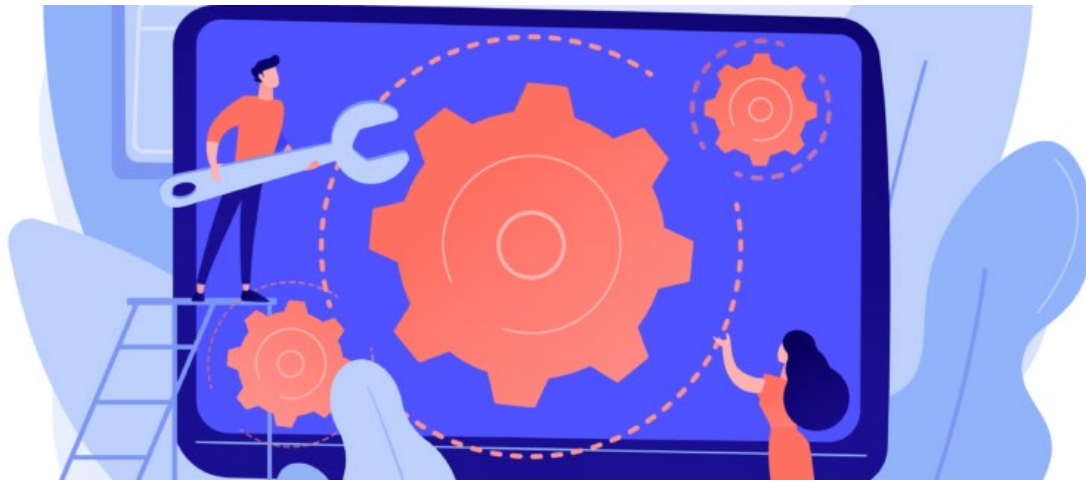




EPITRAX EDIT EVENT SOP

Purpose: The purpose of this document is to provide comprehensive guidance on navigating, editing, and managing events, persons, workflows, and related data within EpiTrax, including instructions for using core system functions essential to accurate case management and reporting.

Disclaimer: All screen shots are from a test environment and do not represent real people or events.

VERSION HISTORY

Date	Author(s)	Changes Made	Reviewer(s)
4/3/2026	Aja Branch	Document remediation	Kelly Sonnemann
7/16/2026	Elizabeth Kessler	Document approved	Mallory LeProvost

Table of Contents

Version History	1
Edit / View Event	4
Open a CMR to Edit	4
Edit Event	4
Options	4
Agency Sharing a CMR	4
Promote / Demote	5
Copy to a New event	6
Add Task	6
Add Attachment	6
Import Events	6
Delete an Event	9
Edit Person	9
WorkFlow Options	10
Workflow Status	10
View	10
Navigate	11
Events	11
People	12
Person Locked	12
Buttons on the right	12
Workflow Status Button	12
Change CMR status	12
Print	13
Save & Continue	13
Save & Exit	13
Brief Note	13
Edit Event Tabs/Accordion Bars	13
Demographic Tab	13
Clinical Tab	15
Laboratory tab	18
Contacts Tab	20
Encounters Tab	23
Investigation Tab	24
	2

Notes Tab	29
Admin Tab	32
References.....	Error! Bookmark not defined.
Glossary	34
Resources and Further Material.....	Error! Bookmark not defined.

EDIT / VIEW EVENT

Editing an event is where the majority of work is performed in EpiTrax. The Edit Event page is loaded when a CMR is selected. If another user has the CMR open for editing the CMR will be opened in the View mode and a locked warning is displayed. In the view mode a user can see data but not make or save changes.

Morbidity and Contact events have different menu items available. Different conditions/diseases will have different sections available for editing. There are also different custom questions and fields available.

The sections and questions reviewed here are the core fields. Core fields are common to all conditions/diseases.

A Local Health Department, LHD, may have steps and directions in addition to these.

OPEN A CMR TO EDIT

1. Select the CMR Search **CMR SEARCH** in the green bar at the top of the page.

Record number

2. Type in a Record Number in the field.

Search

3. Select the Search button near the middle of the page.
4. Matching CMR numbers are listed in the Record number column.

Record Number

961

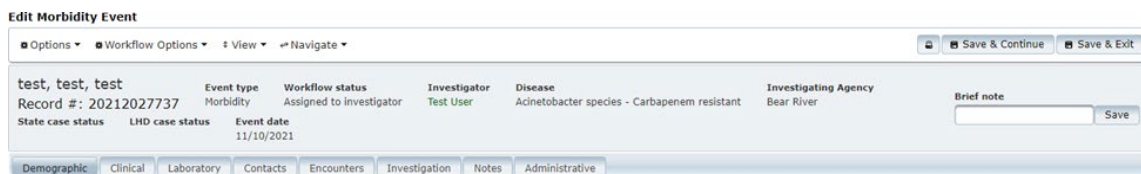
5. Select the green number to open the CMR to work on.

- a. Select the green CMR number text **29017 – Morbidity** anywhere in the program to open that CMR.

The event is opened for editing and the work edit is listed in bold on the right **Edit**.

EDIT EVENT

1. Verify a CMR is opened for editing. It will have the word Edit and the event type in the upper left.



OPTIONS

1. The Option is the first item on the Menu Bar.

Options ▾ **Workflow Options** ▾ **View** ▾ **Navigate** ▾

Agency Sharing a CMR

1. To share an CMR with an agency other than the assigned one, select the Agency Sharing option.

- Agency Sharing
- Demote
- Copy to new event
- Add Task
- Add Attachment
- Import Events
- Delete Event
- Edit Person

Agency Sharing Edit Sharing

2. In the flyout select Edit Sharing.
3. In the popup check the desired agency and then select the Save button.



- a. Check multiple agencies if needed.
4. To discontinue sharing, remove the check and select the Save button.

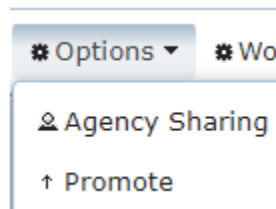
Share Event

Share this event with the following agencies.

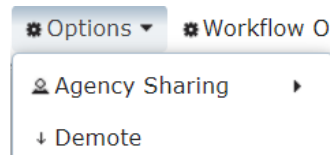
☐ Auto Test Agency3

Promote / Demote

1. Select the Promote option to change a Contact Event to a Morbidity event.



- a. The user is asked to Confirm the change.
2. Select Demote option to change a Morbidity Event to a Contact Event.



- a. The user is asked to Confirm the change.
3. Select Ok to accept the change or Cancel to exit out.

nedsstest.health.utah.gov says
Demote this CMR to a contact event?

OK Cancel

Copy to a New event

1. To create a new CMR based on an existing CMR open the existing CMR in Edit mode go to Options tab at the upper left.
2. Select the Copy to a new event Option.
3. Select the new event's disease from the dropdown. Select the information to copy from the current event to the new one by checking the desired boxes.

Copy Morbidity Event

Create a new event for Blake Seven using the event with record number: 20232028961.

