



## CREATING AND MANAGING HELPFUL 'EVENT'/'VIEWS' SOP

Purpose: Detailed Standard Operating Procedure for the purpose of creating and managing helpful event/views in EpiTrax.

### Version History

| Date | Author(s)       | Changes Made | Reviewer(s) |
|------|-----------------|--------------|-------------|
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## INTRODUCTION

Welcome to the tutorial on Creating and Managing Helpful ‘Events’/‘Views’ 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 how to create an event view and identify variables available for filtering
- Create a view that will allow you to see your agency’s assigned cases awaiting acceptance by the Local Health Department (LHD)
- Modify a view and set one as your default
- Learn about the workflow options in ‘Events’

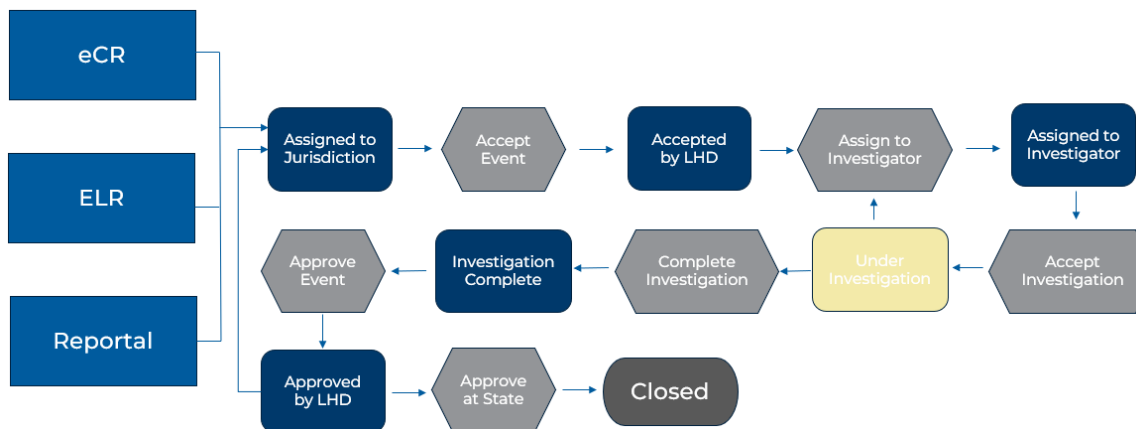
## OVERVIEW OF THE ‘EVENTS’ TAB

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

The ‘events’ tab is located at the top of the page, on the right side. The main purpose of this tab is to allow the creation of a saved set of criteria that will return a line list of confidential morbidity reports (CMRs). You will be able to create and save as many views as you want within ‘Events’, which will aid in your workflow processes.

## ROUTING WORKFLOW DIAGRAM

This diagram illustrates the EpiTrax routing workflow from initial report intake through case closure. Reports originating from sources such as eCR, ELR, or Reportal are first assigned to the appropriate jurisdiction, where the Local Health Department (LHD) reviews and accepts the event. Once accepted, the case is assigned to an investigator, moves through the investigation and approval steps at both the LHD and state levels, and is ultimately completed and closed. The workflow highlights key decision points and status changes that ensure cases are reviewed, investigated, and finalized in a structured and consistent manner.



In Nevada, one of the first steps in routing a Confidential Morbidity Report (CMR) is assigning it to the appropriate local health district (LHD) based on the address listed in the file and the county where the patient resides. A required step in the routing process

is to accept these events, which will then update the CMR status to 'Accepted by LHA'. One way to expedite this process is setting up a view that filters all CMRs that need to be accepted by an LHD. This will help LHDs know when they have been assigned a CMR.

## CREATING A VIEW

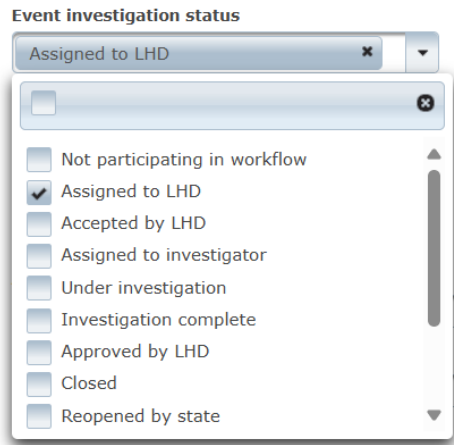
In this example, we are interested in seeing all CMRs assigned to my agency that need to be accepted.

