EpiTrax User Guide

Quick Reference Guide

Missouri **DHSS** Department of Health and Senior Services

EpiTrax

Contents

Missouri **DHSS** Department of Health and Senior Services

EpiTrax

Contents

Overview

What is EpiTrax?

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. Kansas, Utah, and some large cities currently use EpiTrax.

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.

EpiTrax is designed to work best when utilizing the Google Chrome internet browser or the Mozilla Firefox browser. Please do not use Microsoft Internet Explorer while using EpiTrax.

HAVE QUESTIONS OR NEED HELP?

Submit your EpiTrax questions or issues online via the ticketing system or contact the help desk at epitrax@health.mo.gov.

Visit the EpiTrax website to view recorded demos and simulations, sign-up for live training sessions, and access other EpiTrax training resources.

Please note: All person, contact event, and morbidity event information referenced in this document were fabricated for instructional purposes.

This guide was created based on input from Missouri LHDs, Missouri DHSS, local and state public health agencies in other states, and others. Thank you to all who have contributed their time and knowledge to this guidance document.

If you would like to suggest edits or additional items to include in this user guide, please send suggestions to epitrax@health.mo.gov. We appreciate your feedback.

EpiTrax Main Screen Descriptions

Dashboard

The EpiTrax Dashboard is the first screen you will see upon logging into your account. The Dashboard is a 'to-do list' to display any tasks that have been assigned to you by either yourself or others such as a supervisor or team member.

The Dashboard is not a list of all your morbidity and/or contact event records. Your event records can be viewed in the "Events" tab (this function is discussed later).

Events Management

The "Events" section within EpiTrax allows users to establish filters (or search criteria) to display a list of certain events. You can use these filters to view a list of new cases and/or contacts assigned to your jurisdiction by DHSS or other jurisdictions. You can create and save multiple Events views/lists.

EpiTrax Confidential Morbidity Report (CMR)

Missouri regulations require laboratories to send lab results on COVID-19 to DHSS (while not prohibiting reporting to LHDs); therefore, DHSS has accepted the responsibility for COVID-19 laboratory report entry into EpiTrax.

Local health departments may receive reports from medical providers, laboratories, or others before a laboratory report is received or processed at the state level. Local health department users can create a new Confidential Morbidity Report (CMR) without having to wait for DHSS to create one.

EpiTrax CMR Search

The CMR Search functionality can be used to find and edit an existing CMR. Within this search, there are 8 important tabs a case investigator should populate with known information:

- Demographic
- Clinical
- Laboratory
- Contacts
- Encounters
- Investigation
- Notes
- Administrative

Job Aid

Using Proof Point Email Encryption

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Using Proof Point Email Encryption

Why did I Receive an Encrypted Email?

The Department of Health and Senior Services (DHSS) uses Proof Point email encryption software to eliminate the risks in sharing Protected Health Information (PHI) and Personally Identifiable Information (PII). Users can manually encrypt messages using [encrypt] in the subject line.

Proof Point automatically screens all outgoing messages and attachments for PHI and auto-encrypts the contents if sensitive information is suspected.

In some cases the software will auto-encrypt a message without PHI if it detects an eight or nine digit number in the body of the message or an attachment. Invoice numbers, confirmation numbers, or order numbers may be mistaken for Social Security numbers or Department Client Numbers (DCNs) by the software.

Registering to Open an Encrypted Email for the First Time

When you select an encrypted email in Outlook that was sent from the State of Missouri using Proof Point, the email will appear as shown below. Click either the **Click here** link in the body of the message or **click the attachment**.
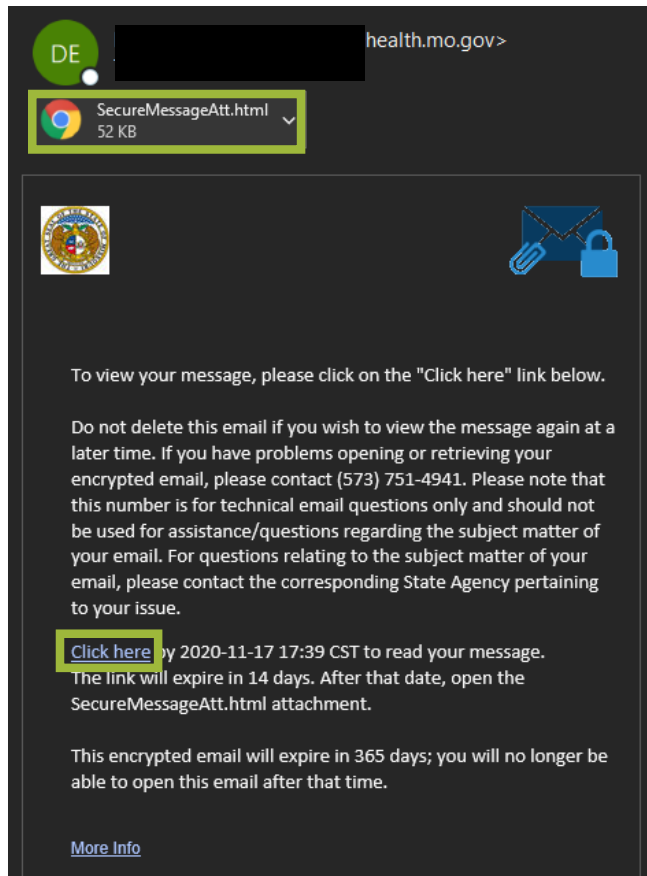
Using Proof Point Email Encryption

If this is the first time you have opened an encrypted message, you will be prompted to register in the Proof Point email encryption system. This is a one-time registration process.

1. Populate the fields below:
   a) **First Name:** Type your first name
   b) **Last Name:** Type your last name
   c) **Password:** Enter a password
   d) **Confirm password:** Re-enter the password
   e) **Question 1:** Select a question from the dropdown
   f) **Answer:** Type the answer to Question 1
   g) **Question 2:** Select a question from the dropdown
   h) **Answer:** Type the answer to Question 2

2. Click **Continue**

⚠️ **Note:** The password you create must have 8 to 20 characters with uppercase and lowercase characters, at least one digit (0-9), and at least one symbol character required. This password will be used for opening all subsequent encrypted messages.

Using Proof Point Email Encryption

If you opened the attachment, your browser will open and prompt you to click the button: **Click to read message**.
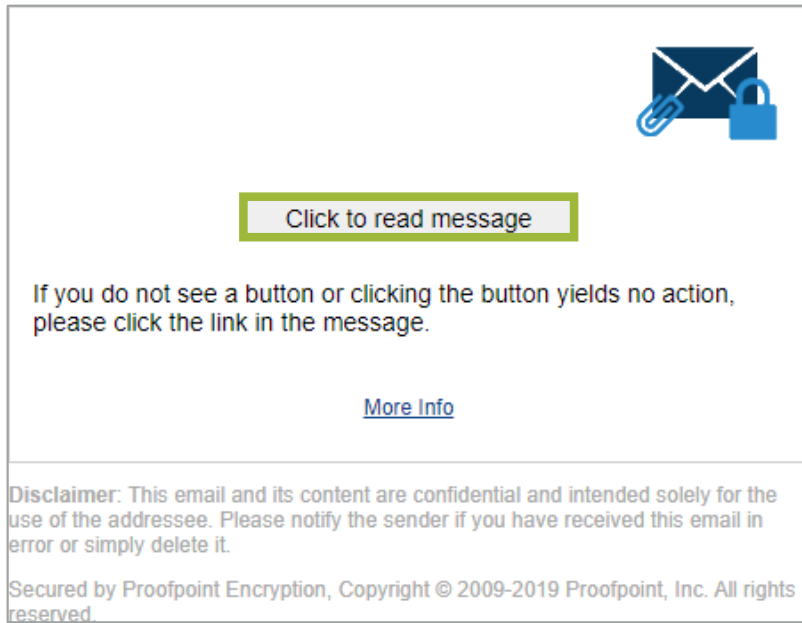
Opening an Encrypted Email (Subsequent Openings)

Once you have completed the password registration, you will only be prompted to enter your password to view the message. If you forget your password, click **Forgot Password** and answer the security questions as prompted (next page):

Missouri Department of Health and Senior Services
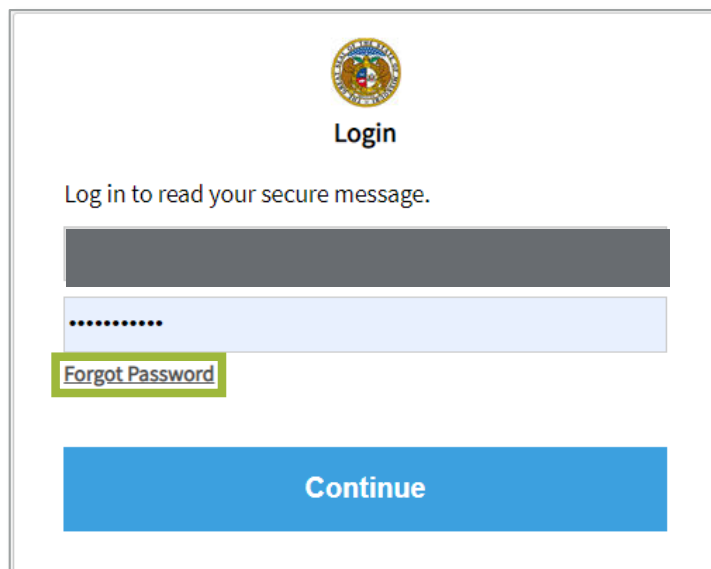
Using Proof Point Email Encryption

Reset Your Password

Please answer the following to reset your password.

your first real job

Answer

favorite sports team

Answer

Cancel   Continue

If your attempts to reset your password fail or you are locked out of the system, contact the OA ITSD Helpdesk at 800-347-0887 or 573-751-6388. You may also submit a ticket through the ITSD Service Portal.

Forwarding or Replying to Encrypted Messages

After logging in and decrypting a message, you may reply or forward the encrypted message. Click **Reply** or **Forward** located inside the encrypted message in your browser window. This will ensure that your message remains encrypted.

Reply   Reply All   Forward

[encrypt]

From:
To:
Cc:
Sent: 8/8/2020 10:56:23 AM

Note: You can only forward the encrypted email to users who are in the same email domain as the sender or recipient. You will receive an error if forwarding the message to anyone else.

Using Proof Point Email Encryption

When you are finished, click **Logout** to ensure proper closure.

Initiating an Encrypted Message

To initiate a secure message from a State of Missouri email account:

1. Open a new message window in your email program.

2. Enter the recipient's email address.

3. Type **[encrypt]** in the subject line. Enter the body text of your message and click **Send** to complete the process.

