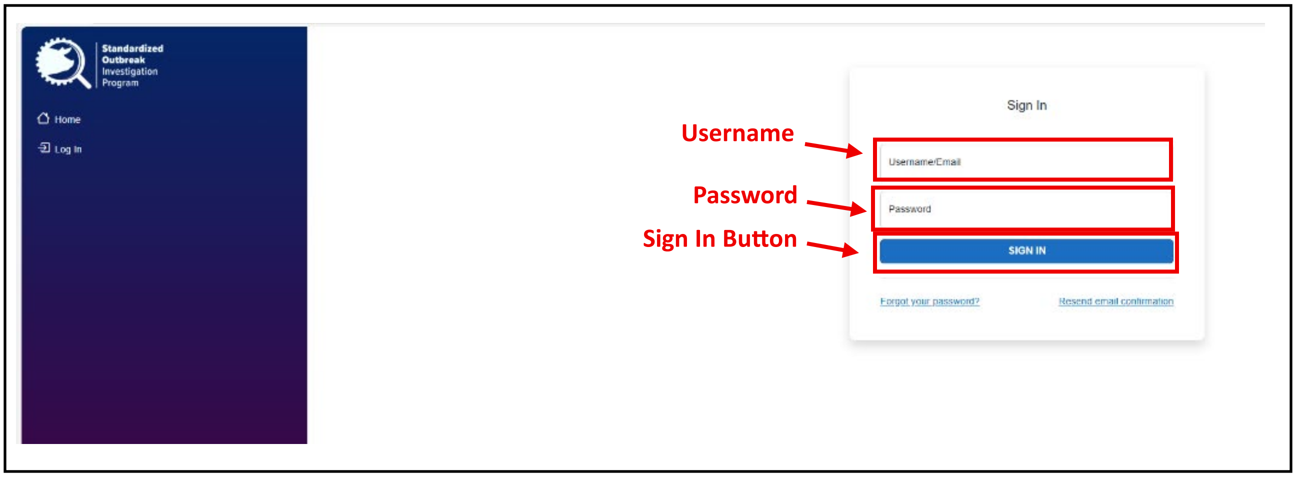
Accessing the Standardized Outbreak Investigation Program

If you are registering a new company through the Standardized Outbreak Investigation Program (SOIP), first contact the Program Administrator at soip@iastate.edu. The Program Administrator will set up the account and you will be registered as a Company Administrator. You will need to provide the Program Administrator the name of your company with your account request. For existing companies in the SOIP, a Company Administrator for your company can set up your account.

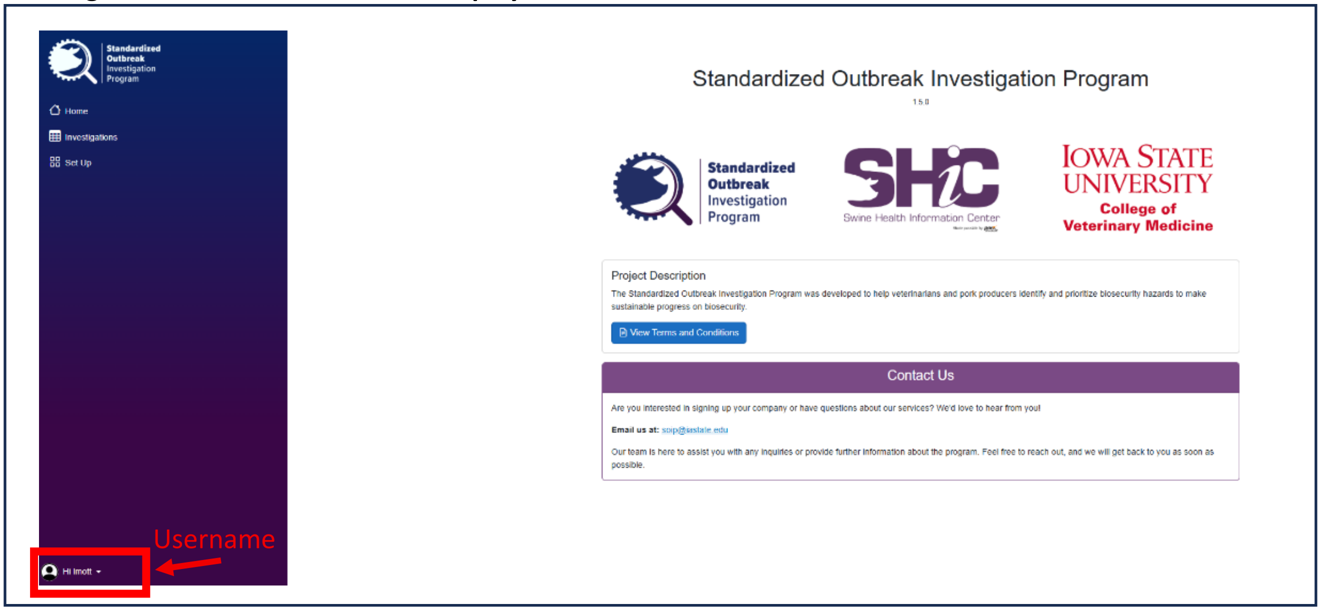
- Once the request is processed by the Program Administrator, the Company Administrator will receive an email to activate the account. This email will include a username and password for the account.
- To gain access to the SOIP, click on the link provided in the email from the Program Administrator. You will be redirected to the login page for the SOIP, where you can enter the username and password assigned to your account (see Image 1 below for an example of the login page).

Image 1: SOIP Login Page



- Once you have logged in, you will be redirected to the Home Screen, where you will see the message "Hi, (username)" displayed in the lower left corner of the screen (see Image 2).
- Users cannot change the assigned username, but you can update your password by selecting the dropdown arrow seen next to "Hi, (username)." This will populate a dropdown menu, where you will select "Manage Account."
- You will be directed to a new page titled "Manage Account." At the bottom of the page, there will be a section reading "Click here to change password of your account." Click on the blue "here" link.
- This will take you to a new screen where you will input your email address associated with your account and be sent a link to reset a new password.

Image 2: SOIP Home Screen and Display Menu



Organization of the SOIP

The SOIP is organized to be user-friendly. Once you are logged in, you will automatically be redirected to the Home Screen.

