



EpiTrax User Guide

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What is EpiTrax?

On March 5, 2012 the Kansas Department of Health and Environment (KDHE) went live with their new electronic disease surveillance system, EpiTrax. This system replaced KS-EDSS.

EpiTrax is an open source, highly configurable, comprehensive surveillance and outbreak management application designed for public health. It allows local, state, and federal agencies to identify, investigate, and mitigate communicable diseases, environmental hazards, and bioterrorism events.

EpiTrax supports electronic laboratory reporting (ELR) and offers sophisticated analysis, visualization, and reporting of contact and case information.

EpiTrax increases overall effectiveness in preventing morbidity and mortality through decreased reporting time, automated assignment and routing processes, easy form-creation tools, trend analysis, detection of anomalies, and quality assurance.

Why use EpiTrax?

Per KAR 28-1-2, certain infectious diseases must be reported to the Kansas Department of Health and Environment.

KDHE receives disease reports by phone, mail, or fax. These reports are sorted and routed to the Surveillance Section in the Bureau of Epidemiology and Public Health Informatics or to the appropriate section within the Bureau of Disease Control and Prevention – specifically the Tuberculosis (TB), Sexually Transmitted Diseases (STD), and HIV/AIDS programs.

The Bureau of Epidemiology and Public Health Informatics (BEPHI) receives lab reports from physicians and from laboratories; the patient's local health department (LHD) is notified, and the report is entered into an internet-accessible database (EpiTrax).

All LHDs can access EpiTrax online. Some reports require immediate follow-up by LHDs, while others are not urgent. BEPHI must notify LHDs of each disease report within an appropriate time period.

Accessing EpiTrax

EpiTrax is designed to work best when utilizing the Mozilla Firefox internet browser.

If your agency's IT department permits the use of Mozilla Firefox, you may want to install it on your computer (a free download at <http://www.mozilla.com/en-US/firefox/>).

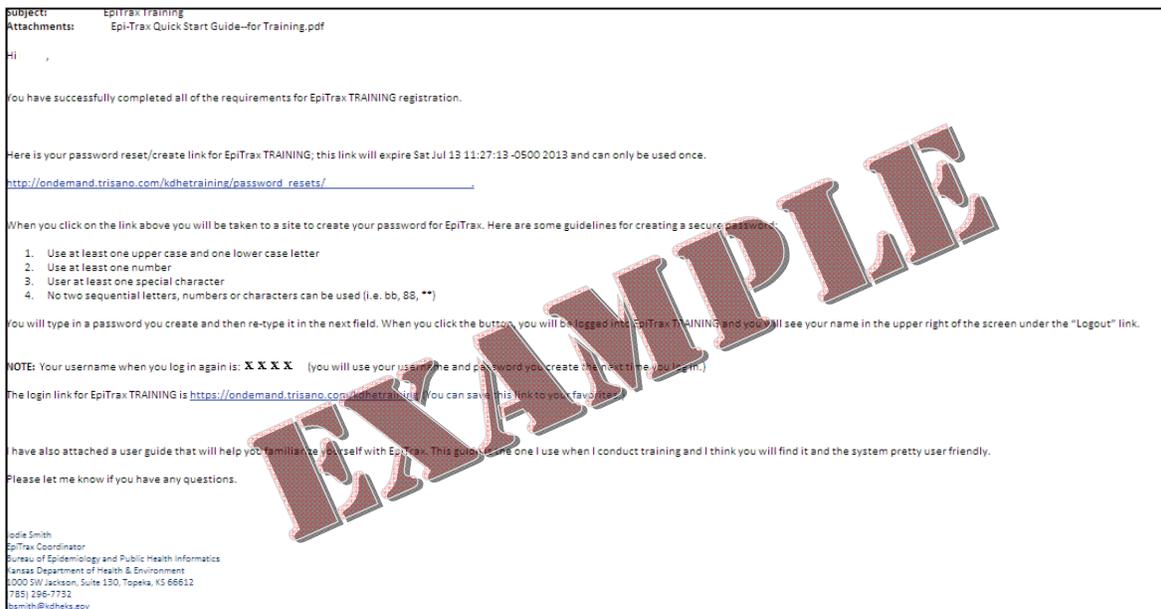
The EpiTrax software functions better with Mozilla Firefox than with Internet Explorer. However, if your agency's IT department does not permit the use of Mozilla Firefox, Internet Explorer 7.0 or higher will work but you may experience some display or lag-time issues.

Establishing your EpiTrax account

The first step in establishing an EpiTrax account is to register for access through the Kanphix website (<https://kanphix.kdhe.state.ks.us>).

The EpiTrax Coordinator will contact your Administrator to verify permissions to access EpiTrax for your jurisdiction.

Once authorization is received, you will receive an email welcoming you to the EpiTrax training. This email will contain your EpiTrax User Name and a link to create your EpiTrax training password.



After creating a password, you will be able to complete the EpiTrax trainings located at KS-TRAIN. These trainings were designed to walk you through the different tabs of the EpiTrax application. Training is divided into 20 different modules. You will need approximately 15 minutes to complete each module.

- Module 1—Security and Access
- Module 2—Navigation Dashboard
- Module 3—User settings Email
- Module 4—User Setting Alerts
- Module 5—New CME Search
- Module 6—New CMR Creation
- Module 7—Navigation Events Listing
- Module 8—Navigation Existing CMR Search
- Module 9—New CMR Routing Internal
- Module 10— New CMR Routing Reassignment
- Module 11—CMR Editing Demographics
- Module 12—CMR Editing Clinical
- Module 13—CMR Editing Laboratory
- Module 14—CMR Editing Contacts
- Module 15—CMR Editing Encounters
- Module 16—CMR Editing Epidemiological
- Module 17—CMR Editing Reporting
- Module 18—CMR Editing Investigation
- Module 19—CMR Editing Notes
- Module 20—CMR Editing Administrative

After completing these modules, you will be granted access to the EpiTrax production environment. This environment provides you access to the real cases in your jurisdiction. If you feel that you need additional training prior to working in the production environment, please notify your EpiTrax Coordinator. They will be able to provide you with additional training specific to your needs.

When you are granted access to the production environment, you will receive an email with a link to create your production password. **Note: You will use the same User Name for production as for training.**

Approved users are also assigned a role in the system. The role determines exactly what the user can view, access and change in the system. These pre-determined privileges are why some users can access all cases and others may only be able to access those in their county or region and/or those that are not considered sensitive. A user's supervisor can request a change to the user's role by contacting the EpiTrax coordinator.

Now you are ready to begin working in EpiTrax!

