



THE 'PEOPLE' TAB SOP

Purpose: Detailed Standard Operating Procedure for the purpose of learning the people tab in EpiTrax.

Version History

Date	Author(s)	Changes Made	Reviewer(s)
8/7	Jenna DeSellem		

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INTRODUCTION

Welcome to the tutorial on the 'People' tab 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

- Learn when you may want to use the 'People' tab
 - Discover what information appears in a person file
 - Discern what information you can and cannot edit, add, or delete within a person file
- Discover how changes you make in a CMR will affect the person file and vice versa.

OVERVIEW OF THE 'PEOPLE' TAB

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

- This allows you to search for a person and see profile-level information
- Will display certain details of all the CMRs you have permissions to view
 - EX: Someone has multiple reinfections of a condition, and you need to see when the other infections took place
- When you edit certain fields in a CMR, the changes will also be reflected in the 'People' and vice versa
 - Applicable to a person overall, like address, date of death, and vaccine history
 - Does not include very specific disease information

NAVIGATING THE 'PEOPLE' TAB

Step by Step Instructions:

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

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

2. Enter the information for someone of interest. Remember that it is best practice to search with at least two pieces of information and to try to search a few different ways if your initial search is unsuccessful. Click 'Search' and a list of possible matches will display.

EpiTrax | Welcome, Jenna DeSellems | NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

People

Person name: Last, First, Middle | Last name: | First name: | Middle name: | DOB: mm/dd/yyyy | Phone: | Birth sex: Please select... | Show deleted events: | Search | Clear

EpiTrax | Welcome, Jenna DeSellems | NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

People

Person name: Last, First, Middle | Last name: test | First name: test | Middle name: | DOB: mm/dd/yyyy | Phone: | Search | Create Person and CMR | Clear

Birth sex: Please select... | Show deleted events:

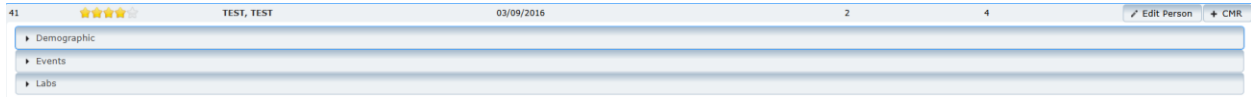
ID	Score	Last, First	Birth Date	Phone	Morbidity	Contact	
41	★★★★☆	TEST, TEST	03/09/2016		2	4	Edit Person + CMR
40	★★★★☆	TEST, TEST	07/13/2016	(899) 999-0000 x00000	1	0	Edit Person + CMR
27	★★★★☆	test, test_condition	10/01/2024		0	0	Edit Person + CMR
17	★★★★☆	test, test2	09/01/2010		2	0	Edit Person + CMR
88	★★★★☆	test, testyyyy	02/04/2025		1	0	Edit Person + CMR
99	★★★★☆	test9, <h1>test</h1>			0	1	Edit Person + CMR
18	★★★★☆	test, tes3	09/04/2008		1	0	Edit Person + CMR
106	★★★★☆	test9, testnow			6	0	Edit Person + CMR

Note: you can determine from the star rating and by comparing the known information, which is the best result.

DEMOGRAPHICS

Step by Step Instructions:

1. Click on the person you are looking for. Once this is done, three accordion tabs underneath their name will populate.



41 TEST, TEST 03/09/2016 2 4 Edit Person + CMR

- Demographic
- Events
- Labs

2. Click on 'Demographic'. This will show you basic demographic information like name, date of birth, and then all addresses, emails, and phone numbers that have been entered into the person's various CMRs.



Demographic

Name			Age		Mortality Status	
Last name	First name	Middle name	Date of birth	Current age	Died?	Date of death
TEST	TEST		03/09/2016	9 Years 4 Months 20 Days		

Addresses

Telephones Email Addresses

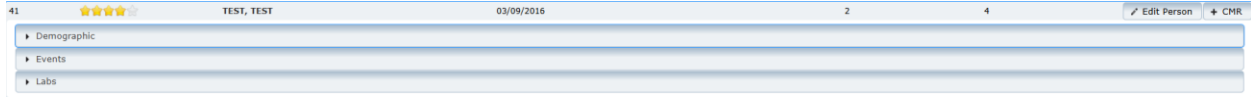
Demographics

Birth sex	Current gender	Primary language	Ethnicity	Race	Country of birth

EVENTS

Step by Step Instructions:

