



## EPITRAX MAIN MENU

**Purpose:** This documentation covers the Dashboard, Events, Facilities, CMR Search, People, and Settings menu items in the green bar. This covers the tabs, core fields and functions available. The remaining Menu items are covered in their own documentation.

**Disclaimer:** This view contains simulated patient data for training purposes only. No real patient information is shown.

### Version History

Date	Author(s)	Changes Made	Reviewer(s)
10/21/25	Mallory LeProvost		

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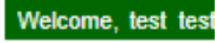
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## MENU BAR

The green and white Menu Bar is available throughout EpiTrax.

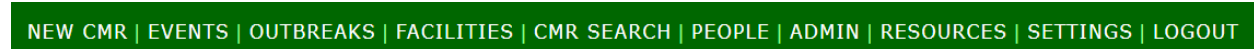


On the far left is the EpiTrax test. Selecting the EpiTrax  text returns the user to the Dashboard page from anywhere within the program. The current user's name appears  next to this.

- For additional information on user accounts see the EpiTrax Account Management documentation.

The words in white text across the center and upper right of the green bar are links that will load different pages and modules in EpiTrax.

The options available will vary depending on the current user's permissions. This documentation covers the Dashboard, Events, Facilities, CMR Search, People, and Settings menu items.

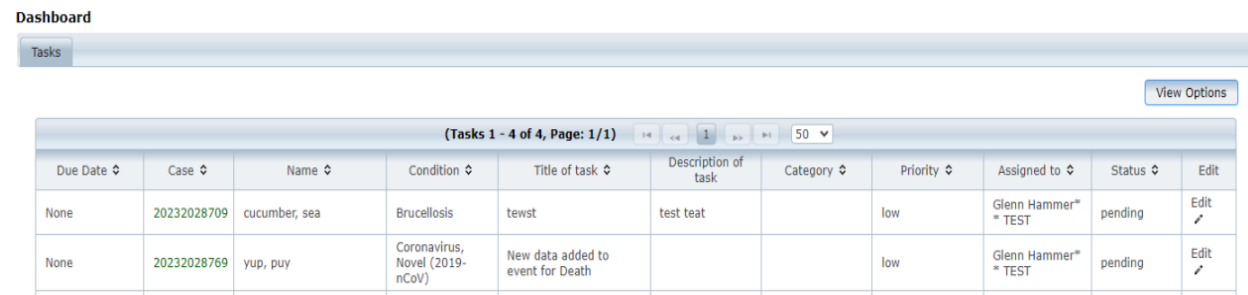


The other items are covered in their own EpiTrax documentation.

- See additional EpiTrax documentation for the New CMR, Outbreaks, Exports, and Admin menu items.
- If the Menu bar is missing, then log out of EpiTrax and log back in.

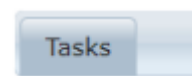
## DASHBOARD

The Dashboard is the first page loaded when logging into EpiTrax.

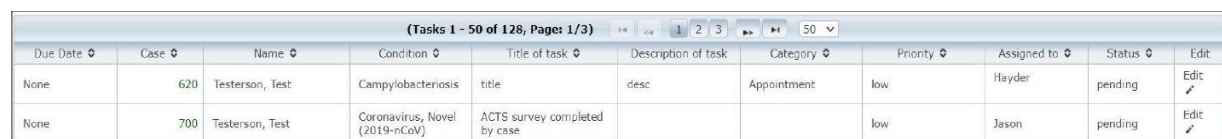


### Tasks Tab

### Dashboard



The first tab on the left is Tasks. The Tasks Tab lists the Tasks the current user can work on.



Due Date	Case	Name	Condition	Title of task	Description of task	Category	Priority	Assigned to	Status	Edit
None	620	Testerson, Test	Campylobacteriosis	title	desc	Appointment	low	Hayder	pending	Edit
None	700	Testerson, Test	Coronavirus, Novel (2019-nCoV)	ACTS survey completed by case			low	Jason	pending	Edit

These can be assigned to the current user specifically or they can be tasks the user has access to based on conditions and roles. Some of the Task information is displayed. This includes Due Date, Case number, Name, Condition, Title of task, Description of task, Category, Priority, Assigned to, and Status. A Task is an Appointment, a Call back or a Treatment associated with an event.

- For more information on Tasks see the EpiTrax Edit Event SOP and Technical documentation.

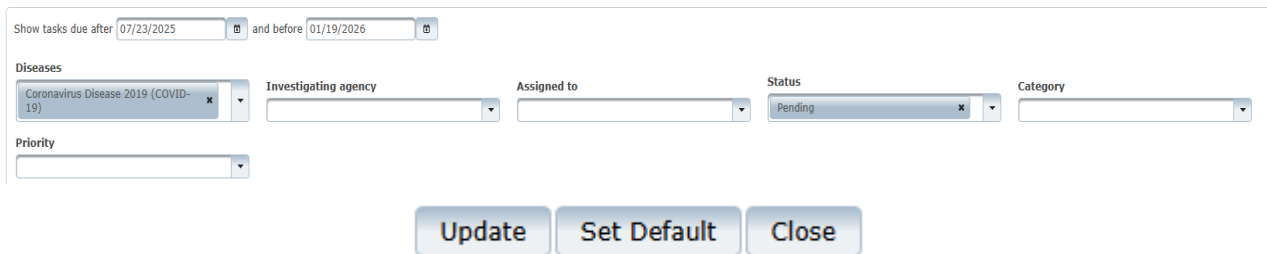
Select a green CMR (case) number from the Case column on the left to load the CMR for editing. This will open the Edit Event page.

- For more information on editing a CMR see the EpiTrax Edit Event SOP and Technical documentation.

### View Options

**View Options**

Select the View Options button on the upper right of the Tasks tab to see the available Task filters.




The filters include a Due date range, Disease, Investigating agency, who the Task is Assigned to, Status, Category, and the Priority. Make any desired filter changes. Near the bottom of the popup are the View Options buttons.

The Update button will apply the selected filters. The Set Default will save the filters and apply them every time the current user comes to the Task tab on the Dashboard page. The Close button will hide the options. Selecting View Options again will close the options.

### Edit Tasks

**Edit**

The Edit button  in the Edit column on the far right opens a Task for editing. The Due Date, Title of task, Description of tasks, Category, Priority, Assigned to, and Status fields are now editable.

- If a desired investigator is not in the dropdown check that the desired user has the

Due Date	Case	Name	Condition	Title of task	Description of task	Category	Priority	Assigned to	Status	Edit
None	2025504617	influa, test	Novel Influenza A Virus Infection	updated novel form			low	Cam-Van Huynh	pending	Edit ✓ ✕

investigator role, they have the correct jurisdiction access and they have access to the condition.

