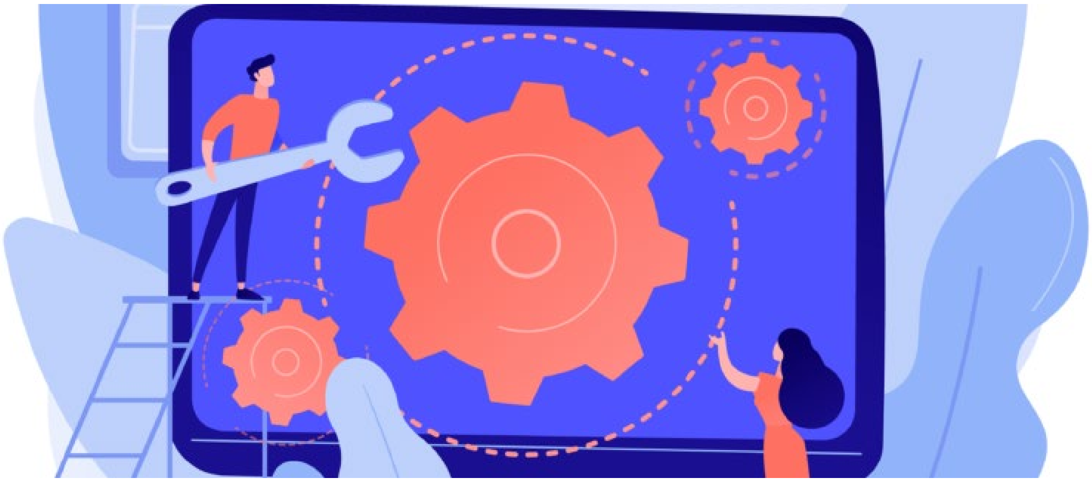
NEVADA DIVISION of PUBLIC and BEHAVIORAL HEALTH



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

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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.

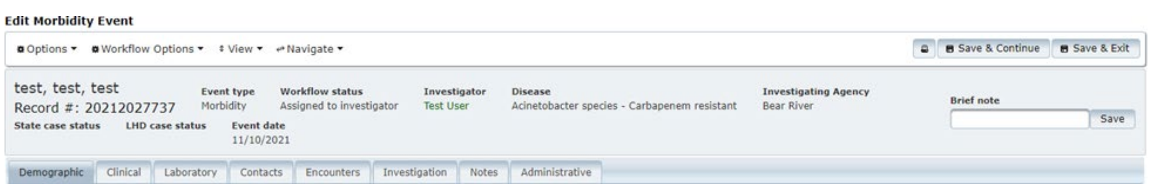
OPEN A CMR TO EDIT

1. Select the CMR Search CMR SEARCH in the green bar at the top of the page.
2. Type in a Record Number Record number in the field.
3. Select the Search Search button near the middle of the page.
4. Matching CMR numbers are listed in the Record number column.
5. Select the green number Record Number 961 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.



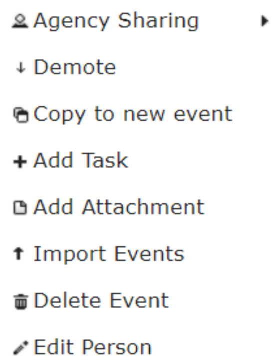
OPTIONS

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

Options ▾ Workflow Options ▾ View ▾ Navigate ▾

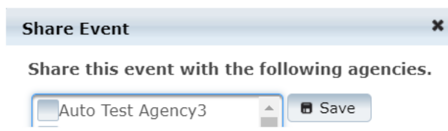
Agency Sharing a CMR

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



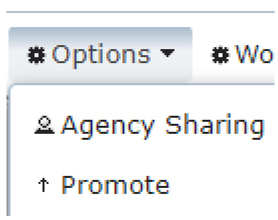
2. In the flyout select Edit Sharing. 

.
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.

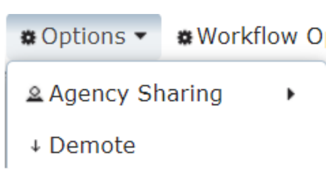


Promote / Demote

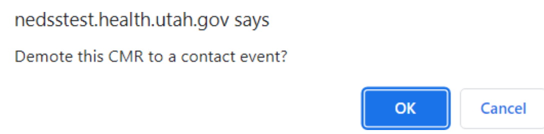
1. Select the Promote option to change a Contact Event to a Morbidity event.



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

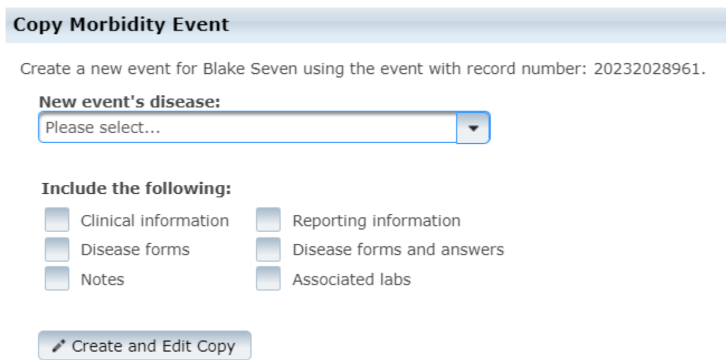


    a. The user Is asked to Confirm the change.
3. Select Ok to accept the change or Cancel to exit out.



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.



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

Add Task

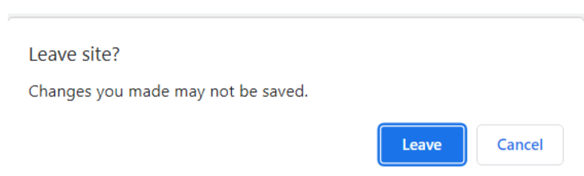
To add a task to a CMR, see the Notes Tab directions below.