EpiTrax Dashboard

The EpiTrax Dashboard is the first screen you will see upon logging into your account.

Note: You may return to the Dashboard view at anytime by clicking on the KDHE logo in the upper left hand corner.

The screenshot shows the EpiTrax Dashboard interface. At the top, there is a green header bar. On the left side of the header, the Kansas Department of Health logo is visible, with the text 'EpiTrax Powered by Trisano' next to it. On the right side of the header, there is a navigation menu with links: 'NEW CMR | STAGING AREA | EVENTS | OUTBREAKS | SEARCH | PEOPLE | PLACES | AVR | ADMIN | SETTINGS | HELP | LOG OUT'. Below the navigation menu, the user's name 'JODIE SMITH' is displayed. A yellow callout box with the number '1' points to the navigation menu. Below the header, there is a green banner with the text 'WELCOME TO TRIBANO'. A yellow callout box with the number '3' points to this banner. Below the banner, the text 'Successfully logged in.' is displayed. Below this, there is a section titled 'Tasks' with a yellow callout box with the number '4'. Under 'Tasks', there is a sub-section 'Event Tasks' with the text 'No tasks'. Below the 'Tasks' section, there is a section titled 'Tools' with a yellow callout box with the number '5'. Under 'Tools', there is a sub-section 'Event Alerts' with the text 'No alerts'. At the bottom of the dashboard, there is a section titled 'EpiTrax Training System' with a yellow callout box with the number '5'. Below this section, there is a disclaimer: 'By using this system the user consents to the interception of information and/or the examination and retrieval of stored information by assigned staff of the Department of Health and Environment (KDHE). Only employees of the KDHE or people granted special permission by KDHE are authorized to use this network. Users authorized and unauthorized have no expectation of privacy. Unauthorized and improper use of this system may result in disciplinary action or criminal and civil penalties.' and a copyright notice: 'Copyright © 2006 - 2013 Kansas Department of Health and Environment'.

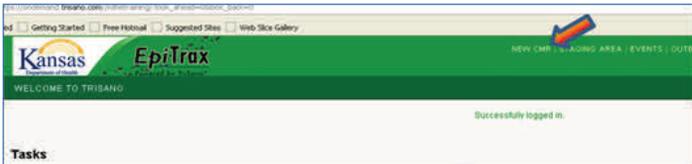
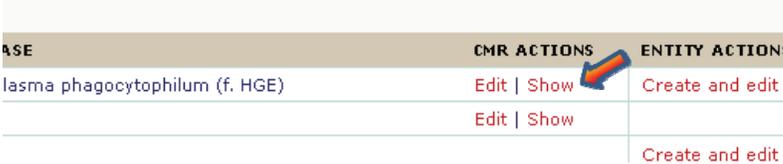
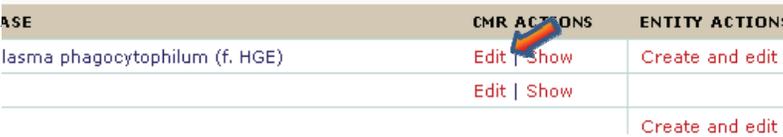
There are four main portions to note on the dashboard:

1. **Menu**—This will be used to access different portions of the system.
2. **Log In Verification**—This section will display your name upon log in and will have a “Log Out” link to log out listed above it. You will use the “Log Out” link once you have completed and saved your necessary investigations for the day within EpiTrax.
3. **Header**—This will display the heading for the portion of the system you are accessing.
4. **Tasks and Events**—This will display tasks or events you have established within various CMRs.
5. **System Descriptor**—This will display which EpiTrax system you are currently in.

EpiTrax CMR Creation

Kansas regulations require laboratories send lab results on notifiable diseases to the state; therefore KDHE has accepted the responsibility for laboratory report entry into EpiTrax.

Sometimes, local investigators will receive reports from medical providers and may want to enter investigation notes *before* a laboratory report is processed at the state level. Because of this, local users *can* create a New Confidential Morbidity Report (CMR) without having to wait for KDHE to create one.

<p>1. The first step in creating a new CMR is to click on the “New CMR” link located at the top of EpiTrax in the menu.</p>																																																							
<p>2. Before creating a new CMR, you will want to search to see if the person is already listed in the system. To do this, please use the search fields provided.</p>																																																							
<p>3. You will receive a listing of search results. The results that more closely resemble your search term will be listed at the top.</p> <p>If a result matches your search exactly, the date of birth field will be populated.</p>	 <table border="1"> <thead> <tr> <th>NAME</th> <th>BIRTH DATE</th> <th>GENDER</th> <th>EVENT TYPE</th> <th>ASSIGNMENT</th> <th>CREATED DATE</th> <th>DISEASE</th> <th>CMR ACTIONS</th> <th>ENTITY ACTIONS</th> </tr> </thead> <tbody> <tr> <td>Doe, John</td> <td></td> <td></td> <td>Morbidity Event</td> <td>Unassigned</td> <td>2023-10-07</td> <td>Anaplasma phagocytophilum (f. HGE)</td> <td>SR Show</td> <td>Create and edit CMR using this person</td> </tr> <tr> <td>Daniel, John W</td> <td></td> <td></td> <td>Morbidity Event</td> <td>Unassigned</td> <td>2023-10-07</td> <td></td> <td>SR Show</td> <td>Create and edit CMR using this person</td> </tr> <tr> <td>Smith, John Doe</td> <td></td> <td></td> <td>None</td> <td></td> <td></td> <td></td> <td></td> <td>Create and edit CMR using this person</td> </tr> <tr> <td>Smith, John Doe</td> <td></td> <td></td> <td>None</td> <td></td> <td></td> <td></td> <td></td> <td>Create and edit CMR using this person</td> </tr> <tr> <td>Smith, John Doe</td> <td></td> <td></td> <td>None</td> <td></td> <td></td> <td></td> <td></td> <td>Create and edit CMR using this person</td> </tr> </tbody> </table>	NAME	BIRTH DATE	GENDER	EVENT TYPE	ASSIGNMENT	CREATED DATE	DISEASE	CMR ACTIONS	ENTITY ACTIONS	Doe, John			Morbidity Event	Unassigned	2023-10-07	Anaplasma phagocytophilum (f. HGE)	SR Show	Create and edit CMR using this person	Daniel, John W			Morbidity Event	Unassigned	2023-10-07		SR Show	Create and edit CMR using this person	Smith, John Doe			None					Create and edit CMR using this person	Smith, John Doe			None					Create and edit CMR using this person	Smith, John Doe			None					Create and edit CMR using this person
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6. If the result is the Same Person / Different Disease, you will click on the "Create and Edit CMR using this person" option in the right-hand column.