- If a user recently had investigator privileges changed, and the account of the person assigning the task does not "recognize" the change yet, wait 30 minutes and try again. If the new investigator is still not listed, have the person trying to assign the task logout and login.

## NEW CMR

**NEW CMR**

Select the New CMR **NEW CMR** menu option to search for a person and add a new CMR.

- For more information on the New CMR menu option, see the EpiTrax New User SOP or EpiTrax Edit Event Technical documentation.

## EVENTS

**EVENTS**

Select the Events **EVENTS** menu item to open the events page. The Events page helps to organize work. Users can create and save different filters to see different collections of CMRs. These are customized for currently logged in user. If a different user logs in, that user will get their own views.

### New Default View

A new EpiTrax user will have no views created when they first log in. The first section shows the Name field, the Save button and the Cancel button. Add some view criteria before entering a name and saving.

The next section shows the criteria/filters available.

#### New view name

These fields consist of Record #, Last name, First name, Age range, Event date after, Event date before, Event Type, Event investigation status, Queues, Tags, Investigators, Diseases, Investigating agency, Language, Address at diagnosis, Facility, and Show deleted events.

View Criteria

Record #	Last name	First name	Age range	Event date after	Event date before	Date range
<input type="text"/>	<input type="text"/>	<input type="text"/>	- ▾ - ▾	01/01/2015 <input type="button" value="🗑️"/>	mm/dd/yyyy <input type="button" value="🗑️"/>	- ▾

Event Type

Contact  Morbidity

Event investigation status	Queues	Tags
<input type="text" value="▾"/>	<input type="text" value="▾"/>	<input type="text" value="▾"/>

Investigators	Diseases	Investigating agency	State case status
<input type="text" value="▾"/>	<input type="text" value="▾"/>	<input type="text" value="▾"/>	<input type="text" value="▾"/>

Language	County at diagnosis
<input type="text" value="▾"/>	<input type="text" value="▾"/>

Address at diagnosis

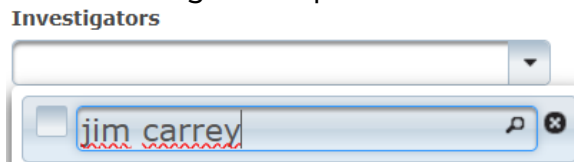
Facility

Show deleted events

- For more information on deleted events see the EpiTrax Edit Event Technical Documentation.

An individual user might want to make a view for each disease they work on. A manager might want a view for each member of their staff to help balance work loads. This can be used in conjunction with the Dashboard, that shows the current users tasks.

To filter for a specific investigator. Select the Investigator dropdown near the middle of the

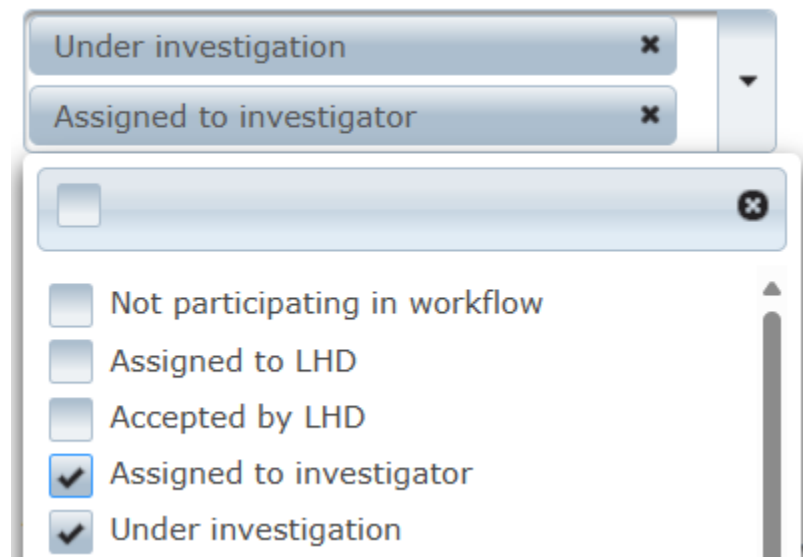


window. Type in the inspectors name to filter for it. Select the check box next to the desired name(s) to add it to the filter.

To only see the events in the “Assigned” and “Under investigation” status select the Event investigation status drop down. Search for the desired items and select the check boxes.

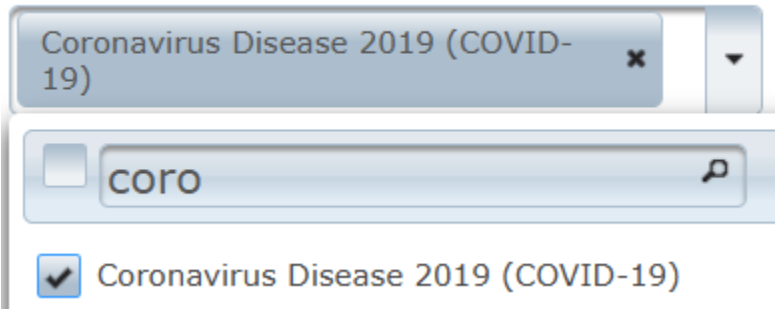
To filter by disease, select the Disease drop down. Check the boxes for the desired diseases.

#### Event investigation status

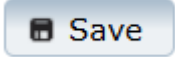


<input type="checkbox"/>	Under investigation	✕
<input type="checkbox"/>	Assigned to investigator	✕
<input type="checkbox"/>	Not participating in workflow	
<input type="checkbox"/>	Assigned to LHD	
<input type="checkbox"/>	Accepted by LHD	
<input checked="" type="checkbox"/>	Assigned to investigator	
<input checked="" type="checkbox"/>	Under investigation	

## Diseases

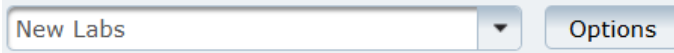


Once the view criteria fields are set, type in a name in the top left “New View name” and

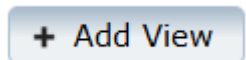
select the Save button  to the right of the new view name. The first saved view becomes the default view and will be displayed every time the user comes to the Events page.