1. Click on the person you are looking for. Once this is done, three accordion tabs underneath their name will populate.

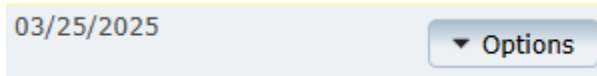


2. Click on 'Events'. This dropdown will display all CMRs associated with the person.

LN, FN, MN / Record #	Disease	State Status	Local Status	Investigating Agency	Workflow Status	Event Date	Options
TEST, TEST 2025472365 - Contact	Candida auris, clinical			DRHS	Not participating in workflow.	03/25/2025	Options
TEST, TEST 2025472442 - Morbidity	Acute Flaccid Myelitis			DRHS	Assigned to LHD	07/22/2025	Options
TEST, TEST 2024472293 - Morbidity	Measles (rubeola)			DRHS	Assigned to LHD	11/03/2021	Options
TEST, TEST 2025472394 - Contact	Measles (rubeola)			DRHS	Not participating in workflow.	05/14/2025	Options
TEST, TEST 2025472437 - Contact	Measles (rubeola)			Deleted	Assigned to LHD	07/21/2025	Options
TEST, TEST 2025472397 - Contact	Measles (rubeola)			DRHS	Not participating in workflow.	05/14/2025	Options

Note: The CMRs are color-coded to indicate what part of the workflow they are in

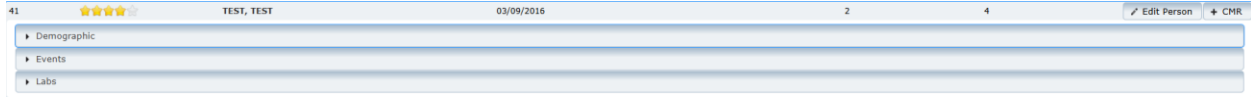
3. Clicking the 'Options' button on the right side of the event row will allow you to select to edit or view either the event or the person.



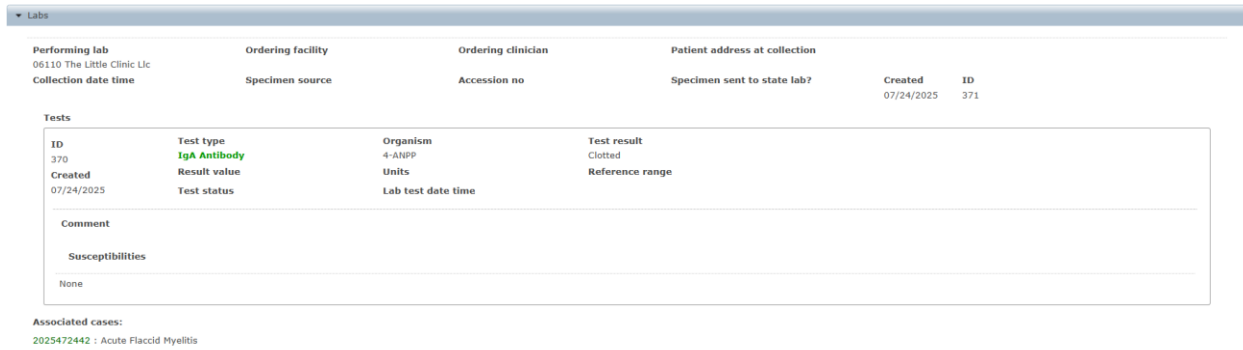
LABS

Step by Step Instructions:

1. Click on the person you are looking for. Once this is done, three accordion tabs underneath their name will populate.



2. Click on 'Labs'. This dropdown will display all lab information from CMRs associated with the case.



The 'Labs' section displays a table with the following columns: Performing lab, Ordering facility, Ordering clinician, Patient address at collection, Collection date time, Specimen source, Accession no, Specimen sent to state lab?, Created, and ID.

Performing lab	Ordering facility	Ordering clinician	Patient address at collection	Collection date time	Specimen source	Accession no	Specimen sent to state lab?	Created	ID
06110 The Little Clinic LLC								07/24/2025	371

Below the table, there is a 'Tests' section with a table:

ID	Test type	Organism	Test result
370	IgA Antibody	4-ANPP	Clotted
Created	Result value	Units	Reference range
07/24/2025	Test status	Lab test date time	

There are also sections for 'Comment' (containing 'Susceptibilities') and 'None'.