DATE	DISEASE	CMR ACTIONS	ENTITY ACTIONS
-07	Anaplasma phagocytophilum (f. HGE)	Edit Show	Create and edit CMR using this person
-07		Edit Show	

7. If the person is not found in the results, you will click on the "Start a CMR with the criteria you searched on" link located below the results table.

jones, jay			Morbidity Event	Shawn
McCullagh, Johanna L.			None	

Displaying **all 13** results

[Start a CMR with the criteria you searched on](#)

EpiTrax CMR Search

Many times you need to return to a previously created CMR to complete the investigation or add follow-up information. To do this you will use the “Search” option located within the green header menu at the top of the page.



The Search option will allow you to search for a CMR by many options, including:

- Full-text Name
- Starts with First Name
- Starts with Last Name
- Record Number
- Date of Birth

There is also a drop down box where you may select how many results you would like to view at a time.

Note: This system uses Soundex. In *most* cases the closest matches to your search request will be within the top 10 results.

To conduct your search, click on the “Submit Query” button. Your results will be populated below the search criteria box.

Displaying all 5 results

Record number	Name	Age/Birth date	Gender	Disease	City	County	Jurisdiction	Onset date
2013000260 CMR	Doe, John	1 / 2011-09-14					Unassigned	
2013000035 CMR	Doe, John						Unassigned	
2013000036 CMR	Doe, John			Anaplasma phagocytophilum (f. HGE)			Unassigned	2013-01-07
2013000039 CMR	Doe, Sam	26 / 1986-10-21		Rabies, animal			Rush County	
2013000077 CMR	Jones, Jay			Meningococcal disease (Neisseria meningitidis)			Shawnee County	

If you are able to locate the specific CMR, you may click on the record number to open that case.

If you are uncertain as to if it is your CMR, you may click on the patient’s name to open a view of all CMRs associated with that particular person.

EpiTrax Tabs

The EpiTrax default view is a tabbed format. This allows you to click on individual pages, or tabs to enter in specific information.

By clicking the “Save and Continue” button in the upper right hand corner, you are able to save the entered information prior to navigating to a different tab. This helps to ensure that the entered information is saved in the system, and reduces the likelihood of information disappearing in the event of a system glitch.

The fields under each tab may change depending on information entered in previous fields. This is done to help indicate additional information that may be needed for various diseases, as well as to reduce the data-entry time for other diseases that may not require as much detail.



EpiTrax does include an option to view all fields on one page. Some people may prefer to view, edit, or input the CMR information through this alternate view.

In order to view all information without tabs, you will need to click on the “Disable Tabs” bracketed option located above the tab headings.



After creating a “New CMR” and clicking the “Save & Continue” button for the first time within the CMR, you will notice that the area above the tab headings changes.

This area will be populated with the patient’s name, event type, jurisdiction, creation date, and status.

As you progress through the CMR, the disease name will be added.

This section will also populate additional editing options, such as Show, Print, Add attachment, Events, etc.

Demographics Tab

The first tab you will encounter after creating or entering a CMR is the “Demographics” tab. This tab will allow you to enter in the personal contact information for the patient.

Sections under this tab include:

- Reported Dates
- Name
- Address
- Age
- Telephone/Email
- Demographics

Note: You are required to complete the “Date first reported to public health” and “Last name” fields prior to saving your CMR.

Date first reported:

This section is to input the date the issue was first brought to the attention of a public health official. This is used for reporting purposes.

Name:

This field is for inputting the patient name. You may wish include the first, middle, and parent/guardian information to be complete, although this is not required prior to saving your CMR.

Address:

This is divided into several different fields. The “Street Number” field is used to input the house number (i.e. 123 Generic Street has a street number of 123).

The “Street Name” field is the remainder of the address. In the example above the street name is Generic Street.

If the patient provides both a mailing and physical address, we will need to record both in the “Street Name” field (i.e. West Prairie Street/PO Box 12) .

“Unit Number” indicates an apartment unit or multi-family housing complex. You will enter the apartment, space or unit number in this field.

In the “City” field, you will want to input the full city name, unabbreviated.

Select the state from the drop down field provided.

Address continued:

“Zip Code” will be the five digit zip code for the patient.

After entering the address information, you will need to click on the “Look Up Address” link located below the “Latitude” and “Longitude” fields. This will perform a Google Maps search used to populate the coordinates.



The screenshot shows a form with two input fields at the top. Below them is a red-bordered box containing the text "Look Up Address" in red. Underneath this is the text "Address verified as: Berry Lane, Wamego, KS 66547, USA" followed by three red links: "Show Map", "Update Coordinates", and "Update Address".

You will want to review the address provided in the search results. If the address is correct, click on the “Update Address” link. If the address is less complete than the address you entered, click on the “Update Coordinates” link to input the latitude and longitude based on the zip code.

After looking up and verifying the address, you will want to input the “County” for tracking and reporting purposes.

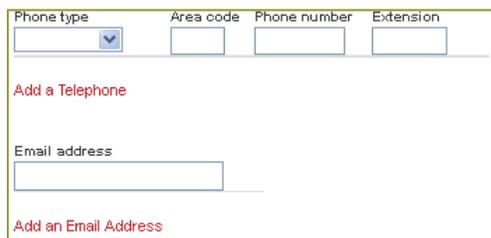
Note: If the county is entered prior to verifying the address, you may be required to input this information again after updating the address via the link provided.

Age:

This field is where you can input the patient’s date of birth. The EpiTrax system will use this date to automatically generate the patient’s age and the age at the onset of the disease after saving. This information is used for reporting purposes.

Telephones/Email:

This section allows you to input contact methods for instances where follow-up with the patient is necessary. You may add multiple telephone numbers or email addresses by using the red links provided within this section.



The screenshot shows a form with four input fields: "Phone type" (a dropdown menu), "Area code", "Phone number", and "Extension". Below these fields is a red link "Add a Telephone". Underneath is an "Email address" input field followed by a red link "Add an Email Address".

Demographics:

This section allows you to input information regarding the patient’s birth gender, ethnicity, race and spoken language. You may select more than one race from the box by left mouse clicking on multiple races while holding the Ctrl key on your keyboard.

Clinical Tab

The second tab you will encounter after creating or entering a CMR is the “Clinical” tab. This tab will allow you to enter in the disease classification.

Sections under this tab include:

- Disease
- Hospitalized Health Facilities
- Mortality Status
- Treatments
- Encounter Specific Treatments
- Clinicians
- Diagnostic Facilities

Note: When you first create a CMR select the disease then hit “Save & Continue” to see all fields and forms that are relevant to the specific disease and to hide fields that are not relevant.