## Add a View

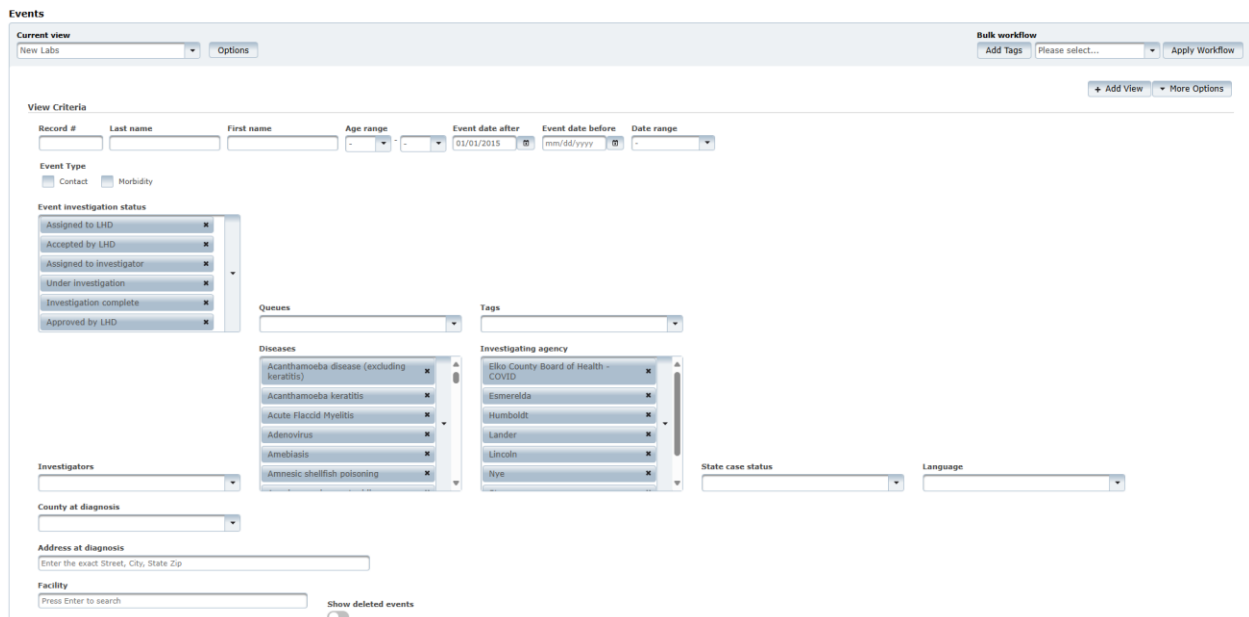
To create an additional view on the events page, select the Options **Current view**



button on the left to open the tool.



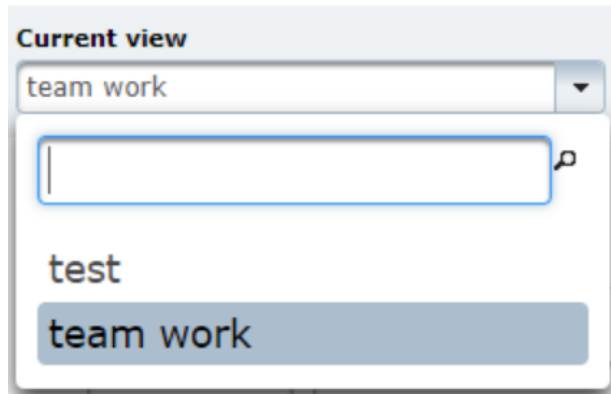
Select the + Add View button on the right side of the screen. The block of criteria fields is added.



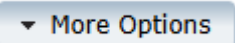
Set the criteria as desired. Type in a name for this view and select save. This new view becomes available in the current view dropdown.

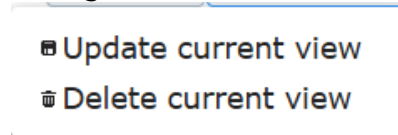
Select the Cancel button to close the New View options.

## Editing an existing Event view



Open the events page and select the desired view from the Current View drop-down menu in the upper left. Press the “Options” button so the filters are visible. Make the desired


changes to the View Criteria/ Filters. Select the More Options  button on the right side of the window. Select the Update Current View option



to save the changes made. Select the Delete Current View option to remove it. Select the Set as Default option to make the open view the new default view. Select the Options button again to hide the view criteria and not keep the changes made.

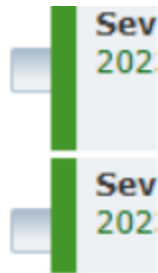
### ***Bulk Workflow***

It is possible to move several CMRs from one Workflow status to the next at the same time. This changes CMRs from one workflow status to the next status. Scroll to the desired CMR's. All the CMRs must be in the same initial workflow status and be going to the next status. Verify the CMR's are all in the same Workflow status by looking at the Workflow Status column. This screenshot shows different statuses.

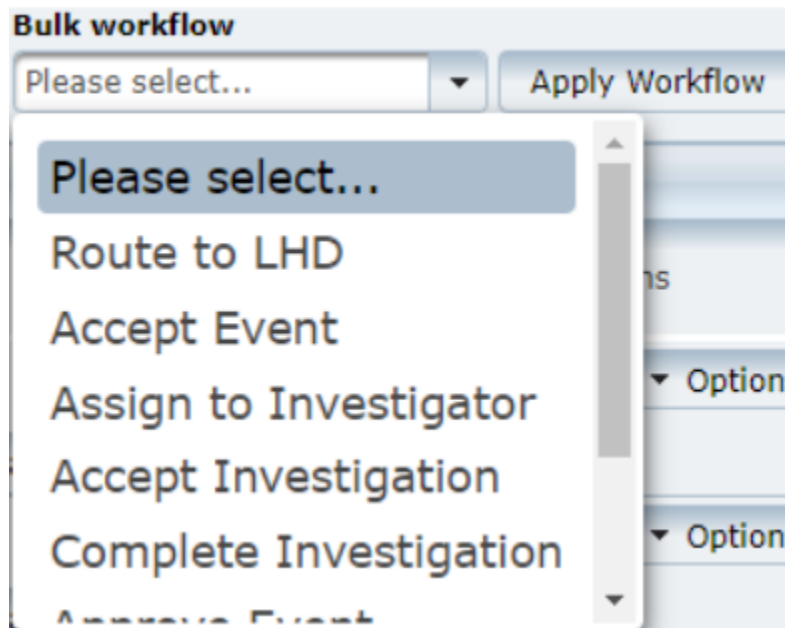
Workflow Status 	
Reopened by state Investigator: Hammer* * TEST Glenn	
<input type="text" value="stuff"/>	<input type="button" value="Save"/>
Approved by LHD Investigator: Hammer* * TEST Glenn	
<input type="text" value="Add brief note"/>	<input type="button" value="Save"/>
Under investigation Investigator: Hammer* * TEST Glenn	
<input type="text" value="Add brief note"/>	<input type="button" value="Save"/>
Under investigation Investigator: Hammer* * TEST Glenn	
<input type="text" value="Add brief note"/>	<input type="button" value="Save"/>
Assigned to investigator Investigator: Hammer* * TEST Glenn	
<input type="text" value="Add brief note"/>	<input type="button" value="Save"/>
Under investigation Investigator: Hammer* * TEST Glenn	
<input type="text" value="Add brief note"/>	<input type="button" value="Save"/>

- Making a view to filter for CMRs by workflow status is recommended if a user will be using this tool.

