



MANAGING TASKS SOP

Purpose: Detailed Standard Operating Procedure for the purpose of managing tasks in EpiTrax.

Version History

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

Welcome to the tutorial on Managing Tasks 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 navigate the tasks dashboard
- Update a task view and set a default for your dashboard
- Explore the 'My Scheduled Tasks' tab
- Learn how to assign tasks within a CMR, both to yourself and to another investigator

OVERVIEW OF TASKS

- EpiTrax allows you to assign tasks to yourself and other users (different from being assigned a case)
- Tasks: actions that need to be taken on an individual CMR (i.e. a call back, case update, medical record review, etc.)
- Useful for: trading cases, following up on cases, and sending to LHDs

NAVIGATING TASK DASHBOARD

As a reminder, your main landing page when you log into EpiTrax will look like this:



The screenshot shows the EpiTrax interface with a navigation bar at the top. Below the navigation bar, there is a 'Dashboard' section with a 'Tasks' link. A table displays a list of tasks with the following data:

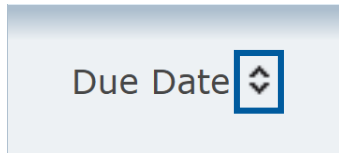
| Due Date | Case | Name | Condition | Title of task | Description of task | Category | Priority | Assigned to | Status | Edit |
|----------|------------|-------------------|--------------|-------------------|---------------------|-----------|----------|--------------|---------|------|
| None | 2025472406 | Restricted access | Tuberculosis | Restricted access | Restricted access | Treatment | | Preston Tang | pending | |

Note: The standard display is all pending tasks assigned to your agency.

These column titles will provide information like due date, CMR number, CMR name, condition, etc.:

| Due Date | Case | Name | Condition | Title of task | Description of task | Category | Priority | Assigned to | Status | Edit |
|----------|------|------|-----------|---------------|---------------------|----------|----------|-------------|--------|------|
|----------|------|------|-----------|---------------|---------------------|----------|----------|-------------|--------|------|

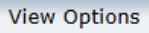
You can sort these columns in ascending or descending order by clicking the arrows near the column title:



Note: The tasks display will not show all cases assigned to you, only tasks that are assigned to you. To see all cases assigned to you, please set up an event view with your desired criteria.

FILTERING TASKS

1. Click the 'View Options' button located on the top right-hand side.



2. Select the criteria you want to filter the tasks to display. For example, filter the 'Assigned to' have your name listed, so only the tasks assigned to you will appear.



Form showing filtering options: Show tasks due after 03/17/2015 and before 09/12/2028. Fields include Diseases, Investigating agency, Assigned to (highlighted), Status, Category, and Priority. Buttons: Update, Set Default, Close.

3. You can also filter diseases to only show tasks relevant to you. Click on 'Diseases' to filter this way.



Form showing filtering options: Show tasks due after 03/17/2015 and before 09/12/2028. Fields include Diseases (highlighted), Investigating agency, Assigned to, Status, Category, and Priority. Buttons: Update, Set Default, Close.

4. Click 'Update' at the bottom to finalize the filters you have set.



SETTING A DEFAULT

After filtering your tasks, you can set as default by click the 'Set Default' button below.

Set Default

Note: this will be the default when opening your tasks dashboard.

USING 'MY TASK SCHEDULE'

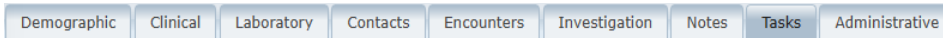
Tasks will automatically be shown in a monthly format. You can change the calendar view for the week or for the day. You can click the 'Week' or 'Day' button to change the calendar format in the top right-hand corner.

Month Week Day

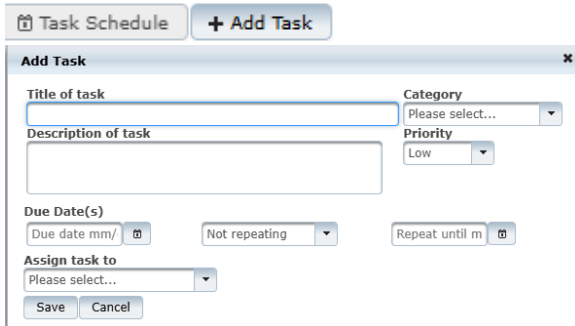
Commented [EK1]: Do we need both pictures?

ASSIGNING TASKS IN A CMR

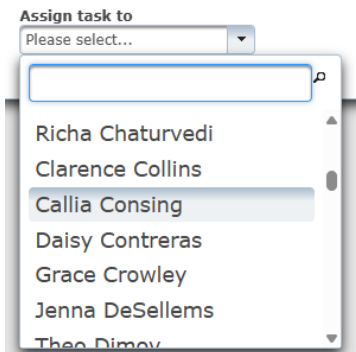
1. Click the 'Task' tab.



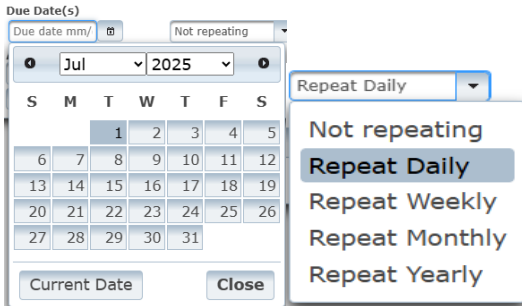
2. Click on '+Add Task' tab. You can give your task a title, description, category, and priority.



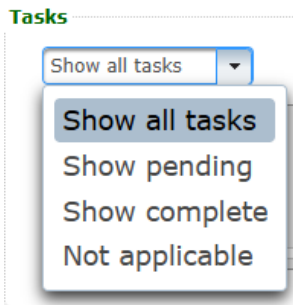
3. Click the dropdown button to assign the task. You can assign the task to yourself as a reminder, or you can assign tasks another staff member if the task fits best within someone else's workflow.



4. Tasks can be set a due date. Tasks can also be set up to repeat. For example, maybe you are doing travel monitoring for someone, and they need to be called every day for a check-in. I will set this task to recur daily, and this will result in reoccurring due dates for the task.



5. Saved tasks can be viewed by clicking the 'View all tasks' dropdown. If the task is assigned to you, it will appear on your EpiTrax dashboard (image needed for this!)



CONCLUSION

This concludes the user guide on Managing Tasks in EpiTrax.

Acronyms

- CMR: Confidential Morbidity Report
- LHA: Local Health Authority

Questions

Any questions that you may have, please contact the Office of State Epidemiology Informatics team at 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](#)