Disease:

This section contains a drop down box from which you may select the specific disease being investigated. You may also list the date the disease symptoms first appeared for the patient and the date that the patient was diagnosed with the specific disease.

Hospitalized Health Facilities:

This section allows you to indicate if the patient was hospitalized due to the specified disease and if so, where and when the hospitalization occurred. You may also indicate any associated medical record number for tracking purposes.

If the patient was admitted to multiple health facilities, you may click on the red “Add a Hospitalization Facility” link to display additional fields. These additional fields will allow you to enter in information for the additional inpatient dates.

Mortality Status:

Use this section to indicate if the patient has passed and the date of death.

Pregnancy Status:

This section indicates if a patient was pregnant during the course of the disease. This is important for tracking diseases that may be transmitted from mother to child. If the patient is pregnant, you will also want to enter the expected delivery date to aid the investigation tracking.

Treatments:

Treatments are specified by disease. If you have entered the disease and clicked on the “Save & Continue” button, only treatments associated with the specific disease should display. You will need to select an option in the “Treatment Given” field, select the treatment type and dates for that specific treatment.

If additional treatments were rendered, you may select the red “Add a Treatment” link to display additional fields to add further treatment information.

Encounter Specific Treatments:

These fields will only display based on the disease indicated. Some diseases may not need this information and thus these fields will be hidden in the CMR. Information in this section will be auto-populated from information entered into the “Encounter” events.

Clinicians:

This section allows you to enter information regarding the patient’s doctor(s). You **must** first search for the clinician using the search field provided.

If the clinician is found by performing a search, you will click on the red “Add” link located next to the doctor’s telephone number to add that clinician to the case record.

If you need to add more than one clinician, you may use the red “Add a clinician” link to search for and add more physicians associated with the case.

Diagnostic Facilities:

Here you may list any facilities that assist with the diagnosis of the disease. These facilities may be hospitals, doctor’s offices, schools, correctional facilities, or any other facility where the patient is receiving care. You **must** search for the diagnostic facility using the search field provided.

If your diagnostic facility does not appear when using the Search, you must contact EpiTrax Administration at epitraxadmin@kdheks.gov.

If you need to enter more than one diagnostic facility, you may use the red “Add a diagnostic facility” link to insert more fields for reporting purposes.

Laboratory Tab

The “Laboratory” tab holds the information on lab work that has been processed for the patient.

Sections under this tab include:

- Labs
- Encounter Labs

Note: This section will be completed by KDHE Quality Assurance agents. Local Health Departments or other non-KDHE entities should not enter any information into this tab. If you have a laboratory report that needs to be entered, it should be faxed to 1-877-427-7318.

Non-KDHE employees will be able to view the lab results to aid in the investigative process.

Show | Print | Delete | Add Task | Add Attachment | Export to CSV | Create a new event from this one | Events

[Disable Tabs]

Demographic | Clinical | **Laboratory** | Contacts | Epidemiological | Reporting | Investigation | Notes | Administrative

Laboratory Information [Hide]

Labs

Lab

Accession number Test type Organism Test result

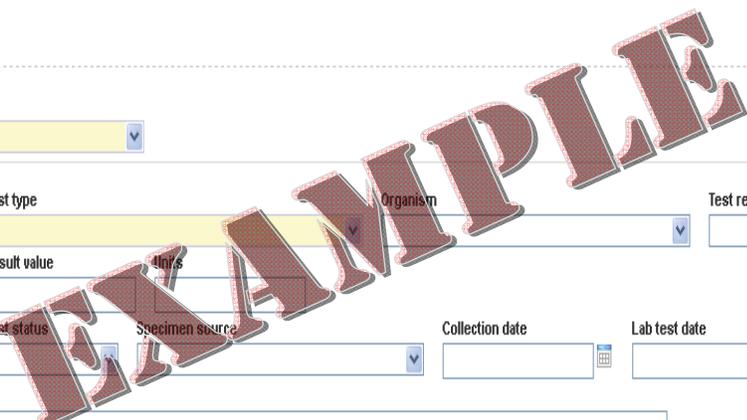
Result value Units Test status Specimen source Collection date Lab test date Specimen sent to state lab?

Reference range

Comment

Add a new lab result to this lab

Add a new lab



Contacts Tab

The “Contacts” tab is where we can record the information for persons or animals who have been in contact with the case patient during the infectious period of the disease. The collection of contact information allows us to track clusters or possible outbreaks, identify contacts at risk of spreading the disease, and to take public health action to reduce further exposure in the community.

Sections under this tab include:

- Contacts

Contacts:

This section allows you to enter information regarding potential exposures.

You must first search for the contact’s name using the Search field provided.

If the person is found by performing a search, you will click on the red “Add” link located in the right hand column of the results table to add that person to the case record as a potential exposure.

If the person is not found, you may use the “Last Name,” “First Name,” and “Telephone Number” fields to add the contact. You will select the appropriate option from the “Disposition” fields to indicate the status of infection of the contact and the “Contact type” to indicate the setting where the exposure occurred.

If you need to add more than one Contact you may use the red “Add a contact” link to search for and add more people associated with the exposure.

Note: After clicking the “Save & Continue” button, you will see new options to allow you to “Remove,” “Show,” or “Edit” the contact event.

Parent Patient: Eric Williams Q Fever (Coxiella burnetti), Acute			
CONTACT NAME	DISEASE	JURISDICTION	STATUS
Watson, James <i>Contact Event 2011-10-17</i>	Q Fever (Coxiella burnetti), Acute	Allen County Route to Local Health Depts.	Not Participating in Workflow
Edit Print Delete  Task Add Attachment Promote to CMR 			

Note: If a contact has a confirmatory lab or if the contact’s symptoms meet the case definition for the disease based on the Disease Investigation Guidelines, you may promote the contact to it’s own CMR. Once in the “Show” view for the contact, you will see an option to “Promote to CMR”. This will allow you to create a new CMR easily with the contact’s information already populated.

Encounters Tab

The “Encounters” tab will be mostly used for local health department investigators doing case management to track when and where a case has had encounters with public health.

Sections under this tab include:

- Encounters
- Encounter Notes

Investigator:

This field will auto-fill with the investigator’s name that is completing the CMR. If you need to change the name, you may click on the field to view and select from the drop down box listing of investigators.

Encounter Date:

Enter the date of the encounter with public health.

Location:

This field contains a drop down box listing the types of methods through which the public health encounter may have occurred. Select the appropriate option from this field.