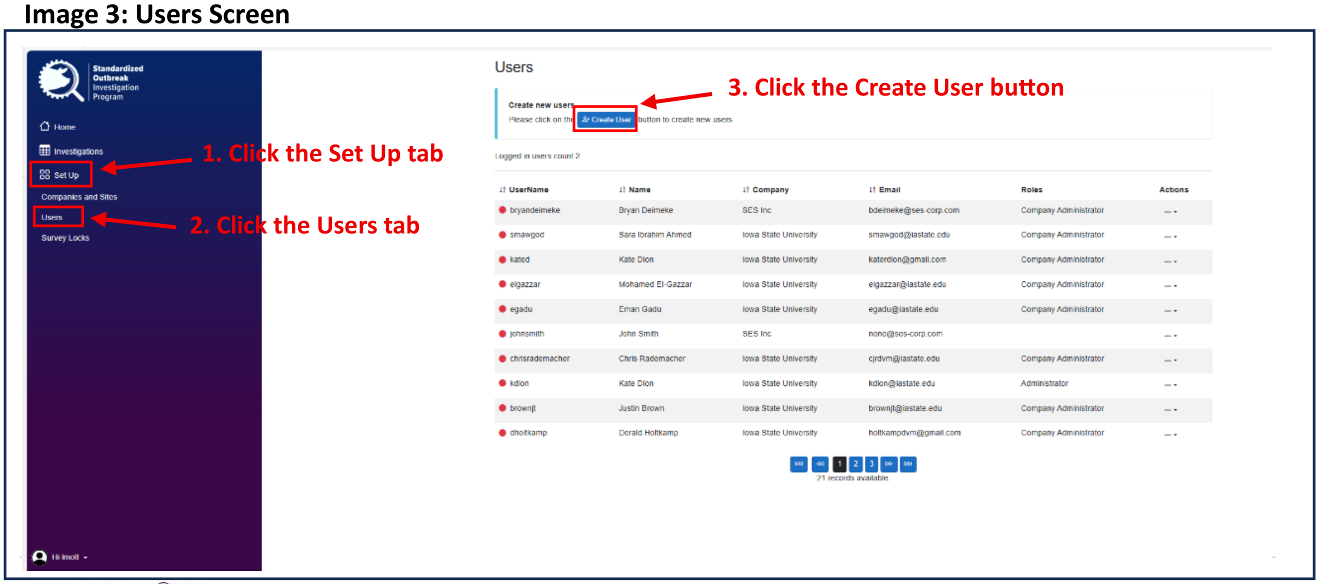
- On the Home Screen, you will find a menu displayed on the left side of the screen. All actions needed within the SOIP can be found through this menu.
- Two types of users may be registered through the SOIP:
    - Company Representatives: may add additional company representatives, but cannot delete users
    - Company Administrators: may add or delete company representatives

Adding a Company Representative in the SOIP

As a Company Administrator, you may need to add additional representatives of the farms you work with, such as farm managers, herd veterinarians, or production managers, to allow them access to the SOIP and the ability to view ongoing investigation information.

- To add a new user, click the “Set Up” tab on the left side of the Home Screen. Additional dropdown options will be displayed below.
- Next, click the “Users” tab from the dropdown menu. This will take you to a new screen where all users established through your company will be displayed.
- To add an additional user, select the blue “Create User” button at the top of the screen (see Figure 3). This will redirect you to a new page.
- On the next screen (new page), you will enter the new user’s information, including a username of your choice, their first name, last name, and email address. The “Main Company Name” will automatically populate with the name of the company you are assigned to.
  - Any new users you add should be registered as a “Company Representative.”
    - A company may have as many “Company Representatives” as needed, and anyone may be added as a “Company Representative.”
      - Examples of “Company Representatives” you may want to add include other individuals that work for your company, farm manager or production managers you are working with, veterinarians associated with the investigation, etc.
      - Company Representatives may create and edit investigations but cannot add new users.
    - You may only add new users under the company that you are registered with through the SOIP.
- Once a new user’s information has been entered, select the blue “Create User” button at the bottom of the screen. Once you have confirmed and saved the user information, you will be redirected back to the “Users” screen (See Image 3). The new user’s information should populate here.

Image 3: Users Screen



Who Can Delete Users, Sites, and Companies in the SOIP

Varying capabilities are available through the SOIP depending on the role you are registered as.

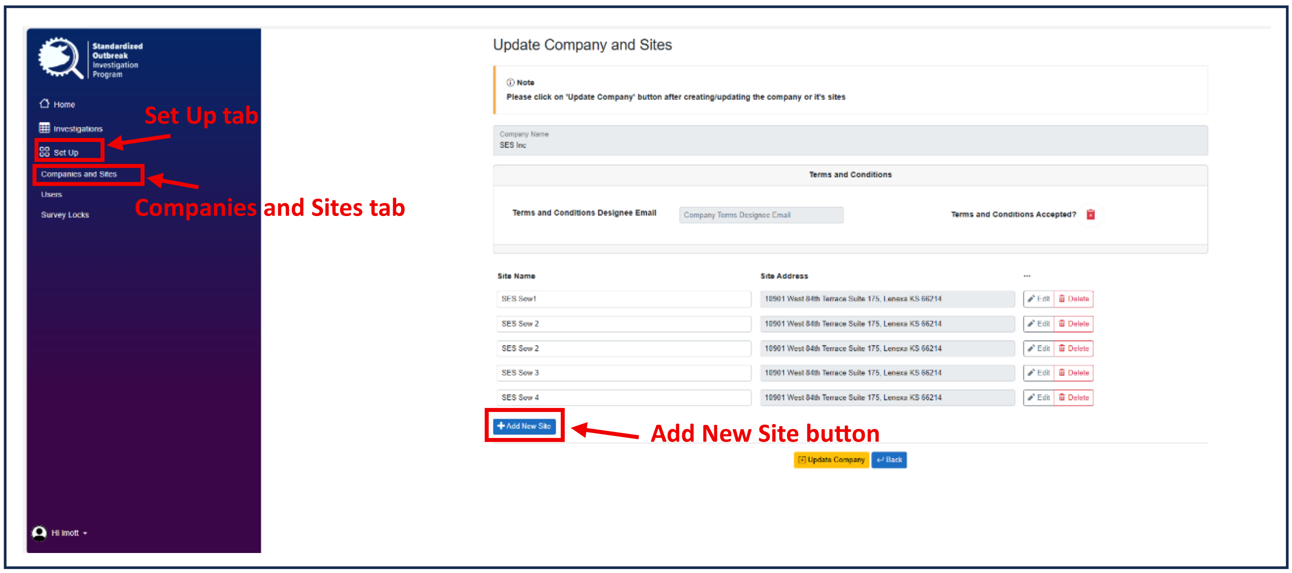
- Company Administrators can:
  - View user information
  - Edit user information
  - Create new users
  - Delete existing users
  - View sites
  - Create new sites
  - Edit existing sites
  - Delete existing sites
  - View investigations
  - Edit investigations
  - Create new investigations
  - Delete investigations
  - View Detailed Reports and Executive Summaries for investigations
  - Flag or unflag biosecurity hazards listed in the Detailed Report
  - Unlock locked investigations
- Company Representatives can:
  - View investigations
  - Edit investigations
  - Create new investigations
  - View Detailed Reports and Executive Summaries for investigations
  - Flag or unflag biosecurity hazards listed in the Detailed Report
  - Unlock locked investigations
- Only the Program Administrator can delete a company registered in the SOIP. To do so, email the Program Administrator at soip@iastate.edu.