Add Attachment

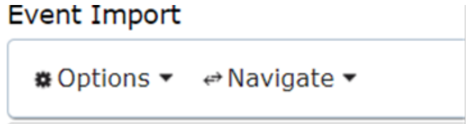
To add an attachment to a CMR, see the Notes Tab directions below.

Import Events

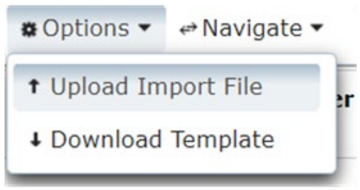
1. To import and create multiple events opens CMR in Edit mode. Go to the Options tab at the upper left.
    a. Importing Events and Importing Contacts follow the same process described here.
2. Select the Import Events event Option.
3. Confirm changing to a new page. Select the Leave button to leave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



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



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

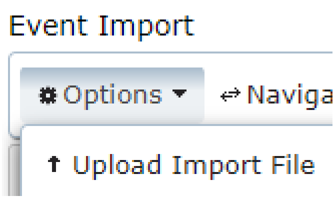


6. Edit the Template File.
    a. Open the Downloaded Template.
        i. You Might need to scroll to the left to see more fields.
    b. Fill out one row for each Event or Contact.
        i. Fill in the fields.

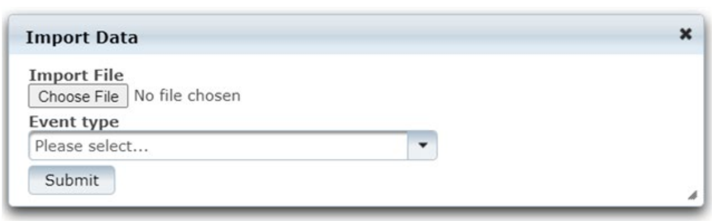
K	L	M	N	O	P	Q
person_city	person_state	person_county	person_zip	address_at_diagnosis	investigating_agency	workflow
moab	UT	grand	84551-9622	Y	Southeastern Utah District Health Dep	closed
cedar city	UT	washington	84660	N	Utah County Health Department	assigned_to_lhd
Fillmore	Utah	WS	84631	Yes	Central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

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

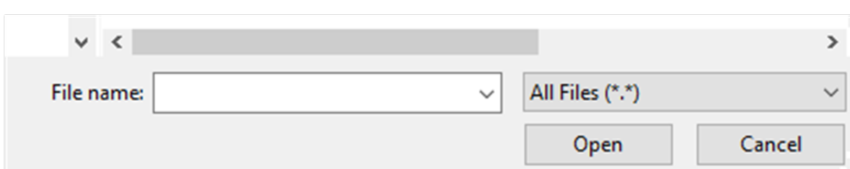
7. In the Options menu on the Event Import page select the Upload Import File option.



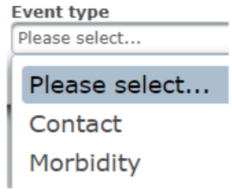
8. The import Data popup opens.



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



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

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 [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

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

Uploaded
3

b. Review the number of invalid items

Invalid
0

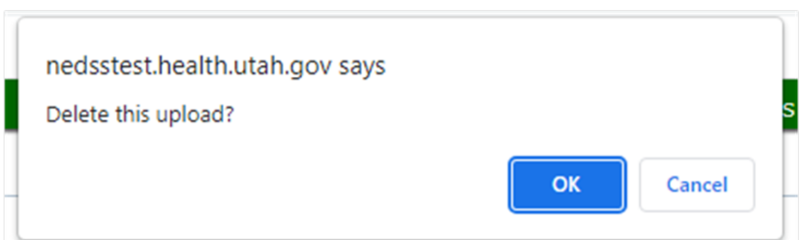
i. Open the Import file and fix any issues.

ii. Save it and try the import process again.

c. If necessary select the trash icon on a batch's status row to delete it.

i. Delete files that have invalid items.

ii. Confirm deleting/stopping the upload.

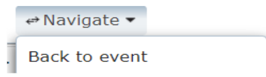


d. Select the +Import [+ Import] button on the right to continue.

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.

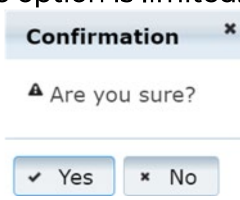
Batch Status	Uploaded	Invalid	Imported
Imported	0	0	3

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

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

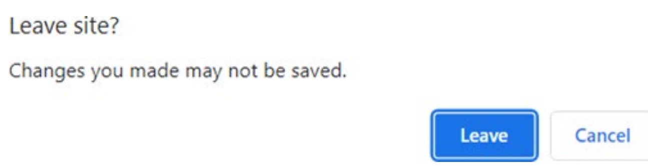
1. Select Options menu then select Delete event. This removes the CMR from Epitrax.
    a. Access to the Delete option is limited.



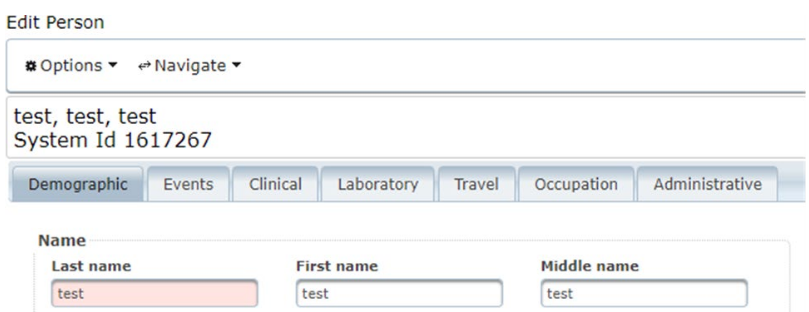
    b. The user is asked to confirm the deletion.
    c. Select Yes to continue or No to cancel.