New event's disease:
Please select...

Include the following:

☐ Clinical information	☐ Reporting information
☐ Disease forms	☐ Disease forms and answers
☐ Notes	☐ Associated labs

Create and Edit Copy

4. Select the Create and Edit Copy button to make a copy and open it to edit.

Add Task

To add a task to a CMR, see the Notes Tab directions below.

Add Attachment

To add an attachment to a CMR, see the Notes Tab directions below.

Import Events

1. To import and create multiple events opens CMR in Edit mode. Go to the Options tab at the upper left.
 - a. Importing Events and Importing Contacts follow the same process described here.
2. Select the Import Events event Option.
3. Confirm changing to a new page. Select the Leave button to leave the Edit Event page or select the Cancel button to exit.

Leave site?

Changes you made may not be saved.

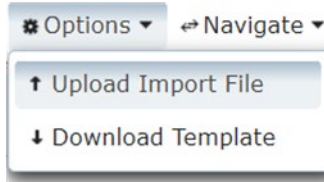
Leave Cancel

4. The Event Import page opens. Select the Options menu item.

Event Import

⚙ Options ▾ ↔ Navigate ▾

5. Select Download Template to get a copy of the Template. It is an Excel format file.



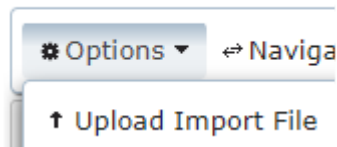
6. Edit the Template File.
 - a. Open the Downloaded Template.
 - i. You Might need to scroll to the left to see more fields.
 - b. Fill out one row for each Event or Contact.
 - i. Fill in the fields.

K	L	M	N	O	P	Q
person_city	person_state	person_county	person_zip	address_at_diagnosis	investigating_agency	workflow
moab	UT	grand	84551-9622	Y	Southeastern Utah District Health Dep	closed
cedar city	UT	washington	84660	N	Utah County Health Department	assigned_to_lhd
Fillmore	Utah	WS	84631	Yes	Central Utah Public Health Departmer	assigned_to_lhd

For Information on Modifying the Import Template see the EpiTrax Edit Event Technical documentation.

7. In the Options menu on the Event Import page select the Upload Import File option.

Event Import



8. The import Data popup opens.

Import Data

Import File

Choose File No file chosen

Event type

Please select...

Submit

- a. Use the Choose File button to select the file to import.
 - i. Brows to the file location and select the desired file.

<

>

File name:

All Files (*.*)

Open

Cancel

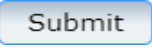
- ii. Select Open to continue with the import or select Cancel to exit.

Event type
Please select...

Please select...

Contact

Morbidity

- b. Next select the event type that is being imported from the dropdown.
- c. The import will create Contact events or Morbidity events
- d. Select the Submit  button when ready.
9. The file is uploaded and a batch status bar is shown. This includes the ID, the date, the file selected, the status, the number of rows uploaded, the number of invalid items, the number rows imported, and the trash can.

ID	Uploaded	File name	Batch Status	Uploaded	Invalid	Imported	
16966	07/12/2023 11:05 AM	IMPORT_TEMPLATE.xlsx	Uploaded	0	0	0	

Uploaded

3

- a. Review the number of valid rows shown in the Uploaded column.

Invalid

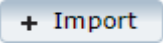
0

- b. Review the number of invalid items
- Open the Import file and fix any issues.
 - Save it and try the import process again.
- c. If necessary select the trash icon  on a batch's status row to delete it.
- Delete files that have invalid items.
 - Confirm deleting/stopping the upload.

nedsstest.health.utah.gov says

Delete this upload?

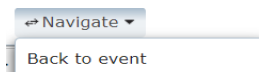
OK Cancel

- d. Select the +Import  button on the right to continue.
10. When the new items are imported the batch status column changes to Imported and the number of items imported is shown in the Imported column.

Batch Status	Uploaded	Invalid	Imported
Imported	0	0	3

11. Select and open the Status bar to see a high level view of the data imported.

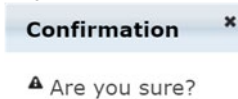
Imports						
	Row ID	Status	Event Type	Record Number	First Reported PH	Person name
☒	8552	Imported	Contact	20232028997		George
☒	8552	Imported	Contact	20232028998	Dec 07, 2021	Bob
☒	8552	Imported	Contact	20232028999	Dec 05, 2021	Sam



12. In the Navigate menu select the Back to event option to return to the event.
13. Verify the data was imported correctly.

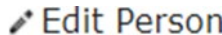
Delete an Event

1. Select Options menu then select Delete event. This removes the CMR from EpiTrax.
 - a. Access to the Delete option is limited.



- b. The user is asked to confirm the deletion.
 - c. Select Yes to continue or No to cancel.

Edit Person

1. Select the Options menu then select Edit person  to open the Edit Person page. A person is also called a patient.
 - a. Select the Leave button to confirm leaving the Edit Event page or Cancel to exit.

Leave site?
Changes you made may not be saved.



- b. The edit Person page is opened.

Edit Person

Options
Navigate

test, test, test
System Id 1617267

Demographic
Events
Clinical
Laboratory
Travel
Occupation
Administrative

Name

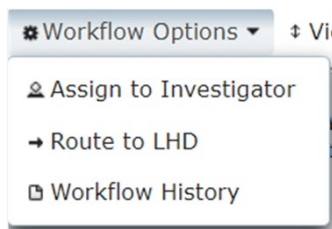
Last name
First name
Middle name

test
test
test

For more information on the Edit Person page see the EpiTrax Edit Person Documentation.

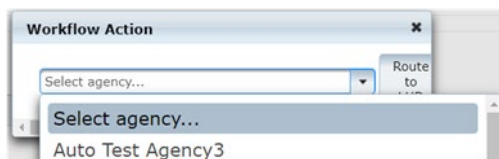
WORKFLOW OPTIONS

1. Select the Workflow Options menu.



Workflow Status

1. The first item will change the workflow status **✓ Accept Event** for the CMR.
 - a. Select this to change the Event's current status to the next one.
2. Route to LHD will reassign this Event to the selected LHD.



- a. Select the new agency from the drop down.



- b. Select the Route to LHD button to continue or select the Cancel button to exit.
3. Select Do not Investigate to pass over the investigation workflow statuses.
 - a. Select the Do Not Investigate button to Confirm making this change or select Cancel to exit.



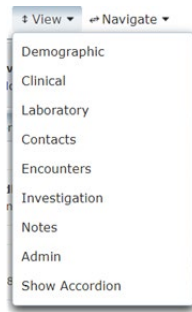
4. Select Workflow history to open a popup with a summary of the actions for this event.