Mark the check boxes on the left to select the CMRs whose workflow status is to change.

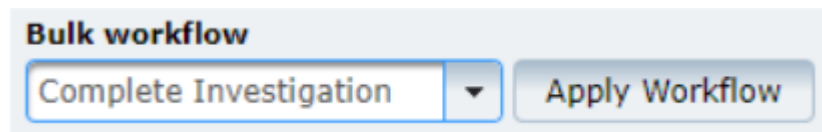


On the right, select the next Workflow status from the drop-down menu.



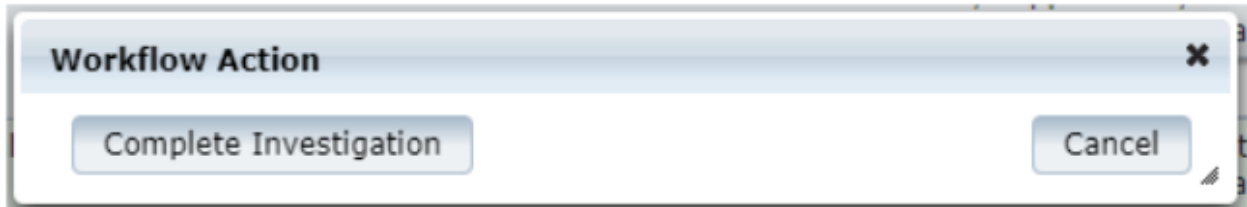
This will change all the selected CMRs to this status, if they are able to change.

- This will not force a CMR to “skip” a status or make a CMR go back to a previous status.




Select the Apply Workflow button when ready.

The user will confirm the new status by selecting the status button on the left or exit by selecting the Cancel button or the X in the top right of the popup.



The CMRs are moved to the new status. A Successful banner is placed at the top of the screen indicating how many CMRs were updated. If the selected status is not the next viable status for a selected CMR a warning is shown. The CMR's with a warning are not changed.

**Events**

 **Failure** Unable to change workflow for 20232028893. selected workflows are not valid.  
**Failure** Unable to change workflow for 20232028625. selected workflows are not valid.

 **Successful** Bulk workflow:Investigation complete was applied to:4 events.

For CMRs that failed check the current Workflow status, required data fields, and user permissions.

The status is updated in the Workflow Status column.

Workflow Status ⌵

Investigation complete  
Investigator: Hammer\* \* TEST Glenn  
stuff  Save

Investigation complete  
Investigator: Hammer\* \* TEST Glenn  
Add brief note  Save

Approved by LHD  
Investigator: Hammer\* \* TEST Glenn  
Add brief note  Save

Investigation complete  
Investigator: Hammer\* \* TEST Glenn  
Add brief note  Save

Assigned to investigator  
Investigator: Hammer\* \* TEST Glenn  
Add brief note  Save

Investigation complete  
Investigator: Hammer\* \* TEST Glenn  
Add brief note  Save

- For more information on Workflow statuses and Required Data Fields, see the EpiTrax Edit Event Technical documentation.

### ***Adding Brief Notes in Events Page***

Scroll down to see the different CMRs that match the current views criteria

Disease ⌵	State Status ⌵	Local Status ⌵	Investigating Agency ⌵	Address at Diagnosis ⌵	Workflow Status ⌵	Event Date ⌵
Coronavirus, Novel (2019-nCoV)			Auto Test Agency3		Assigned to LHD Add brief note <input type="text"/> Save	08/15/2023
Coronavirus, Novel (2019-nCoV)			Bear River		Assigned to LHD Add brief note <input type="text"/> Save	08/14/2023
Hepatitis C virus infection, chronic			Bear River		Assigned to LHD Add brief note <input type="text"/> Save	08/14/2023

A brief note can be added to CMRs here. This is available once you have created a view. Scroll to the desired event. Type the desired comment in the corresponding Add brief note

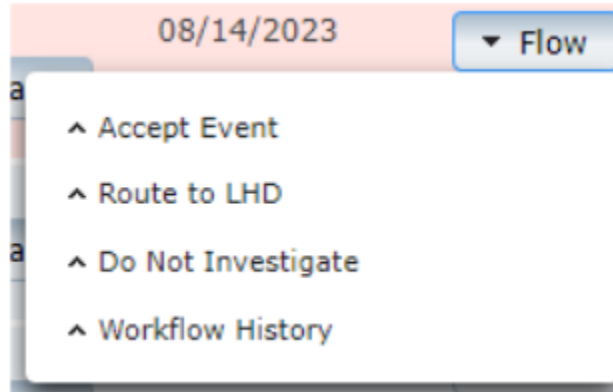
Add brief note  Save

field and select the Save button when finished. Various actions will cause the screen to be redrawn. This will cause the note to disappear, but saved notes are found on the notes tab of the CMR.

- For more information on the Notes tab, see the EpiTrax Edit Events SOP and EpiTrax Edit Event Technical documentation.

### **Flow**

Select the Flow button to see the workflow options available to a particular CMR.



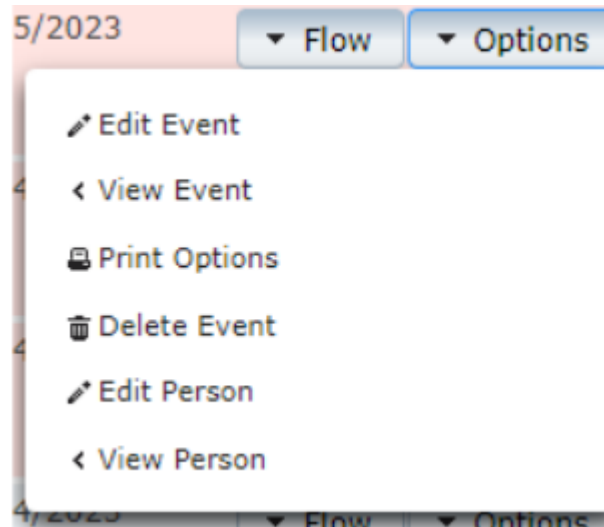
The first option is the next Workflow Status of the CMR. The Route to LHD option is available to users with the correct permission. This reassigns the CMR to another jurisdiction. Do not Investigate is available if a CMR is not yet accepted by a LHD. The Workflow history option will show a simplified history of the CMR.