> ⚠️ **Note:** To successfully encrypt a message, you must use square brackets [ ]. You may include a subject after [encrypt]. Do not include any PII or PHI in the subject of the message. Proof Point will only encrypt the body text and attachments of the message.
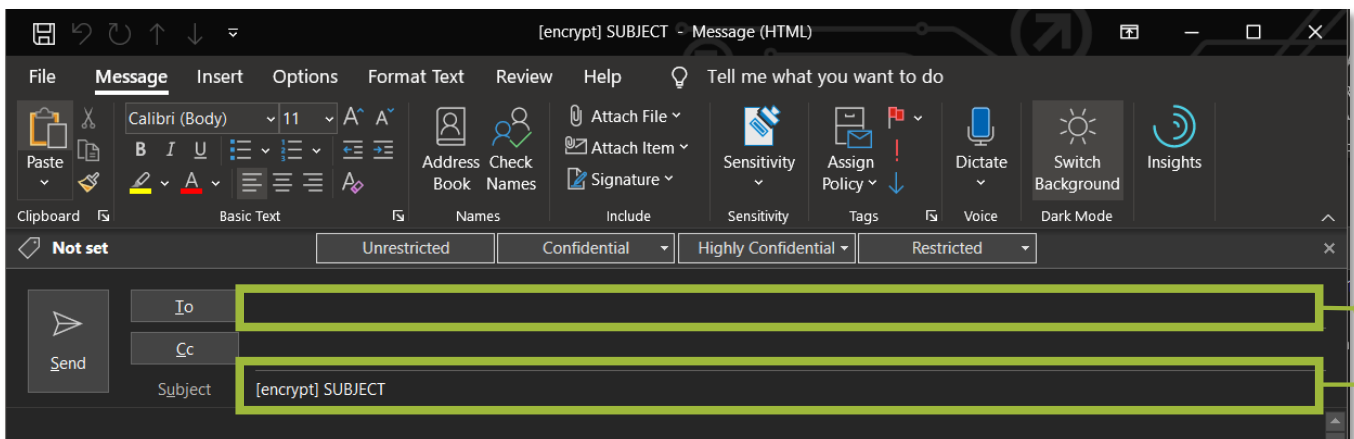
Job Aid

EpiTrax Settings

EpiTrax Settings

When you log into EpiTrax the first time, proceed directly to **Settings** on the far right of the top green banner and verify the General User Information is correct. This is also where you can change your password.
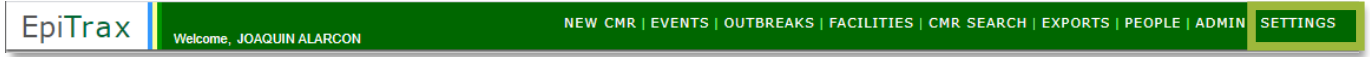
1. Populate all **General User Information** fields.
   a) This will ensure your contact information is available and able to be displayed to other users who may want to contact you regarding a case for which you are listed as the investigator.
2. Click **Save.**
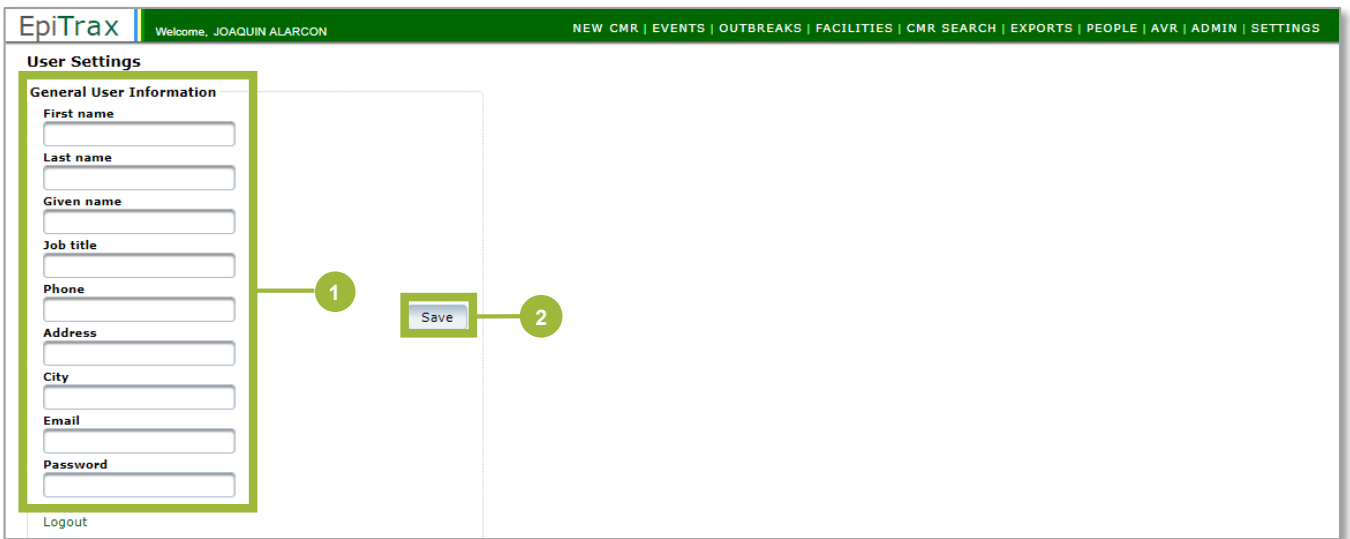
Job Aid

Changing your password in EpiTrax

EpiTrax

Changing Your Password in EpiTrax

1. After logging in with your temporary password, click **Settings** in the top green banner, right side.

2. Change your password using the following guidelines:
   a) 12 characters
   b) At least one uppercase letter
   c) At least one lowercase letter
   d) At least one number
   e) At least one special character, i.e. ! or @

3. Click **Save.**

4. Use your new password next time you log into EpiTrax.

Job Aid

Navigating the EpiTrax Primary Menu Items

Navigating the EpiTrax Primary Menu Items

Options and Workflow Options menu items are listed on top of the page for easy navigation.

OPTIONS

Option	Description
Agency Sharing	Select **Edit Sharing** under **Agency Sharing** to add another jurisdiction from the available list. Multiple jurisdiction can be selected to share the event, and all jurisdictions with which the event has been shared will be able to edit the event.
Promote / Demote	**Promote**: Click **Promote** to update a contact event to a morbidity event **Demote**: Click **Demote** to update a morbidity event to a contact event If an event is Demoted to a contact Event, it should be "Submitted to Tracing" (see the Routing Contact job aid)
Copy to new event	Click to copy the details from current event to a new event for the person. To copy certain sections from the current event, mark the check boxes available in the pop-up box.
Add Task	Click to add and assign a task (ex: Task for a call back to a patient on the day isolation ends)
Add Attachment	Click to add an attachment under this event. (File size limitation is 30 MB.)
Import Events	Click to import event. Select **Leave Page** button from the popup window. From the next page, click on **Option** menu item, and select **Download Template**. This will open a csv file with all the fields. Enter details in the .csv file, save it. Then from the **Options** menu, select **Upload Import file** and select the edited .csv file.
Delete Events	This option deletes the current event. Deleting events can potentially cause issues with data integrity and morbidity. Please reach out to the Bureau of Reportable Disease Informatics at DHSS before using this option.
Edit Person	Click to edit demographic details or add another event for the person.

Navigating the EpiTrax Primary Menu Items

Options and Workflow Options menu items are listed on top of the page for easy navigation.

WORKFLOW OPTIONS

Option	Description
Workflow Status	Transition the event through the different workflow statuses, for example: Accept Event > Assign to Investigator > Accept Investigation > Complete Investigation > Approve Event
Route to LHD	Click to route the event to a different local health department
Workflow History	Click on this to view the history of workflow actions for a morbidity event along with date of action, jurisdiction, and who performed the action

Job Aid

Setting up Task List Views in the EpiTrax Dashboard

Setting up Task List Views in the EpiTrax Dashboard

The Dashboard is a 'to-do list' to display Tasks that have been assigned to you by either yourself or others such as a supervisor or team member. Tasks are created under the **Notes** tab, but can be managed (reassigned or marked as complete) directly from the Dashboard.

The Dashboard is **not** a list of all your morbidity and/or contact event records. A list of your event records can be viewed in the **Events** section (this function is discussed later).

The EpiTrax system does not automatically generate the task list on your Dashboard. You must set up what Tasks you want to display on the Dashboard by following the instructions below:

1. In the Dashboard view, click **View Options** button in the right-hand corner.
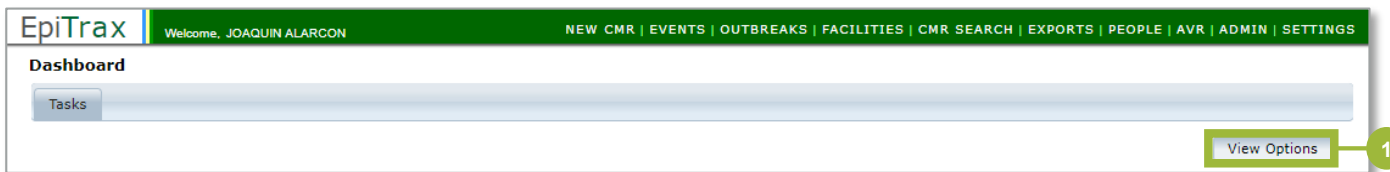
2. Enter the view options you wish to use by populating the fields below:
    a) Show Tasks due after and before dates: **Enter a due date range**

    Note: If you leave the date fields blank, EpiTrax will show tasks with any due date, as long as they meet the remaining filter criteria you select. Tasks with no due date will be displayed regardless of the date criteria you select.
    b) **Diseases:** COVID-19
    c) **Investigating agency:** Select the correct Investigating Agency
    d) **Assigned to:** Select the Investigator you wish to filter by
    e) **Status:** Pending, Complete, or Not applicable
    Note: If only "Pending" is selected, Tasks marked "Complete" will drop off the view.
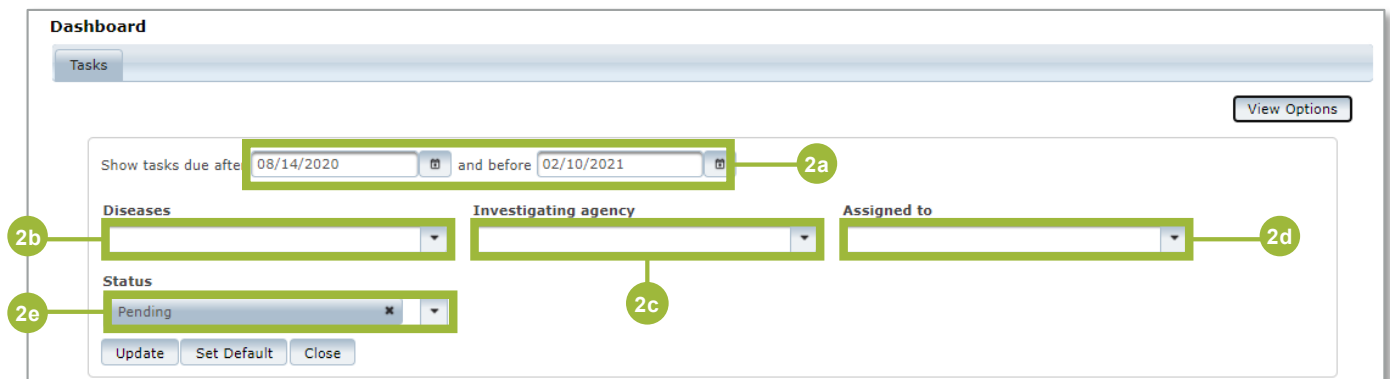
Setting up Task List Views in the EpiTrax Dashboard

When you have selected your preferred view options, you can either:

1. Click on **Update** to update your current Dashboard view temporarily.

2. Or click **Set Default** to save your selections as your default Dashboard view that will display each time you open EpiTrax or return to the Dashboard screen.

Job Aid

Using the EpiTrax Event Workflow

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Using the EpiTrax Event Workflow

When a record is assigned to a LDH, it must be transitioned through the workflow.