Description Field:

This field allows the investigator to enter in additional information which may elaborate on the specified encounter.

If you need to add more than one encounter you may use the red “Add a new encounter” link to add more encounters associated with the exposure.

Note: After clicking the “Save & Continue” button, you will see new options to allow you to “Remove,” “Show,” or “Edit” the encounter event.

Edit Encounters

The “Edit Encounters” option will provide you with an easy option to add or edit information related to a specific encounter without the need to navigate through each main tab individually.

This option will be divided into micro-tabs that allow you to access only the pertinent fields. The micro-tabs are as follows:

- Encounter
- Clinical
- Lab
- Investigation
- Notes

EDIT ENCOUNTER EVENT

Encounter 2013-07-18

Show

[Disable Tabs]

Encounter Clinical Lab Investigation Notes

Encounter Information Hide

Encounter

Investigator: JODIE SMITH

Encounter date: July 18, 2013

Location: Clinic

Description

↑ Return to top

Note: To return to the main CMR view, simply click on the red “Parent Patient” name in the upper right hand corner.

Epidemiological Tab

The “Epidemiological” tab contains fields that record and track factors that relate to how the patient was exposed and the possible risk factors.

Sections under this tab include:

- Contact Oriented
- Place Exposures
- Other

Note: You will need to enter as much information as possible into this tab, as it helps track possible exposure pathways. The fields within this tab will change based on the disease selected.

Food Handler:

This field indicates if the person works in a setting that prepares or distributes food.

Health Care Worker:

This field indicates if the patient works in a health care setting, such as a doctor’s office, hospital, acute care facility, etc.

Group Living:

This field indicates if the patient is a resident in a group living setting, such as a communal living facility, retirement community, or assisted living facility.

Day Care Attendee/Worker:

This field indicates if the patient attends/is employed in a setting that cares for children.

School Attendee/Worker:

This field indicates if the patient attends/is employed in an educational setting.

Occupation:

This text-based field allows you to manually enter the occupational title for the patient.

Check all that apply:

These checkboxes may be used to indicate other work status not previously listed within other fields, such as volunteer, unemployed, or retired.

Place Type:

This field allows you to select the type of location where the patient may have exposed other individuals to the particular disease.

Name:

This section allows you to enter information regarding the specific places where the patient may have exposed others to the disease. You **must** first search for the location using the search field provided.

If the location is found by performing a search, you will click on the red “Add” link located in the right hand column of the results table to add that place exposure to the case record. Then you may indicate the date of that particular exposure, if known.

If the location is not found, you may use the Name, Street Number, Street name, Unit Number, City, State, County and Zip Code fields to add the new location.

If there are multiple place exposures, you may use the red “Add a place exposure” link to search for and add more potential exposure locations associated with the case.

Note: After clicking the “Save & Continue” button, you will see new options to allow you to “Remove,” “Show,” or “Edit” place information.

The screenshot shows a web form for adding a place exposure. On the left, there is a 'Place type' dropdown menu with three options: School, Pool, and Food Establishment. To the right of this menu are several input fields: Name (a yellow highlighted text box), Date of exposure (a date picker), Street number (a text box), Street name (a text box), Unit number (a text box), City (a text box), State (a dropdown menu), County (a dropdown menu), and Zip code (a text box). The form is enclosed in a light gray border.

Imported From:

This field allows you to indicate if the disease was contracted within Kansas, another US state, or outside of the country. If the location where the disease was contracted is unknown, you may select the unknown option within this field.

Risk Factors:

When shown, this field will allow you to select potential risk factors associated with the specific disease that the patient may have had. For example, diseases related to care received during hospitalization may have pre-cursors that make them susceptible to the disease under investigation.

Risk Factors Notes:

This field allows you to elaborate on the various risk factors selected.

Other Data 1 and 2:

These fields are used to help further categorize an event. You will only need to input data into these fields when directed by KDHE.

Note: The “Risk Factors” and “Risk Factors Notes” fields are hidden for the majority of diseases.

Reporting Tab

The Reporting tab is used to gather information about the reporting agency.

Sections under this tab include:

- Reporting Agency
- Reporter
- Reported Dates

Reporting Information Name:

This section allows you to enter information regarding who alerted public health of the contracted disease. These may include doctor's offices, laboratories, or local health departments. You **must** first search for the reporting location using the search field provided.

If the location is found by performing a search, you will click on the red "Add" link located in the right hand column of the results table to add that reporting agency to the case record.

If the reporting location is not found, you may use the Reporting Agency Name and Telephone Number fields to add the Reporting Agency.

Reporter Name:

This field allows you to search for and input the name of the specific person who first brought this disease instance to the attention of public health. You **must** first search for the reporter's name using the search field provided.

If the reporter is found by performing a search, you will click on the red "Add" link located in the right hand column of the results table to add that reporter to the case record.

If the reporter is not found, you may use the Reporting Last Name, Reporter First Name and Telephone Number fields to add the Reporter.

Reported Dates:

This field allows you to enter the date when results of the case were reported to a clinician. This can be done manually or by using the calendar icon to select the date.

Date First Reported to Public Health:

This field is automatically populated from the required date field under the Demographic tab.

Investigation Tab

For many infectious diseases, there will be fields displayed under the “Investigation” tab. If additional tabs do appear, you will need to complete all fields displayed. Fields will be displayed in a micro-tabbed format.

Note: If you receive the message “No investigation forms are configured for this event/ and or disease”, your CMR was entered correctly, however that particular disease has no associated forms to complete.

[Disable Tabs]

Demographic Clinical Laboratory Contacts Epidemiological Reporting Investigation Notes Administrative

Investigative Information [Hide]

Forms in Use

- Cryptosporidiosis Form
- QI Fields Form (core only) v. 2

Add/Remove forms for this event

Forms

- Cryptosporidiosis Form

Interview Information Symptoms Water Exposure Animal Exposure Other Exposure Case Definition

Interviewer name

Number of call attempts:

Follow-up status

Interviewed Refused Lost to Follow-up

Date of interview

In some circumstances, you may need to use multiple forms to investigate a case. You may see the forms currently added to the case by reviewing the Forms in Use section on the left hand side of the Investigation tab.

To add a form, or to remove a form you do not need, click on the “Add/Remove forms for this event”. This will allow you to select the forms that you wish to add or remove. You may then use the “Show” and “Edit” links at the top of the form selection screen to return to the case.

When you click on a form listed in the Forms in Use section, you will see tabs to the right. You may use these tabs to complete investigation regarding the case. These forms are the same as the paper (pdf) versions of the disease specific forms.