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.



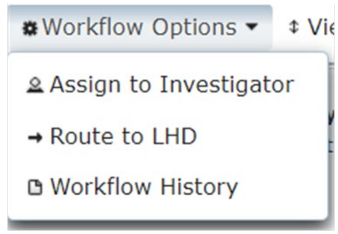
    b. The edit Person page is opened.



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

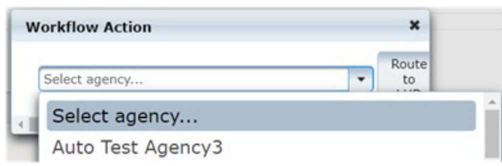
WORKFLOW OPTIONS

1. Select the Workflow Options menu.

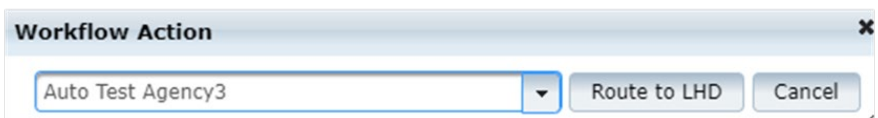


Workflow Status

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.

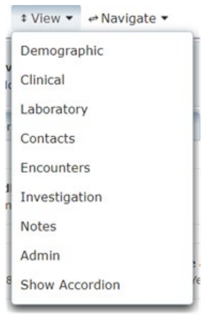
Workflow History

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

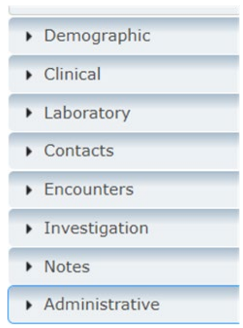
For More information on Workflow Status see the EpiTrax Edit Event Technical documentation. Look in the Information bar section.

VIEW

1. Select an option to navigate to that tab.



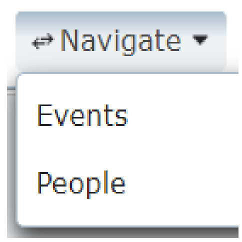
2. Select Show Accordion option Show Accordion to change the view from tabs to Accordion.



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.

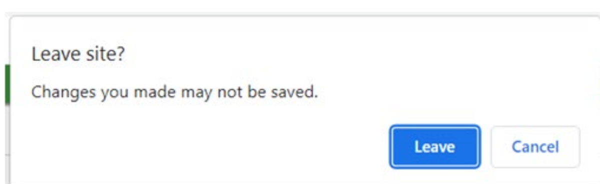
NAVIGATE

1. Select the Navigate menu item.



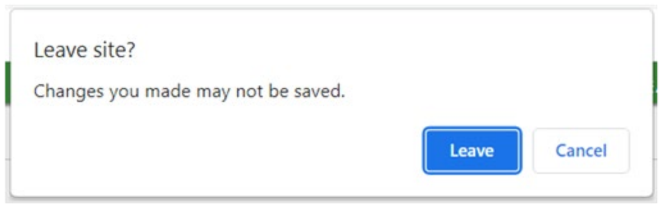
Events

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

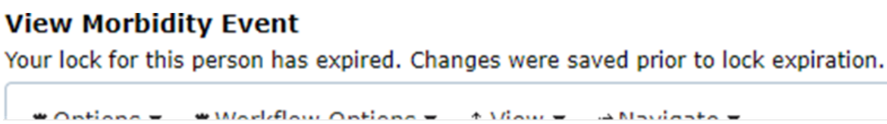
1. Select the People People option to load the green People Search PEOPLE tab.
   a. Select the Leave button to go to the People search page.
   b. Select the Cancel button to exit out of the popup.



PERSON LOCKED

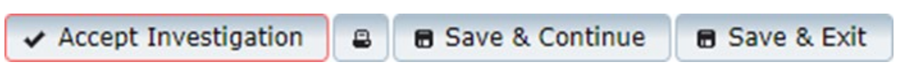
1. The Person Locked Person Locked menu item appears if another user has the person or one of the associated CMR's open for editing and a second user tries to open one.
2. Select the Person Locked menu to see who the person locked by.

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.



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.

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.

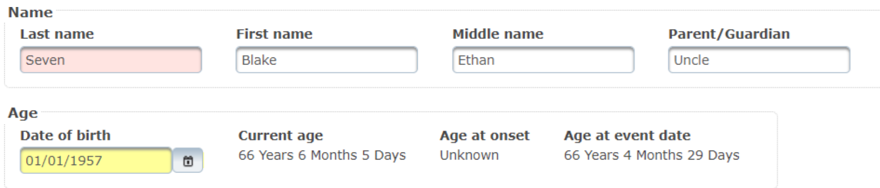
For more information see the Notes Tab description below.

EDIT EVENT TABS/ACCORDION BARS

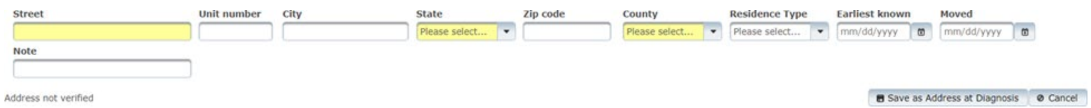
1. Select one of the tabs, or accordion bars, to edit the fields found there.
   a. Select Save & Continue after entering data and before selecting another tab.

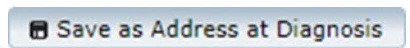
Demographic Tab

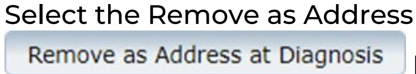
1. Select the Demographic tab to edit information about the person such as name and age.