1. Upon entering a CMR for the first time, the LHD will have two options to accept the CMR:
    a) Click on **Accept Event** in the top right corner
    b) Or click on **Workflow Options** in the top left corner and click **Accept Event**
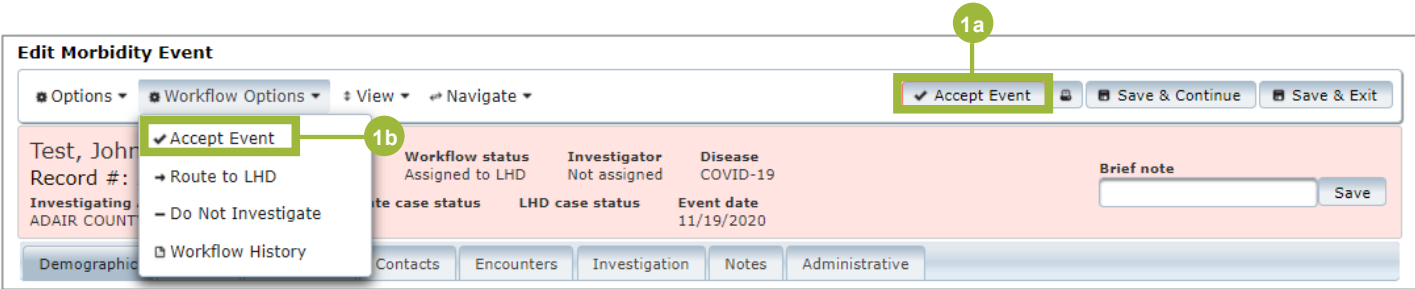
2. An investigator will need to be assigned to the CMR. Depending on your permissions in the system, you can either assign yourself or someone else in your jurisdiction by doing one of the following steps:
    a) Click **Assign to Investigator** in the top right corner
    b) Or click **Workflow Options** in the top left corner and click **Assign to Investigator**
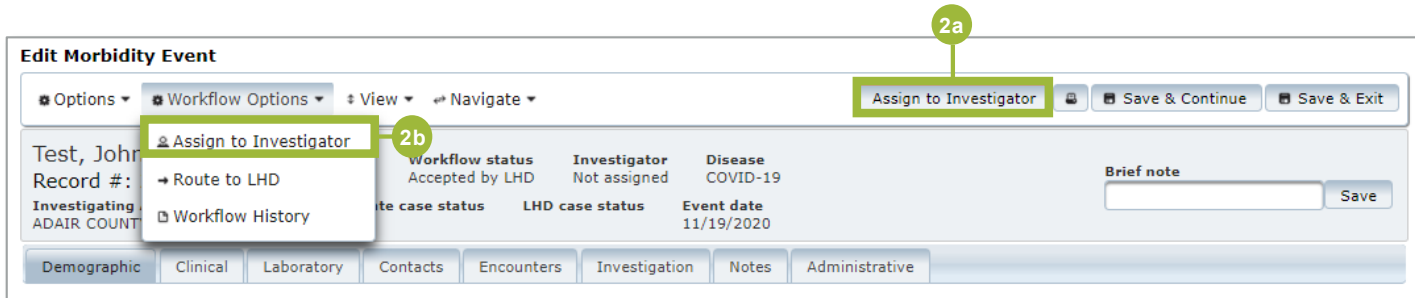
    c) A Workflow Action box will appear. **Select the investigator's name** from the dropdown
    d) Click **Assign to Investigator**
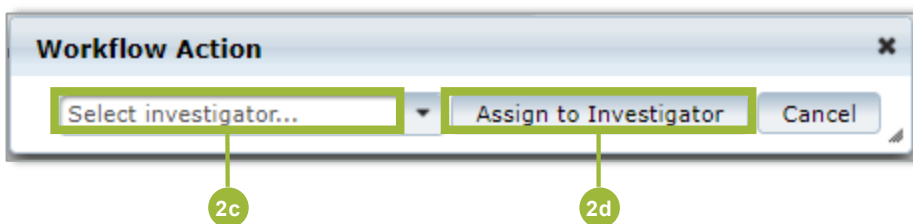
Using the EpiTrax Event Workflow

3. Once the case is assigned to an investigator, it must be accepted by the investigator. To accept investigation:
   a) Click **Accept Investigation** in the top right corner
   b) Or click **Workflow Options** in the top left corner and click **Accept Investigation**
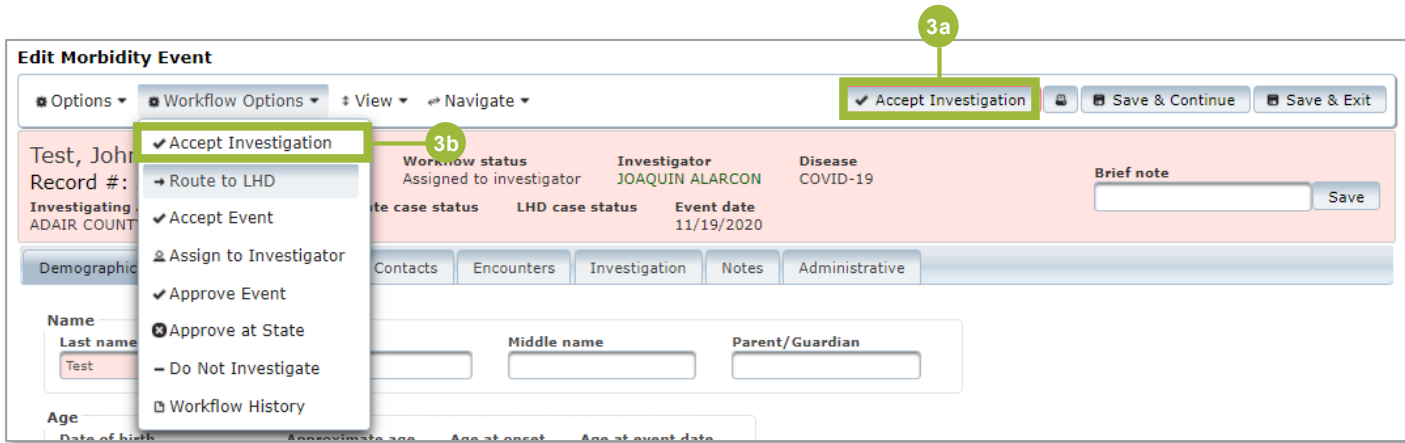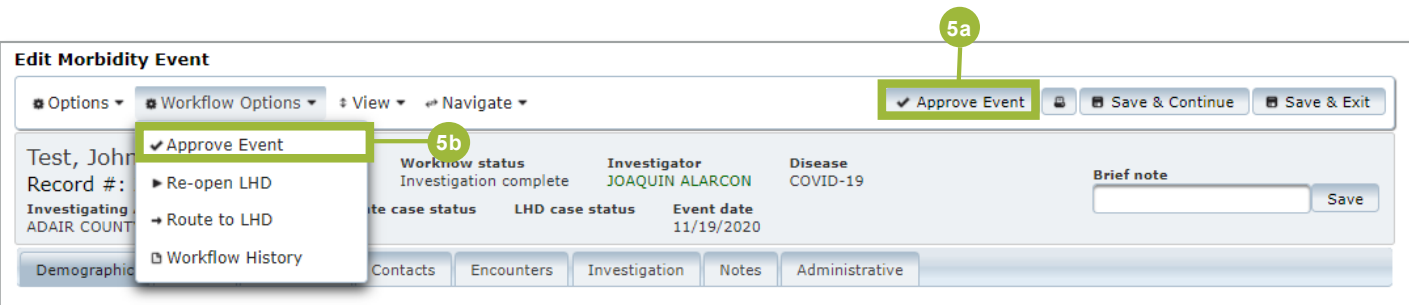
4. When the investigation is complete, the investigator will either:
   a) Click **Complete Investigation** in the top right corner
   b) Or click **Workflow Options** in the top left corner and click **Complete Investigation**
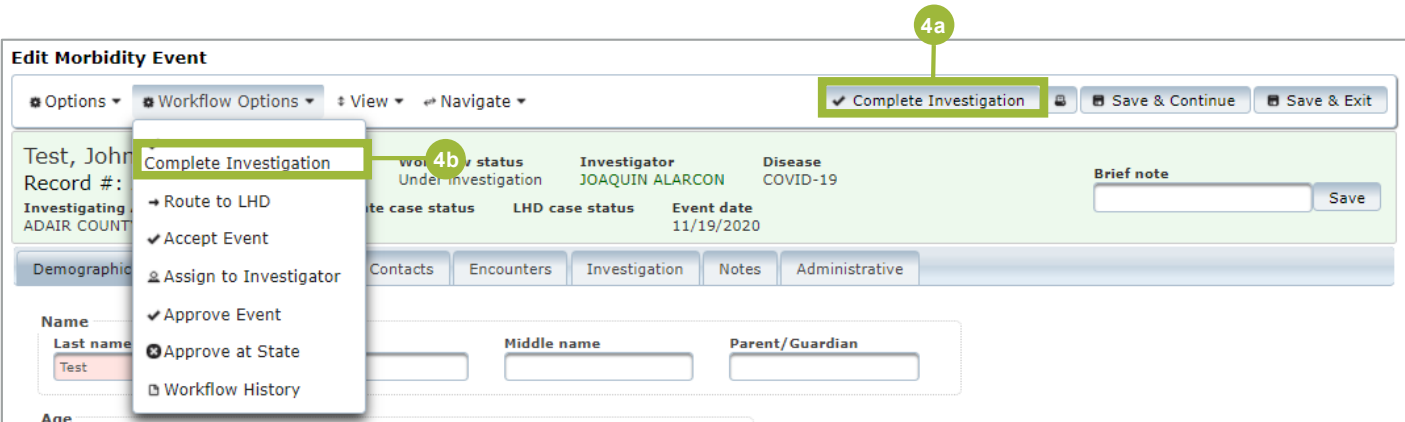
Using the EpiTrax Event Workflow

5. The final step in the workflow is to approve the event. In many LHDs this will be done by the administrator. To approve the event, either:
    a) Click **Approve Event** in the top right corner
    b) Or click **Workflow Options** in the top left corner and click **Approve Event**

Job Aid

Case Investigation and Contact Tracing Intersection

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Case Investigation and Contact Tracing Intersection

Case Investigation and Contact Tracing Overview

EpiTrax is the communicable and environmental disease surveillance system that supports case reporting and investigation in Missouri. MO ACTS is the software that supports contact tracing for Missouri.

Case contact data collected during case investigations is documented in EpiTrax and flows to MO ACTS for a Contact Tracer to begin outreach activities. Below is a visualization of this data flow.
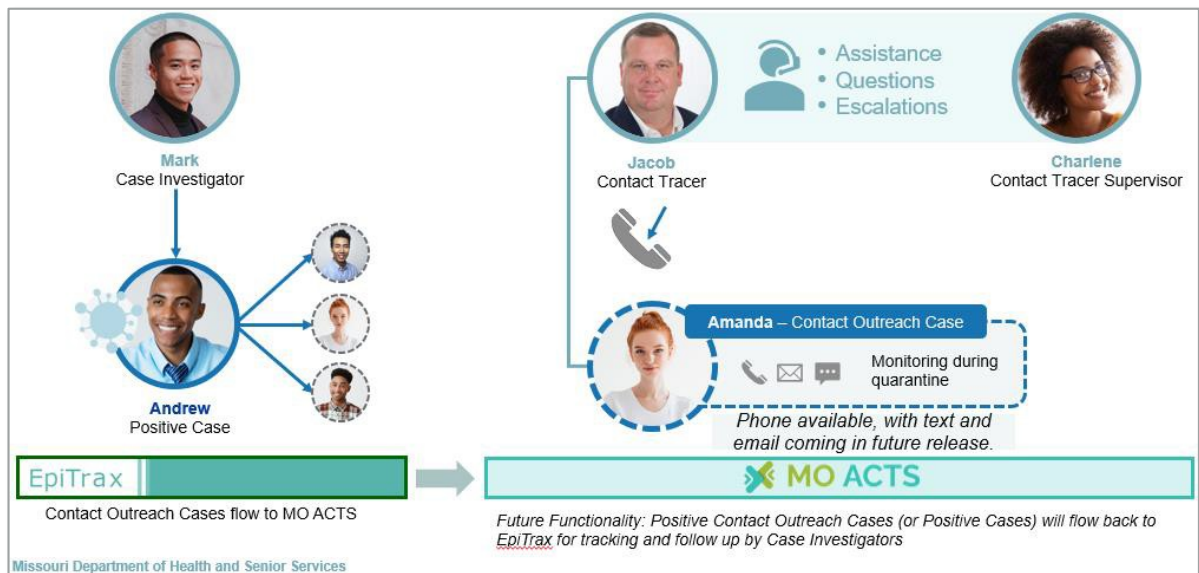
Note: See the linked job aids for detailed steps on how to enter/edit case contact information, and how to send a case to tracing.

Please provide as much information as possible when adding contacts to a Morbidity event. The Contacts information will be transferred to EpiTrax. For a full list of all required fields, please see the COVID-19 Tech Response System Data Dictionary. (Required fields in EpiTrax are marked "Yes" in the "Required? (Y/N)" column.)

Failure to provide a phone number will have the following effects:
- Significantly hinder a Contact Tracer's ability to reach out to a Contact
- EpiTrax will be unable to transfer Contact information to MO ACTS

Case Investigation and Contact Tracing Intersection

Additional Information

Screenshot – EpiTrax Demographic Tab

Screenshot – EpiTrax Contacts Tab

The outlined fields on the EpiTrax screenshots above map to the outlined fields in the MO ACTS screenshots on the next page.