### *Step-by-Step Instructions:*

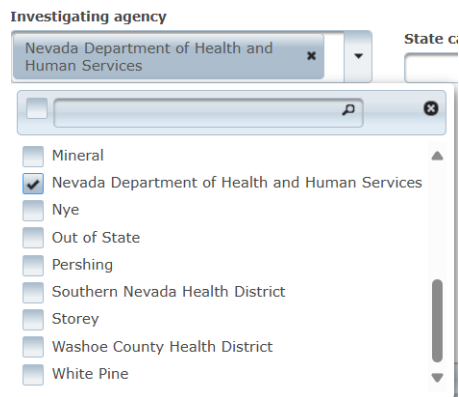
1. Click on the 'Events' tab, which is located on the top right side of the page.

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

2. Click on the drop-down arrow under "Event investigation status", and select 'Assigned to LHD'




3. Next, click on the drop-down arrow under "Investigating agency". You can scroll or type the name of your agency to find it. Click on the box on the left-hand side of your agency to select.




- After the “Event investigation status” and “Investigating Agency” have been selected, you can create a view and save. To do this, type a name under “New View Name”, and click ‘Save’ which is located to the right of the text box.

### New view name

Cases Needing Acceptance

 Save

 Cancel

- A line list will populate below, indicating which CMRs need to be accepted by the LHD.

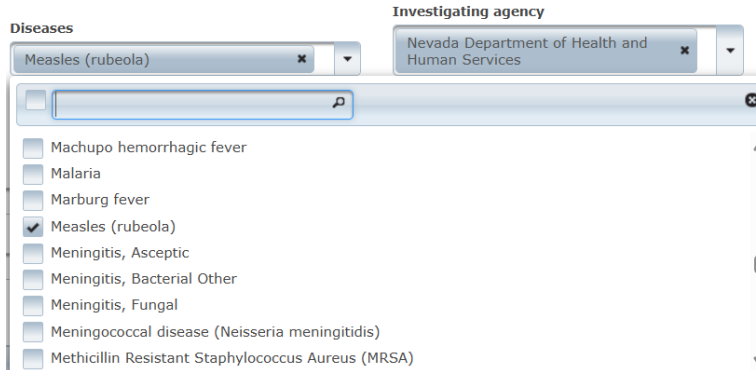
| LN, FN, MN / Record #                    | Disease                             | State Status | Local Status | Investigating Agency | Address at Diagnosis | Workflow Status   | Event Date | Actions      |
|--|-------------------------------------|--------------|--------------|----------------------|----------------------|---|------------|--------------|
| Test, Cindy<br>2025472390 – Morbidity    | Legionellosis                       |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 05/06/2025 | Flow Options |
| Test, Cindy<br>2025472387 – Contact      | Varicella                           |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 04/29/2025 | Flow Options |
| Test, Cam<br>2025472384 – Morbidity      | Novel Influenza A Virus Infection   |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 04/17/2025 | Flow Options |
| Test, Cindy<br>2025472364 – Morbidity    | Candida auris, clinical             |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 03/04/2025 | Flow Options |
| Test, Cindy<br>2025472352 – Morbidity    | Candida auris, clinical             |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 02/28/2025 | Flow Options |
| Test, Cam<br>2025472349 – Morbidity      | Novel Influenza A Virus Infection   |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 02/11/2025 | Flow Options |
| Test, Cindy<br>2025472358 – Morbidity    | Q fever, acute                      |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 02/07/2025 | Flow Options |
| test, testyyyy<br>2025472348 – Morbidity | Coronavirus Disease 2019 (COVID-19) |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 02/01/2025 | Flow Options |
| test, core<br>2025472323 – Morbidity     | Dengue                              |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 01/15/2025 | Flow Options |
| Test, Cindy<br>2024472298 – Morbidity    | Novel Influenza A Virus Infection   |              | Probable     | DHHS                 | Out of Country       | Assigned to LHD<br>Add brief note <input type="text"/> Save | 11/24/2024 | Flow Options |
| TEST, TEST<br>2024472292 – Morbidity     | Measles (rubeola)                   |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <input type="text"/> Save | 11/04/2024 | Flow Options |