Associated cases:
2025472442 : Acute Flaccid Myelitis

+CMR

Step by Step Instructions:

1. If you have found the person you are searching for but do not see the event of interest under the event accordion tab, you can select '+CMR.'

Morbidity	Contact	
2	4	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>

2. You will see a screen with the person's already registered CMRs.

Note: Please review these again to ensure that you are not creating a duplicate CMR.

New CMR

Creating a new CMR for TEST, TEST

First reported to public health <input type="text" value="mm/dd/yyyy"/>	Disease <input type="text" value="Please select..."/>	Investigating Agency <input type="text" value="Please select..."/>	<input type="button" value="Save & Continue"/> <input type="button" value="Cancel"/>
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Are you creating a duplicate CMR?

Please review the following events for TEST, TEST to prevent duplicates.

LN, FN / Record #	Disease	Investigating Agency	Workflow Status	Event Date
TEST, TEST 2025472365 - Contact	Candida auris, clinical	DHHS		03/25/2025
TEST, TEST 2025472442 - Morbidity	Acute Flaccid Myelitis	DHHS	Assigned to LHD	07/22/2025
TEST, TEST 2024472293 - Morbidity	Measles (rubeola)	DHHS	Assigned to LHD	11/03/2021
TEST, TEST 2025472394 - Contact	Measles (rubeola)	DHHS		05/14/2025
TEST, TEST 2025472437 - Contact	Measles (rubeola)	Deleted	Assigned to LHD	07/21/2025
TEST, TEST 2025472397 - Contact	Measles (rubeola)	DHHS		05/14/2025

3. To create a new CMR, enter the reported date, disease, and investigating agency. Click 'Save & Continue' to create the CMR.

First reported to public health <input type="text" value="mm/dd/yyyy"/>	Disease <input type="text" value="Please select..."/>	Investigating Agency <input type="text" value="Please select..."/>	<input type="button" value="Save & Continue"/> <input type="button" value="Cancel"/>
---	---	--	--

EDITING THE PERSON

From the search results page, you can click 'Edit Person.'

Morbidity	Contact	✎ Edit Person	+ CMR
2	4		

Demographics:

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

EpiTrax Welcome, Jenna DeSellems NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

Edit Person

Options ▾ | Navigate ▾ Save & Continue | Save & Exit

TEST, TEST
System Id 41

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

Name

Last name TEST	First name TEST	Middle name
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Age

Date of birth 03/09/2016	Current age 9 Years 4 Months 20 Days	Mortality Status Died? Please select...	Date of death mm/dd/yyyy
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Addresses

No addresses found. Enter Address

Telephones

Telephone type Please select...	(Area) Phone, Ext Enter phone, click Save to add	Country	Earliest known mm/dd/yyyy	Note
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Email Addresses

Enter email, click Save to add

Demographics

Birth sex Please select...	Current gender Please select...	Primary language Please select...	Ethnicity Please select...	Race (Select all that apply)	Country of birth Please select...
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Once you are in a Person file, you will see this screen. This has the following tabs: demographic, events, clinical, laboratory, travel, and occupation.

The demographics tab is much like the display we saw when we clicked on the accordion tab for 'Demographic', as we first searched for this person. We see basic demographic information like name, date of birth, and then all addresses, emails, and phone numbers that have been entered in this CMR. You can add, delete, or edit any of this information.

Events:

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

EpiTrax
Welcome, Jenna DeSellems
NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

View Person

Options | Navigate | Person Locked

Force Unlock | Force Unlock & Edit | Edit Person

TEST, TEST
System Id 41

Demographic | Events | Clinical | Laboratory | Travel | Occupation | Administrative

+ Create CMR

LN, FN, MN / Record #	Disease	State Status	Local Status	Investigating Agency	Workflow Status	Event Date	
TEST, TEST 2025472365 - Contact	Candida auris, clinical			DHHS	Not participating in workflow.	03/25/2025	Options
TEST, TEST 2025472442 - Morbidity	Acute Flaccid Myelitis			DHHS	Assigned to LHD	07/22/2025	Options
TEST, TEST 2024472293 - Morbidity	Measles (rubeola)			DHHS	Assigned to LHD	11/03/2021	Options
TEST, TEST 2025472394 - Contact	Measles (rubeola)			DHHS	Not participating in workflow.	05/14/2025	Options
TEST, TEST 2025472437 - Contact	Measles (rubeola)			Deleted	Assigned to LHD	07/21/2025	Options
TEST, TEST 2025472397 - Contact	Measles (rubeola)			DHHS	Not participating in workflow.	05/14/2025	Options

The 'Events' tab here is also very similar to the previous events accordion display. CMRs will appear here, color-coded based on their investigation status. You have the same 'Options' menu to the right and can add a CMR with the 'Plus Create CMR' button if needed.