Case Investigation and Contact Tracing Intersection

Additional Information

Below, you will see that in MO ACTS the **Contact Details** (left) displays the contact outreach case information data that has been populated from EpiTrax: **Name, Birth Date, and Home Phone** (previous page)**.**

The **Birth Date** and **Age** fields will inform the Contact Tracer whether the outreach case is a minor and any additional steps in order to follow Public Health and HIPAA policies. In the **Details** pane (right) the **Last Exposure Date** is populated.

Screenshot – EpiTrax Investigation Tab

Below, the **Last Exposure Date** has populated with the **Contact Disposition Date** from EpiTrax. This information will inform the Contact Tracer on the length of quarantine for the contact outreach case.

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Job Aid

Looking for Persons and CMR

Looking for Persons and CMR

1. To search for the person, click the **New CMR** link.
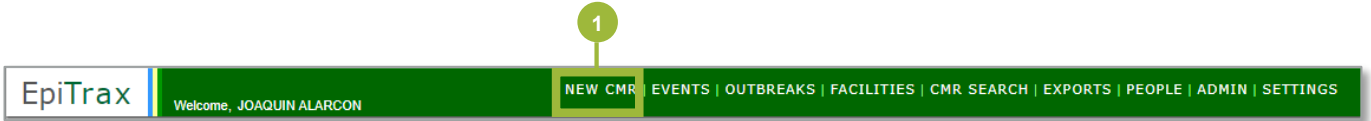
2. In the New CMR search page populate the following fields:
   a) **Last Name**
   b) **First Name**
   c) **Date of Birth**
   d) **Phone Number**
      a) For phone numbers, only enter digits. EpiTrax will add parentheses and dashes as needed.
   e) Click **Search**

3. The list of results for your search will appear upon clicking **Search**. The record that appears has a **5-star rating**, indicates a strong match.

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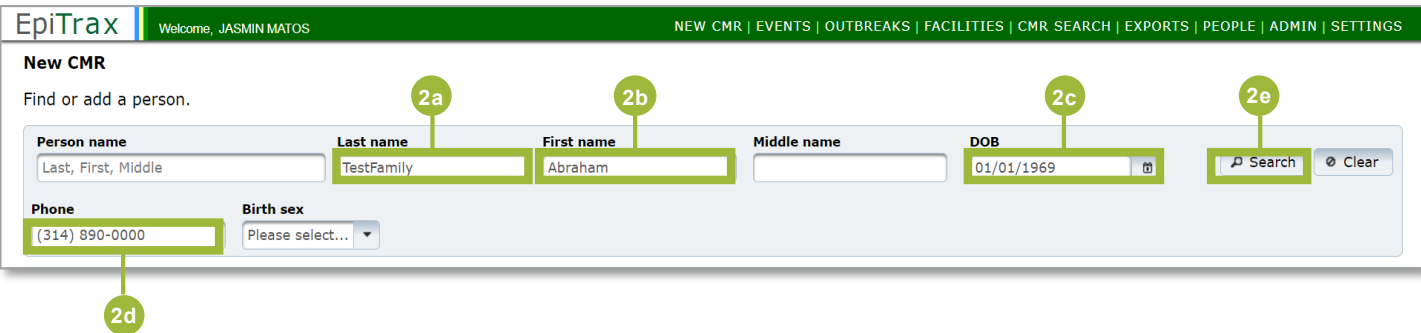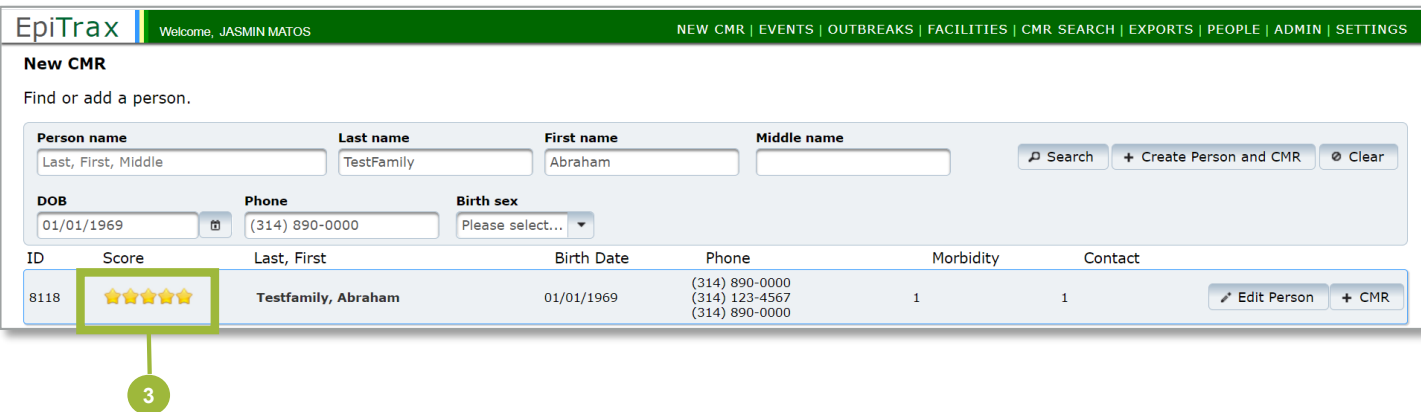
Looking for Persons and CMR

4. To view more details, click the **person's name**.

5. Click the arrows next to **Events** to expand the tab and view the person's morbidity record.

Missouri Department of Health and Senior Services

Job Aid

Creating Persons and CMR

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Creating Persons and CMR

1. Click the **New CMR** link.
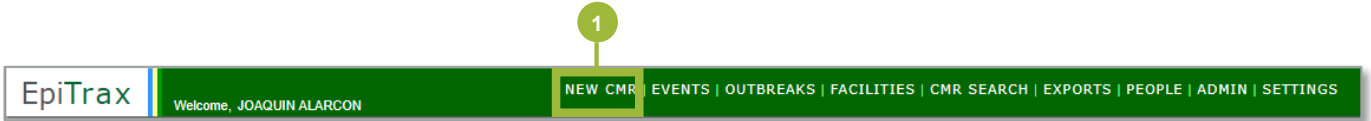
2. In the New CMR search page populate the following fields to see if the person already has an event in the system:
   a) **Last Name**
   b) **First Name**
   c) **Date of Birth**
   d) **Phone Number**
      a) For phone numbers, only enter digits. EpiTrax will add parentheses and dashes as needed.
   e) Click **Search**
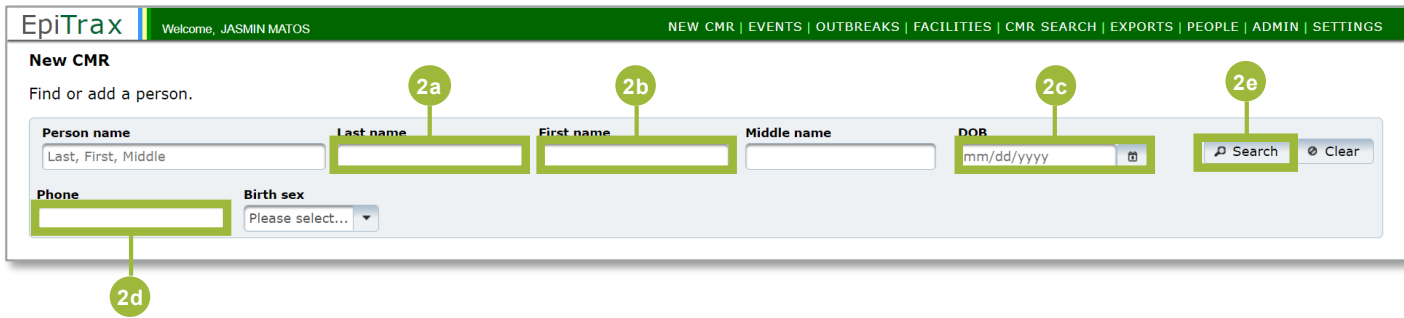
3. If a case record does not already exist for the person you are searching, click **+ Create Person and CMR.**

Creating Persons and CMR

4. Populate the following fields:
   a) **First reported to public health**
   b) **Disease**
   c) **Investigating Agency**

5. Click **Save & Continue.**

⚠️ **Note:** If you only have permissions for one agency in the system, you will not see the **Investigating Agency** field. The investigating agency will automatically be set for your jurisdiction.

6. To create a new CMR for an **existing person**, select the record from the search result list and click **"+ CMR"** button.

Job Aid

Finding Deleted CMR's in EpiTrax

Finding Deleted CMR's in EpiTrax

To find deleted CMR's in EpiTrax, follow the steps below:

1. Click on the **CMR SEARCH** located at the top right corner of the green header.

2. Fill in any information you have about the case.

3. Click on the **Advanced Search** option at the left of the screen located directly below the **Person name** search box.
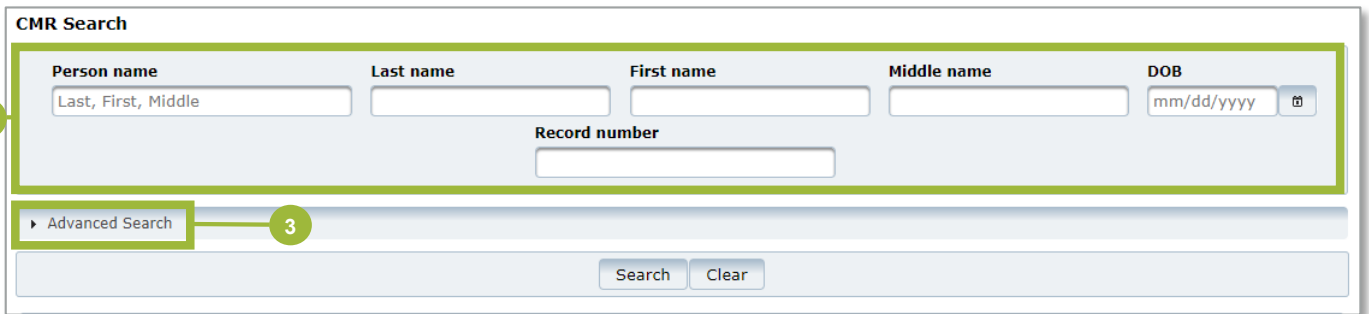
4. Click on the **Show deleted Events** toggle to the right and turns green as displayed in the screenshot below.

5. Click **Search.**
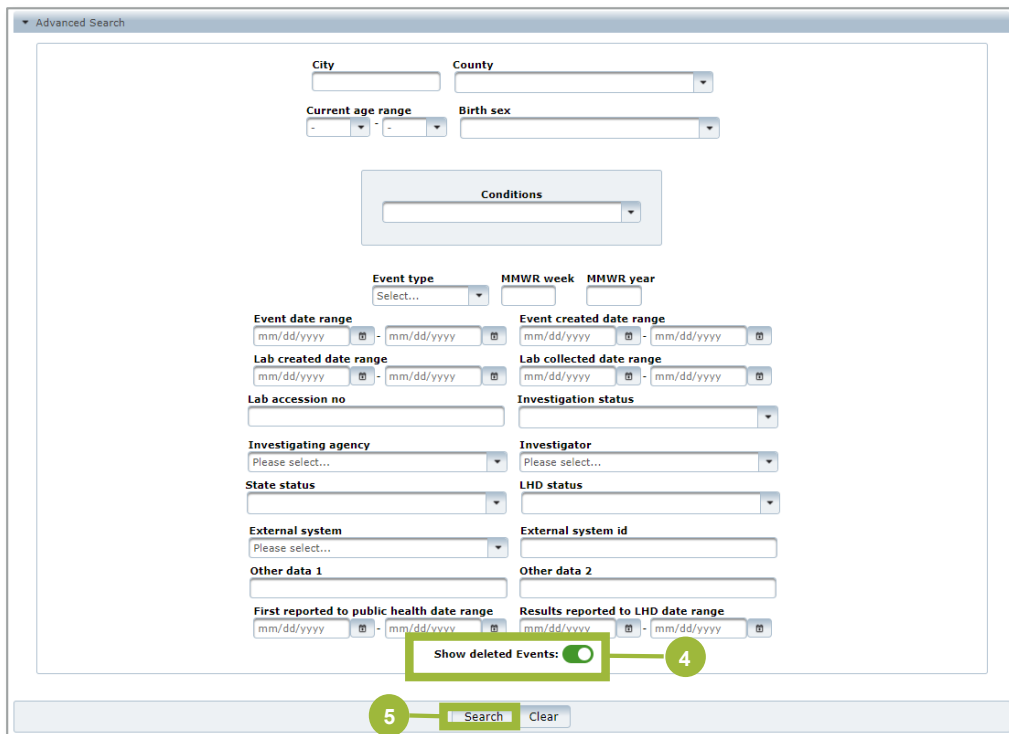
Job Aid

Using the Events Tab in EpiTrax

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Using the Events Tab in EpiTrax

The **Workflow** feature in EpiTrax updates when certain actions are completed. When BRDI (Bureau of Reportable Disease Informatics) staff enter a case and route it to an agency, Workflow status is set to **Assigned to LHD**.