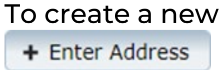


2. Scroll down to the address section.
    a. Enter an address using the provided fields.



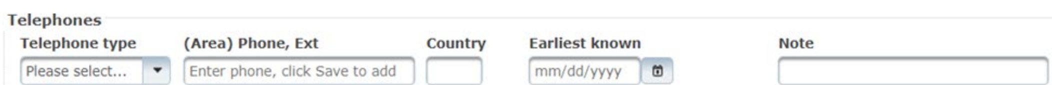
    b. Select Save & Continue.
        i. Select the Save as Address at Diagnosis 

        button if this is the address at the time of diagnosis.
        ii. Select the Remove as Address at Diagnosis 

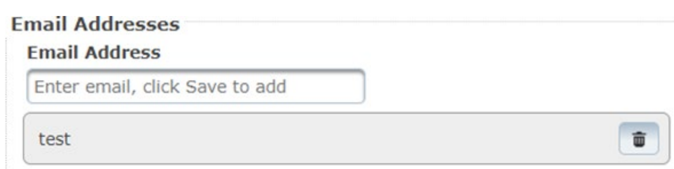
        button on the right to remove it.
        iii. To create a new blank address select the + Enter Address 

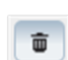
        button.
3. Select the Other Addresses **Other Addresses** text to see additional addresses associated with this person.

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



    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.



    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.

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.

a. Enter the Onset date and the Date diagnosed.

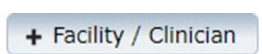
i. Select the calendar icon  to use the calendar to select the date.

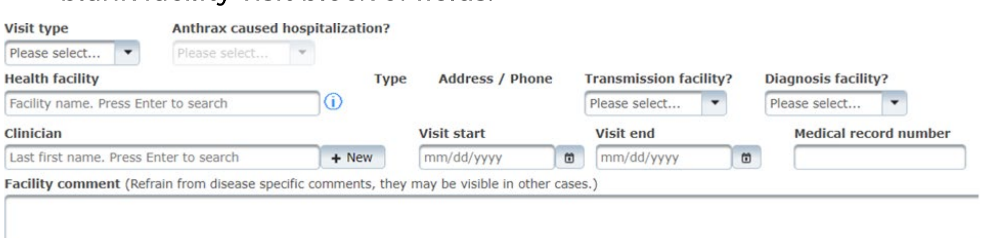
ii. Select the desired date and the calendar will close and the date is placed in the field.

iii. Selecting the Current date button sets the field to today's date.

iv. Select Close to exit without setting a date.

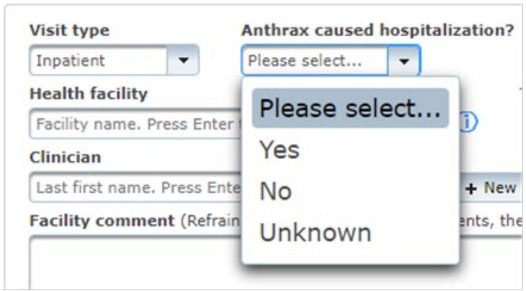
2. Scroll down to the Facility / Clinician / Hospitalized Status section.

a. Select the + Facility / Clinician  button to manually add a blank facility visit block of fields.



b. Select the Visit type from the drop down.

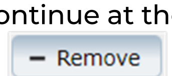
i. For Inpatient visit select if this disease caused the hospitalization.



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.

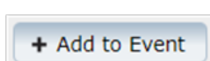
d. Use the dropdown to indicate if this was the Transmission facility.
e. Use the dropdown to indicate if this was the Diagnosis facility.
f. Enter the Clinician name and press enter to search the existing names.
    i. Select the +New button to add a clinician.

    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 

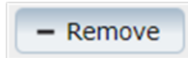
button to take a visit off a CMR.

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.

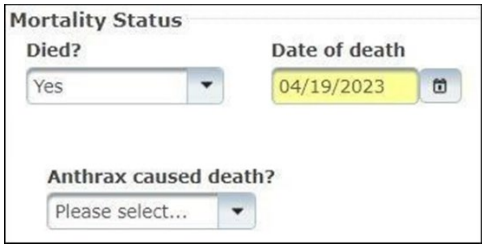
Other Facility / Clinician / Hospitalized Status

    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.

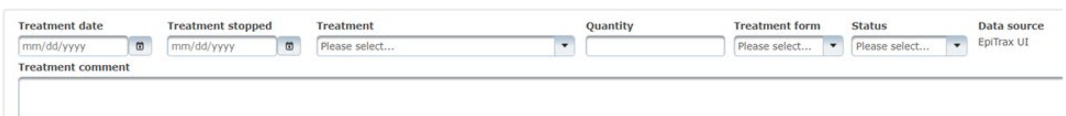
4. Scroll down to the Mortality Status section.
   a. In the Mortality Status section select yes from the dropdown if the patient died.

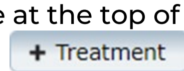


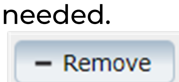
   b. Enter the Date of death.
   c. Select yes if this disease was the cause of death.

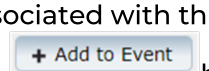
Users can see if there is death information in the EDEN system by selecting the green Shown Death Data From EDEN **Show Death Data From EDEN** link.

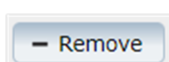
5. Scroll down to the Treatments section.
   a. Select Yes from the Dropdown  if treatments were given. This will add a blank block of treatment fields.



   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.

   a. Select the + Vaccine **+ Vaccine** button to Manually add the vaccine block of fields.