Setting up Sites and Building Site Maps in the SOIP

Company Administrators in the SOIP may need to set up sites for an investigation or build maps for those sites. The site must already be set up through the SOIP to be able to be included in an investigation.

- To set up a site, click the "Set Up" tab in the menu located to the left side of the Home Screen. This will populate a dropdown menu with additional options. Select "Companies and Sites" from the dropdown menu.
- After clicking "Companies and Sites," you will be redirected to a new page titled "Companies and Sites," where you will see your company's information.
- Under the "Actions" tab on the right side of the "Companies and Sites" screen, select the "Edit Company" option to set up a new site.
    - A pop-up box will appear asking to confirm that you would like to update the company. Select "Yes, Proceed."
- This will redirect you to a new page titled "Update Company and Sites," where you will see any existing sites that have been set up for your company (see Image 4).
- To add a new site, select the blue "Add New Site" button at the bottom of the screen (see Image 4).

Image 4: Update Company and Sites Page



- This will take the user to a new page titled "Create New Site" where they can enter site details, including:
    - Site name
    - Latitude and longitude
    - Premises identification number
    - Site address

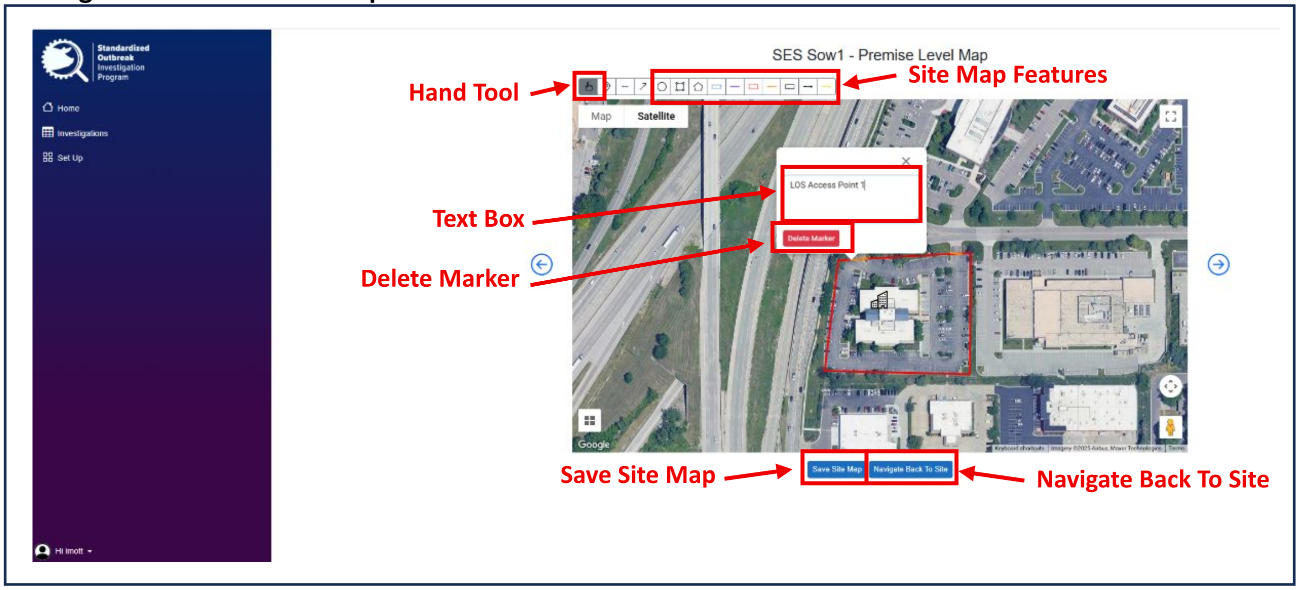
- When all needed site information is entered, select the blue “Create New Site” button at the bottom of the screen. This will save your site information to your company, and take you to a new screen labeled “Update Site.”
- On the “Update Site” page, users can create site maps for the premises selected.
    - The mapping feature includes the option to build a Premises Map, as well as radius maps for one, three, and five miles around the premises.
    - Any information included on the site map will be automatically pulled into investigation forms that include the applicable site.
- To start, select the “Premises Map” option. This will take you to a new screen where you will see the premises marked with a building icon if the Global Positioning System (GPS) coordinates and address provided are correct.
    - If the map does not look correct, select “Navigate Back to Site” at the bottom of the screen. Verify that the address and GPS coordinates were entered correctly.
    - The building icon may be moved, so if it is not centered correctly, you can adjust the feature as needed. If the icon is moved, be sure to save the changes before exiting the site map.
- The map feature allows you to add Secure Pork Supply (SPS) mapping features to the premises map to mark where other relevant features to the investigation may be.
- Line tools available for use on the site map are shown along the top of the map (see Image 5). Each symbol reflects a different aspect of the SPS Plan. See below for a features legend:

Perimeter Buffer Area (PBA)
PBA Access Point(s)
Line of Separation (LOS)
LOS Access Point(s)
Vehicle cleaning and disinfection (C&D) station(s)
Designated parking area
Carcass disposal/pickup location
Carcass removal pathways
Vehicle movements (animal transport vehicles, deliveries, etc.)
Site Entry

- To include features on your site map, select the icon that aligns along the top (see Image 5).
- To label or delete any features on the map, select the hand tool at the upper left corner of the map. Use the hand tool to click on the feature you would like to label or delete.
    - To label, type the label into the text box that appears, then select the “X” button. This will automatically save.
    - To delete a feature, select the red “Delete Marker” option below the text box.

- Once the map has all the necessary features added, select “Save Site Map” and then select “Navigate Back to Site.”
- This will take you back to the “Update Site” page, where you can develop one-, three-, or five-mile radius maps as well. On the radius maps, you can identify other operations or areas of concern that may be near the premises.
    - Each map is independent of each other. Features outside of the site location do not transfer from one map to the next. You must manually add additional features to each map and save each map individually.