Notes Tab

The “Notes” tab is used to add information that may be useful when reviewing the case. For example, if the case entered is a duplicate of a previously entered case, you will want to note this in the Notes tab as well as send an email to the EpiTrax admin group.

Sections under this tab include:

- Attachments
- Notes
- Tasks

Note: A note that has been saved is PERMANENT. It cannot be deleted, however you may use the strike-through option to indicate that the note is no longer valid.

There are three types of notes:

Administrative: System added notes that are created when certain actions take place within the case. These are used for case tracking purposes.

Clinical: Notes added by a user to record data that cannot be entered on any other tabs.

Brief: Used to notify receiver as to why a case was routed to a specific jurisdiction.



The screenshot shows a web interface for adding a new note. At the top, it says "New note". Below this is a large, empty text input box. Underneath the text box is a checkbox labeled "Is admin". A red arrow points to this checkbox. At the bottom of the form, there is a button labeled "Tasks [Hide]".

When you add a new note, you will notice a checkbox option for “Is Admin?”.

If you do not check this box, the note will be added as a clinical note by default. You may check this box if your note is regarding the editing or routing of the case for reporting and tracking purposes.

Note: Any attachments and/or tasks for the CMR will be displayed on the “Notes” tab.

Administrative Tab

The “Administrative” tab allows users to input additional information regarding the case.

Sections under this tab include:

- Event Information
- Case / Outbreak
- Auditing / Investigation

Note: This is the section where you can obtain the record or case number. You will need this number when contacting the EpiTrax coordinator or EpiHotline regarding case questions.

You can also locate the “MMWR year,” “MMWR week,” and “Date Record Created” fields on this tab.

Administrative Information [Hide]

Event Information
Record number: 2013000035 MMWR year: 2013 MMWR week:2
Date record created: 2013-01-07

Case / Outbreak
LHD case status: [dropdown] State case status: [dropdown] Outbreak associated: [dropdown] Outbreak name: No outbreaks associated with this disease

Auditing / Investigation
Jurisdiction of residence: Not Applicable
Event status: New Date investigation started: Date investigation completed: Date review completed by state:

[↑ Return to top](#)

Some of the fields under the “Administrative” tab are only to be used by LHD, and others are to be used only by KDHE. Below are some of the guidelines to help you understand who completes what fields under this tab.

LHD Case Status: Completed by LHD based on LHD protocols

State Case Status: Completed by KDHE

Outbreak Associated: Completed by LHD or KDHE if the case has been identified as being associated with an outbreak

Outbreak Name: Completed by KDHE when an outbreak is currently being investigated

Auditing / Investigation: These fields are to be completed at the LHD based upon LHD protocols. Fields may include Event Name and Acuity among others.

Events Management

The “Events” section within EpiTrax allows you establish filters to view all or only specific events available to you based upon your user role.

You will access the “Events” section by clicking on the word “Events” in the green menu header at the top of each EpiTrax page.

LIST MORBIDITY EVENTS Create New Morbidity Report				
Export all to CSV Change View				
PATIENT NAME	DISEASE	JURISDICTION	STATUS	EVENT CREATED
Doe, John <i>Morbidity Event</i> Show Edit Print Delete	Cryptosporidiosis	Unassigned Route to Local Health Depts.	New	2013-07-24
smith, j <i>Morbidity Event</i> Show Edit Print Delete	Botulism, foodborne	Unassigned Route to Local Health Depts.	New	2013-07-18
Brucellosis, Dog <i>Morbidity Event</i> Show Edit Print Delete	Brucellosis, animal	Unassigned Route to Local Health Depts.	New	2013-07-12
Pan, Tinkerbell <i>Morbidity Event</i>	Tuberculosis, Latent Infection (LTBI)	Barton County Route to Local Health Depts.	Accepted by Local Health Dept. Brief note: <input type="text"/> <input type="button" value="Save"/>	2013-07-09

When you access the “Events” page, you will see a listing of all CMRs associated with your jurisdiction.

The most recently accessed records will be listed at the top then descend by time/date created.

Note: You may use the table headings to sort the list.

To create a customized filter of your events view, you may click on the “Change View” option located under the page header. You can select multiple items against which the filter will be applied by holding down the Ctrl key on your keyboard when making your selections..

LIST MORBIDITY EVENTS

[Export all to CSV](#) | [Change View](#)

Event Investigation Status New Assigned to Local Health Dept. Accepted by Local Health Dept. Rejected by Local Health Dept. Assigned to Queue	Queues Q1 - Shawnee County VPD Queue - Johnson County VPD Queue - Saline County Lawrence-Douglas Q1 - Douglas County	Investigators ALICE GEISLER ALICE GREIG ALISHA LANGHAM ALYSIA DENNIS AMANDA DREASHER
---	---	--

Diseases

- Amebiasis (Entamoeba histolytica)
- Anaplasma phagocytophilum (f. HGE)
- Anthrax
- Arboviral, other
- Babesiosis

Items per page: 25

Do not show deleted records
 Set as default view

[Close](#)

Note: You can create a customized default view for your events by selecting your preferences, checking the “Set as default view” and then clicking on the “Change View” button.

Alerts Management

The “Alert Subscription” option within EpiTrax establishes notifications for when CMRs are assigned to your jurisdiction, labs are added to a previously created CMR within your jurisdiction, or if the jurisdiction for a CMR has changed.

To access the “Alert Subscription” page, you will click on the “Settings” link located in the green menu header at the top of each EpiTrax page. You will then click on the red “Manage Alert Subscriptions” link.



When the “Alert Subscriptions” screen loads, you will see any alerts that you have previously established, as well as options to: “Subscribe to CMR Created Alerts,” “Subscribe to Lab Result Created Alerts,” and “Subscribe to Jurisdiction Changed Alerts.”

You may also edit or delete previously created Alerts using this view.

When you click on each alert option, you will be able to select further criteria to filter and execute that particular alert.



Note: Alerts that you establish will be displayed on the dashboard when you next log in.

Task Management

The “Tasks” section allows you to set-up reminders for yourself or others. This aids in the work-flow process and helps you remember if additional action is needed. Tasks are usually some type of follow-up that must be undertaken for a patient or a contact.