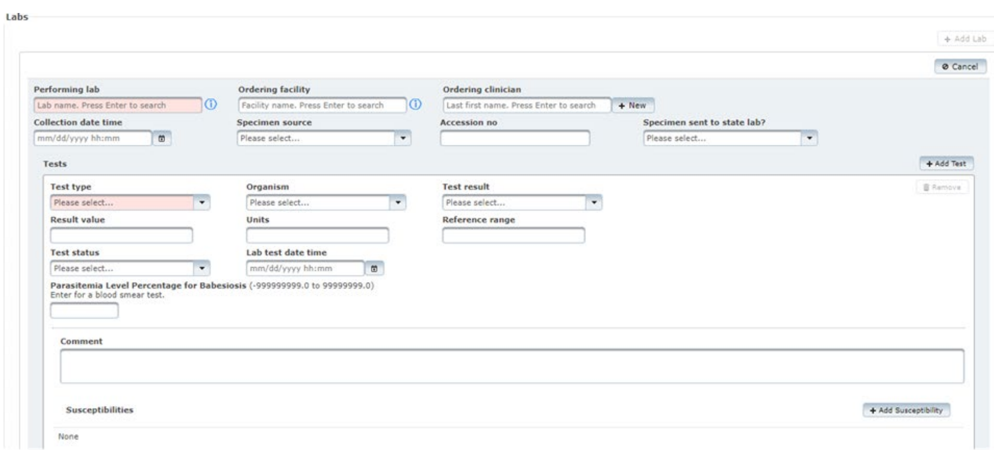
   b. Fill in the Vaccine, Administered date, Dose number in series, Manufacturer, Lot number, Expiration date, National drug code (NDC), Vaccination record identifier, Information Source fields.
   c. The Data source field is automatically entered.
   d. Fill in any comments.
   e. Select the Cancel **Cancel** button to remove a vaccine.
   f. 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

1. To manually add a lab select the +Add Lab **+ Add Lab** button on the right.

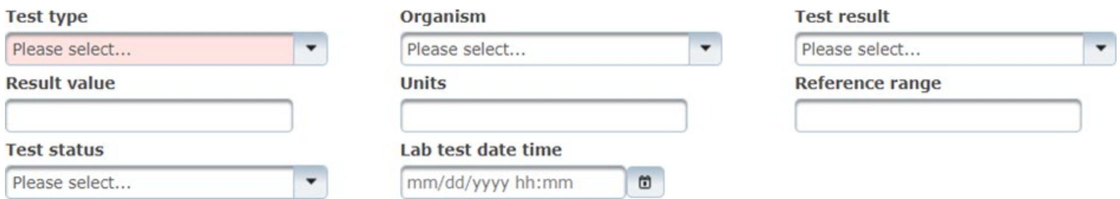


   a. Enter a name in the Performing Lab field and press enter to search for existing labs in Epitrax.
   b. Enter the Ordering facility and press enter to search for existing facilities.
   c. Enter the Ordering clinician and press enter to search for existing clinicians.

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

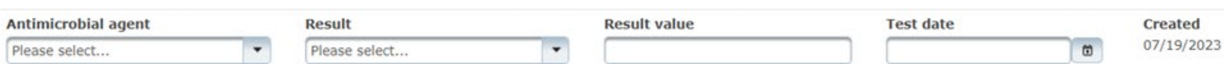
iii. Select the Save Clinician button to keep the entry or select the X in the upper right corner to exit.

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.



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 [Comment] box provided.
n. Scroll to the Susceptibilities section.

o. Select the + Add susceptibilities. [+ Add Susceptibility] button to add one.



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 [− 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 [+ Add Test] button.
u. Fill out the new test as usual.
v. Select the Trash icon [Delete] to remove a Test from a lab.

Be aware that there are several Trash icons available.

NEVADA DIVISION of PUBLIC and BEHAVIORAL HEALTH

w. Select the Trash icon Delete 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 ()	+ Add
04/19/2023 03:12 PM	Abscess	1	**Antigen by DFA/IF**	Chlamydia trachomatis Positive / Reactive ()	+ Add
04/19/2023 03:00 PM	Blood	1	**Antigen by DFA/IF**	Chlamydia trachomatis Positive / Reactive ()	+ Add

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

Add lab to this event?

OK Cancel

   d. Select the -Remove − 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

Last name, First, Middle. Press Enter to search

   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) 1 50

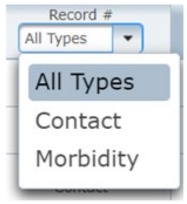
Actions	Record # All Types	Person ▲	Contact Type	Contact Disposition	Disposition date
▾ Options	20232029004 Contact	test, tb, Inshallahfinal			mm/dd/yyyy

      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.

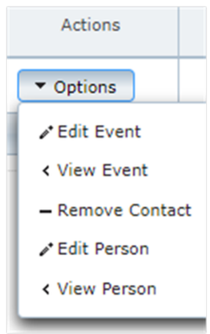
i. Select All Types, Contact, or Morbidity from the Record Number column drop down to change the filter.



2. Select the Import ↑ 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 Edit Event to open the contact event CMR for editing.

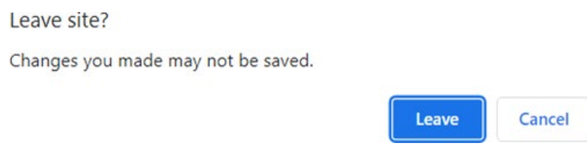
i. Select Leave to confirm opening the Contact Event CMR for editing or select Cancel to exit.

ii. On the Edit Contact Event page select the Investigation Investigation Tab.

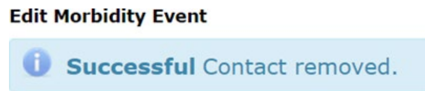
1. Fill out the fields as needed.
2. Select the Save & Continue or Save & Exit.
3. Select the Contacts Tab and the Record Record # 20232029 number to return to the parent Morbidity Event.

iii. Select View Event ‹ 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.