When an LHD receives and accepts the case, the **Workflow** status updates to **Accepted by LHD**. This means that any new cases that have been assigned to an LHD but have not been acted upon will have the **Assigned to LHD** status.

Cases still in **Assigned to LHD** status are shaded in *pink*. These are the new cases. If you have not set any filters on your **Events** page, these new cases will be mixed in with other cases. However, you can set up a view to see only the new cases.

1. Click **Events**.

2. Click **Options**.

3. Click **+ Add View**.
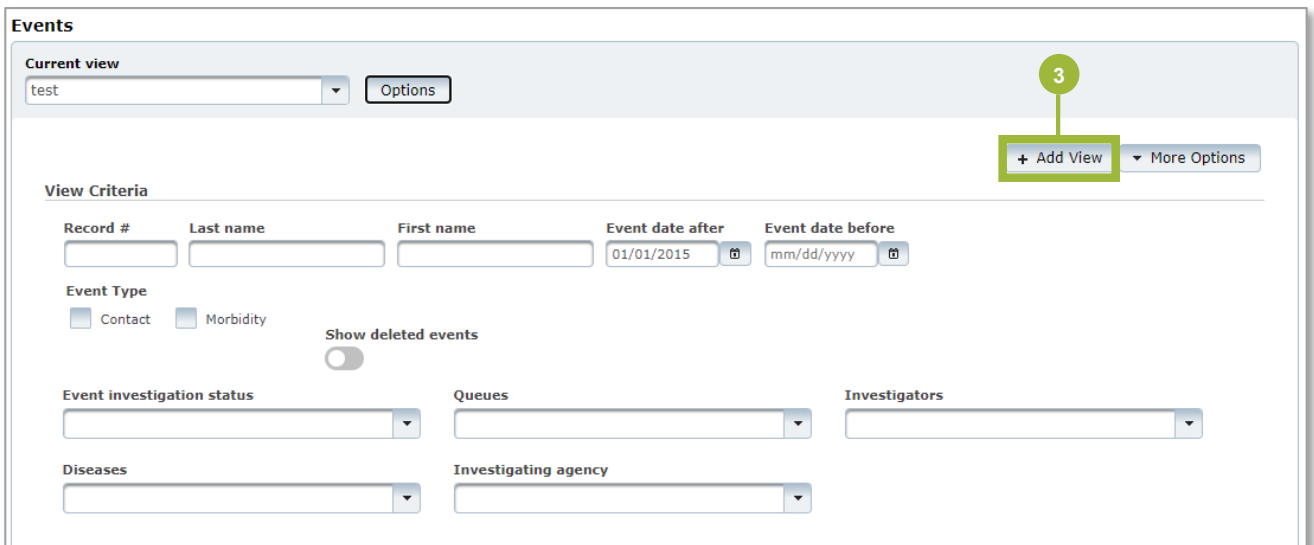
Using the Events Tab in EpiTrax

4. Make the following selections in the expanded options box:
    a) **New view name:** New Cases
    b) **Event investigation status:** Assigned to LHD
    c) **Diseases:** COVID-19
    d) **Investigating Agency:** select your agency
    e) **Event Type:** Select Morbidity

5. Click **Save.**

The **Events** list will now display all your new cases, all of which should be shaded in pink. You only need to set up and save this query once. When you want to pull your list of new cases, return to the **Events** tab and select **New Cases** from the **Current View** list.

Along the left side of each record is a color bar. Green indicates a *Morbidity* record while yellow indicates a *Contact* record.

Please review the Filtering and Exporting – Public Templates job aid to understand the export functionality to discover new cases.

Note: If a case is reassigned to a different LHD, the **Workflow Status** resets to **Assigned to LHD**, so the case will show in pink as new for the newly assigned jurisdiction. If you have any questions or issues with using this feature of EpiTrax, please reach out to the EpiTrax Help Desk by emailing epitrax@health.mo.gov.

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Using the Events Tab in EpiTrax

To view new Contact events in the Events page, you can set similar filters following the steps below:

1. Repeat steps 1-3 above

2. **New view name:** New Contacts

3. **Event investigation status:** Assigned to LHD

4. **Diseases:** COVID-19

5. **Investigating Agency:** select your agency

6. **Event Type:** Select Contact

7. Click **Save**

The Events list will now display all your new contacts, all of which should be shaded in grey. You only need to set up and save this query once. When you want to pull your list of new contacts, return to the Events tab and select New Contacts from the Current View list.

Job Aid

Searching For Contacts

Searching for Contacts

The Contacts tab shows detailed information for persons who have been in contact with the case during the infectious period of the disease. The collection of contact information allows LHDs and DHSS 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.

To find a case's contacts, follow the steps below:

1. Click on the **Contacts** tab.

2. Enter the contact's name in the **Search person** field.

Searching for Contacts

3. Click on the contact to add them to the contact list.

> ⚠️ **Note:** Remember to click the contact's green record number to enter the required information (Last Name, First Name, Date of Birth, Phone, Telephone Type, address or county At Diagnosis). Also, route it to your jurisdiction under Workflow Options, assign the record to yourself, and accept the record.

4. If you are not able to find a Contact, you may add a new contact by following the steps in the Adding New Contacts job aid.
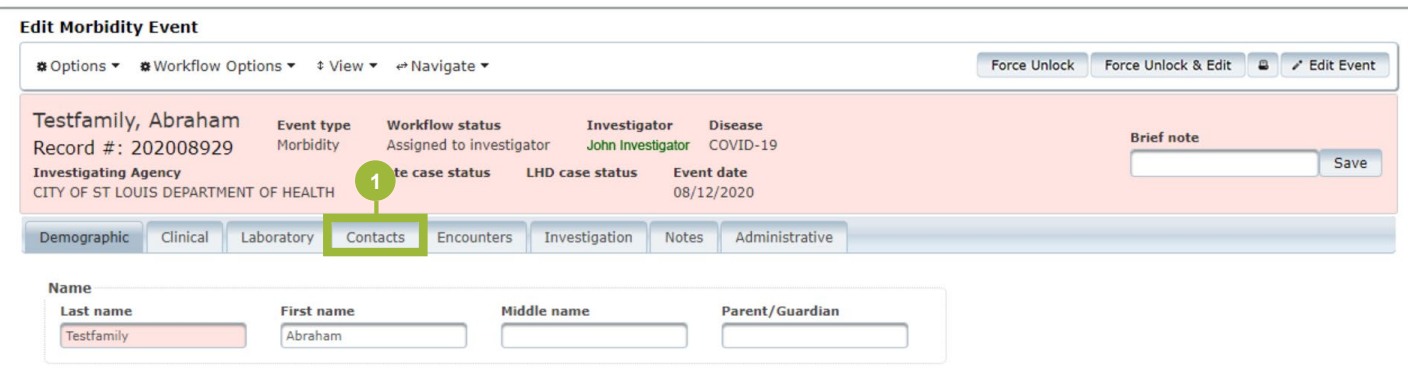
Job Aid

Adding New Contacts

Adding New Contacts

The Contacts tab shows detailed information for persons who have been in contact with the case during the infectious period of the disease. The collection of contact information allows LHDs and DHSS 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.

⚠️ **Note:** This section does not record contact information for the case. It records people the case may have exposed during the case's infectious period.

If a contact search yields no results for the person you are searching for, you may add a new contact by following the steps below.

1. Click on the **Contacts** tab.

2. Click **+ Create New Person.**

Adding New Contacts

3. Populate the following fields:
   a) **Last Name**
   b) **First Name**
   c) **DOB (Date of Birth)**
   d) **Phone**
   e) **Telephone Type**

4. Click **+ Add.**

The newly added contact will now appear in the list of contacts. Next, you will need to specify the **contact type**, **contact disposition, and disposition date or last date of contact.** Please remember to update the contact disposition, as appropriate, throughout the monitoring and release of this patient.

5. To open the contact record, click the **green record number.**
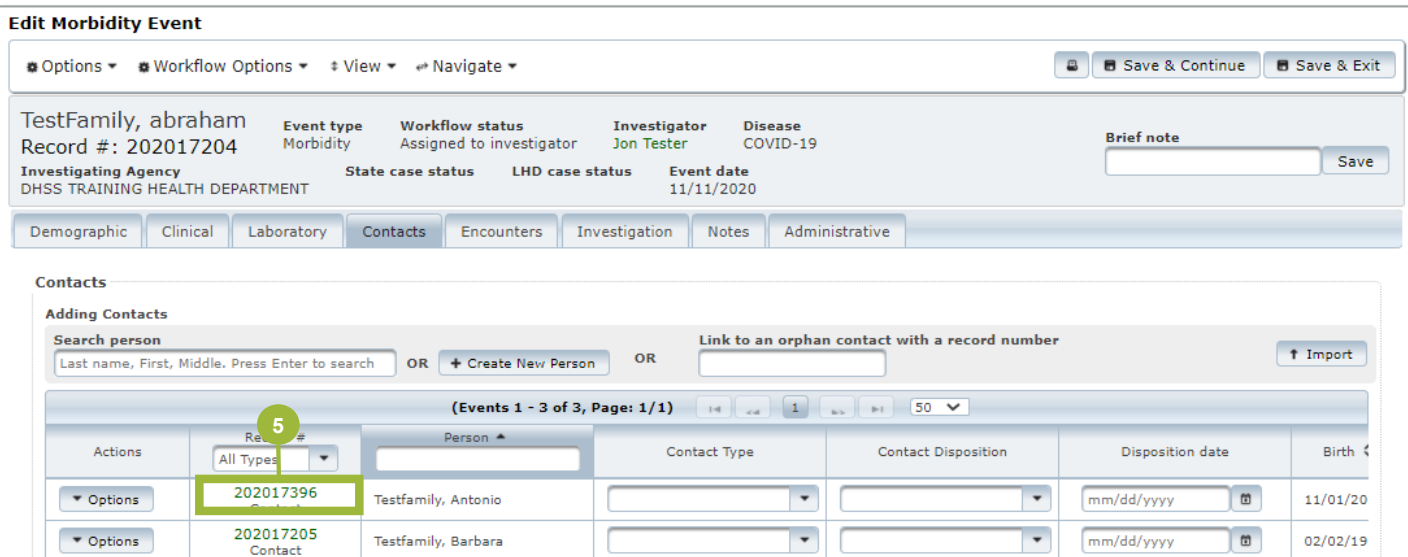
Adding New Contacts

6. The pop-up below will appear. Click **Leave.**

Leave site?

Changes you made may not be saved.

☐ Prevent this page from creating additional dialogs

6

Leave   Cancel

7. Next, enter the contact's address information (county at minimum) in the **Demographic** tab.

8. Then, click **Save as Address at Diagnosis**.

9. Under **Workflow Options**, route to the correct jurisdiction. If you are working the contact, also assign the record to yourself and accept it.