Workflow History		
Date of action	Workflow action	Action performed by
Tue, Jul 11, 2023 15:44:47 PM	LHD chose not to investigate Central Utah	Glenn Hammer * * TEST
Tue, Jul 11, 2023 15:43:28 PM	Assigned to LHD Central Utah	Glenn Hammer * * TEST
Tue, Jul 11, 2023 15:32:54 PM	Accepted by LHD	Glenn Hammer * * TEST
Tue, May 30, 2023 10:18:44 AM	Assigned to LHD Bear River	Glenn Hammer * * TEST

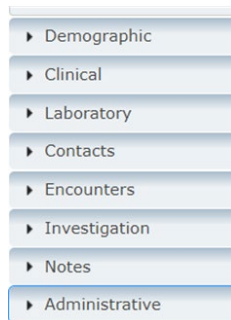
For More information on Workflow Status see the EpiTrax Edit Event Technical documentation. Look in the Information bar section.

VIEW

1. Select an option to navigate to that tab.



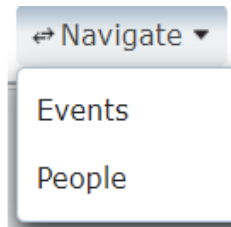
2. Select Show Accordion option **Show Accordion** to change the view from tabs to Accordion.



3. Select the Show Tabs **Show Tabs** option to change back.
4. See the descriptions of the other items in the Edit Event Tabs section below.

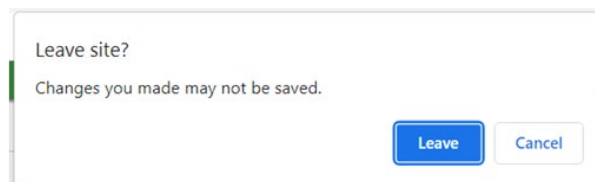
NAVIGATE

1. Select the Navigate menu item.



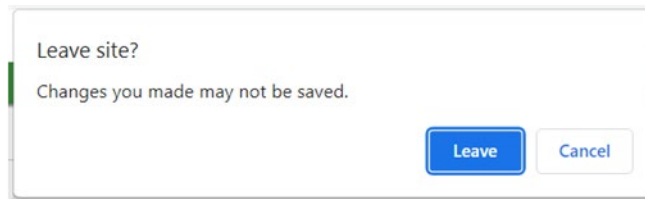
Events

1. Select the Events **Events** option to load the green Events **EVENTS** tab with the default filter applied.
 - a. Select the Leave button to leave the CMR edit view and go to the Events page.
 - b. Select the Cancel button to exit out of the popup.



People

1. Select the People **People** option to load the green People Search **PEOPLE** tab.
 - a. Select the Leave button to go to the People search page.
 - b. Select the Cancel button to exit out of the popup.



PERSON LOCKED

1. The Person Locked **Person Locked** menu item appears if another user has the person or one of the associated CMR's open for editing and a second user tries to open one.
2. Select the Person Locked menu to see who the person locked by.



3. To unlock the CMR, contact the locking user and request them to save and exit.
4. The second way to unlock a file is to wait 15 minutes. EpiTrax will expire the lock on inactive files after 15 minutes.

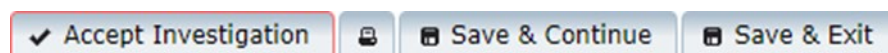
View Morbidity Event

Your lock for this person has expired. Changes were saved prior to lock expiration.



BUTTONS ON THE RIGHT

1. Look at the button on the right.



Workflow Status Button

Change CMR status

1. Select the first button to change the CMR to the next status **Approve at State**
 - a. To Assign an investigator, when needed, Select the Assign to Investigator button.
 - b. Select an investigator from the dropdown.

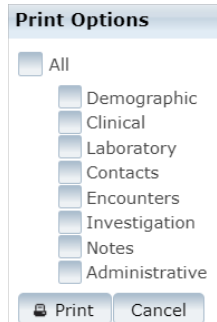


- c. Select the Assign to Investigator button to continue or select Cancel to exit

See the EpiTrax Edit Event Technical document for more information on the Workflow statuses.

Print

1. Select the print button  to print this CMR.
2. Check the box next to the desired sections.



Print Options

☐ All

☐ Demographic

☐ Clinical

☐ Laboratory

☐ Contacts

☐ Encounters

☐ Investigation

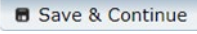
☐ Notes

☐ Administrative

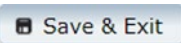
3. Select the Print button to continue or select Cancel to exit.

Be aware this printout may include personal and protected information.

Save & Continue

1. Select the Save & Continue  button to keep any changes made and keep the CMR open for additional editing.

Save & Exit

1. Select the Save & Exit  button to keep any changes made and exit the CMR so another user can edit it

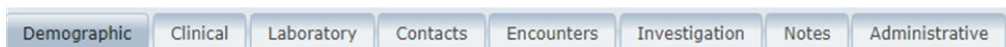
See the Person locked section above for more information

BRIEF NOTE

1. Enter text in the Brief Note  field.
2. Select the Save  button and this note is saved to the Notes Tab.

For more information see the Notes Tab description below.

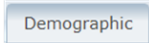
EDIT EVENT TABS/ACCORDION BARS



Demographic Clinical Laboratory Contacts Encounters Investigation Notes Administrative

1. Select one of the tabs, or accordion bars, to edit the fields found there.
 - a. Select Save & Continue  after entering data and before selecting another tab.

Demographic Tab

1. Select the Demographic tab  to edit information about the person such as name and age.

Name

Last name	First name	Middle name	Parent/Guardian
Seven	Blake	Ethan	Uncle

Age

Date of birth	Current age	Age at onset	Age at event date
01/01/1957	66 Years 6 Months 5 Days	Unknown	66 Years 4 Months 29 Days

2. Scroll down to the address section.
 - a. Enter an address using the provided fields.

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

Note

Address not verified

- b. Select Save & Continue.

- i. Select the Save as Address at Diagnosis button if this is the address at the time of diagnosis.
 - ii. Select the Remove as Address at Diagnosis button on the right to remove it.
 - iii. To create a new blank address select the + Enter Address button.

3. Select the Other Addresses **Other Addresses** text to see additional addresses associated with this person.

Other Addresses

Street	Unit number	City	State	Zip code	County	Residence Type	Earliest known	Moved	Created	Note
ee		Liberator	Utah			M - Hotel/Motel			05/19/2022	

4. Scroll down to the Telephones section.
 - a. Enter phone number information in the blank fields.

Telephones

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

- b. Select Save & Continue at the top of the page. The phone number is saved and a new blank telephone row is added.



- c. Select the trash can icon to remove a phone number.

5. Scroll down to the Email Addresses section.
 - a. Enter an email in the email field.
 - b. Select the Save & Continue button at the top of the page to keep the email. A new blank field will appear.

Email Addresses

Email Address
Enter email, click Save to add
test Trash



- c. Select the trash can icon to remove an email address.

6. Scroll down to the Demographics section.

- a. In the Demographics section set the Birth sex, Current gender, Primary Language, Ethnicity, Race and Country of birth fields by using the dropdowns.