Tasks typically fall into three categories:

- Appointments
- Call Backs
- Treatments

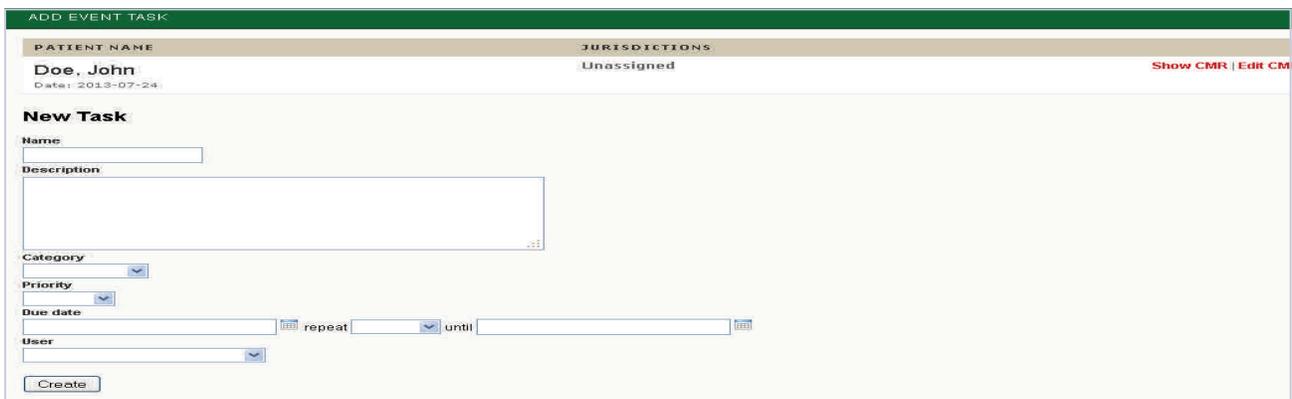
To create a task you will click on the Events link located in the green menu header and select the CMR for which you would like to create a task.

Note: You may only create tasks for morbidity or contact events.

Once you have located and opened your CMR, you will notice that under the patient’s name there are several red links. Click on the link “Add Task”.



This will open up the “Add Event Task” screen where you may enter in the reminder or note you wish to add to the case. Once you have completed all desired fields and click on the “Create” button, your task will be added to your dashboard view as well as to the notes of the specific CMR.



Appendix

Definitions

BEPHI: Bureau of Epidemiology and Public Health Informatics

Carrier: Individuals who harbor an infectious agent but are asymptomatic

Case: A person with the particular item of interest or disease; an alternate name for the CMR or record that you are working on

CMR: Confidential Morbidity Report

Confidentiality: The obligation to not disclose identifying information unless needed to protect the public's health

Confirmed Disease Outbreak: A disease outbreak in which laboratory analysis of appropriate specimens confirms a causative agent and epidemiologic analysis implicates the source of the illness

Contact: A person the patient may have exposed to an illness, or a person who exposed the patient to an illness

Encounter: The interaction between a patient and a public health official

Epidemiology: The study of the distribution and determinants of health-related states or events within a specific population, and the application of this study to control health problems

Food Establishment: An operation that stores, prepares, packages, serves, vends, or otherwise provides food for human consumption

Foodborne Illness: A disease acquired through eating or drinking contaminated food or liquids

KDHE: Kansas Department of Health and Environment

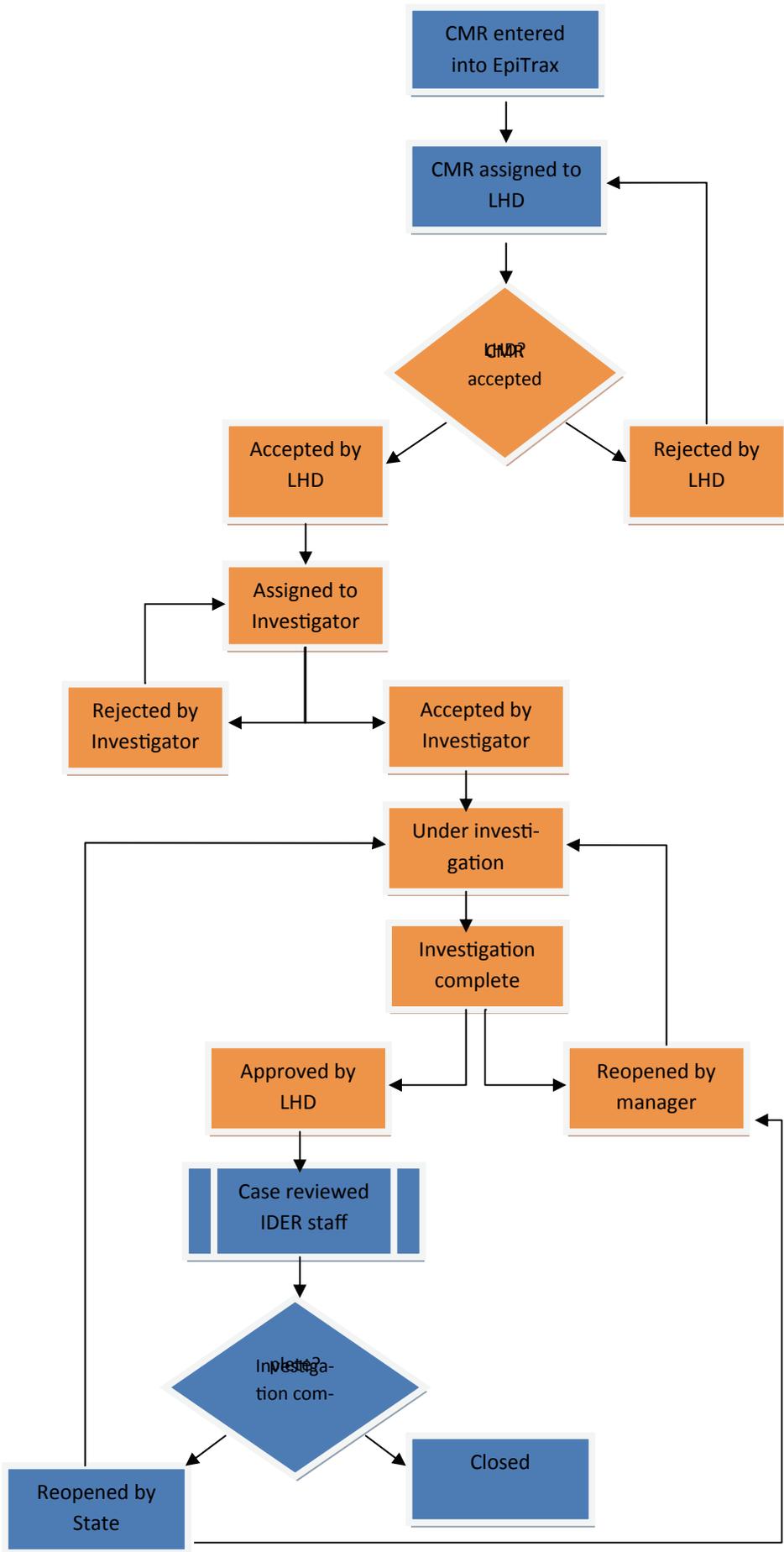
Public Health Surveillance: The routine collection, analysis, summarization, and dissemination of data for the purpose of preventing and controlling the spread of disease