10. Click **Save & Continue.**

9   **10**

Edit Contact Event

⚙ Options ▾   ⚙ Workflow Options ▾   ↕ View ▾   ↩ Navigate ▾   🖥   💾 Save & Continue   💾 Save & Exit

Testfamily, Antonio   Event type   Workflow status   Investigator   Disease   Brief note
Record #: 202017396   Contact   Not participating in workflow.   Not assigned   COVID-19
Investigating Agency   Event date   Parent patient   [   ] Save
DHSS TRAINING HEALTH DEPARTMENT   11/20/2020   abraham TestFamily

| Demographic | Clinical | Laboratory | Contacts | Encounters | Investigation | Notes | Administrative |

Name
Last name   First name   Middle name   Parent/Guardian
[Testfamily]   [Antonio]   [   ]   [   ]

Age
Date of birth   Current age   Age at onset   Age at event date
[11/01/2001] 📅   19 Years 22 Days   Unknown   19 Years 19 Day

7

Addresses

Street   Unit number   City   State   Zip code   County   Earliest known
[   ]   [   ]   [   ]   Please select... ▾ [   ]   Please select... ▾ [mm/dd/yyyy] 📅
Moved   Note
[mm/dd/yyyy] 📅 [   ]

Address not verified   💾 Save as Address at Diagnosis   ⊘ Cancel

8

Adding New Contacts

Creating an Orphan Contact:

When an LHD receives a contact for a case that is out of state (and therefore the case is not in EpiTrax), the LHD should enter the contact as an "orphan contact". An orphan contact refers to a contact in EpiTrax that does not belong to a "parent patient" (a case in EpiTrax to which the contact is linked).

The simplest way to create an orphan contact is to start by adding the person to the system as you would with an actual case (search for the person to make sure they are not already in the system, create a new CMR, etc.). This will put the contact into EpiTrax as a morbidity event.

⚠️ **Note**: It is crucial to make sure that before you save the event, you demote it to a contact event. This will ensure that it does not get saved as a morbidity event and count as a case in your jurisdiction.

To demote a morbidity event to a contact event:

1. Click **Options** at the top left.
2. Click **Demote.**

Sometimes, a contact event may need to be promoted to a morbidity event. In that case, follow the steps below:

1. Click **Options** at the top left.
2. Click **Promote.**

Job Aid

Routing Contacts

EpiTrax

Routing Contacts

If a contact to a case in your jurisdiction resides in another jurisdiction, you need to route the contact event to the appropriate LHD for follow-up. The routing of contact events is done the exact same way as the morbidity events.

⚠️ **Note:** Contact events are automatically assigned to the jurisdiction that the parent/origin case is assigned. However, they are **NOT** automatically placed in in **Workflow**. Therefore, even if the contact resides in your jurisdiction, the contact should be routed to your jurisdiction and approved by LHD. This will enable it to be appropriately closed out.

⚠️ **Note:** To be able to route a case you must ensure you are assigned as the investigator to the case.

1. Click the **Workflow Options** menu.

2. Select **Route to LHD.**
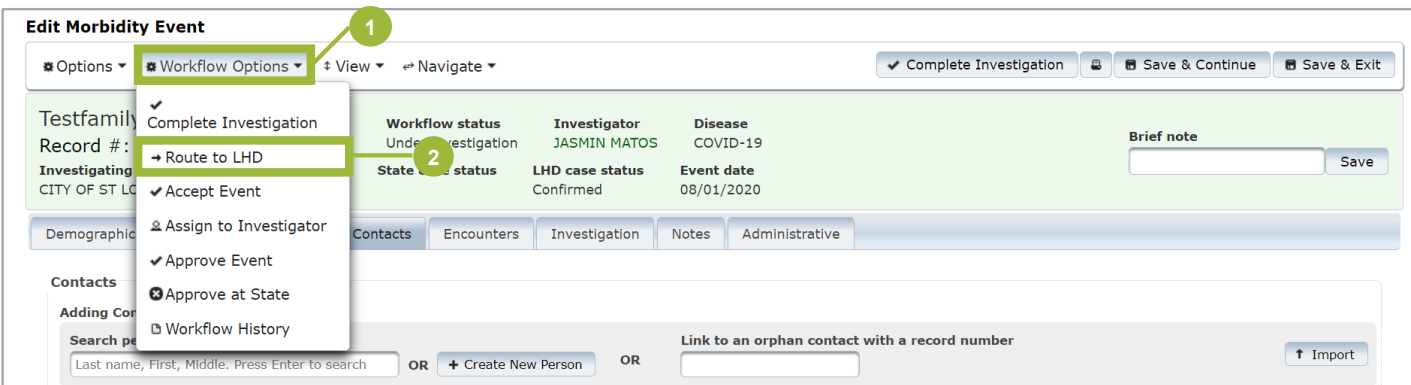
3. Select the correct jurisdiction from the drop-down menu.

4. Click **Route to LHD.**
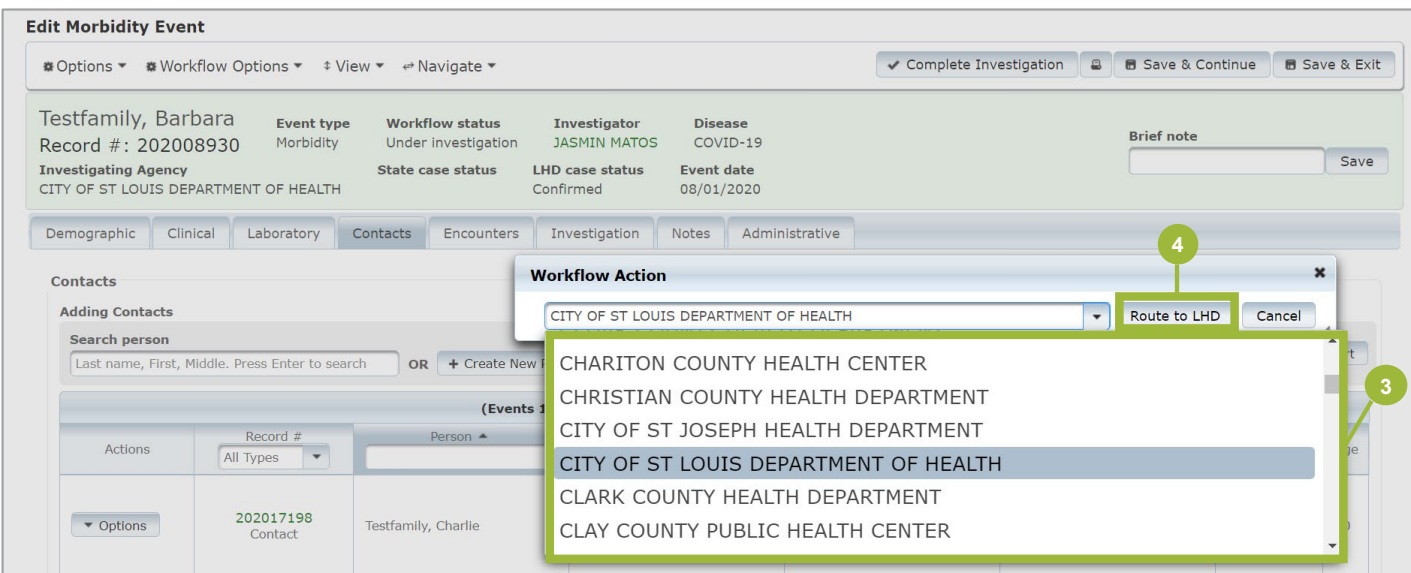
Routing Contacts

You will also need to send the contact to tracing. All contacts will be worked in the MO ACTS system. To send contacts from EpiTrax to MO ACTS:

1. Click **Options** next to the contacts you wish to send.

2. Select **Send to Tracing** from the drop-down menu.

> **Note:** If the contact is not sent to tracing following steps 1 and 2 above, the contact **will not** be sent to MO ACTS, and the Contact Tracer will be unable to perform their contact notification. This will help other jurisdictions (even if you are not using MO ACTS) and will allow DHSS surge support to assist.
>
> **A contact's information can only be sent to tracing in MO ACTS once time. Any changes to a contact's information after sending to tracing will not be transferred to MO ACTS.**
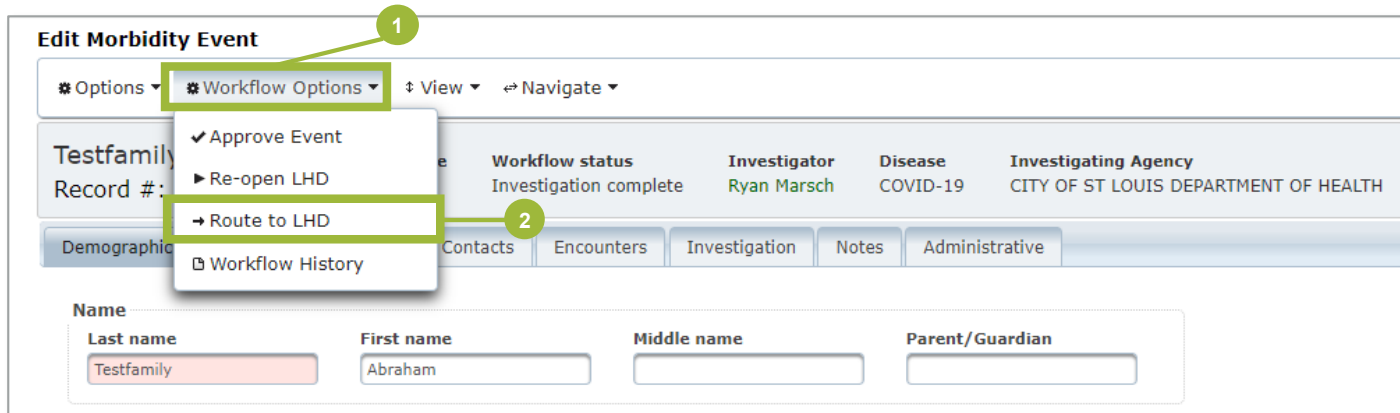
Job Aid

Re-Routing Cases in EpiTrax

EpiTrax

Re-Routing Cases in EpiTrax

If a case is incorrectly assigned to your jurisdiction, you can route the case to the appropriate LHD by performing these steps:

1. Click **Workflow Options.**
2. Click **Route to LHD.**
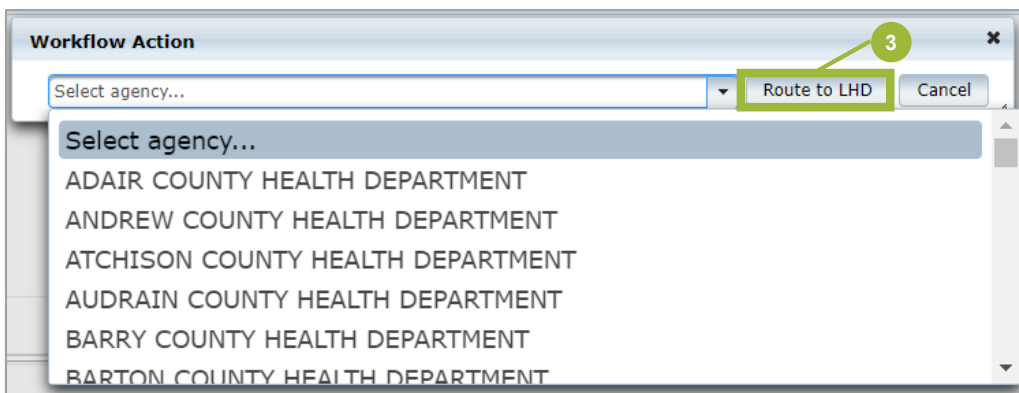
3. Select the health department that this case should be re-routed to, and then select the **Route to LHD** button.

Make sure to select either **Save & Continue** or **Save & Exit**, otherwise the case will not be re-routed and will remain assigned to you.

If you determine that a case assigned to your jurisdiction has a different current address than what is listed in EpiTrax (and belongs to a different jurisdiction), make sure to add that address in EpiTrax before routing the case to the new jurisdiction. Always ensure the current addresses and the address at diagnosis are up-to-date before re-routing.

Note: Once you route a case to a different jurisdiction, you will lose visibility of that case. Unless both the receiving jurisdiction and the sending jurisdiction have an existing data sharing agreement in place and have submitted that agreement to DHSS for documentation purposes.