Image 5: Premises Level Map



- The blue arrows to the left and right of the maps may be used to navigate through the complete series of maps associated with the site.
- Once all information is saved for each map, select “Navigate Back to Site” at the bottom of the screen. This will take you back to the “Update Site” page. Here, select “Update Site” to ensure all changes are saved. Then, select “Navigate Back to Company.”

Editing and Deleting Existing Sites in the SOIP

Company Administrators may delete or edit existing sites as needed for their associated company.

- Select the "Set Up" tab from the menu located on the left side of the Home Screen. This will populate a dropdown list where you will then select "Companies and Sites."
- This will take you to a screen labeled "Companies and Sites," where you will see your company's name listed and the number of sites registered through your company.
- Under the "Actions" tab to the right side of the screen, select the dropdown arrow and then select "Edit Company" from the list of options that appears.
- This will take you to a screen labeled "Update Company and Sites." All sites registered through your company will appear here, and you will be able to edit or delete those sites (see Image 4).
- To edit an existing site, select the "Edit" option to the right side of the site you would like to edit. This will take you to the "Update Site" page, where you can update site information and/or site maps as needed.
    - If you update the latitude and longitude, ensure that you click "Update Map Center" so the site map will automatically adjust as well.
    - Once you have made changes, select the "Update Site" button at the bottom of the screen, then select "Navigation Back to Company" to return to the "Update Company and Sites" page.
- To delete an existing site, click the red "Delete" tab to the right side of your screen for table-row representing that site.
    - A pop-up box will appear to verify that you would like to delete the site. Select the red "Delete" option.
- Once you have deleted the site, select the yellow "Update Company" button at the bottom of the screen to save any changes.

Creating an Outbreak Investigation in the SOIP

Most of your time will be spent working in the "Investigations" section.

- Select the "Investigations" tab on the menu to the left on the home screen. This will take you to the "Outbreak Investigations" screen.
  - Under Outbreak Investigations:
    - You can set up a new investigation or search existing investigations.
    - Any existing investigations will appear under "Available Investigations."
      - If your company does not have any investigations set up, this section will be empty.
      - If an investigation you are searching says it is locked, click "Survey Locks" on the left side of the screen. That will take you to a new screen that shows any locked investigations. Click the "unlock" button to the right of the investigation you need. Locking occurs when someone else is actively working on an investigation, so multiple people may not edit at once.
        - Company Administrators and Company Representatives can unlock investigations.

Setting up a new investigation

- Click on the "Investigation" tab under the menu to the left side of the screen. Select "New Investigation."
  - There are two investigation options: "prospective outbreak" or "current outbreak."
    - Prospective outbreak: conducting an investigation as a biosecurity hazard analysis.
      - Hazard analysis: a method of collecting and evaluating information on biosecurity hazards associated with the introduction of pathogens to a susceptible herd.
    - Current outbreak: in the context that an outbreak has recently occurred. A current outbreak will include biohazard information and disease information.
  - Select which type you need, then click "Create Investigation." This will take you to the next section.
- Investigations will be split into two parts:
  - Pre-investigation survey
    - Fill out with information you have gathered before the investigation interview.
  - Investigation forms
    - Complete with information found during the investigation interview.

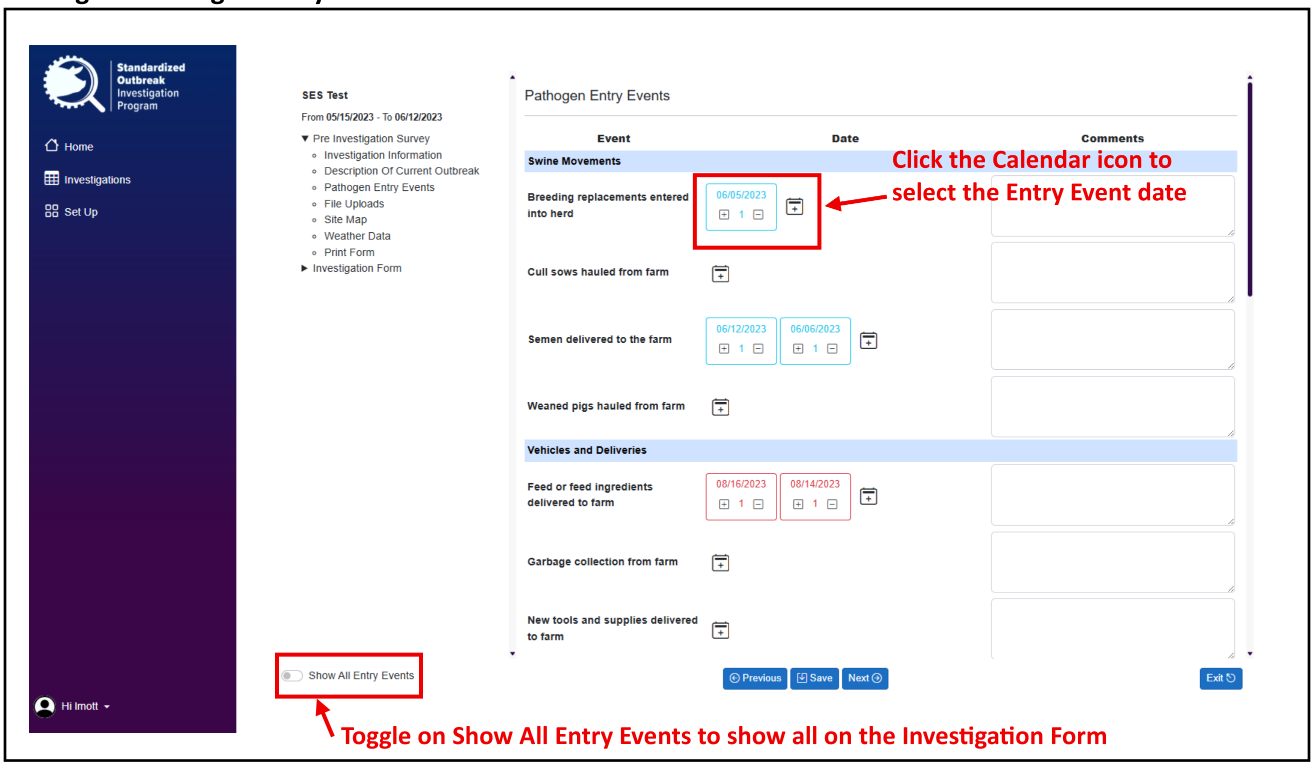
Pre-investigation survey

- Section 1: Investigation Information
  - Here, you will enter the following site information:
    - Investigation name
    - Company name