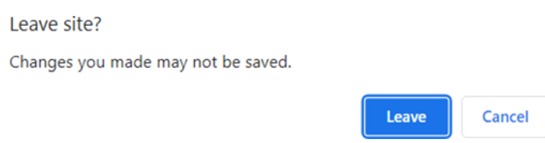


iv. Select Remove Contact – Remove Contact to remove this contact event from this CMR.
   1. After successfully processing a Successful Contact removed banner is added to the top left under the Edit Event type title



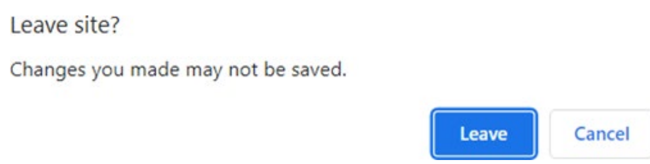
There is no confirmation before removing a contact event.

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.



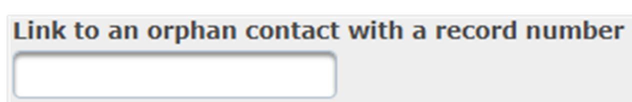
See the EpiTrax Edit Person documentation for more information about this tool.

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.



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.

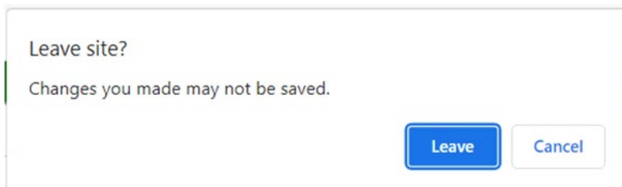


   a. Select a save option.
5. Navigation Options become available depending on the number of contacts available.
   a. These include advancing by page, jumping to the end, and changing the number of contacts displayed on each page.

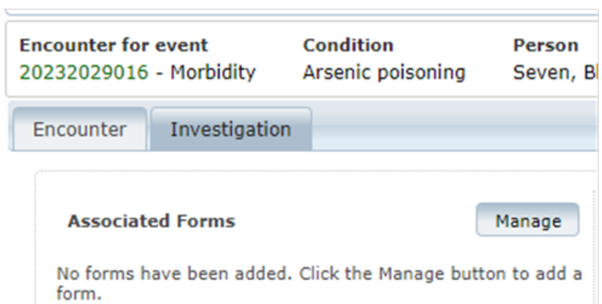
6. Select Save & Continue before changing tabs.

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 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.



   b. The Edit Encounter Form page opens.

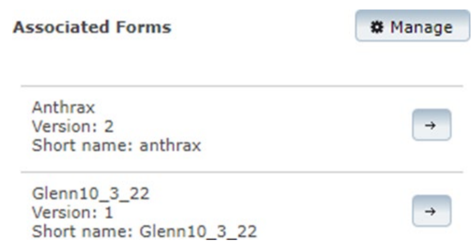


   c. Select the Investigation tab to edit the custom fields of the form.

   d. Select the Manage button to add other available forms to this encounter.
      i. Select the desired form from the popup.

   ii. Select Save & Continue or select the ✖ to exit without saving changes.

e. Select the arrow to edit the desired from the list in the Associated Forms column.

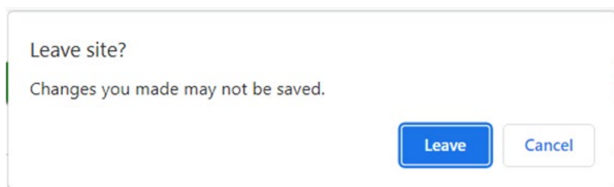


   i. Fill in form fields as needed.

f. Select Save & Continue to keep any changes made.

g. Select the Back to Event [← 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 ⚙ 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.

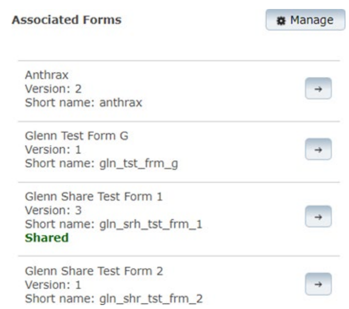
Note: Data can be overwritten and lost if sharing is used incorrectly.

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

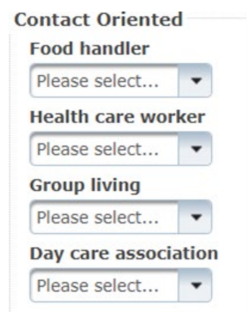
Forms available for use

Actions	Form	Diseases	Jurisdictions	Event Type

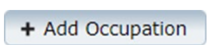
      i. Scroll to the desired form.
      ii. Select the Add Add button to attach the desired form to the current CMR.
      iii. Select Save & Continue to keep changes or select the ✖ button to close without keeping associated form changes.
   c. New associated forms are listed on the left.
      i. Forms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

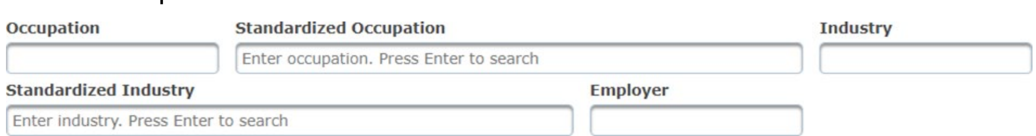


5. Scroll down to the Contact oriented section. Select values from the dropdowns as needed.

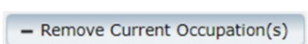


6. Scroll down to the Current Occupation(s) section.

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



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

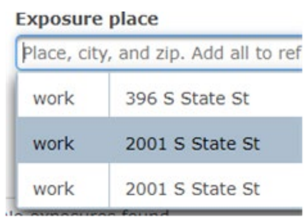
      iii. Select Save & Continue to keep changes or select the Cancel button to exit out of the occupation window.
      iv. Select the - Remove Current Occupation(s)  button to remove an occupation from this CMR.