- For more information on Workflow Statuses, names, and options see the EpiTrax Edit Event Technical documentation.

### **Options**

The Options button has Edit Event, View Event, Print Options, Delete Event, Edit Person, and View Person. Select the desired option.

- For more information on Edit Event, View Event, Print Options, and Delete Event see



the EpiTrax Edit Event Technical documentation.

- For more Information on Edit Person and View Person See the EpiTrax Edit Person Technical documentation.

### **Select an Event to Edit**

Select the green event number on the left **2026407** to Edit that CMR. The Edit CMR page will open.

The navigation options become available when there are large numbers of rows. These let the user go to the first or last page, advance or back by one page, or select a specific page to load. The user can also change the number of Events displayed on a page from 50 to 100.

## **OUTBREAKS**



Select the Outbreaks menu item **OUTBREAKS** to open the Outbreaks page.

- For more information on the Outbreaks section see the EpiTrax Outbreak User Technical and the EpiTrax Outbreak Admin Technical documentation.

## **FACILITIES**

The Facilities **FACILITIES** menu item opens the facility search **Facility Search** page.

### **Facility Search**

The Facility Search section contains the filter options available. These consist of Facility, Facility Type, Corporate ownership, Facility's investigating agency, Condition, Disease type, Communicable, Environmental, State status, LHD status, Transmission facility, Diagnosis facility, and Date range for events and outbreaks. Use these fields to narrow down the search.

**Facility**

Press Enter to search

**Facility type** **Corporate ownership**

**Facility's investigating agency** **Condition**

Please select...

**Disease type**

Auto Test Condition GroupA  
 Communicable  
 Environmental

**State status** **LHD status**

**Facility relationship**

**Transmission facility?** please select... **Date range for events and outbreaks**

**Diagnosis facility?** please select...  -

Type part of the name of a facility in the Facility field. Press enter to get a pop up of matching facilities. Basic information is presented to help narrow down the possibilities. This consists of Id, Name, Type, and address.

Id	Name	Type	Address
----	------	------	---------

Select a facility and it is added to the facility filter field.

Select the X to remove a facility from the filter field.

**Facility**

62398 test Facility ✕

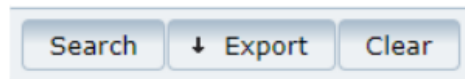
Communicable  
 Enteric

The Disease type carrot/triangle can be opened to see sub items. Use this to narrow the search to a particular condition or groups of conditions

## Buttons

The next section has the Facility Search buttons. The search button looks for Facilities that match the filter criteria set above. The export makes a simple export. This file is downloaded to the local computer. The clear button removes filter criteria.

The export makes a comma separated value (CSV), file of the Facilities that match the filter criteria.



facility\_export\_081123101722.csv

This file can be opened in programs like Excel or Google sheets.

## Current Search Criteria

The Current Search Criteria section lists what the current criteria are. This is filled in after a search is run.

### Current Search Criteria

**Selected Facilities:** test Facility **Selected Facility Types:** Laboratory **Selected Conditions:** Anthrax

The results of the search are listed in the area below.

(Facilities 1 - 1 of 1, Page: 1/1)			
Facility ID	Facility	Facility types	Agency
62398	test Facility		

The navigation options become available when many rows are returned. These let the user go to the first or last page, advance or back by one page, or select a specific page. The user can also change the number of facilities displayed on a page. The user can also change the number of Events displayed on a page from 50 to 100.

Select the green number from the Facility ID column to open the corresponding Edit Facility page.

## Edit Facility

The Edit Facility page opens when the facility number is selected

**Edit Facility**

Options ▾ Export Options ▾ Save & Continue Save & Exit

test Facility	Facility Type	Investigating Agency
Facility ID: 62398		

**Current Search Criteria**  
Search criteria is empty

Summary Demographics Associated Events Associated Outbreaks Notes

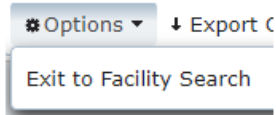
Only one user at a time can edit a facility. If another user has the same facility open for editing the user attempting to open it will get a warning.

Unable to save. Facility locked by Glenn Hammer\* \* TEST.

To edit a locked facility contact the indicated user and request them to Save and Exit. When a user has Saved & Exited a facility another user can now edit the facility.

### Option Menu

The first item in the menu bar on the Edit Facility page is Options. The item available here is Exit to Facility Search.

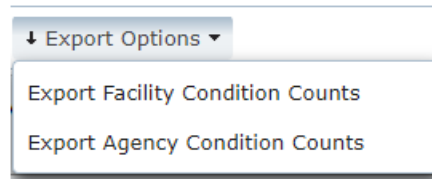


This returns the user to the Facility Search page. The user is asked to confirm before leaving the Edit Facility page.

### Export Options Menu

The Export Options have two choices. The first is Export Facility Condition Counts and the second is Export Agency Condition Counts.

Export Facility Condition Counts creates a CSV file for this facility that contains a list of the



conditions and their statuses. This is the same information from the Summary Tab. This tab is described below.

```
"condition","state_confirmed","state_probab
"Anthrax","0","0","0","0","0","0","1","1"
"Totals","0","0","0","0","0","0","1","1"
```

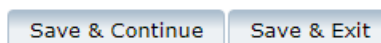
Export Agency Condition Counts creates a CSV file with the agency counts. This is the same information from the Summary Tab. This tab is described below.

```
"agency","condition","state_confirmed","state_pr
"Test Health Department","Anthrax","1","0","0","
"Totals","","1","0","0","1","0","0"
```

- CSV files can be opened in programs like Excel or Google sheets.

### Save Buttons

On the upper right of this page are the save buttons



The Save & Continue button saves any changes made and keeps the facility open for additional editing. The Save & Exit button saves any changes made and exits the facility so another user can edit it. Select a save option before changing tabs.

### Information

The Information section of the page shows the name of the open facility and some details.

test Facility Facility ID: 62398	Facility Type Laboratory, Acute Care - Hospital	Investigating Agency Auto Test Agency1
<b>Current Search Criteria</b> Search criteria is empty		

These include the Name, Facility Type, Investigating Agency, Facility ID and any Current Search Criteria from the Facility Search page.

<b>Current Search Criteria</b> Transmission Facility: Yes    Diagnosis Facility: Yes
---

### Summary Tab

On the Summary Tab the first section is Outbreaks Data. This shows the number of outbreaks associated with this facility.

The next section shows the Facility Condition Counts for different conditions associated

#### Outbreak Data

Total Number of Outbreaks: 1

with this facility. Confirmed, Probable, and Suspect statuses for morbidity events are counted here. Not all possible case statuses are shown here. Transmission, and Diagnosing facility counts are also shown. These can be exported using the Export Options described above.