Job Aid

Entering Test Results

Entering Test Results

Test results may be reported in various forms, such as:
- Lab reports
- Persons Under Investigation (PUI) forms
- CD-1 reports

Types of tests conducted can be:

Type of Test	Description
PCR	PCR tests may have language on the lab report, such as: PCR, RT-PCR, Real-Time PCR, RNA, Qualitative NAAT
Antibody	Antibody tests may have language on the lab report, such as: Serology, IgG, IgM
Antigen	Antigen tests may have language on the lab report, such as: Antigen, Ag, Sophia Covid-19 SARS Antigen
LAMP	LAMP tests may have language such as LAMP or Abbott.

To enter tests results, follow the steps below:

1. Navigate to the **Laboratory** tab.
2. Click **+ Add Lab.**

Entering Test Results

3. Populate the fields below by typing or clicking the dropdown (where relevant):
   a) **Performing Lab**
   b) **Ordering Facility**
   c) **Patient's address at collection**
   d) **Collection Date**
   e) **Specimen Source**
   f) **Test Type**
   g) **Test Result**
   h) **Lab Test Date**

4. Click **Save & Continue.**

Entering Test Results
Point of Care (POC) At-Home Tests

With the availability of at-home point of care (POC) COVID tests (i.e. over-the-counter BinaxNOW, Lucira Check It), LPHAs may have individuals contacting them to report a POC test result or have providers contacting them to report an individual who called the provider to report a POC test result. These tests, both positive and negative, should be entered into EpiTrax and follow up conducted as appropriate. The test type for the over-the-counter antigen tests, such as BinaxNow, should be entered as SARS-CoV-2 Antigen in EpiTrax. The test type for over-the-counter LAMP tests such as the Lucira Check It should be entered as a LAMP test type. For data entry questions, please contact the Help Desk at Epitrax@health.mo.gov.

For individuals contacting the LPHA directly to report a POC test result:

- Follow the same instructions for entering labs in the EpiTrax User Guide (https://clphs.health.mo.gov/lphs/diseaseprevention/epitrax/pdf/user-guide.pdf).

1. For the Performing Lab, enter POINT OF CARE TEST (POCT), hit **ENTER**, and **select** POINT OF CARE TEST (POCT) from the dropdown.

2. Repeat the previous step for the Ordering Facility: enter and select POINT OF CARE TEST (POCT).

3. Enter "Self-Reported Test" in the Comment field on the same tab

Entering Test Results
Point of Care (POC) At-Home Tests

For providers reporting that they received a report from an individual who conducted a POC test themselves (the provider DID NOT conduct the test):

- Follow the same instructions for entering labs in the EpiTrax User Guide (https://clphs.health.mo.gov/lphs/diseaseprevention/epitrax/pdf/user-guide.pdf).

1. For the Performing Lab, enter POINT OF CARE TEST (POCT), hit **ENTER**, and **select** POINT OF CARE TEST (POCT) from the dropdown.

2. Repeat the previous step for the Ordering Facility: enter and select POINT OF CARE TEST (POCT).

Please note: If the provider conducted the POC test on the individual, the provider's name goes in the Performing Lab and the Ordering Facility. Only enter POINT OF CARE TEST (POCT) in the fields when an individual conducts the test on themselves or someone else using the over the counter test (at-home test).

3. On the Administrative tab, under the Reporting Agency section, enter the name of the facility/provider who received the call from the individual and was reporting the test result (Note: data in other fields is simulated):

Job Aid

Finding a Specific Case or Lab Test

Finding a Specific Case or Lab Test

1. To search for the person, click the **New CMR** link.
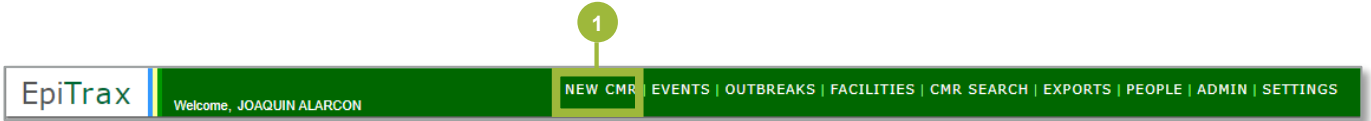
2. In the New CMR search page populate the following fields:
   a) **Last Name (required)**
   b) **First Name (required)**
   c) **Date of Birth (optional)**
   d) **Phone Number (optional)**
      a) For phone numbers, only enter digits. EpiTrax will add parentheses and dashes as needed.
   e) Click **Search**

3. The list of results for your search will appear upon clicking **Search**. The record that appears has a **5-star rating**, indicates a strong match.

Missouri Department of Health and Senior Services
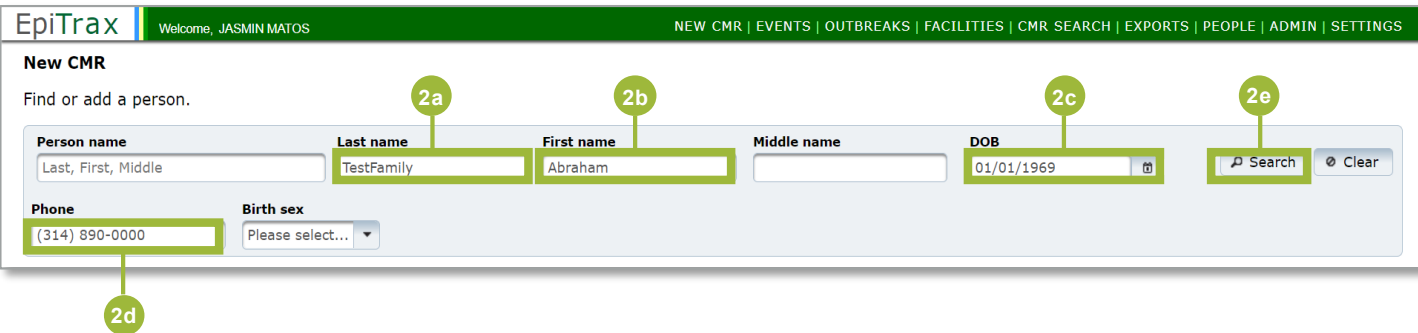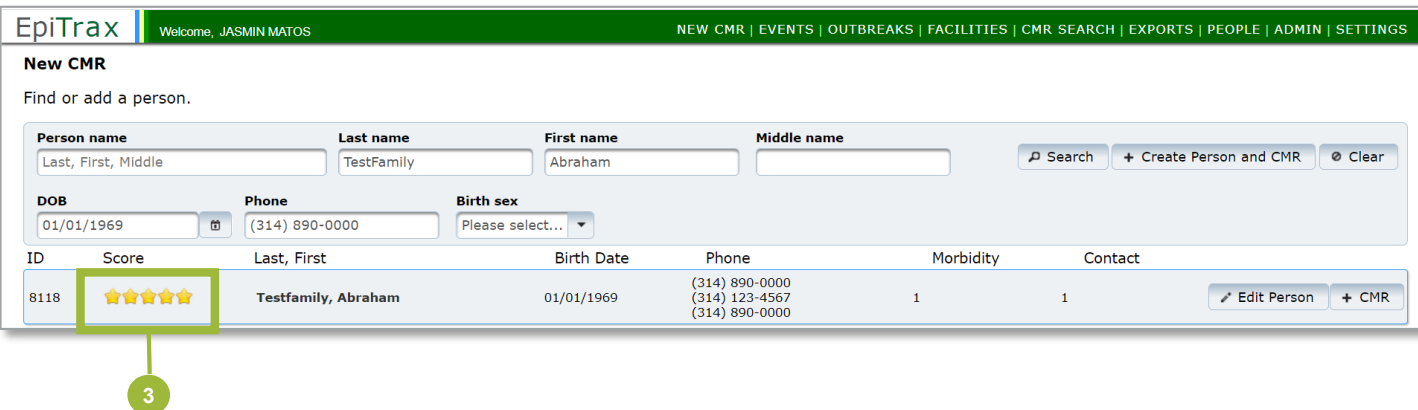
Finding a Specific Case or Lab Test

4. To view more details, click the **person's name**.

5. Click the arrows next to **Events** to expand the tab and view the person's morbidity record.
6. Select the **record number** for the case with the morbidity event.

Finding a Specific Case or Lab Test

7. Click on the **Laboratory tab** to view the available test results.

8. On the laboratory tab, you will be able to see the Date of Collection, Specimen Source, Test Type, Organism, Test Result, and Performing Lab.

9. To view other previous test results the patient may have on file, click **Other Patient Labs** to expand the list.

Job Aid

Assigning Case to Investigator

Missouri DHSS — Department of Health and Senior Services

EpiTrax

Assigning Case to Investigator

To assign a case to an investigator, please follow the steps below:

1. Click **Workflow Options.**

2. Click **Accept Event.**

3. Click **Accept Event** in the pop-up.

Assigning Case to Investigator

4. The **Workflow Status** will change to **Accepted by LHD.**

5. Click **Workflow Options.**

6. Click **Assign to Investigator.**

Assigning Case to Investigator

7. Click **Select Investigator…** to select the correct investigator.

8. Click **Assign to Investigator.**

Job Aid

Accepting Investigations

Accepting Investigations

To accept an investigation, follow the steps below:

1. Click on **Workflow Options.**

2. Click **Accept Investigation.**

3. Click **Accept Investigation** in the pop-up.

Job Aid

Updating Cases

EpiTrax

Updating Cases

When updating cases with information gathered during the case investigation process, there is a list of minimum required fields to populate. Those required fields and how to populate them are outlined in the subsequent pages.

Demographic Tab

1. Open a CMR
2. Click the **Demographics** tab.

Edit Morbidity Event

| ⚙ Options ▼ | ⚙ Workflow Options ▼ | ↕ View ▼ | ↩ Navigate ▼ | | ✔ Complete Investigation | 🖨 | 🖫 Save & Continue | 🖫 Save & Exit |

Testfamily, Barbara
Rec   #: 202008930
Investigating Agency
CITY OF ST LOUIS DEPARTMENT OF HEALTH

Event type	**Workflow status**	**Investigator**	**Disease**
Morbidity	Under investigation	JASMIN MATOS	COVID-19
	State case status	**LHD case status**	**Event date**
			08/10/2020

Brief note
[   ] Save

| **Demographic** | Clinical | Laboratory | Contacts | Encounters | Investigation | Notes | Administrative |

Name

| **Last name** | **First name** | **Middle name** | **Parent/Guardian** |
| Testfamily | Barbara | | |

3. Populate the following fields:
   a) **Last Name**
   b) **First Name**
   c) **Middle Name (if applicable)**
   d) **Parent/Guardian**
   e) **Date of birth**
   f) **Street**
   g) **Unit Number**
   h) **City**
   i) **State**
   j) **Zip Code**
   k) **County**

   ⚠ **Note:** Certain fields may be auto-populated from the initial CMR creation. If other addresses are already listed, do not delete previous addresses when entering a new address.

   ⚠ **Note:** The following fields in the Demographic tab must also be filled out for a contact case: **Last Name, First Name, Birth Sex, Ethnicity**, and **Race**.

Updating Cases

4. You will also need to complete the required **Demographics** fields below:
   a) **Birth Sex**
   b) **Ethnicity**
   c) **Race**

5. Click **Save & Continue.**

Updating Cases

Clinical Tab

Next, you will need to enter the clinical information under the "Clinical" tab. Note, some of this information may be prepopulated.

1. Select the **Clinical** tab.
2. Ensure the **Disease** is COVID-19 (more diseases will be tracked in EpiTrax at a later date).
3. Populate the **Onset date** and **Date diagnosed** fields.

4. Click the correct radio button to answer the question: **Was the patient hospitalized?**

⚠️ **Note:** If a patient was hospitalized (i.e. due to a car accident) but the reason for hospitalization was not due to COVID-19, even the patient was diagnosed with COVID-19 while in the hospital, this field should be marked as **No**.