## UPDATING A VIEW

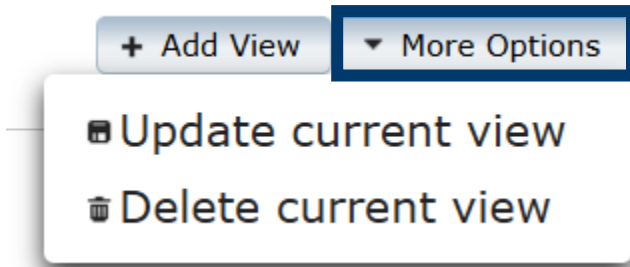
In this scenario, we will filter our view to show CMRs of a certain condition. This example will show how to update the view to provide only cases of Measles waiting to be accepted by the LHD.

### *Step-by-Step Instructions:*

1. Click on the drop-down arrow under “Diseases”. Type or scroll down to find the disease you are looking for. In this scenario, we are interested in all Measles cases.



2. To save, select the ‘More Options’ drop-down menu which is located on the right side of the page. Click ‘Update current view’.



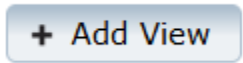
NOTE: This will save all criteria that are currently pulled up, so be mindful if you want to change the parameters or start a new one.

## ADDING A NEW VIEW

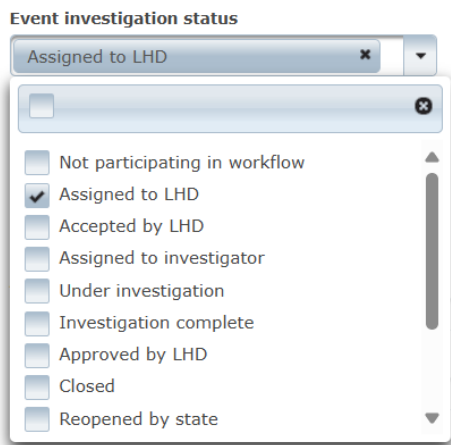
In this example, we want to see all Measles CMRs that need to be accepted by the LHD.

### *Step-by-Step Instructions:*

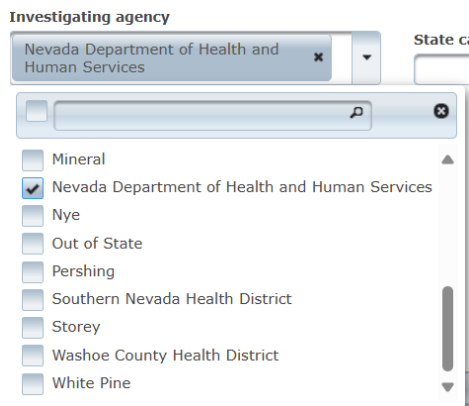
1. Click the 'Add View' button located on the right side at the top, next to 'More Options'.



2. Click on the drop-down arrow under "Event investigation status", and select 'Assigned to LHD'



3. Next, click on the drop-down arrow under "Investigating agency". You can scroll or type the name of your agency to find it. Click on the box on the left-hand side of your agency to select.



4. Click on the drop-down arrow under "Diseases". Type or scroll down to find the disease you are looking for. In this scenario, we are interested in all Measles cases.

**Diseases** **Investigating agency**

Measles (rubeola) Nevada Department of Health and Human Services

Machupo hemorrhagic fever

Malaria

Marburg fever

Measles (rubeola)

Meningitis, Asceptic

Meningitis, Bacterial Other

Meningitis, Fungal

Meningococcal disease (Neisseria meningitidis)

Methicillin Resistant Staphylococcus Aureus (MRSA)

- After the “Event investigation status”, “Investigating Agency”, and “Diseases” have been selected, you can create a view and save. Type a name under “New View Name” and click ‘Save’ which is located to the right of the text box.