#### Facility Condition Counts

Condition	State			Local			Transmission	Diagnosing
	Confirmed	Probable	Suspect	Confirmed	Probable	Suspect		
Anthrax	4	0	1	1	3	1	1	1
Ebola Hemorrhagic Fever	0	1	0	1	0	0	0	0
Tuberculosis, Latent Infection (LTBI)	0	0	0	0	1	0	0	0
Totals	4	1	1	2	4	1	1	1

The Investigating Agency Condition Counts section is last. This shows the facilities condition counts by agency. Not all possible case statuses are shown here. These can be exported using the Export options described above.

#### Investigating Agency Condition Counts

Agency	Condition	State			Local		
		Confirmed	Probable	Suspect	Confirmed	Probable	Suspect
Auto Test Agency1	Anthrax	4	0	1	1	3	1
Auto Test Agency1	Ebola Hemorrhagic Fever	0	1	0	1	0	0
Auto Test Agency1	Tuberculosis, Latent Infection (LTBI)	0	0	0	0	1	0
Totals		4	1	1	2	4	1

The navigation options become available when there are large numbers of rows. These let the user go to the first or last page, advance or go back by one page, or select a specific

page to load. The user can also change the number of facilities displayed on a page.



### Demographics Tab

The first section on the Demographics tabs is Facility Contacts Information.

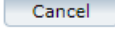
#### Facility Contacts Info

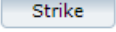
(Contacts 1 - 1 of 1, Page: 1/1)			
Contact Name ↕	Job Title ↕	Phone ↕	Email ↕
someone	Boss person	(555) 555-5555	

The name, title, phone number, and email address are listed. Select the Add Contact



button to add a blank row. Fill out the fields for a new contact. Select a

save option from the top right or select the Cancel  button to remove the unsaved row.

Select the Strike button  if a contact is no longer valid. This puts a line through the fields.

Contact Name ↕	Job Title ↕	Phone ↕	
someone	Boss person	(555) 555-5555	

Select the Unstrike  button to remove the strikethrough line.

The Facility Addresses section shows the addresses associated with this Facility.

Addresses are not edited here.

#### Facility Addresses

(Addresses 1 - 1 of 1, Page: 1/1)				
Street ↕	Unit ↕	City ↕	State ↕	Zip ↕
350 State St		Salt Lake City	Utah	84103-0000

- See EpiTrax Admin Menu documentation for more information on editing and adding facilities.

Facility Demographics has several fields available to describe a facility. These include Facility Type, Specific Facility Type, Corporate Ownership, IP CIC Certified, Licensed Bed Count, Licensed ICU Bed Count, NHSN, NHSN Number, CMS Certified, CMS CCN Number, State Licensed, State DOPL License, EHR System, Accredited, Accreditation Agency, Provides Hand Hygiene Training, Audit Hand Hygiene, Provide PPE Training, Audit PPE Use, Provide Environmental Cleaning Protocol, Audit Environmental Cleaning Practices, System to Monitor Cleaning Effectiveness, System Present for Early Detection/Isolation Infectious

Patients, System for Antibiotic Stewardship, and Uses Facility Transfer Form.

Facility Type	Laboratory, Acute Care - Hospital	Specific Facility Type	Please select...
Corporate Ownership	Please select...	IP CIC Certified	Please select...
Licensed Bed Count		Licensed ICU Bed Count	
NHSN	Please select...	NHSN Number	
CMS Certified	Please select...	CMS CCN Number	
State Licensed	Please select...	State DOPL License	
EHR System	Please select...		
Accredited	Please select...	Accreditation Agency	Please select...
Provides Hand Hygiene Training	Please select...	Audit Hand Hygiene	Please select...
Provide PPE Training	Please select...	Audit PPE Use	Please select...
Provide Environmental Cleaning Protocol	Please select...	Audit Environmental Cleaning Practices	Please select...
System to Monitor Cleaning Effectiveness	Please select...	System Present for Early Detection/Isolation Infectious Patients	Please select...
System for Antibiotic Stewardship	Please select...	Uses Facility Transfer Form	Please select...

Facility Vaccination History

Add Vaccination History

(Vaccination History 0 - 0 of 0, Page: 1/1) 10

Year	Total Employees	Total Vaccinated	Percentage	Actions
No History Found				

The Facility Vaccination History is next.

Select the Add Vaccination History [Add Vaccination History](#) button to add a row. Enter the Year, Total Employees, and the Total Vaccinated. Select a save option from the upper right.

Year	Total Employees	Total Vaccinated	Percentage
2019	100	90	90%

The Percentage is calculated. Select the Cancel [Cancel](#) button to remove an unsaved entry.

Select the Delete [Delete](#) button to remove a saved row. The user is asked to confirm the deletion.

The navigation options become available in the different sections when there are large numbers of rows. These let the user go to the first or last page, advance or or back by one page, or select a specific page. The user can also change the number of facilities displayed on a page.



**Associated Events Tab**

The Associated Event tab lists CMRs that have this facility in the Clinical tab. The Record Number, Event Type, Name, DOB(Current Age), Gender, Condition, City, Investigating Agency, and Event Date are shown. Below is a screen shot with some sample data.

Record Number	Event Type	Name	DOB(Current Age)	Gender	Condition	City	Investigating Agency	Event Date
20232028631	Morbidity	Blake Smith	01/01/1957(65)	Male	Anthrax		Auto Test Agency3	01/31/2023
20232028756	Morbidity	Test DPHIPETBLUG-46	01/01/2003(19)		Anthrax		Auto Test Agency3	02/06/2023
20232028996	Morbidity	Avon Jackson	10/01/1996(27)		Anthrax		Auto Test Agency3	04/06/2023
20232029001	Contact	Avon Jackson	10/01/1996(27)		Acute Flaccid Myelitis		Four Points Health	07/19/2023
20232029007	Contact	blake seven	Unknown		Anthrax		Auto Test Agency3	07/18/2023
20232029009	Morbidity	Blake Smith	01/01/1957(65)	Male	Anthrax	Farlington	Auto Test Agency3	07/19/2023
20232029016	Morbidity	Blake Smith	01/01/1957(65)	Male	Arsenic poisoning		Auto Test Agency3	07/27/2023
20232029021	Morbidity	Blake Smith	01/01/1957(65)	Male	Anthrax		Auto Test Agency3	07/24/2023
20232029026	Morbidity	Blake Smith	01/01/1957(65)	Male	Anthrax	out of state	Auto Test Agency3	08/01/2023
20232029031	Morbidity	Blake Smith	01/01/1957(65)	Male	Tuberculosis, Latent Infection (LTBI)		Auto Test Agency3	08/09/2023
20232029032	Morbidity	Blake Smith	01/01/1957(65)	Male	Ebola Hemorrhagic Fever		Auto Test Agency3	08/08/2023

Select the green number in the Record Number column to open the CMR for editing. The user must confirm before leaving the Edit Facility page and going to the Edit Event page.

