

# EPITRAX CASE WORKFLOW— TRANSCRIPT

## WELCOME

Hello and welcome to the tutorial on Case Workflow in EpiTrax, the state of Nevada's electronic disease surveillance system. This training is being provided by the State of Nevada Office of State Epidemiology.

## ABOUT DPBH

The Nevada Division of Public and Behavioral Health's mission is to protect, promote, and improve the physical and behavioral health and safety of all people in Nevada, equitably and regardless of circumstances, so they can live their safest, longest, healthiest, and happiest life. Our vision is a Nevada where preventable health and safety issues no longer impact the opportunity for all people to live life in the best possible health. The purpose of this division is to make everyone's life healthier, happier, longer, and safer.

## ABOUT OSE

The main goal of the Office of State Epidemiology is to prevent and respond to a variety of public health issues through disease surveillance, standardized data collection, meaningful interpretation, statewide standards, and centralized guidance to improve health outcomes for our communities.

## AGENDA

The objectives of this video are for the user to understand all the routing steps in EpiTrax. You will discern which workflow steps are required and which can be skipped. You will participate in the routing options in two areas of a Confidential Morbidity Report (CMR) record. You will also complete routing steps including accepting a CMR for the local health department and then assigning and accepting a CMR as an investigator.

## ROUTING WORKFLOW DIAGRAM

Let's look at how the routing steps are laid out. This diagram shows you all the steps that a case might go through from CMR creation to closure. The squares are the various stages of routing the CMR can be in. The hexagons tell you what action needs to be taken to get to that stage. For example, down here we can see that a CMR must be accepted by the investigator before it will show as 'Under Investigation'.

## USER ROLES

Note that a user's roles will determine what steps of the routing process that they participate in. For example, someone assigned the 'investigator' role in EpiTrax will have limited permissions and will not be able to accept the CMR for the LHD. They will not be able to approve the CMR at the local level. However, most users will have manager access and will be able to participate in all EpiTrax's steps. With that being said, LHDs can develop processes to manage the different steps according to their needs. For example, perhaps an LHD elects to appoint one person for the responsibility of accepting all CMRs and assigning

them to their team. That can be decided internally by the LHD and implemented by requesting changes to staff user roles. Next, we'll go over the flowchart for EpiTrax.

## EPITRAX FLOWCHART

Here is another example of a flowchart, from when the CMR is entered into EpiTrax to when it is approved.

## EPITRAX DEMONSTRATION

I will start by typing in a case. Note that the UAT environment does have real health information, so I am going to be sure to search for a fictional CMR. After searching and confirming I have the right CMR, I will click on the record number to open it.

When you first open a CMR, you will see the event header with information like patient name disease, jurisdiction, and status. The pink color indicates that there is action that needs to be taken on the case.

Above this, there is a button that gives you the next step in the routing process. I will accept the event for my LHD and then this button will change to the next step, which is 'Assign to Investigator'. Notice that this button always displays the next step in the routing process. You can click through these steps here as you go through your case investigation process, all the way up until you approve the CMR at the local level, if your permissions allow you to do so.

Next, I will assign the case to myself and then also accept it. Notice the header turn green to indicate that the CMR is under investigation.

Once I have finished the investigation, I will click the 'Complete Investigation' button. This turns the header gray, indicating that the investigation is complete.

## WORKFLOW OPTIONS

Here is another example of a fake CMR. To route cases, you can also use this 'Workflow Options' menu on the left-hand side. You have a few options here, based on your user role and what stage of the process the CMR is in. We will accept the event and then assign the investigator as those are required steps. Once the CMR has been accepted and assigned to an investigator, you can go through the regular steps in this menu as you did with the other button or skip around. For example, once assigned as an investigator, I can go ahead and go straight to approval, which approves the CMR at the local level.

## 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)

## ACRONYMS

- CMR: Confidential Morbidity Report
- eCR: Electronic Case Reporting
- ELR: Electronic Lab Reporting
- LHD: Local Health Department
- UAT: User Acceptance Testing

## **THANK YOU**

Thank you for watching! Visit the EpiTrax User Site for more resources and walk-through videos on other topics.

**CURRENT TRAINING VIDEO ~ 6 MINUTES**