### New view name

Measles to Accept Save Cancel

- A line list will populate below, indicating which Measles CMRs need to be accepted by the LHD.

| LN, FN, MN / Record #                  | Disease           | State Status | Local Status | Investigating Agency | Address at Diagnosis | Workflow Status                                     | Event Date | Actions      |
|--|-------------------|--------------|--------------|----------------------|----------------------|---|------------|--------------|
| TEST, TEST<br>2024472292 – Morbidity   | Measles (rubeola) |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <span>Save</span> | 11/04/2024 | Flow Options |
| Test, Salena<br>2024472273 – Morbidity | Measles (rubeola) |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <span>Save</span> | 07/09/2024 | Flow Options |
| TEST, TEST<br>2024472293 – Morbidity   | Measles (rubeola) |              |              | DHHS                 |                      | Assigned to LHD<br>Add brief note <span>Save</span> | 11/03/2021 | Flow Options |

## MANAGING VIEWS

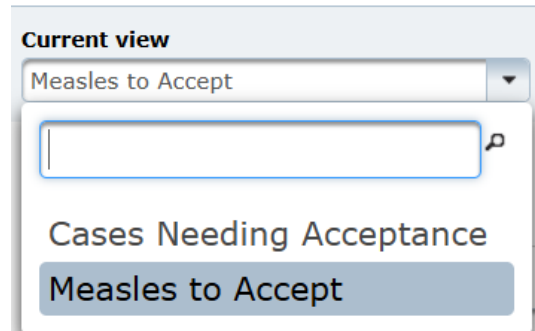
There are several ways you can manage your views.

### Sorting

| LN, FN, MN / Record # | Disease | State Status | Local Status | Investigating Agency | Address at Diagnosis | Workflow Status | Event Date | Actions |
|-----------------------|---------|--------------|--------------|----------------------|----------------------|-----------------|------------|---------|
|-----------------------|---------|--------------|--------------|----------------------|----------------------|-----------------|------------|---------|

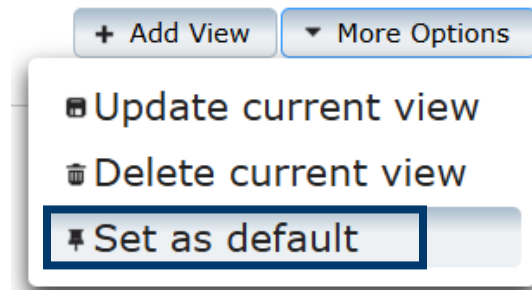
When you click on the arrows next to the heading, it will sort either in ascending order or, with a second click, descending order.

### Retrieving a View



To pull up any of the views we created today, click on the 'Current View' drop-down menu located on the top left of the page. Select which view you want displayed.

### Setting a Default

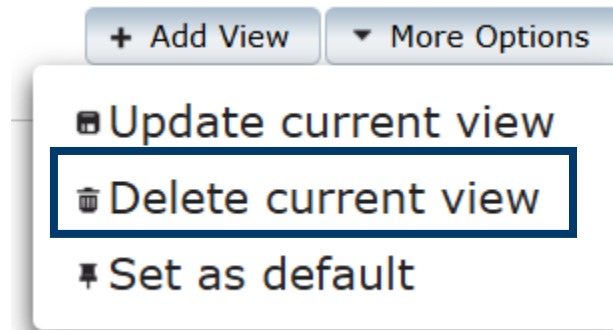


If there is a list that you frequently use and you would like that to appear every time you open the 'Events' tab, you can set it as your default.

1. Pull up the view that you want to set and default.
2. Click 'More Options' located in the top right.
3. Select 'Set as default' from the drop-down menu.

Now, when I go into 'Events,' I will see a line list of CMRs filtered by the criteria I selected in that default view.

### *Deleting a View*



You can also delete any views you don't need any more by clicking on 'More options' and then 'Delete current view.' The view will no longer appear under 'Current Views.'

## WORKFLOW OPTIONS

There are several actions you can take within the 'Events' page.

### Hyperlinks

|                                       |               |      |                 |            |   |  |
|---------------------------------------|---------------|------|-----------------|------------|---|--|
| Test, Cindy<br>2025472390 - Morbidity | Legionellosis | DHHS | Assigned to LHD | 05/06/2025 | <input type="text" value="Add brief note"/> <input type="button" value="Save"/> | <input type="button" value="Flow"/> <input type="button" value="Options"/> |
|---------------------------------------|---------------|------|-----------------|------------|---|--|

This is located within the line list on the 'Events' page. The hyperlink record number is highlighted under the name and is a nine-digit number. Click on the highlighted, hyperlinked record number which will take you to the CMR. You can view or enter CMR information here.

