



# EPITRAX CASE WORKFLOW SOP

Purpose: Detailed Standard Operating Procedure for the purpose of learning case workflow in EpiTrax.

## Version History

Date	Author(s)	Changes Made	Reviewer(s)
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## Table of Contents

Introduction.....	3
Objectives.....	3
Routing Workflow Diagram.....	3
Epitrax Flowchart.....	4
Case Workflow in Epitrax .....	5
Step by Step Instructions:.....	5
Workflow Options.....	5
Step by Step Instructions:.....	7
Conclusion.....	9
Acronyms.....	9
Questions.....	9
Frequently Asked Questions .....	9
Resources and Further Material.....	9

## INTRODUCTION

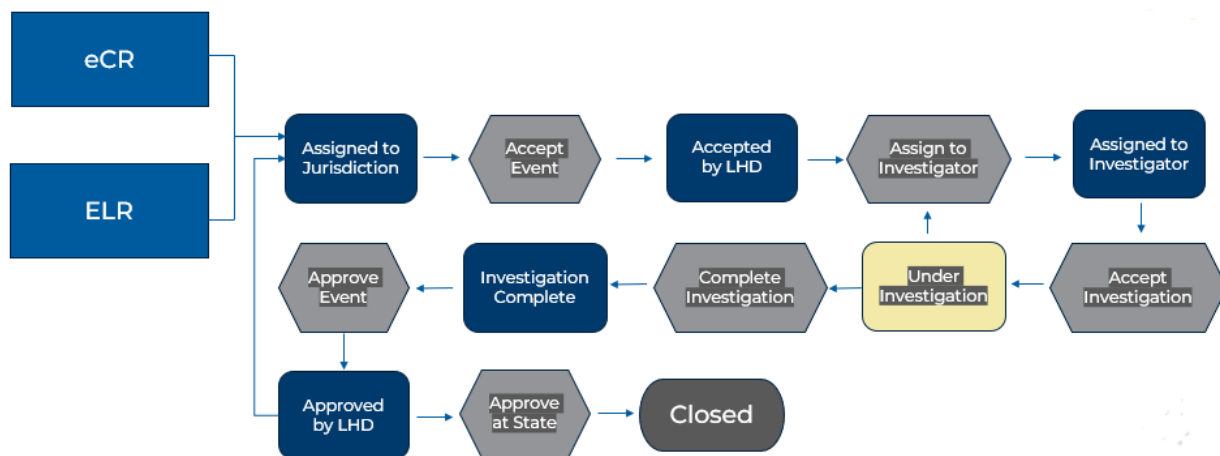
Welcome to the tutorial on Case Workflow in EpiTrax, the state of Nevada’s electronic disease surveillance system. This user guide is being provided by the State of Nevada Office of State Epidemiology.