    - Site name (selected from a dropdown list of pre-existing sites for your company)
    - Farm manager name
    - Herd veterinarian
    - Site address
    - Latitude and longitude
    - Primary pathogen
    - Date investigation performed
  - You may also add a Facilitator for the investigation here, but a Facilitator is not required to conduct the investigation.
  - People who are part of SHIC response teams are set up as Facilitators in the Outbreak Investigation Tool. You may add those members here if they will be assisting with the investigation.
  - All lines/questions must be completed on this page to move to the next.
  - When the page is filled out, click "next" to go to the second page. This automatically saves your information.
- Section 2: Description of Current Outbreak
  - Enter information as you go through the pre-investigation and investigation process on this page. Clicking "next" or "save" will save any information entered.
- Section 3: Pathogen Entry Events
  - Entry Event: occurs when one or more pathogen-carrying agents enter the perimeter buffer areas or the premises.
  - Examples of Entry Events: entry of semen, removal of culls, entry of employees, entry of feed, etc.
  - Fill out information on this page, including dates (see Image 6).
  - If no date is selected for an event and the "show all events" button is not selected, events will NOT show up on the Investigation Form (see Image 6).
  - To delete a listed event, hover your mouse over the calendar until "X" appears. Click "X" to delete.
- Section 4: File Uploads
  - You can upload diagnostic files/related investigation files here.
    - File formats accepted include Portable Document Format (PDF) and Microsoft Word.
- Section 5: Site Map
  - The site map will automatically be pulled from the address entered.
  - The map section will have various feature options to label the premises.
    - Feature options include the perimeter buffer area, line of separation, and entry points.
      - Map features are the same as those used in the SPS Plan.
        - Map features can be found under the dropdown list on the top right side of the mapping page.
    - You may add comment boxes with labels for various features as well.
    - You may view site maps from a one-, three-, or five-mile radius. Use the magnifying glass on the upper right side of the screen to zoom in and out. You can also use the scroll feature on your mouse.

  - Click "Save" to document any changes made to the site map.
- Section 6: Weather Data
  - The weather data for your investigation period will automatically populate based on the days and location previously entered.
- Section 7: Print Questionnaire
  - Selecting "Print" will create/print a PDF file with all information input up to that point.
  - You may use this form during the investigation. If a site does not have internet connection, the printed version can be filled out onsite, if a site's biosecurity restriction will allow it, and then information can be uploaded to the SOIP web application after.

Image 6: Pathogen Entry Events

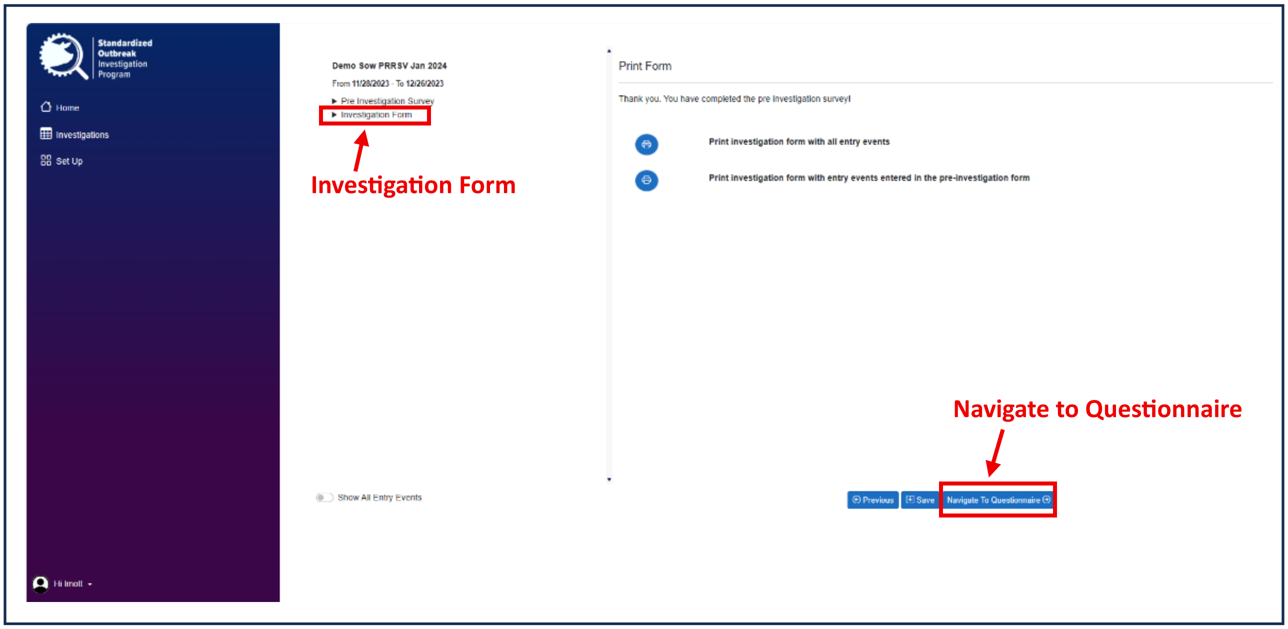


Overview of the Questionnaire Section of the SOIP

Once you have completed and saved the pre-investigation survey, you can move on to the Questionnaire.

- To get to the Investigation Form, select the "Navigate to Questionnaire" button at the bottom of the Pre-Investigation Survey Print Form screen, or select "Investigation Form" on the left side of the screen, listed below the investigation name (see Image 7).

Image 7: Pre-Investigation Survey, Print Form Screen



Questionnaire Sections and Guidance

- Section 1: Characteristics of the Herd
  - The first page you will be directed to is titled "Characteristics of the Herd."
  - Fill out all herd information here.
  - Click "Next" to auto save information. You can also click the "Save" button at the bottom of the screen.
- Section 2: Site Summary
  - The next page in the Investigation Form is the Site Summary.
    - The Site Summary has two sub-sections:
      - Sub-section A: Characteristics of the Premises
      - Sub-section B: Characteristics of Surrounding Area
  - You will be provided with 14 multiple choice questions to complete in Sub-section A. Select the answers applicable to your investigation.
  - Click "Next" to auto save information. You may also click the "Save" button at the bottom of the screen.