Demographics

Birth sex Male	Current gender Male	Primary language English	Ethnicity Not Hispanic or Latino	Race (Select all that apply) Asian	Country of birth Algeria
-------------------	------------------------	-----------------------------	-------------------------------------	---------------------------------------	-----------------------------

7. Select Save & Continue before selecting another tab.

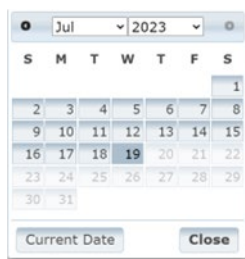
Clinical Tab

1. In the Disease section select the disease drop down to change the disease, only if it is needed. This will change the custom fields and forms available to those of the new disease.

Disease

Disease Anthrax	Onset date mm/dd/yyyy	Date diagnosed mm/dd/yyyy
--------------------	--------------------------	------------------------------

- a. Enter the Onset date and the Date diagnosed.
 - i. Select the calendar icon  to use the calendar to select the date.



Jul 2023

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Current Date Close

- ii. Select the desired date and the calendar will close and the date is placed in the field.
 - iii. Selecting the Current date button sets the field to today's date.
 - iv. Select Close to exit without setting a date.
2. Scroll down to the Facility / Clinician / Hospitalized Status section.

Facility / Clinician / Hospitalized Status

No facilities or clinicians found.

[+ Facility / Clinician](#)

- a. Select the + Facility / Clinician [+ Facility / Clinician](#) button to manually add a blank facility visit block of fields.

Visit type
Please select...

Anthrax caused hospitalization?
Please select...

Health facility
Facility name. Press Enter to search

Type
Address / Phone

Transmission facility?
Please select...

Diagnosis facility?
Please select...

Clinician
Last first name. Press Enter to search

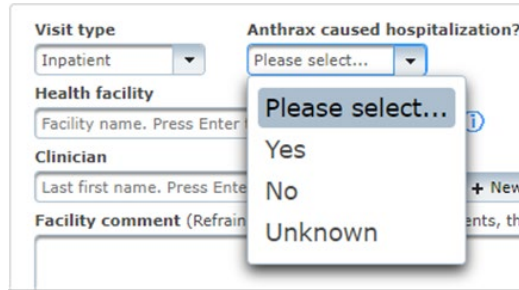
Visit start
mm/dd/yyyy

Visit end
mm/dd/yyyy

Medical record number

Facility comment (Refrain from disease specific comments, they may be visible in other cases.)

- b. Select the Visit type from the drop down.
 - i. For Inpatient visit select if this disease caused the hospitalization.

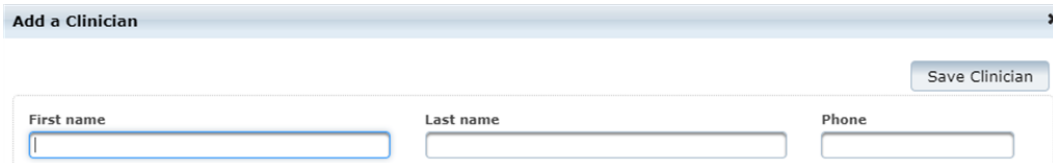


- c. Type the facility name in the Health facility field and select enter to search for it.
 - i. The Type and Address fields are automatically added after the CMR is saved, if the information was entered in EpiTrax.



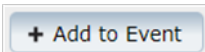
For more information on Facilities see the EpiTrax Dashboard, Facility, CMR Search documentation and the EpiTrax Admin Menu Technical documentation.

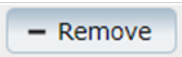
- d. Use the dropdown to indicate if this was the Transmission facility.
- e. Use the dropdown to indicate if this was the Diagnosis facility.
- f. Enter the Clinician name and press enter to search the existing names.
 - i. Select the +New button to add a clinician.

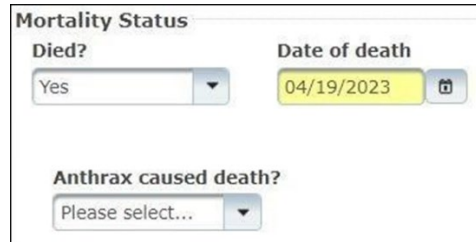


- ii. Enter a first name, last name, and phone number.
 - iii. Select the Save Clinician button to keep the data entered and connect this new Clinician to the CMR.
 - g. Enter the Visit start date.
 - h. Enter the Visit end date.
 - i. Enter the Medical record number.
 - j. Enter any comments.
 - i. Do not enter personal or private information.
 - k. Select the Save & Continue at the top of the page to keep any changes made.
 - l. Select the -Remove button to take a visit off a CMR.
3. Scroll down to the green Other Facility / Clinician / Hospitalized Status link.
 - a. Select the Other Facility link to see other facilities in EpiTrax that are associated with this patient.

Other Facility / Clinician / Hospitalized Status

- b. Select the Add to Event  button to associate the selected facility visit to this CMR/event.

- c. Select the Remove  button to remove the selected facility visit from this CMR/event.
 4. Scroll down to the Mortality Status section.
 - a. In the Mortality Status section select yes from the dropdown if the patient died.



Mortality Status

Died? Date of death 

Anthrax caused death?

- b. Enter the Date of death.
 - c. Select yes if this disease was the cause of death.

Users can see if there is death information in the EDEN system by selecting the green **Show Death Data From EDEN** link.

5. Scroll down to the Treatments section.



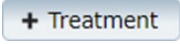
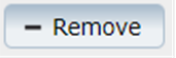
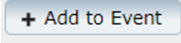
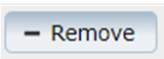
Treatments

Treatment given?

- a. Select Yes from the Dropdown if treatments were given. This will add a blank block of treatment fields.



Treatment date	Treatment stopped	Treatment	Quantity	Treatment form	Status	Data source
mm/dd/yyyy	mm/dd/yyyy	Please select...		Please select...	Please select...	EpiTrax UI
Treatment comment						

- b. Enter the Treatment date and the date Treatment stopped.
 - c. Select a Treatment from the drop down and next enter the Quantity.
 - d. Select the Treatment form and the status.
 - e. The data source is automatically filled out.
 - f. Enter any comments as needed.
 - g. Select Save & Continue at the top of the page to keep any changes made.
 - h. Select the +Treatment  button to the right to create additional treatment blocks as needed.
 - i. Select the - Remove  button to remove a treatment block.
 6. Scroll down to the green Other Treatments link.
 - a. Select the Other Treatments **Other Treatments** text to see other treatments in EpiTrax associated with this person.
 - b. Select the + Add to Event  button to associate a treatment to this CMR.
 - c. Select the -Remove  button to remove the treatment association from this CMR.

7. Scroll down to the Vaccine section.

Vaccines

[Show Vaccine Data From IIS](#)

No vaccines found.

[+ Vaccine](#)

- Select the + Vaccine [+ Vaccine](#) button to Manually add the vaccine block of fields.