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.

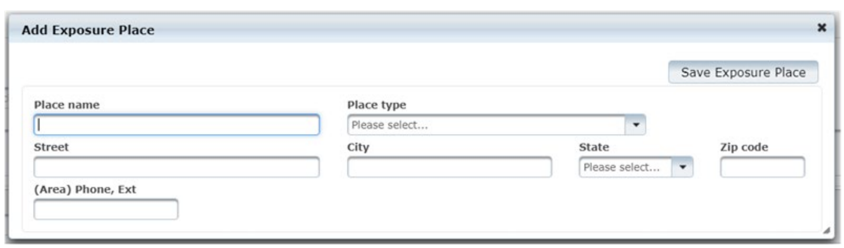
Occupation	Standardized Occupation	Industry	Standardized Industry	Employer
cabinetry	Cabinetmakers and Bench Carpenters	cabinetry	Furniture and Related Product Manufacturing	cabinetry

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

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



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



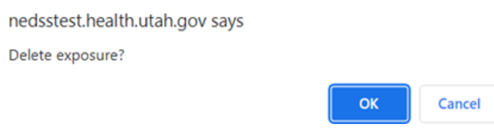
      ii. Select the Save Exposure Place button to keep the new location or select the X in the upper right to exit out.
   d. Enter the beginning and ending exposure dates in the fields.

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

i. Select the Magnifying Icon to see additional fields.

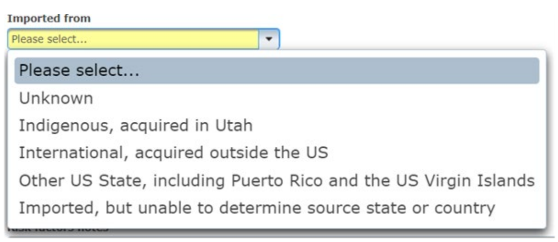
i. Select the Magnifying Icon to hide the additional fields.

j. Select the Trash can icon to remove an Exposure place.

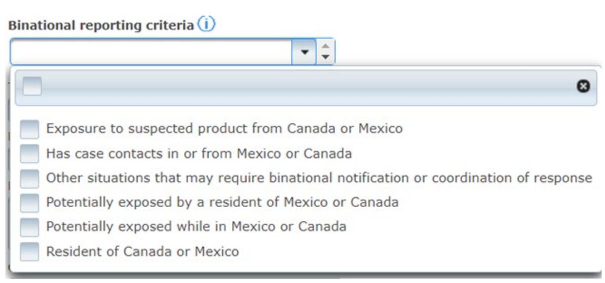


i. Select Ok to confirm removal or select Cancel to exit out.

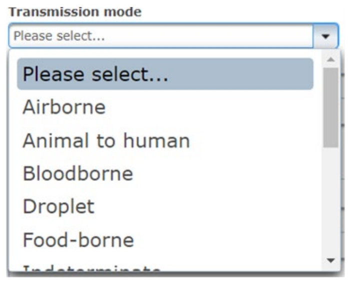
9. Scroll down to the Travel section.
10. Select the + Travel button to add the travel block of fields.
    a. Fill in the Country, State, County, City, Start date, and End date fields as needed.
    b. Select a save option at the top to keep the changes or select the cancel button to exit.
    c. Select 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.



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



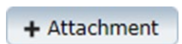
    c. Select an option for Transmission mode.

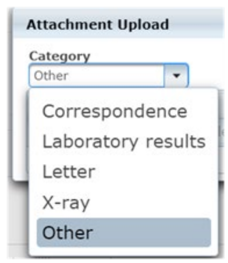


    d. Fill in data for Risk factors, Risk factors notes, Other data 1, and Other data 2 as needed.

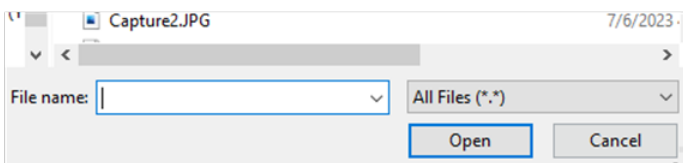
13. Select Save & Continue before moving to another tab.

Notes Tab

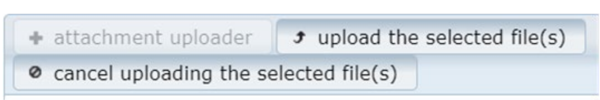
1. Select the + Attachment  button to add a file to this CMR.
    a. Select the Category from the drop down.



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



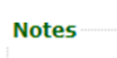
        ii. Select the open button.
    c. Select the upload the selected file(s) or the cancel uploading the selected file(s) button as needed.



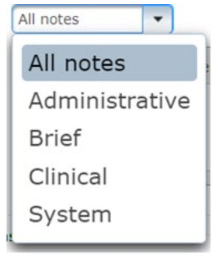
    d. To download an attachment select the Down arrow  button.
    e. Select the Trash can  Icon to remove an attachment from this CMR.

Files can have personal or protected information.

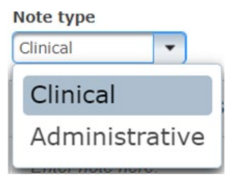
ELR, lab attachments come later than the message.

2. Scroll down to the Notes  section.

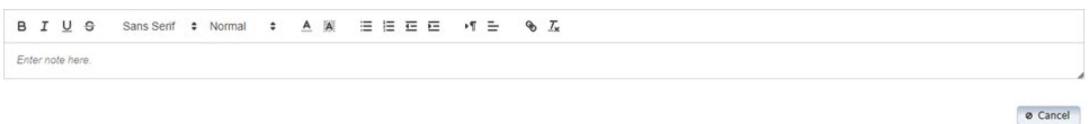
a. Select a filter from the Notes dropdown to limit the Notes shown.