  - If you select "Next," you will be taken to Sub-section B, where you will complete five questions regarding the area surrounding the site, as well as a table to notate additional farms within a five-mile radius.
  - Click "Next" to auto save information. You may also click the "Save" button at the bottom of the screen.
- Section 3: Entry Events
  - The final section of the Investigation Form is titled "Entry Events That Occurred During the Investigation Period."
    - An "Entry Event" occurs when a pathogen-carrying agent enters a premises. The entry event must be measurable and will be recorded in the outbreak investigation report created.
  - All Entry Events entered in the pre-investigation survey will automatically populate here.
  - To see a list of the Entry Events for the investigation, select "Entry Events that Occurred During the Investigation Period" on the left side of the screen.
    - This creates a dropdown list with all the entry events from the Pre-Investigation Survey.
    - Events are listed by event type frequency, from most to fewest occurrences.
    - Click on each Entry Event listed to create another drop-down menu. This will show all instances of that specific Entry Event.
    - You may then click on specific sub-categories listed of those Entry Events. This menu will show each section of information that will be completed for each Entry Event.
  - You will automatically be taken to the Entry Event with the highest number of occurrences.
  - A calendar will display, showing the investigation period from beginning to end. Dates that the specific Entry Event listed occurred will be highlighted. Verify that the dates are correct (see Image 8).
    - Example: if semen was delivered once during the investigation period, only one day will be highlighted.
    - Investigation period: varies by pathogen in question, but recognition of the first clinical signs or the date diagnostic samples were collected following a diagnostic confirmation (whichever occurs first) will be used as the endpoint of the investigation period.
      - Example: Porcine Reproductive and Respiratory Syndrome (PRRS) = 28-day investigation window; Porcine Epidemic Diarrhea (PED) = ten-day investigation window
  - If the calendar looks correct, select "Next" to move to the next information section.
  - The following pages of information and questions will vary depending on the specific Entry Event being reviewed. Complete all applicable sections.
  - Each Entry Event will provide a section to assign the event a hazard rating and justification for the rating. Events can be rated as high, medium, or low risk (see Image 9). Once this section is completed, select "Next" to automatically save information and continue the Investigation Form.

- Complete this process for all listed Entry Events.
- When done, click "Save and Finish."

Image 8: Entry Events That Occurred During the Investigation Period Example

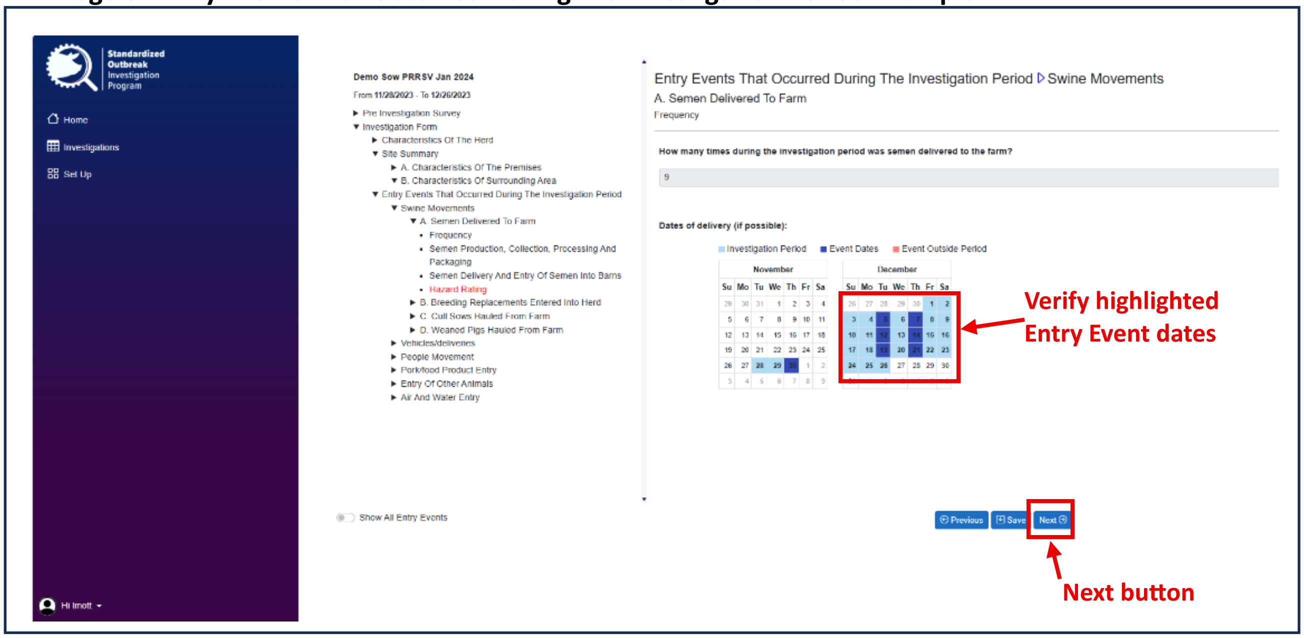
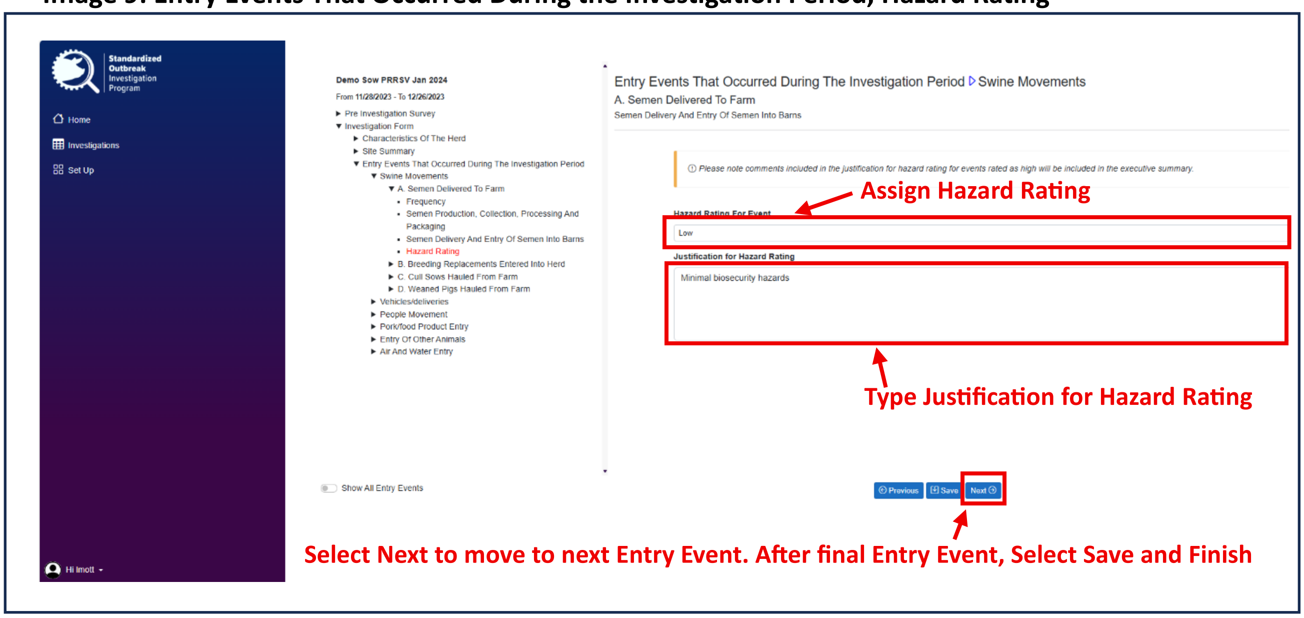


Image 9: Entry Events That Occurred During the Investigation Period, Hazard Rating



Editing Existing Investigations in the SOIP

When using the SOIP, you may need to edit an investigation you previously made or add more information.