Vaccine

Administered date

Dose number in series

Manufacturer

Lot number

Expiration date

National drug code (NDC)

Vaccination record identifier

Information Source

Data source

EpiTrax UI

Vaccine comment

[Cancel](#)

- Fill in the Vaccine, Administered date, Dose number in series, Manufacturer, Lot number, Expiration date, National drug code (NDC), Vaccination record identifier, Information Source fields.
- The Data source field is automatically entered.
- Fill in any comments.
- Select the Cancel [Cancel](#) button to remove a vaccine.
- Select the Save and Continue button at the top of the page to keep the changes made.

Users can select the green Show Vaccine Data from IIS link [Show Vaccine Data From IIS](#) to see if there is vaccine information in this external system.

8. Select the Save & Continue button before changing tabs.

Laboratory tab

- To manually add a lab select the +Add Lab [+ Add Lab](#) button on the right.

Labs

[+ Add Lab](#)

[Cancel](#)

Performing lab

Lab name. Press Enter to search

Ordering facility

Facility name. Press Enter to search

Ordering clinician

Last first name. Press Enter to search

+ New

Collection date time

mm/dd/yyyy hh:mm

Specimen source

Please select...

Accession no

Specimen sent to state lab?

Please select...

Tests

Test type

Please select...

Organism

Please select...

Test result

Please select...

Result value

Units

Reference range

Test status

Please select...

Lab test date time

mm/dd/yyyy hh:mm

Parasitemia Level Percentage for Babesiosis (-99999999.0 to 99999999.0)

Enter for a blood smear test.

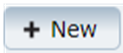
Comment

Susceptibilities

[+ Add Susceptibility](#)

None

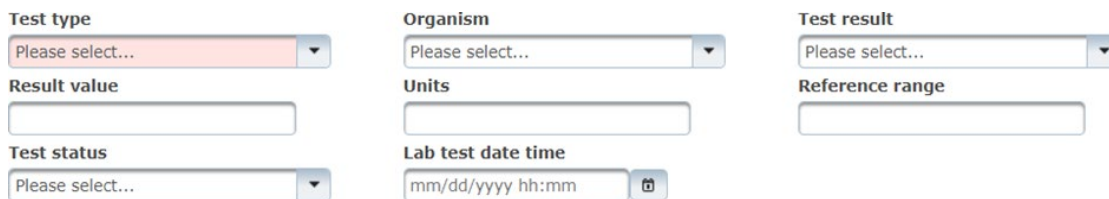
- Enter a name in the Performing Lab field and press enter to search for existing labs in EpiTrax.
- Enter the Ordering facility and press enter to search for existing facilities.
- Enter the Ordering clinician and press enter to search for existing clinicians.

- i. Select +New  button to create a new clinician.
- ii. Enter the First name, Last name and Phone number.



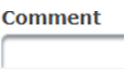
The form is titled "Add a Clinician" and has a close button (X) in the top right corner. It contains three input fields: "First name", "Last name", and "Phone". A "Save Clinician" button is located in the top right corner of the form area.

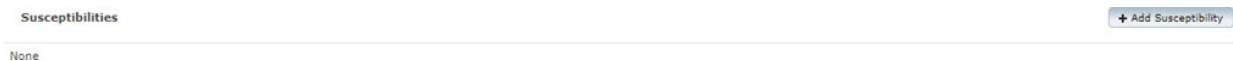
- iii. Select the Save Clinician button to keep the entry or select the X in the upper right corner to exit.
- d. Enter the collection date.
- e. Enter the specimen source.
- f. Enter the accession number.
- g. Use the drop down to indicate if the specimen was sent to the state lab.
- h. Scroll down to the tests section and enter the test information.



The form is divided into two columns. The left column contains: "Test type" (dropdown), "Result value" (text input), and "Test status" (dropdown). The right column contains: "Organism" (dropdown), "Units" (text input), "Reference range" (text input), and "Lab test date time" (text input with a date/time picker icon). All dropdowns have "Please select..." as the default option.

- i. Select the test type, Organism, and Test result using the Drop downs.
- j. Enter the Result value, Units, and Reference range in the provided fields.
- k. Select the test status from the dropdown.
- l. Enter the Lab test date and time.

- m. Enter any additional comments in the  box provided.
- n. Scroll to the Susceptibilities section.

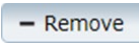
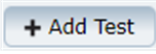
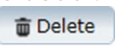


The section is titled "Susceptibilities" and has a "+ Add Susceptibility" button in the top right corner. Below the title, the word "None" is displayed.

- o. Select the + Add susceptibilities.  button to add one.



The form has five fields: "Antimicrobial agent" (dropdown), "Result" (dropdown), "Result value" (text input), "Test date" (text input with a date picker icon), and "Created" (text input showing "07/19/2023").

- p. Select the Antimicrobial agent and Result from the drop downs.
- q. Enter the Result value and the Test date in the fields provided.
- r. The created date is automatically added.
- s. Select the Remove  button in the upper right to remove a Lab from an event.
- t. To add an additional Test to an existing Lab open the desired lab and select the + Add Test  button.
- u. Fill out the new test as usual.
- v. Select the Trash icon  to remove a Test from a lab.

Be aware that there are several Trash icons available.

w. Select the Trash icon  to remove a Susceptibility from a Test.

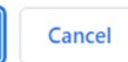
Be aware that there are several Trash icons available.

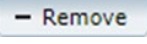
- x. Select the Save & Continue button to keep changes made.
2. Scroll down to the green Other Patient Labs link.
 - a. Select the Other Patient Labs **Other Patient Labs** link to see other Labs in EpiTrax that are associated with this Patient.

04/19/2023 03:12 PM	Amniotic Fluid	1	Antigen by DFA/IF	Chlamydia trachomatis Negative / Non-reactive ()	
04/19/2023 03:12 PM	Abscess	1	Antigen by DFA/IF	Chlamydia trachomatis Positive / Reactive ()	
04/19/2023 03:00 PM	Blood	1	Antigen by DFA/IF	Chlamydia trachomatis Positive / Reactive ()	

- b. Select the + Add  button to associate a Lab with this CMR.
- c. Select Ok confirm or Cancel to exit.

Add lab to this event?

- d. Select the -Remove  button the remove the association of a lab from this CMR.

3. Select Save & Continue at the top of the page before changing tabs.

Contacts Tab

1. Scroll to Adding Contacts **Contacts** **Adding Contacts**
 - a. Enter the last name, first in the Search Person field and press enter to search for an existing person in EpiTrax.

Search person

- b. Possible matches are displayed. The Date of birth and the birth sex are displayed if available.

ID	Name	Date of birth	Birth sex
1616992	test, tb, casekow		
1616993	test, tb, cased		

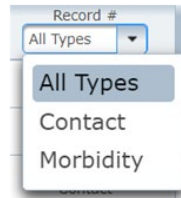
- c. Select the desired name.
- d. The complete name is added to the search field.
- e. Select Save & Continue to add a contact event to the current CMR for that person.