- See EpiTrax Edit Event SOP and Technical Documentation for more information on Clinical tab.

The navigation options become available when there are large numbers of rows. These let the user go to the first or last page, advance or back by one page, or select a specific page. The user can also change the number of facilities displayed on a page.

### Associated Outbreaks Tab

The Associated Outbreaks tab lists the outbreaks associated with this facility. The



information displayed consists of the Outbreak Number, Outbreak Name, Condition, Closed?, and Outbreak Date.

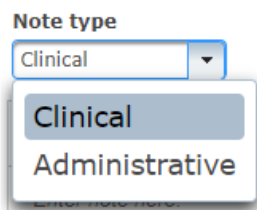
Outbreak Number	Outbreak Name	Condition	Closed?	Outbreak Date
2022-02826	FoodTest	Foodborne Illness Complaint	Active	05/01/2022

Select the green Outbreak Number on the left to open the View Outbreak page. The user will need to confirm before leaving the Edit Facility Page.

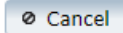
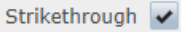
- See the EpiTrax Outbreak documentation for more information on Outbreaks.

### Notes Tab

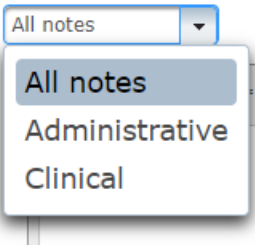
Facility Notes can be created here. A note can be clinical or Administrative. Select one from the dropdown menu.



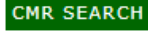
Enter text in the text  section. There are text formatting options available. Select text and apply the desired formatting.


Select a save option in the upper right corner. Select the Cancel  button to removed unsaved notes. After saving notes, the Strikethrough  option is available. Use this to mark notes that are no longer needed. When notes are added the filter by type is available. All notes, Clinical or Administrative, are the options available.

The scroll bar becomes available when several notes are added. Select the Save & Exit option when you have finished editing this Facility so another user can have access to it.



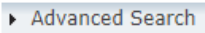
## CMR SEARCH

The CMR Search menu  option, in the green bar at the top of the page, is used for looking up CMRs. The first section lists fields that are used in a basic search. These include Person name (in a combined name field), Last name, First name, Middle name, DOB (Date of Birth), Phone, and the Record number.

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

The calendar button can be used to select a date. For dates that are more than a few years in the past it might be easier to type the date in.

## Advanced Search

Select the Advanced Search  accordion bar to see the advanced fields available.

**City**  **County**

**Current age range**  -  **Birth sex**

**Conditions**

**Event type**  **MMWR week**  **MMWR year**

**Event date range**  -  **Event created date range**  -

**Lab created date range**  -  **Lab collected date range**  -

**Lab accession no**  **Investigation status**

**Investigating agency**  **Investigator**

**State status**  **LHD status**

These include City, County, Current age range, Birth sex, Conditions, Event type, MMWR week, MMWR year, Event date range, Event created date range, Lab created date range, Lab collected date range, Lab accession no, Investigation status, Investigating agency, Investigator, State status, LHD (Local Health Department) status, Queues, Tags, External system, External system id, Other data 1, Other data 2, First reported to public health date range, Results reported to LHD date range, and Show deleted Events.

- See the EpiTrax Edit Event Technical documentation for information on deleted Events

## Export

The Export accordion section is next. Use this section to create a simple export. More complex exports can be created in the Export module. After completing a search, the

information can be exported. Select the  bar on the left to see the options. Check the box if short column names are to be used.

- This is for users that are more familiar with EpiTrax

Use short column names

Select fields to export...

Event  Lab  Treatment  Place  Encounter  Diagnostic / Hospital Facility

Select a box for the corresponding data to be included in the export file.

Select the **Export** button in the center to create a CSV file.


patient_d	person_last_n	person_fi	person_m	patient_p	address_a	address_at_di	address_a
Coronavir	Testerson	Test				Saint Charles	ID
Coronavir	Testerson	Test					
Coronavir	Testerson	Test				Saint Charles	ID
Coronavir	Testerson	Test				Perry	UT

- **Warning:** This file might contain private and or sensitive information!
  - Follow the appropriate security guidelines.
- CSV files can be opened in programs like Excel or Google Sheets
- For additional information on the Export Module, see the EpiTrax Export Tool Technical documentation.

## Buttons

The next section has the CMR Search buttons. The Search button looks for CMRs that match the filter criteria set above. The export makes a simple export. This file is downloaded to the local computer. The clear button removes search / filter criteria.

**Search** **Export** **Clear**

The next section shows the CMRs that match the search / filter criteria. The returned items are given a score in yellow stars . The more yellow stars that are assigned to a returned CMR means the better match the CMR is to the search criteria. The image below shows sample data.

Record Number	Event Type	Name	DOB(Current Age)	Gender	Condition	City	County	Agency	Event Date
20232029031	Morbidity	Seven, test, Ethan	01/01/1957(66)	Male	Tuberculosis, Latent Infection (LTBI)			Auto Test Agency3	08/09/2023
20232029032	Morbidity	Seven, test, Ethan	01/01/1957(66)	Male	Ebola Hemorrhagic Fever			Auto Test Agency3	08/08/2023

Some information is shown about each CMR to help the user locate the desired one. This information includes Record Number, Event Type, Name, DOB(Current Age), Gender, Condition, City, County, Agency, and Event Date. Select the green CMR number on the left to open the CMR in the Edit page. This CMR is opened in another tab.

The navigation options become available when a large number of rows are returned. These let the user go to the first or last page, advance or go back by one page, or select a specific page. The user can also change the number of rows displayed on a page.



## EXPORTS

Select the Exports menu **EXPORTS** option to open the export module.

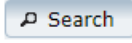
- For information on Exports module see the EpiTrax Export Technical documentation

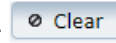
## PEOPLE

The People menu **PEOPLE** option opens the People search page. This is similar to the CMR Search page.

People

Person name Last, First, Middle	Last name	First name	Middle name	DOB mm/dd/yyyy	Phone
Birth sex Please select...					