Clinical:

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

EpiTrax
NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

View Person
Force Unlock Force Unlock & Edit Edit Person

TEST, TEST
System Id 41

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

Facilities and Clinicians

Visit type	Health facility	Type	Address / Phone	Transmission facility?	Diagnosis facility?
Inpatient	Summitte Hospital And Medical Center	Other	3186 South Maryland Parkway , LAS VEGAS , Nevada 89109	No	No

Clinician	Visit start	Visit end	Medical record number
	04/21/2023	04/26/2023	

Facility comment

Hospitalized for conditions?
Candida auris, clinical : Yes

Associated cases
2025472365 : Candida auris, clinical

Visit type	Health facility	Type	Address / Phone	Transmission facility?	Diagnosis facility?
Inpatient	Summitte Hosp And Med Ctr	Other	3186 Maryland Pkwy, LAS VEGAS, Nevada 89109 pn:0-731-8050-0.0	Not answered	Not answered

Clinician	Visit start	Visit end	Medical record number

Facility comment

Hospitalized for conditions?
Measles (rubeola) : Not answered

Associated cases
2024472293 : Measles (rubeola)

Treatments
No treatments found.

Vaccines
[Show Vaccine Data From IIS](#)
No vaccines found.

The clinical tab will show information about facilities visited, pregnancies, treatments, and vaccines. You cannot edit this information, but you can click 'Show Vaccine Data from IIS' and see if a relevant profile is (or can be) connected to this person. You will not be able to add vaccines here. You can add, delete, or edit vaccination information by going into the corresponding CMR and editing it there.

Laboratory:

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

EpiTrax NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

Welcome, Jenna DeSolems

View Person

Options ▾ | Navigate ▾ | Person Locked ▾ Force Unlock | Force Unlock & Edit | Edit Person

TEST, TEST
System Id 41

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

Date of Collection	Specimen Source	Test Count	Test Type	Organism	Result (Value)	Performing Lab
		1	65 Antigen by DFA/IF	None	None ()	11NE NICU
		1	IgA Antibody	4-ANPP	Clotted ()	06110 The Little Clinic Lc

The laboratory will show you lab results from various CMRs. This information is also not editable here, but you can change this information by returning to the corresponding CMR and adding it there.

Travel:

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

EpiTrax
NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

Edit Person
Save & Continue Save & Exit

Options ▾ Navigate ▾

Auris-test , C
System Id 135

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

Travel
+ Travel

Country	State	County	City	Start date	End date	
Mexico	Please select...	Please select...	Mexico City	01/01/2025	02/01/2025	✕
Associated cases						Delete
None						

+ Travel

Travel will have information on travel dates, location, and details from CMRs where travel history might be an important factor in disease exposure or spread. You can add travel by clicking the '+ Travel' button.

Note: When you add travel here, it will not have an associated CMR. You can also edit any travel information associated with a specific CMR within that CMR.

Note: Be sure to click 'Save & Continue'

Occupation:

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

EpiTrax | Welcome, Jenna DeSolems | NEW CMR | EVENTS | OUTBREAKS | FACILITIES | CMR SEARCH | EXPORTS | PEOPLE | MERGE | ADMIN | RESOURCES | SETTINGS | LOGOUT

Edit Person

Options ▾ | Navigate ▾ | Save & Continue | Save & Exit

Auris-test, C
System Id 135

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

Occupations + Occupation

Standardized Occupation ⓘ	Standardized Industry ⓘ	Employer	Avg Weekly Employment Hours
Teachers and Instructors, All Other	Elementary and Secondary Schools		

Primary Work Location: On-Site ▾ Delete

Associated cases: None

+ Occupation

The 'Occupation' tab will have information on occupation title and industry. The information can be manually input. You can add occupation by clicking the 'Plus Occupation' button, entering the field manually and searching for occupation and industry standardization.

Note: Any occupation info you enter here will not be associated with a CMR. You can edit any occupation information associated with a specific CMR within that CMR.

Note: Be sure to click 'Save & Continue'

CONCLUSION

This concludes the user guide on the People tab in EpiTrax.

Acronyms

- CMR: Confidential Morbidity Report

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](#)