

MANAGING TASKS - TRANSCRIPT

WELCOME

Hello and welcome to this training on managing tasks 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 in order to improve health outcomes for our communities.

AGENDA

The objectives of this videos are for the user to understand how to navigate the tasks dashboard, update a task view and set a default for the dashboard, explore the 'My Scheduled Tasks' tab, and 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, which is different from being assigned a case. Tasks are actions that need to be taken on an individual CMR. For example, a callback, case update, medical record review, etc. This helps you organize and prioritize your duties. Events give you views of cases that might be relevant to your workflow and can talk bulk action. Think of events as "What cases might be relevant to me?" Think of tasks as "What scheduled investigation actions do I need to complete?" Tasks are useful for several reasons. For example, trading cases with another investigator, following up on cases that need checked on within three, six, or nine months such as congenital syphilis, and can also send cases to LHAs to close or follow up with.

NAVIGATING TASK DASHBOARD

As a reminder, your main landing page when you log into EpiTrax will look like this. The standard display is all pending tasks assigned to your agency. You can see from the column titles that will have information like due date, CMR number, CMR name, condition, etc. You can sort these columns in ascending or descending order by clicking the arrows near the column title. Please note that 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.

Next, we will talk about filtering tasks and setting a default.

FILTERING TASKS AND SELECTING A DEFAULT

You can further filter what tasks display for you. Remember the standard view if of pending task that are within your jurisdiction, but this view may not be best suited to your workflow needs.

Clicking the 'View Options' button, we can select criteria in which to filter the tasks display and select a new default for our EpiTrax landing page. Perhaps I am an investigator, and I only want to see tasks assigned to me, not my whole agency. I can select a name under the 'Assigned to' and click 'Update' and it will show those cases only. I can also set this display as my default so that this is the display I see when I log into EpiTrax.

As another example, perhaps I am a viral respiratory disease manager, and I only want to see tasks relevant to my team. I could select Anthrax under conditions so that only tasks regarding these conditions from anyone on my team would be displayed. When you change criteria, you will need to click 'Update'. 'Update' will change the display of tasks below but will not affect which CMRs are displayed on your landing page as a default.

Next, we will talk about the 'My Task Schedule' tab.

USING 'MY TASK SCHEDULE'

Clicking on the 'My Task Schedule' tab will give you more of a visual representation of your tasks by due date in a calendar format. Only your tasks will show here. You can also change this calendar view to display your tasks for the week or for the day. Like the 'My Tasks' tab, you can also further filter which of your tasks show on the calendar. Here, I will filter by highest priority to focus on those tasks first. When you click on those tasks, you can see some of the details and if needed, make edits to the assigned person and status.

Next, we will talk about how to assign tasks in a CMR.

ASSIGNING TASKS IN A CMR

Tasks can be created and assigned within a CMR. From the CMR landing page, you can click the 'Task' tab and then click '+Add Task.' Here, you will be able to give your task a title, description, category, and priority. You can assign the task to yourself, if you want to use it as a sort of reminder, or you can assign it to another staff member if the task fits best within someone else's workflow.

You can set a due date, and you can also set the task 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.

You can look through saved tasks using the 'View all tasks' dropdown and you can also see how those appear on your task schedule by clicking 'Task Schedule.' If the task has been assigned to you it will appear on your EpiTrax dashboard like we see here.

CONCLUSION

That concludes this presentation on Events/Views in EpiTrax. We hope you learned more about how to manage tasks.

QUESTIONS

Any questions that you may have, please contact the Office of State Epidemiology Informatics team at informatics@health.nv.gov.

ACRONYMS

CMR: confidential morbidity report

LHA: local health authority

THANK YOU

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

CURRENT TRAINING VIDEO ~ 9 MINUTES