Risk Factor: An attribute or exposure that is associated with an increased occurrence of disease or other health-related event or condition

Case Routing Workflow

- 1) Once a CMR has been created within EpiTrax, it will be assigned to a local health department.
- 2) The Local Health Department (LHD) will receive notification by email or on the EpiTrax Dashboard that the new case has been assigned to their jurisdiction.
- 3) Upon receiving the notification, the LHD will review the case and determine if it was assigned to the correct jurisdiction.
 - If the patient's address is NOT in the county for the LHD, the LHD will review to see if the provider is in a county covered by the LHD.
 - If the provider is in a county covered, the LHD will contact the provider to obtain the patient's information
 - If the provider is NOT in a county covered, the LHD will review the CMR to see if the laboratory is in the LHD's county.
 - If the laboratory is within the LHD's county, the LHD will contact the lab to obtain patient information.
 - If the patient is not in the LHD jurisdiction, the LHD will update the address, create and save a brief note, and reroute the case to the appropriate jurisdiction.
 - If the case is an out-of-state case, the LHD will create and save a brief note and then reject the case.
- 4) Once it is determined that the case is in the correct jurisdiction, the LHD will click on the 'Accept' radio button to accept the CMR. This will change the status to "Accepted by Local Health Department".
- 5) In the "Assign to investigator" drop down box, the LHD will assign the CMR and change the status to "Assigned to Investigator".

Alternately, the LHD may "Assign to queue" based on the protocols established by the LHD.
- 6) Once the case is assigned to an investigator or a queue, it must again be "Accepted". This will change the status to "Under Investigation".
- 7) Once the investigation is completed, the LHD investigator will click the "Complete" button. This will trigger an alert to the LHD Administrator so they can review the case before sending to the state. The LHD Administrator will then "Approve" or "Reject" the CMR.
- 8) Once a case is "Approved" by the LHD Administrator, BEPHI staff will review the case to ensure completion.
- 9) Once BEPHI staff reviews and verifies completion, they will "Approve" the case and change the status to closed.



Frequently Asked Questions

EpiTrax is running extremely slow... what can I do?

If you are using Internet Explorer to access EpiTrax, try using Mozilla Firefox. We have found that this browser works better with our system.

You may open EpiTrax simultaneously in multiple tabs or windows. This can help if you find that EpiTrax is taking a while to process your last request, and you have other information that you need to complete in EpiTrax.

You can talk to your IT department about options to increase the priority for Firefox applications on your computer. We have found that this does help to expedite navigation and actions within EpiTrax.

I haven't logged in for a while and forgot my User Name and Password?

It is recommended that you log into your EpiTrax account at least once every week. This will allow you to verify that your log in credentials still work and allow you to familiarize yourself with any changes within the EpiTrax system.

If you need your User Name or your Password reset, you may contact your EpiTrax coordinator via email or telephone. They will respond to your request within one business day.

I am not certain that I have the patients name spelled correctly. Does that matter?

It should not matter. The search system within EpiTrax uses a function called *Soundex*. This translates the spelling into a four character representation based on the way a name sounds rather than how it is spelled.

When I navigate to the Investigation tab, I get the error message "No investigation forms are configured for this event/and or disease". What did I do wrong?

Nothing. This message simply means that there are no forms associated with the particular disease. Not all diseases may require forms as they are less complex and require less research. If you receive this message, you may click on a different tab to proceed with your investigation.

How far should I route the case?

When you first look at a case you should: Accept the case, Assign yourself as the investigator, and Click on the Approve/Complete button until you have the status UNDER INVESTIGATION.

Once you have completed the case investigation, you should click on Complete/Approve until you receive the "Insufficient privileges" message.

Note: If you have the status INVESTIGATION COMPLETE, you have not clicked enough.

At this point, the case is forwarded to the EPI or Medical Investigator in charge of reviewing the specific disease event. If there is additional information required to close the case, the EPI or Medical Investigator will route the case back to you.

How can I see cases that have recently been assigned to my jurisdiction?

Under the Events section, you will need to create a filter by selecting the Change View option at the top of the page.

In the field “Event Investigation Status” you can select to filter new cases that have been assigned to your local health department or to you specifically.

If you deal with a specific disease only, you may make a selection to filter the events by that particular disease.

Do I have to use the Change View every time I want to see only specific Events?

No. After selecting your filter criteria and clicking on the “Change View” button, you may bookmark your page within your browser. We recommend changing the bookmark name to something that is easy to associate with the specified filter.

Once you have your page bookmarked, any time you want to view the filtered results, simply go to the Bookmarks option in Firefox and select your created bookmark from the list. This will load the Events page with your specialized filter applied.

You may also create a custom default view for your events (see page 27).

I used to have an Alert email reminder. Why don't I receive those anymore?

If you have checked your Alert settings, and verified that your email address is correct it may be that you did not create the Alert event initially.

If someone else creates an event on your behalf and then leaves the agency, any Alert that they established will be deactivated when the account is deactivated.

For this reason, we do recommend that you are the only one that establishes Alerts for your account.

I need to view a case that is out of my jurisdiction for investigation purposes, how do I do this?

When you try to access a CMR that is outside of your jurisdiction, you will encounter a text box asking for you to input the reason why you need access to this information.

After you have input your reason and clicked on the “Submit” button, you will be granted access to the Show view for that CMR.

You will also see the red warning message “You have accessed an out-of-jurisdiction event. Please exit if access was unintentional. Access has been logged.”

I don't see the option I need within a drop-down selection box; what can I do?

For space and time saving purposes, drop down selection boxes, such as Test Type, may not immediately display all options. To view all options, scroll to the bottom of the selection box list and click on the option for “More Choices” .

I received a case back from the state after completing my investigation; why?

BEPHI staff will reopen a case that does not have complete investigation information. You will want to check the notes tab to see what actions need to be taken. If you are unable to understand the notes, you may contact the EpiHotline.

What if I don't know a first name for a patient or contact?

You may put "UNK" if the name is unknown.

Where can I find additional resources?

The KDHE website provides a wealth of information and is a great place to find out more information about disease reporting and surveillance efforts.

<http://www.kdheks.gov/bephi/index.html>

http://www.kdheks.gov/epi/disease_investigation.htm