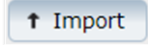
(Events 1 - 1 of 1, Page: 1/1)

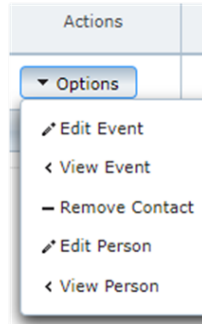
Actions	Record #	Person	Contact Type	Contact Disposition	Disposition date
	20232029004 Contact	test, tb, Inshallahfinal			mm/dd/yyyy 

- i. Select the Contact Type and Contact Disposition From the dropdowns.
- ii. Enter the Disposition date.

- iii. Select Save & Continue to keep changes made.
- f. Got to Record # column to filter the contacts displayed.
 - i. Select All Types, Contact, or Morbidity from the Record Number column drop down to change the filter.



- 2. Select the Import  button to add several contacts at once.
See the Import directions above in the Options menu section.
- 3. Select the Options button in the actions column.

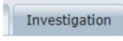
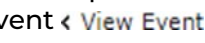


- a. Select Edit Event  to open the contact event CMR for editing.
 - i. Select Leave to confirm opening the Contact Event CMR for editing or select Cancel to exit.

Leave site?

Changes you made may not be saved.



- ii. On the Edit Contact Event page select the Investigation  Tab.
 - 1. Fill out the fields as needed.
 - 2. Select the Save & Continue or Save & Exit.
 - 3. Select the Contacts Tab and the Record  number to return to the parent Morbidity Event.
- iii. Select View Event  to open the Contact Event CMR in view mode.
 - 1. Select the Leave button to Confirm opening the CMR or select the Cancel button to exit.

Leave site?

Changes you made may not be saved.

Leave

Cancel

- iv. Select Remove Contact – **Remove Contact** to remove this contact event from this CMR.

1. After successfully processing a Successful Contact removed banner is added to the top left under the Edit Event type title

Edit Morbidity Event

Successful Contact removed.

There is no confirmation before removing a contact event.

- v. Select the Edit Person **Edit Person** option to open the Edit Person Page.

1. Select the Leave button to confirm opening the Edit person page or the Cancel button to exit.

Leave site?

Changes you made may not be saved.

Leave

Cancel

See the EpiTrax Edit Person documentation for more information about this tool.

- vi. Select the View Person **View Person** option to open the View Person page.

1. Select the Leave button to Confirm opening the Edit person page or the Cancel button to exit.

Leave site?

Changes you made may not be saved.

Leave

Cancel

See the EpiTrax Edit Person documentation for more information about this tool.

4. Enter a record number to link the CMR to an orphan contact.

Link to an orphan contact with a record number

- a. Select a save option.
5. Navigation Options become available depending on the number of contacts available.
 - a. These include advancing by page, jumping to the end, and changing the number of contacts displayed on each page.

(Events 1 - 1 of 1, Page: 1/1)



1

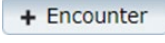


50



6. Select Save & Continue before changing tabs.

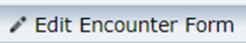
Encounters Tab

1. Select the +Encounter  button to create a new entry.
2. Fill out the Investigator, Encounter date time, Location, and Description fields.
3. Select Save and Continue to keep the changes made.
4. Select the Strikethrough option on the right  to change the text in the

Description

test-text

Description field.

5. Select the Edit Encounter form  to open the Encounter form, if there is one available.
 - a. Select Leave to confirm or Cancel to exit.

Leave site?

Changes you made may not be saved.

- b. The Edit Encounter Form page opens.

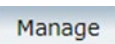
Encounter for event Condition Person

20232029016 - Morbidity Arsenic poisoning Seven, B

Encounter Investigation

Associated Forms 

No forms have been added. Click the Manage button to add a form.

- c. Select the Investigation tab to edit the custom fields of the form.
- d. Select the Manage button  to add other available forms to this encounter.
 - i. Select the desired form from the popup.

Encounter Forms

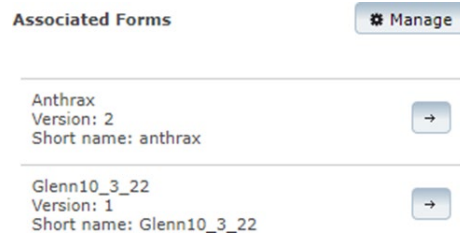
Forms in use

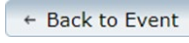
Form Name	Version	Diseases	Jurisdictions	Event Type	Actions
No records found.					

Forms available for use

Form Name	Version	Diseases	Jurisdiction	Event Type	Actions
No records found.					

- ii. Select Save & Continue or select the  to exit without saving changes.
- e. Select the arrow to edit the desired form from the list in the Associated Forms column.



- i. Fill in form fields as needed.
- f. Select Save & Continue to keep any changes made.
- g. Select the Back to Event  Button to return to the Edit Morbidity Event Page.
- h. Select the Leave button to confirm or the Cancel button to exit.



See the EpiTrax Formbuilder documentation for information on making an Encounter form.

6. Select Save & Continue before changing tabs.

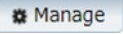
Investigation Tab

1. Scroll to the Investigative information section.



2. In the Associated form Section select the Arrow  button to load a form to edit.
3. The fields of the selected form are loaded in the section on the right. Enter data as needed. Select form tabs as needed.



- a. Check with local management for condition specific directions because different conditions will have different forms and fields available.
4. Select the Manage  button to see a list of other forms that are available for manual attachment or sharing of data.
 - a. Use the upper portion of the popup to see the list forms currently in use by this CMR. Review the columns of information.

Forms in use

Actions	Form	Diseases	Jurisdictions	Event Type	Sharing
 	Anthrax v2	Anthrax Cholera	Bear River Health Department	morbidity_e	Share with these events
 	Glenn Test Form G v1	Anthrax	All	morbidity_e	Share with these events
 	Glenn Share Test Form 1 v3	Anthrax	All	morbidity_e	Share with these events 20232029010 : Anthrax 

- i. To share data from this event to another select the desired event from the Share with these events dropdown list in the Sharing column.



- ii. This will Push data from the currently open CMR to the Checked CMR's fields.

Note: Data can be overwritten and lost if sharing is used incorrectly.

- b. The second portion of the popup shows forms that are available for manual attachment.

Forms available for use

Actions	Form	Diseases	Jurisdictions	Event Type
---------	------	----------	---------------	------------

- i. Scroll to the desired form.
- ii. Select the Add  button to attach the desired form to the current CMR.
- iii. Select Save & Continue to keep changes or select the  button to close without keeping associated form changes.
- c. New associated forms are listed on the left.
 - i. Forms that share data now show the word shared in green.

Associated Forms Manage

Anthrax Version: 2 Short name: anthrax	→
Glenn Test Form G Version: 1 Short name: gln_tst_frm_g	→
Glenn Share Test Form 1 Version: 3 Short name: gln_srh_tst_frm_1 Shared	→
Glenn Share Test Form 2 Version: 1 Short name: gln_srh_tst_frm_2	→

5. Scroll down to the Contact oriented section. Select values from the dropdowns as needed.

Contact Oriented

Food handler
Please select... ▼

Health care worker
Please select... ▼

Group living
Please select... ▼

Day care association
Please select... ▼

6. Scroll down to the Current Occupation(s) section.

Current Occupation(s) + Add Occupation

Current Occupation(s) not set.