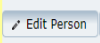



There are several fields that can be used to filter a search. These fields include Person name (combined), Last name, First name, Middle name, DOB, Phone, and Birth sex. Enter the desired search information and select the Search  button to look for

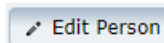
matching information. Select the Clear  button to remove the search criteria.

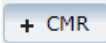
Matching items are returned. The returned items are given a score in yellow stars

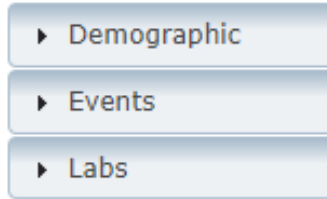


. The more yellow stars that are assigned to a returned person means the better match the person is to the search criteria. Some basic information for each person is displayed to help the user select the correct person.

ID	Score	Last, First	Birth Date	Phone	Morbidity	Contact	
1616213	★★★★★	Seven, Blake, Test	01/01/1957	(333) 333-3333 x33333 (222) 222-2222 x22 (222) 222-2222 x22222	226	4	 
1617282	★★★★★	seven, blake, demote			0	1	 

These fields include ID, Score, Last and First name, Birth Date, Phone, Morbidity CMR count, and Contact CMR count. Select the Edit Person  button to open the Edit

Person page. Select the + CMR  button to create a new CMR associated with this person. Select the person bar to see additional accordion bars. These are Demographics,



Events, and Labs.

Open the Demographics accordion bar to see Name, Age, Mortality Status, Addresses, Telephone numbers, emails and Demographic information. An address can be verified or not verified.

**Street**  
no where

Address not verified

Name			Age		Mortality Status	
Last name	First name	Middle name	Date of birth	Current age	Died?	Date of death
Seven	Blake	Test	01/01/1957	66 Years 7 Months 13 Days	Yes	04/19/2023

[Show Death Data From EDEN](#)

Addresses

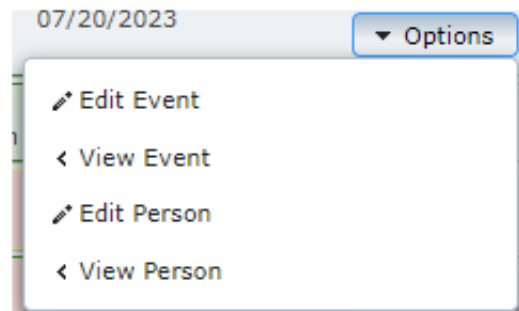
Street	Unit number	City	State	Zip code	County	Residence Type	Earliest known	Moved	Created	Note
--------	-------------	------	-------	----------	--------	----------------	----------------	-------	---------	------

- For more information on verified addresses see the EpiTrax Edit Event Technical documentation

The Events accordion bar shows all the events associated with this person.

LN, FN, MN / Record #	Disease	State Status	Local Status	Investigating Agency	Workflow Status	Event Date	Options
Seven, Blake, Test 20232029010 – Morbidity	Anthrax	Confirmed	Probable	Bear River	Closed	07/20/2023	Options
Seven, Blake, Test 20222028202 – Morbidity	Coronavirus, Novel (2019-nCoV)			Utah State	Under investigation Hammer* * TEST Glenn	04/04/2022	Options
Seven, Blake, Test 20232028688 – Contact	Acinetobacter species - Carbapenem resistant			Bear River	Assigned to LHD	02/15/2023	Options

Some information is displayed to help the user select the correct CMR to work on. This includes Record #, Disease, State Status, Local Status, Investigating Agency, Workflow Status, and Event Date. Select the green CMR number on the left to open the CMR in the Edit window. Select the options button on the right. The options are Edit the Event, View the Event, Edit the person, or View the person.



- See the EpiTrax Edit Event SOP and Technical documentation for more information on Editing and Viewing an Event.
- See the EpiTrax Edit Person Technical documentation for more information on Editing and Viewing a Person.

Open the Labs accordion bar to see labs associated with this person. The first section of each entry is the Performing lab information. This includes Performing lab, Ordering facility, Ordering clinician, Patient address at collection, Collection date time, Specimen source, Accession number, Specimen sent to state lab, the Created date, and the ID number.

After this is the Tests associated with the Lab. This lists information about the tests that

Performing lab DPHIPEPITX-574 retest	Ordering facility	Ordering clinician	Patient address at collection	
Collection date time Tue, Apr 18, 2023 12:00 AM	Specimen source Abscess	Accession no	Specimen sent to state lab?	Created 04/19/2023
ID 2995248				

were performed. This includes ID, Date Created, Test type, Organism, Test result, Result value, Units, Reference range, Test status, Lab test date time, Comments and Susceptibilities.

The final portion is the list of Associated cases to this lab.

**Tests**

<b>ID</b> 2999189	<b>Test type</b> <b>Antigen by EIA/ELISA</b>	<b>Organism</b> Chlamydia trachomatis	<b>Test result</b> Positive / Reactive
<b>Created</b> 04/19/2023	<b>Result value</b>	<b>Units</b>	<b>Reference range</b>
	<b>Test status</b>	<b>Lab test date time</b>	
<b>Comment</b>			
<b>Susceptibilities</b>			
None			

**Associated cases:**

**20222028306 : Chlamydia trachomatis infection**

Select the green CMR number to open the CMR in Edit mode. This takes the user from the People search page.

Select any of the accordion tabs again to close them. The scroll bar appears when the returned CMRs do not fit on one page.

## ADMIN

Select the Admin **ADMIN** menu item from the main green bar, to see the menu options.

- For more information about the Admin menu options see the EpiTrax Admin Menu Technical documentation.

## SETTINGS

Settings is the final main menu item. General User Information is stored here. These fields include First name, Last name, Given name, Job title, Phone, Address, City, and Email.

<b>First name</b>	<input type="text" value="test"/>
<b>Last name</b>	<input type="text" value="test* * TEST"/>
<b>Given name</b>	<input type="text"/>
<b>Job title</b>	<input type="text" value="King of the Planet"/>
<b>Phone</b>	<input type="text" value="(555) 555-5555 x55555"/>
<b>Address</b>	<input type="text" value="1 Bagend"/>
<b>City</b>	<input type="text" value="Mars"/>
<b>Email</b>	<input type="text" value="fish@ocean.net"/>

These fields are used to maintain the user's account and contact information. Changing the values can lead to an account being disabled.

- It is recommended that the values are only changed by an administrator.

When values are changed under the direction of a system administrator, select the Save

button to keep the changes. If the permissions are changed for the logged in user, the user might be directed to select the Logout [Logout](#) button at the bottom left to reset

their permissions. A banner appears notifying the user that they are now logged out.

## **You have logged out.**

Click the Login button below to re-authenticate.

Login

A user will need to log back in to access EpiTrax. Select the Login button.