## OBJECTIVES

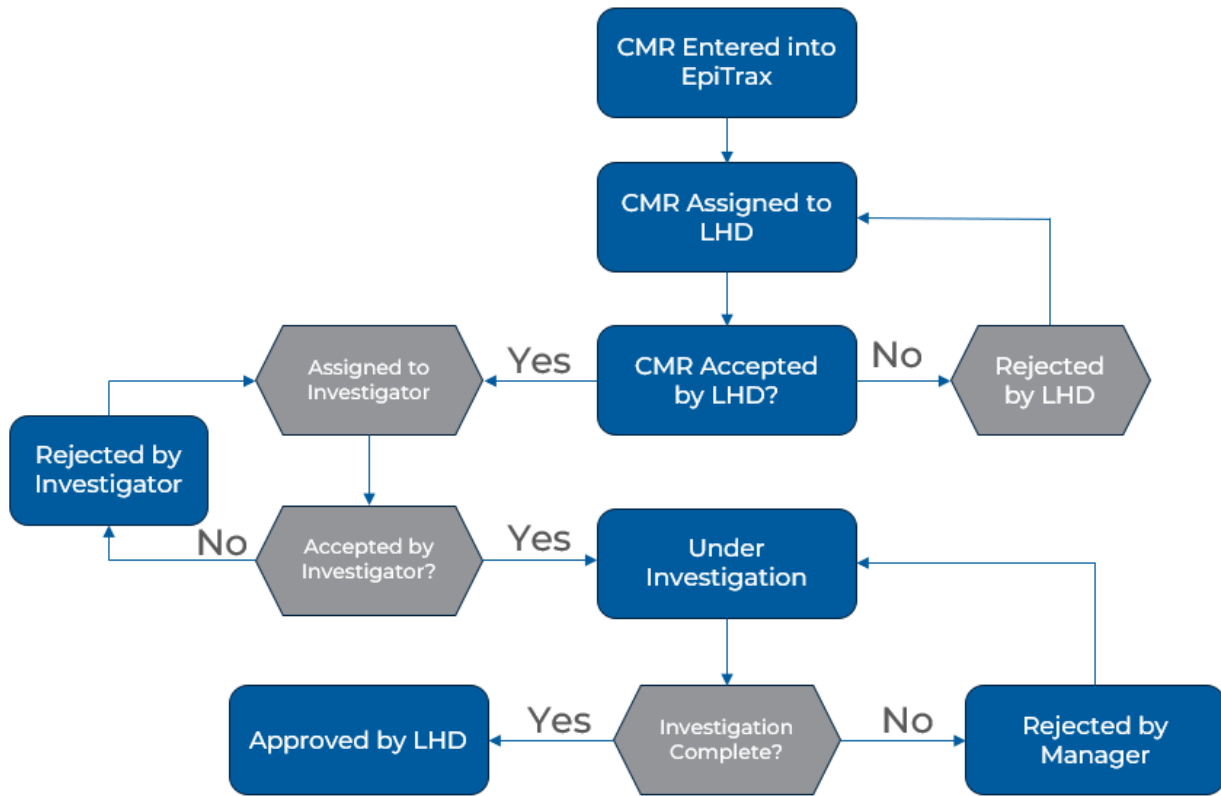
- Understand the routing steps in EpiTrax
- Discern which workflow steps are required and which can be skipped
- Participate in the routing process in two areas of a confidential morbidity report (CMR)
- Complete routing steps including accepting a CMR for a local health department and assigning and accepting a CMR as an investigator

## ROUTING WORKFLOW DIAGRAM

This diagram illustrates the EpiTrax routing workflow for case reports originating from eCR, ELR, or Reportal. Reports are first assigned to a jurisdiction, accepted by the Local Health Department (LHD), and then routed to an investigator. Once accepted, cases move through investigation stages, including “Under Investigation” and “Complete Investigation.” Following completion, events are approved by the LHD and, when required, approved at the state level before being formally closed. This workflow ensures cases are reviewed, investigated, and approved in a consistent and structured manner.



## EPITRAX FLOWCHART



## CASE WORKFLOW IN EPITRAX

### Step by Step Instructions:

1. Click on the 'CMR Search' tab, which is in the top area of the page.

NEW CMR | EVENTS | OUTBREAKS | CMR SEARCH | PEOPLE | RESOURCES | SETTINGS | LOGOUT

2. Type in the name or DOB of the case.

CMR Search

<b>Person name</b> Last, First, Middle	<b>Last name</b>	<b>First name</b>	<b>Middle name</b>	<b>DOB</b> mm/dd/yyyy	<b>Phone</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Record number</b>					
<input type="text"/>					

3. Click on the record number of the case

Record Number

⬇

2024472274

4. The CMR will open, and you will see the event header with information about the patient. The pink color indicates that there is action that needs to be taken on the case.