- To edit an existing investigation, click the "Investigations" tab to the left side of the Home Screen. This will take you to the "Outbreak Investigations" page.
- On this page, you can either use the "Search Investigations" feature or scroll to the bottom of the screen, where you will find a list of all the investigations set up by your company.
- Identify which investigation you would like to edit, then select the drop-down arrow under the "Actions" tab to the right side of the investigation.
    - This will populate a drop-down menu, where you will select "Edit Investigation."
- This will take you to the "Investigation Information" page.
    - You may use the blue "Next" button at the bottom of the screen to move through all the investigation information.
        - This will take you through the pre-investigation survey and the investigation questionnaire.
    - You may also navigate through the investigation by using the drop-down menu to the left side of the "Investigation Information" page and clicking which form they would like to review.
        - Once you select a form, an additional dropdown list will appear under the form name with each section of the form available.
        - This will take you directly to the section they select.
- Once any information is added or updated, click the "Save" button at the bottom of the screen, and then the "Exit" button at the bottom right of the screen to navigate back to the "Outbreak Investigations" page.

Unlocking Locked Investigations in the SOIP

When using the SOIP, you may need to access an investigation that is locked. The purpose of the lock feature is to prevent two users from editing the same investigation at once. To unlock an investigation:

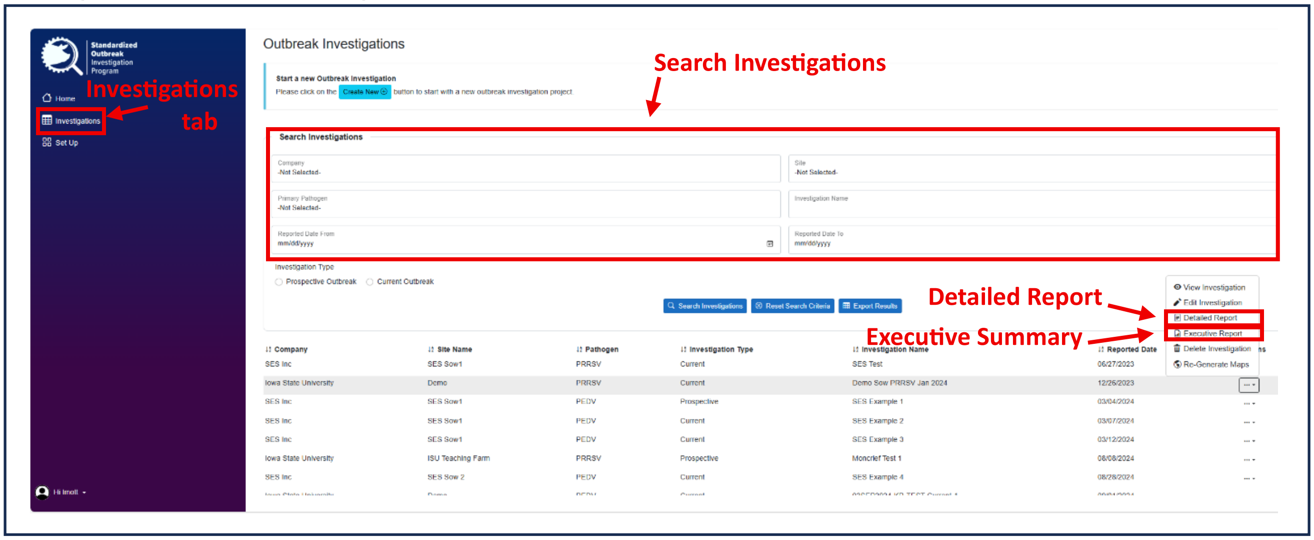
- Click the "Set Up" tab to the left side of the Home Screen. On the dropdown menu that appears under "Set Up," select "Survey Locks."
- This will take you to a new screen titled "User Locked Investigation Forms." If there are any locked investigations for your company, they will appear here.
- To unlock an investigation, click the "Unlock" button on the right of the screen.
- If, after following these steps, you are unable to unlock the investigation form yourself, please contact the Program Administrator at soip@iastate.edu.

Interpreting the Detailed Report in the SOIP

The Detailed Report includes all the information collected from the Pre-Investigation Survey and the Investigation Questionnaire.

- To access the Detailed Report, click the "Investigations" tab on the left side of the Home Screen. This will take you to the "Outbreak Investigations" page.
- Here, you may search your investigation in the "Search Investigations" section or scroll to the bottom of the page for a list of your company's investigations.
- Once you find the investigation you would like to look at, click the "Actions" tab to the right side of the screen. This will populate a dropdown menu. Select "Detailed Report" (see Image 10).
    - This will take you to the Detailed Report.