### Flow

|                                       |               |      |                 |            |   |  |
|---------------------------------------|---------------|------|-----------------|------------|---|--|
| Test, Cindy<br>2025472390 - Morbidity | Legionellosis | DHHS | Assigned to LHD | 05/06/2025 | <input type="text" value="Add brief note"/> <input type="button" value="Save"/> | <input type="button" value="Flow"/> <input type="button" value="Options"/> |
|---------------------------------------|---------------|------|-----------------|------------|---|--|

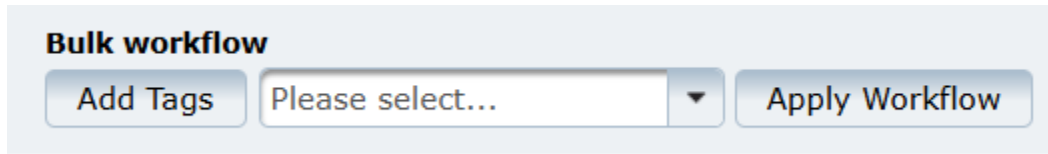
This is located within the line list on the 'Events' page. The flow button is located on the right under 'Actions' and will allow you to route the CMR. The routing steps available will depend on the status of the CMR and your user role.

### Options

|                                       |               |      |                 |            |   |  |
|---------------------------------------|---------------|------|-----------------|------------|---|--|
| Test, Cindy<br>2025472390 - Morbidity | Legionellosis | DHHS | Assigned to LHD | 05/06/2025 | <input type="text" value="Add brief note"/> <input type="button" value="Save"/> | <input type="button" value="Flow"/> <input type="button" value="Options"/> |
|---------------------------------------|---------------|------|-----------------|------------|---|--|

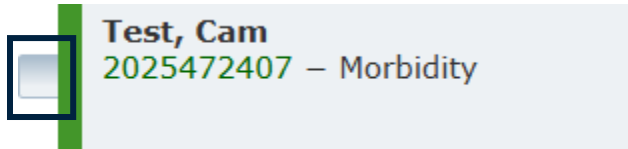
This is located within the line list on the 'Events' page. The options button is located on the right under 'Actions'. This button will give you dropdown options to view or edit at the event or person level.

### Bulk Workflow

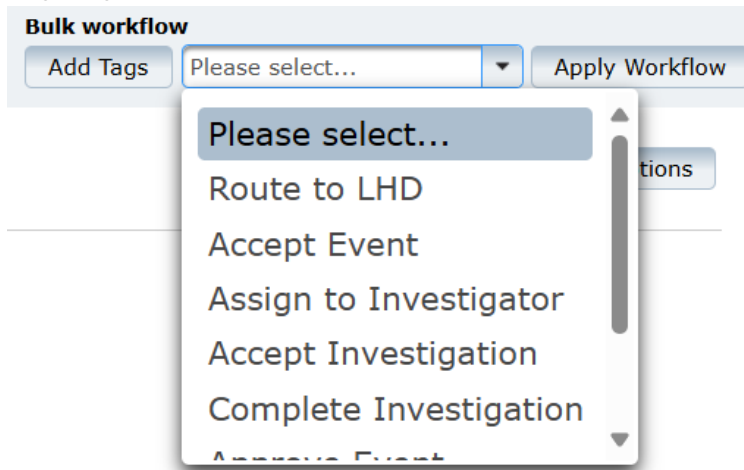


The 'Bulk Workflow' button is located at the top of the 'Events' Page. This allows you to apply changes to more than one CMR.

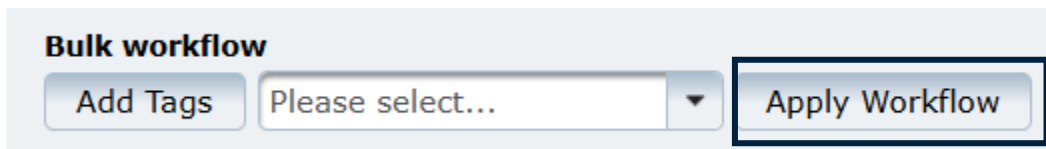
1. Select the checkbox on the left of the CMR's that you are wanting to change.



2. Select an option from the drop-down menu at the top of the page under 'Bulk Workflow'



3. Click 'Apply Workflow' located to the right once finished



NOTE: Will only work if the selected events are in the same stage of workflow. For example, you could select several events that have been Assigned to LHD and accept them at once.

## **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](#)