**Edit Morbidity Event**

Options ▾ Workflow Options ▾ View ▾ Navigate ▾

Auris-test , C	Event type Morbidity	Workflow status Assigned to LHD	Investigator Not assigned	Disease Candida auris, clinical	Investigating Agency CCHHS	State case status	Brief note <input type="text"/>
Record #: 2025472415	LHD case status	Event date 06/06/2025					<input type="button" value="Save"/>

5. Click 'Accept Event' to move to the next step in the workflow process.

✓ Accept Event

6. This button will change to the next step in the process, which is 'Assign to Investigator'. Click on this button.

Assign to Investigator

7. For this example, I will assign this case to myself. It is important to note that you can assign it to other users within the organization

**Workflow Action** ✕

Jenna DeSellems ▼ Assign to Investigator Cancel

8. After assigning it to yourself, click on 'Accept Investigation'.

✓ Accept Investigation

9. After the investigation is finished, click 'Complete Investigation'. This will turn the header gray, indicating that the investigation is complete.

✓ Complete Investigation

Note: The approval of the CMR at the local level is required in order for the CMR to be ready for state review.

10. Click on 'Approve Event'

✓ Approve Event

## WORKFLOW OPTIONS

### Step by Step Instructions:

1. Click on the 'CMR Search' tab, which is in the top area of the page.

NEW CMR | EVENTS | OUTBREAKS | CMR SEARCH | PEOPLE | RESOURCES | SETTINGS | LOGOUT

2. Type in the name or DOB of the case.

CMR Search

<b>Person name</b> Last, First, Middle	<b>Last name</b>	<b>First name</b>	<b>Middle name</b>	<b>DOB</b> mm/dd/yyyy	<b>Phone</b>
<b>Record number</b>					

3. Click on the record number of the case.

Record Number  
⬆

2024472274

4. The CMR will open, and you will see the event header with information about the patient. The pink color indicates that there is action that needs to be taken on the case.

Options							Workflow Options		View		Navigate		Accept Event		Save & Continue		Save & Exit	
test9, testnow	Event type Morbidity	Workflow status Assigned to LHD	Investigator Not assigned	Disease Adenovirus	Investigating Agency Douglas	State case status	LHD case status	Event date 04/10/2023	Brief note		Save							
Record #: 2025472375																		

5. Click on 'Workflow Options, located under 'Edit Morbidity Event'. Then click 'Accept Event'

Workflow Options ▾ View ▾ N

- ✓ Accept Event
- Route to LHD
- Do Not Investigate
- 📄 Workflow History

6. Click on 'Workflow Options' again, located under 'Edit Morbidity Event'. Then click 'Assign to Investigator'

Workflow Options ▾ View ▾ N

- Assign to Investigator
- Route to LHD
- Workflow History

7. Use the drop-down menu to select your name, then click 'Assign to Investigator'

**Workflow Action** ✕

Select investigator... ▾ Assign to Investigator Cancel

8. Click on Workflow Options again, to accept, route, or assign a case.

Workflow Options ▾ View ▾ N

- ✓ Accept Investigation
- Route to LHD
- ✓ Accept Event
- Assign to Investigator
- ✓ Approve Event
- ⊗ Approve at State
- Do Not Investigate
- Workflow History

## **CONCLUSION**

This concludes the user guide on Events/Views in EpiTrax. We hope you learned more about how to create helpful views that will support your workflows.

### ***Acronyms***

CMR: Confidential Morbidity Report

eCR: Electronic Case Reporting

ELR: Electronic Lab Reporting

LHD: Local Health Department

UAT: User Acceptance Testing

### ***Questions***

Any questions that you may have, please contact the Office of State Epidemiology Informatics team at [informatics@health.nv.gov](mailto:informatics@health.nv.gov)

### ***Frequently Asked Questions***

What are the counties that each health authority is responsible for?

Southern Nevada Health District: Clark

Northern Nevada Public Health: Washoe

Carson City Health & Human Services: Carson City, Douglas, Lyon

Central Nevada Health District: Churchill, Mineral, Eureka, Pershing

Nevada Division of Public and Behavioral Health (DPBH) Office of State Epidemiology (OSE): Elko, Esmeralda, Humboldt, Lander, Lincoln, Nye, Storey, White Pine

### ***Resources and Further Material***

[Nevada EpiTrax User Guide September 2022](#)