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



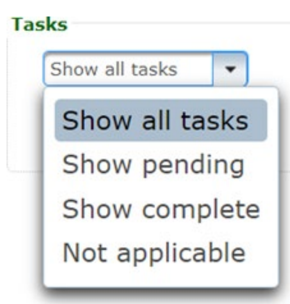
c. Type in the notes field and format the text as desired.

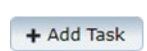


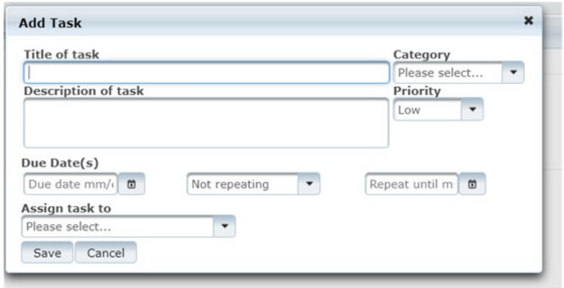
d. Select a Save option, in the upper right, or select the Cancel  button, on the left, to exit.

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.



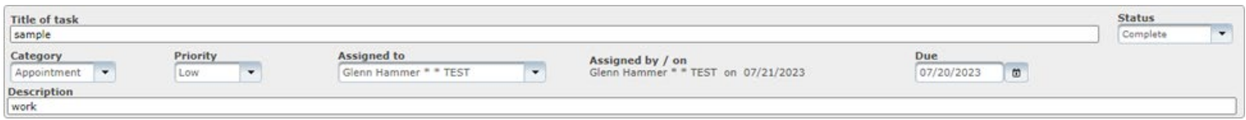
   b. A new task can be added by selecting the Add Task  button.
      i. Fill in the fields for the Add Task popup.



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.

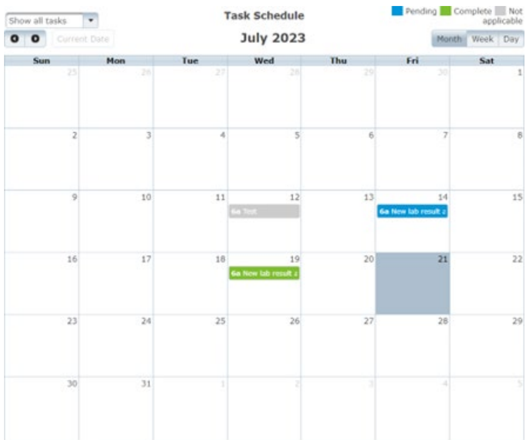
Tasks created here appear on the dashboard discussed in the EpiTrax New User Quickstart Guide.

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

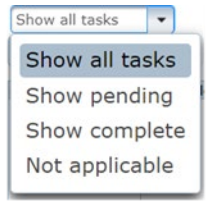


c. Select the Task Scheduler 

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.

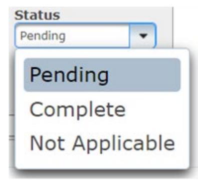


e. Select the Display options Month Week Day to change the view.

f. Use the arrows in the top left to change the month, week or day.

g. Select the Current Date [Current Date] button to return to the current date.

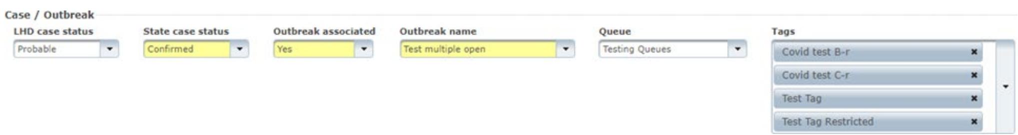
h. Press esc or the X in the corner to exit the Task Scheduler.

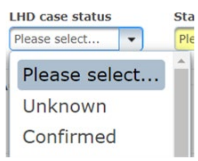
4. After completing a task update the status dropdown 

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

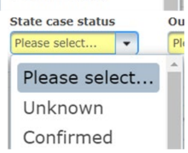
Admin Tab

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

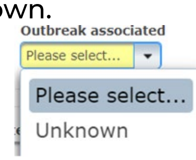


   b. Select the LHD case status 

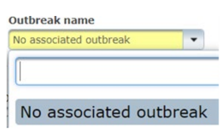
 with the dropdown.

   c. Select the State case status 

 with the dropdown.

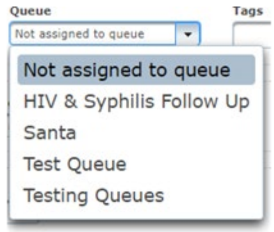
   d. Mark if this CMR is associated with and Outbreak by using 

 the dropdown.

   e. Select the Outbreak name 

 from the dropdown.

   f. Select the desired Queue from the dropdown.



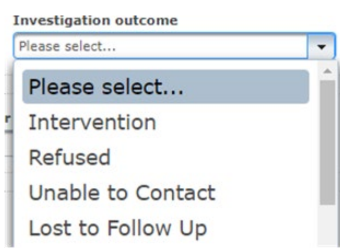
i. The selected Queue is displayed 

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.

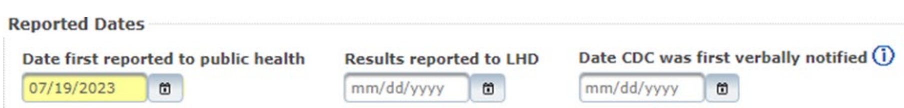


c. Type in an Event name.

3. Scroll down to the Reporter  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  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