- a. Select the +Add Occupation + Add Occupation button to add a Current Occupation block of fields.

Occupation	Standardized Occupation	Industry
	Enter occupation. Press Enter to search	
Standardized Industry	Employer	
Enter industry. Press Enter to search		

- Enter free form text in the Occupation, Industry, and Employer fields.
- Type in text and press enter to search for matches in the Standardized Occupation and Standardized Industry Fields.

Standardized Occupation

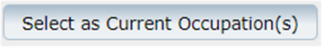
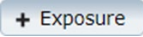
Enter occupation. Press Enter to search

- Computer Programmers
- Software Developers
- Editors
- Writers and Authors
- Engineers, All Other

- Select Save & Continue to keep changes or select the Cancel button to exit out of the occupation window.
- Select the - Remove Current Occupation(s) - Remove Current Occupation(s) button to remove an occupation from this CMR.

7. Scroll to the green Other Occupations link.
 - a. Select the green Other Occupations **Other Occupations** text to display the other occupations associated with this person.

Occupation	Standardized Occupation	Industry	Standardized Industry	Employer
cabinetry	Cabinetmakers and Bench Carpenters	cabinetry	Furniture and Related Product Manufacturing	cabinetry

- i. Select the Select as Current Occupation  button to associate the desired occupation with this CMR.
8. Scroll down to the Exposure section.
 - a. Select + Exposure  button to add the exposure fields.

Exposure place Beginning Ending

Place, city, and zip. Add all to refine search. Press Enter to search 

Description

- b. Enter information in the Exposure place field and press enter to search for existing locations.

Exposure place

work	396 S State St
work	2001 S State St
work	2001 S State St

- i. Select the desired location from the list.
 - c. To make a new place select the + New  button.
 - i. Fill out the Add Exposure Place fields.

Add Exposure Place 



Place name

Place type

Street

City

State

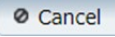
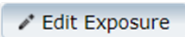
Zip code

(Area) Phone, Ext

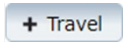
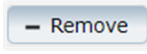
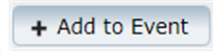
- ii. Select the Save Exposure Place button to keep the new location or select the X in the upper right to exit out.
- d. Enter the beginning and ending exposure dates in the fields.

Beginning Ending

Description

- e. Enter a Description in the text box .
 - f. Select a Save option to keep changes made.
 - g. Select the Cancel  button to exit out of Exposures.
 - h. To edit an existing exposure select the Edit Exposure  button.

- i. Select the Magnifying Icon  to see additional fields.
 - i. Select the Magnifying Icon  to hide the additional fields.
 - j. Select the Trash can icon  to remove an Exposure place.

nedsstest.health.utah.gov says
Delete exposure?
 - i. Select Ok to confirm removal or select Cancel to exit out.
9. Scroll down to the Travel section.
10. Select the + Travel  button to add the travel block of fields.
- a. Fill in the Country, State, County, City, Start date, and End date fields as needed.
 - b. Select a save option at the top to keep the changes or select the cancel button to exit.
 - c. Select the - Remove  button to take a travel off this CMR.
11. Scroll down to the green Other Travels link.
- a. Select green Other Travels **Other Travels** text to see additional Travels associated with this person.
 - b. Select the + Add to Event  button to associate a Travel event with this CMR.
 - c. Select a Save Option.
12. Scroll Down to the Other **Other** section.
- a. Select a value from the drop down for the Imported from field.

Imported from

Please select...

- Please select...
- Unknown
- Indigenous, acquired in Utah
- International, acquired outside the US
- Other US State, including Puerto Rico and the US Virgin Islands
- Imported, but unable to determine source state or country

- b. Select an option(s) for Binational reporting criteria.

Binational reporting criteria ⓘ

☐ Exposure to suspected product from Canada or Mexico

☐ Has case contacts in or from Mexico or Canada

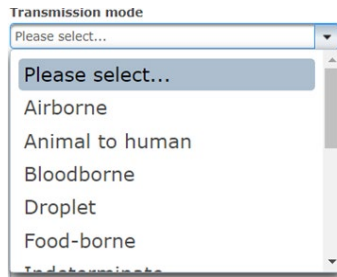
☐ Other situations that may require binational notification or coordination of response

☐ Potentially exposed by a resident of Mexico or Canada

☐ Potentially exposed while in Mexico or Canada

☐ Resident of Canada or Mexico

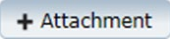
- c. Select an option for Transmission mode.

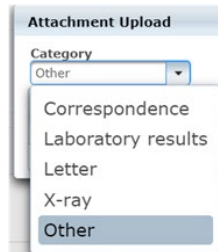


- d. Fill in data for Risk factors, Risk factors notes, Other data 1, and Other data 2 as needed.

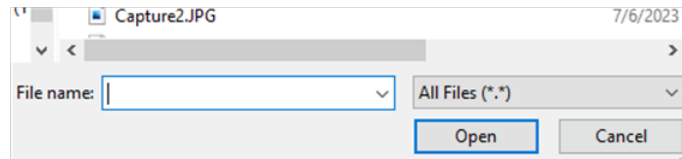
13. Select Save & Continue before moving to another tab.

Notes Tab

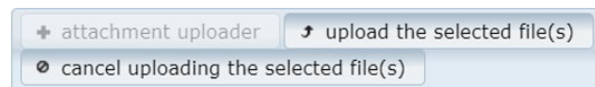
1. Select the + Attachment  button to add a file to this CMR.
 - a. Select the Category from the drop down.



- b. Select the Attachment uploader  button.
 - i. Browse to and select the desired file.



- ii. Select the open button.
- c. Select the upload the selected file(s) or the cancel uploading the selected file(s) button as needed.



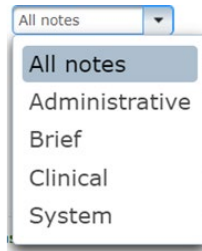
- d. To download an attachment select the Down arrow  button.
- e. Select the Trash can  Icon to remove an attachment from this CMR.

Files can have personal or protected information.

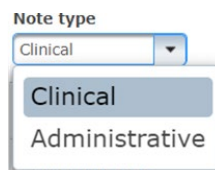
ELR, lab attachments come later than the message.

2. Scroll down to the Notes  section.

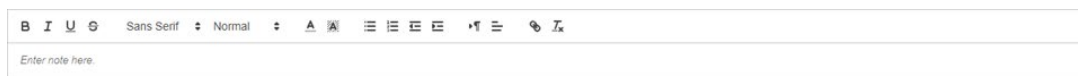
- a. Select a filter from the Notes dropdown to limit the Notes shown.



- b. To create a new note select the type from the Note type dropdown.