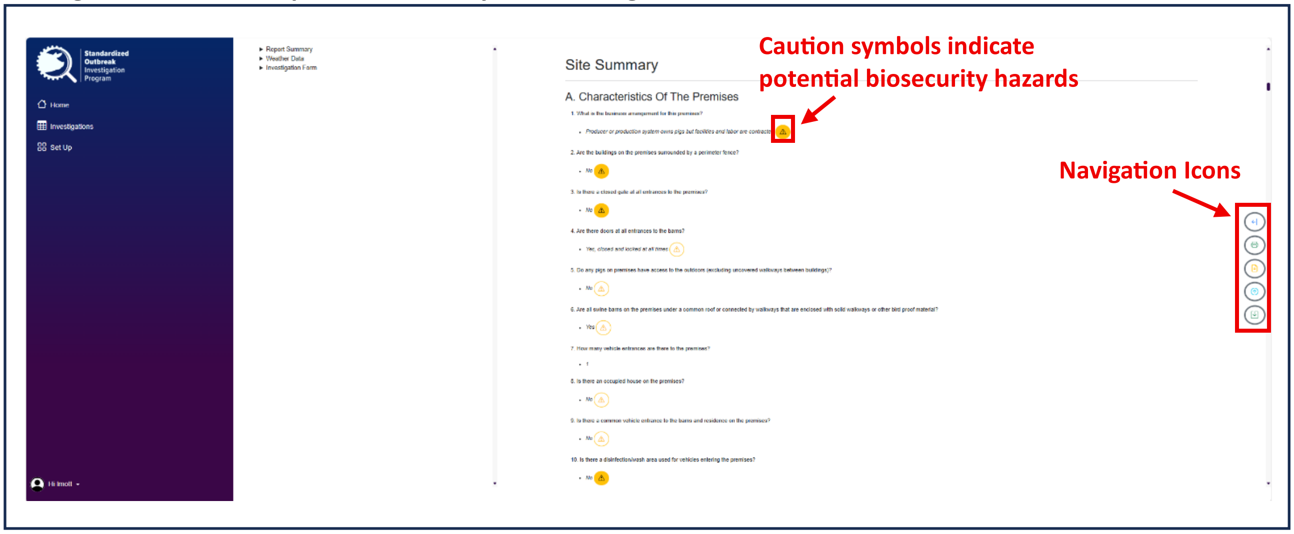
Image 10: Outbreak Investigations Screen, Actions Menu



- This screen will be titled "Standardized Outbreak Investigation Program – Detailed Report."
- To the right side of the screen, you will see a menu with several different navigation icons (see Image 11). From top down, they are:
    - Navigate back to the previous report page
    - Print the Detailed Report
    - Download the Detailed Report as a PDF
    - Scroll to the top of the page
    - Save changes made to the Detailed Report
- The Detailed Report includes a report summary, weather data from the investigation period, a description of the outbreak, herd characteristics, a site summary including site maps, and Entry Events during the investigation period.
    - Each Entry Event will show an assigned hazard rating along with the dates of entry and frequency of occurrences.
    - The SOIP has built in logic features that identify potential biosecurity hazards. These are notated by the yellow circle with a "Caution" symbol (see Image 11).

   - You may toggle these on and off for each question by clicking on the hazard flag.
 - Each Entry Event will also include a justification for its hazard rating.

Image 11: Detailed Report, Biosecurity Hazard Flags



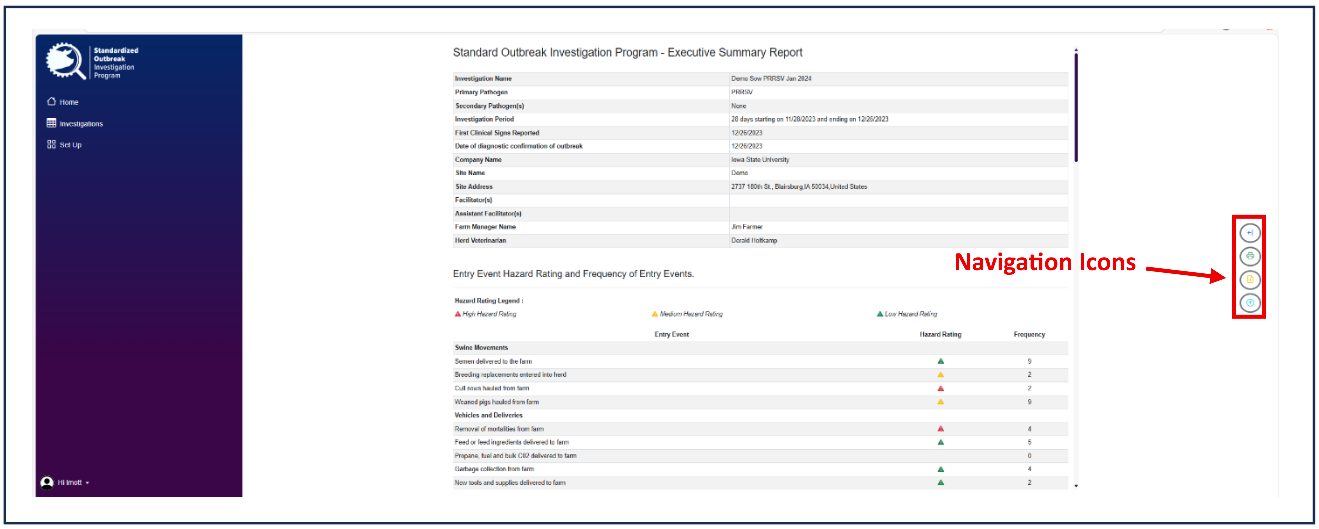
- You may view and update information for each Entry Event included on the form.
- Once all desired changes have been made, go to the menu on the right side of the screen and select the “Save” button.
- Once the report has been saved, select the top button from the right-side menu and click “Back to all investigations.” This will take you back to the “Outbreak Investigations” page.

Interpreting the Executive Summary in the SOIP

The Executive Summary is a shorter report that summarizes the investigation findings. You cannot edit the Executive Summary. Any changes needed must be made through editing the Outbreak Investigation itself or through the Detailed Report. All changes will be updated and reflected in the Executive Summary.

- To access the Executive Summary, click on the “Investigations” tab on the left side of the Home Screen. This will take you to the “Outbreak Investigations” page.
- Here, you may search your investigation in the “Search Investigations” section or scroll to the bottom of the page for a list of investigations through your company.
- Once you find the investigation you’d like to look at, click on the “Actions” tab to the right side of the screen. This will populate a dropdown menu. Select “Executive Summary” (see Image 10).
- This will take you to a screen labeled “Standardized Outbreak Investigation Program – Executive Summary” (see Image 12).

Image 12: Executive Summary Report



- To the right side of the screen, you will see a menu with several different navigation icons. Icons from top down are:
    - Navigate back to the previous report page
    - Print the Executive Summary
    - Download the Executive Summary as a PDF
    - Scroll to the top of the page
- The Executive Summary includes a report summary, list of Entry Events with their hazard ratings and frequency of occurrences, herd characteristics, Entry Events from the investigation period and a justification for each associated hazard rating, and a weather summary for the investigation period.
- To exit the Executive Summary, select the top button from the right-side menu and click “Back to all investigations.” This will take you back to the “Outbreak Investigations” page.

Acronyms

C&D	Cleaning and Disinfection
GPS	Global Positioning System
LOS	Line of Separation
PBA	Perimeter Buffer Area
PED	Porcine Epidemic Diarrhea
PDF	Portable Document Format
PRRS	Porcine Reproductive and Respiratory Syndrome
SHIC	Swine Health Information Center
SPS	Secure Pork Supply
SOIP	Standardized Outbreak Investigation Program