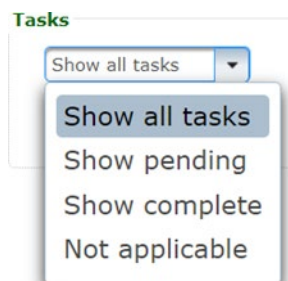
- c. Type in the notes field and format the text as desired.



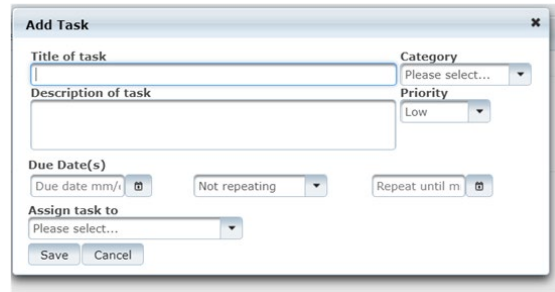
- d. Select a Save option, in the upper right, or select the Cancel button, on the left, to exit.
- e. Check the Strikethrough box to change the note text to strikethrough.



3. Scroll down to the **Tasks** section.
 - a. In the Tasks section use the dropdown to filter the tasks shown.



- b. A new task can be added by selecting the Add Task button.
 - i. Fill in the fields for the Add Task popup.



Add Task

Title of task:

Description of task:

Category:

Priority:

Due Date(s):

Assign task to:

- ii. Enter a Title.
- iii. Select a Category from the dropdown.
- iv. Type in a description of the task.
- v. Select a Priority from the dropdown.
- vi. Select a Due date.
- vii. Set if this item is repeating.
 1. Set a repeat until date if desired.
- viii. Use the drop down to assign this task to a specific user.

Tasks created here appear on the dashboard discussed in the EpiTrax New User Quickstart Guide.

- ix. Select the Save button to keep the changes made or select the Cancel button to exit the Add tach popup.



Title of task: sample

Category: Appointment

Priority: Low

Assigned to: Glenn Hammer * * TEST

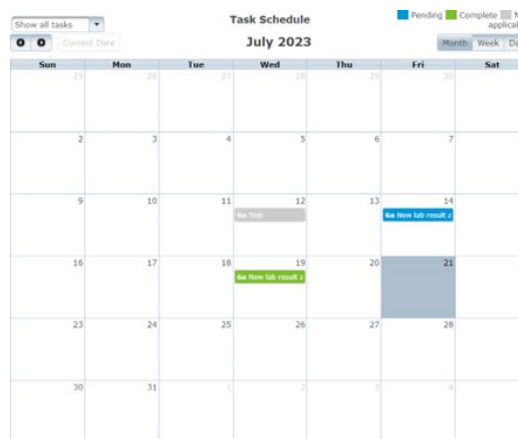
Assigned by / on: Glenn Hammer * * TEST on 07/21/2023

Due: 07/20/2023

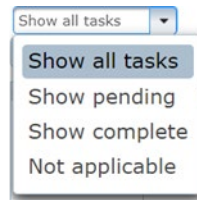
Status: Complete

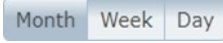
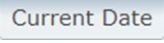
Description: work

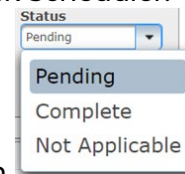
- c. Select the Task Scheduler  **Task Schedule** button to see the tasks with a due date in a calendar format.



- d. Select a filter from the drop down on the left to see different options.



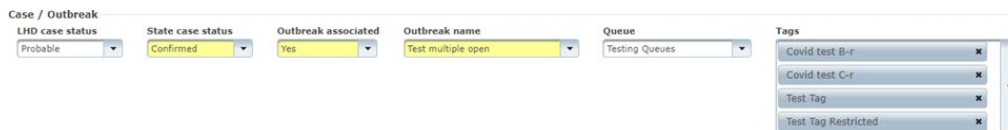
- e. Select the Display options  to change the view.
- f. Use the arrows in the top left  to change the month, week or day.
- g. Select the Current Date  button to return to the current date.
- h. Press esc or the X in the corner to exit the Task Scheduler.

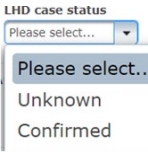


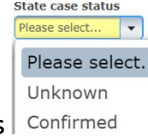
4. After completing a task update the status dropdown.
5. Select Save & Continue before moving to another tab.

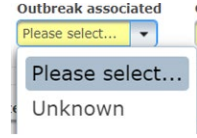
Admin Tab

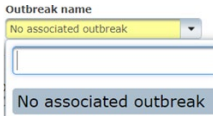
1. Scroll to the Case / Outbreak  section.
 - a. Check with local management about editing these fields.

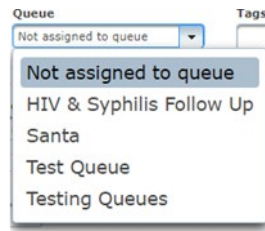
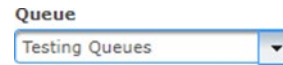


- b. Select the LHD case status  with the dropdown.

- c. Select the State case status  with the dropdown.

- d. Mark if this CMR is associated with and Outbreak by using  the

- e. Select the Outbreak name  from the dropdown.
 - f. Select the desired Queue from the dropdown.

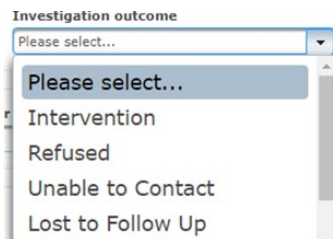
- i. The selected Queue is displayed
- g. Select the desired Tags from the dropdown.



- i. A CMR can have multiple tags.
2. Scroll down to the Auditing / Investigation section.



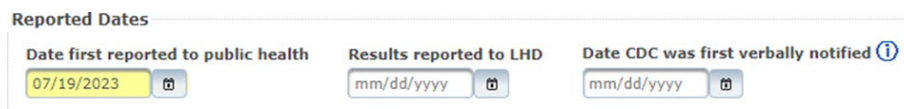
- a. Enter dates in LHD investigation/intervention started, and LHD investigation completed fields.
- b. Select the Investigation Outcome from the Drop down.



- c. Type in an Event name.
3. Scroll down to the Reporter **Reporter** section.



- a. Enter the Last name, First name, Middle name and Phone number or the person reporting the event.
4. Scroll down to the Reported Dates **Reported Dates** section.



- a. Enter a date into the Results reported to LHD, and the Date CDC was first verbally notified fields.
5. Select Save & Continue before moving to another tab.
6. Select Save & Exit when finished entering data so another user can edit this CMR or edit this person.

GLOSSARY

Term	Abbreviation	Definition
Confidential Morbidity Report	CMR	Report submitted by a provider or other reporting source, which triggers the creation or updating of an event in the system
Local Health Department	LHD	Public health agency responsible for protecting and promoting the health of individuals within a specific local jurisdiction
Center for Disease Control	CDC	The national public health agency of the United States