5. Populate the **Mortality Status** fields:
   a) **Died?**
   b) **Date of Death**
   c) **COVID-19 caused death?** (this field will only appear if the **Died?** field is answer as "Yes"

Updating Cases

Clinical Tab

Recording COVID-19 Vaccine Doses in a CMR

1. Click the **+ Vaccine** button.

2. Enter information pertaining to the **FIRST** vaccine dose into the fields that appear.
   a) Vaccine (COVID-19 is the only option)
   b) Administered Date
   c) Dose number in Series
   d) Manufacturer
   e) Vaccination record identifier
   f) Vaccine comment (open text field)

3. Click **Save and Continue**.

4. (If applicable) To add a second dose, repeat steps 1 and 2.

5. Click **Save and Continue**.

Note: The fields used for vaccine data in EpiTrax are for Epidemiological use only. The official vaccine registry will continue to be ShowMeVax.

EpiTrax is NOT currently integrated with ShowMeVax – vaccine records entered into EpiTrax will not be imported into ShowMeVax, and vice versa. Vaccine records must be manually entered into both systems.

Updating Cases

Laboratory Tab

Next, you will need to enter the clinical information under the "Laboratory" tab.

1. Select the **Laboratory** tab.
2. Click **+ Add Lab.**

3. In the Labs section, populate the following required fields (screenshot on next page):
   a) **Performing lab**: Name of the lab that performed the test
   b) **Ordering facility**: Name of the facility that ordered the test
   c) **Patient address at collection**: Patient address at time of collection (dropdown)
   d) **Collection date time**: Specimen collection date. Time is not needed
   e) **Specimen source**: Enter what's on the lab slip or Other if uncertain
   f) **Test type**: If it is on the lab slip, if not leave blank
   g) **Organism**: SARS-CoV-2
   h) **Test result**: Select test result from dropdown
   i) **Lab test date**: Date the test was completed by the laboratory. Sometimes named "Lab result date" or "Lab reported date" on the lab report. Time is not needed.

Updating Cases

Laboratory Tab

Updating Cases

Contacts Tab

Next, you will need to enter the clinical information under the "Contacts" tab.

1. Select the **Contacts** tab.

2. Follow the steps linked here to search for a contact to assign to the case. Or follow the steps linked here to add a new contact to the case.

3. For any contact the case may have, populate the following fields:

   a) **Contact disposition**: Select from the dropdown the applicable contact disposition.

   b) **Contact disposition date**: Enter the contact disposition date (date of last exposure).

   c) **Contact type**: Select the most appropriate option from the dropdown – if no appropriate option is available, select **Other**.

> ⚠️ **Note:** Contact records must be filled out by editing the actual Contact event. Please see the Contact Event section in this job aid for further detail.

Updating Cases

Investigation Tab

The Investigation tab has two different forms to fill out:

1. **Admin Interview Information:** filled out during the **interview stage**.
2. **2019-nCoV Form:** filled out during the **investigation stage**.

⚠️ **Note:** When a Contact event is promoted to a Morbidity event, the 2019-nCoV Form must be added. Additionally, when a person is re-infected, the Reinfection form must be added (form not shown in photo).

Additionally, there are more sections in the Investigation tab that do not change regardless of the chosen form.

1. **Contact Oriented:** This section provides fields to note whether this case is a food handler, health care worker, associated with group living, or associated with day care. This also provides a field to note the occupation of the case.

Updating Cases

2. **Exposures:** This section contains fields to record places that a case visited during their infectious period and may have potentially exposed others. To add an exposure:
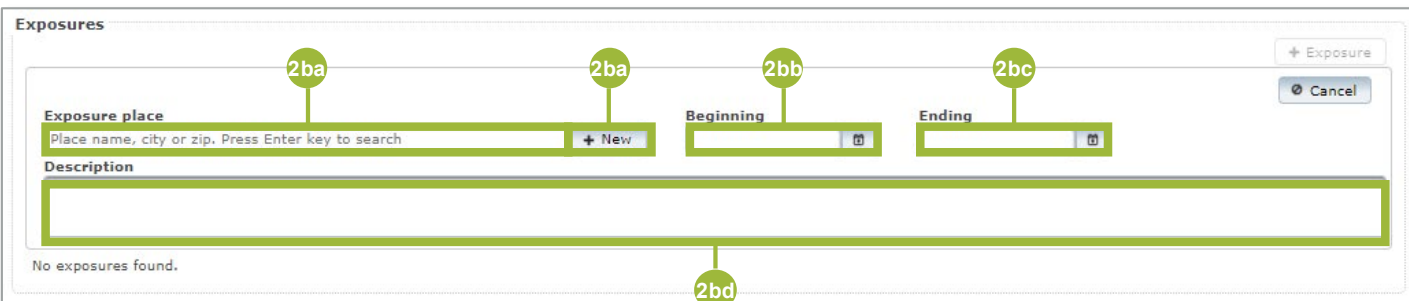
   a) Click **+ Exposure.**

2a

Exposures	
	+ Exposure
No exposures found.	

   b) Populate the following fields:

      a. **Exposure place**: You can search for a previously entered exposure place by typing a place name, city, or zip code and then pressing **Enter**. If the place is not already entered in the system, you can add a new place by clicking **+ New** (see steps below).

      b. **Beginning**: This is the date and time the potential exposure began.

      c. **Ending**: This is the date and time the potential exposure ended.

      d. **Description**: This is a free text box where you can enter any details about the potential exposure event as well as describe follow-up that has occurred.
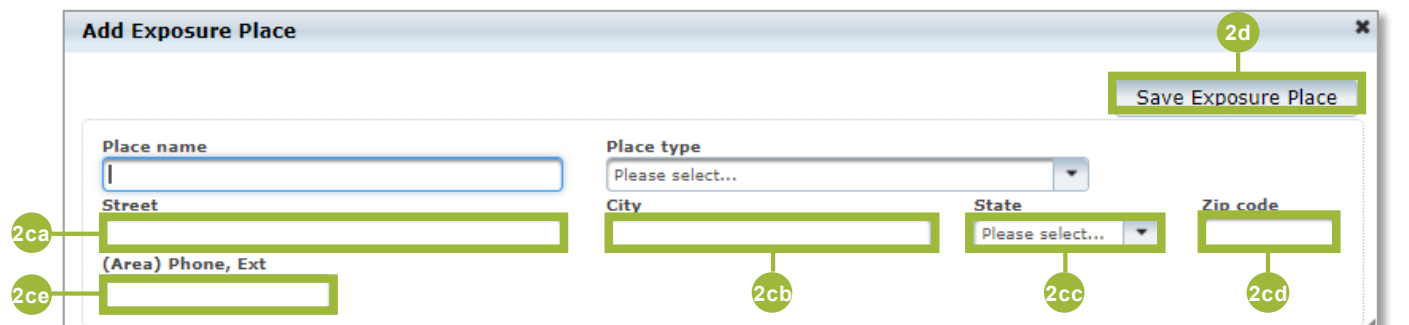
2ba **2ba** **2bb** **2bc**

Exposures

+ Exposure

⊘ Cancel

Exposure place
Place name, city or zip. Press Enter key to search   + New

Beginning

Ending

Description

No exposures found.

2bd

   c) After clicking **+ New** (step 2.b.a), populate the following fields to add an exposure place:

      a. **Street**
      b. **City**
      c. **State**
      d. **Zip Code**
      e. **(Area) Phone, Ext**

   d) Click **Save Exposure Place.**

Add Exposure Place   ✕

2d

Save Exposure Place

Place name

Place type
Please select... ▼

Street   **City**   **State**
Please select... ▼   **Zip code**

2ca

(Area) Phone, Ext

2ce

2cb   **2cc**   **2cd**

Updating Cases

2019-CoV Form

1. Click the **Case Info and Resolution Status** tab.

2. Scroll down to the **Resolution Status** section and populate the **Date of symptom resolution/recovery or isolation ended for asymptomatic patients.**

3. Click the **Symptoms and Clinical Course** tab.

Updating Cases

2019-CoV Form

4. Scroll down to the **Symptoms Present** section and click the correct radio button for **Were symptoms present during course of illness?**

5. Click the **Past Medical and Social History** tab.

6. If the case is a female, scroll down to answer the following fields:
   a) **If female, currently pregnant**
   b) **Trimester at onset of illness**
   c) **Number of weeks gestation at time of onset**

Updating Cases

2019-CoV Form

Recording Genotype (Variant) Testing in a CMR

1. Click the **SARS-CoV-2 Testing** tab.

2. Scroll down to the **Genomic Testing (e.g. Variant)** section.
3. Select appropriate bubble for "Genomic testing completed?" question.
4. If Yes is selected, more options will appear.
   a. Select the specific variant type (if known).
   b. If variant type is unknown, select Unknown.
   c. If variant type is known but not included, select Other. This option will cause a text box to appear for recording addition information.
5. Click **Save and Continue**.

Updating Cases

Administrative Tab

The next tab to fill out is the **Administrative** tab.

1. Click the **Administrative** tab.

2. Populate the following fields:
   a. **LHD case status:** Defines case status by LHD
   b. **Outbreak associated:** Case or contact is associated with a specific outbreak in EpiTrax
   c. **Outbreak name:** Name of the outbreak
   d. **LHD investigation/intervention started:** Day case investigation began
   e. **LHD investigation completed:** Day case investigation was completed
   f. **Investigation Outcome:** Outcome of case investigation
   g. **Facility:** Name of the reporting facility

Updating Cases

Contact Event

Demographic Tab

Contact events have a smaller list of minimum required fields to complete during an investigation. The following pages will highlight the tabs and fields to focus on.

1. Open a **Contact CMR** (same process as opening a Morbidity CMR).

2. Click on the **Demographic** tab.

3. The **Last name** and **First name** fields should already be auto-populated. If not, populate the fields with the correct name.

4. Enter the **Date of birth.**

5. Scroll down and populate the following fields:
   a) **Birth sex**
   b) **Ethnicity**
   c) **Race**
   d) **Contact disposition**
   e) **Contact disposition date**
   f) **Contact type**

Updating Cases

Contact Event

Administrative Tab

The next tab to fill out is the **Administrative** tab.

1. Click the **Administrative** tab.

2. Populate the following fields:
   a. **Outbreak name:** Name of the outbreak
   b. **Facility:** Name of the reporting facility

Job Aid

COVID-19 Reinfections

EpiTrax

COVID-19 Reinfections

In rare cases, people can be experience COVID-19 reinfection. It is important to verify that these cases are true reinfections and not a continuation of the patient's original case. The Investigative Criteria for Suspected Cases of SARS-CoV-2 Reinfection (ICR) from the CDC specifies the conditions for which a patient's case could be considered a reinfection. Based on this current guidance, at a minimum, the second unique infection of COVID-19 must occur 90 days after the first infection. If a positive lab comes in prior to the 90 day mark, you should update the existing CMR as if there is no difference between the infections.

If you determine that a new positive lab is the result of a reinfection, this should be noted in EpiTrax. There are two options for doing so:

1. **Create a new CMR.**

Follow instructions found earlier in the EpiTrax User Guide to create a new case morbidity report for the patient. You can then email epitrax@health.mo.gov to request the positive lab be transferred to this new CMR.

2. **Add the 'COVID-19 Recurrent Presentation' form to the existing CMR.**

This form can be found on the **Investigation** tab of the existing CMR. To add this form, click 'Manage' within the Investigation tab, then click 'Add next' to the COVID-19 Recurrent Presentation form.

Once the form is added to the CMR, you can select which instance of infection you wish to access by selecting the appropriate form on the left side of **the Investigation** tab. For the first instance, select the 2019-nCoV form. For the second, more recent infection, select the Recurrent Presentation form.

Job Aid

Entering COVID-19 Deaths in EpiTrax

Entering COVID-19 Deaths in EpiTrax

It has come to DHSS' attention that some COVID-19 mortality totals reported on the DHSS Dashboard do not match internal records. EpiTrax is the authoritative source for the DHSS Dashboard totals. It is very important that LHDs enter death-related information as soon as they are notified.

To enter death-related information, follow the steps below:

1. Click on the case's **Clinical** tab

2. Scroll down to the **Mortality Status** section

3. Populate the following fields:
   a) **Died?:** Yes
   b) **Date of death:** enter the case's date of death
   c) **COVID-19 caused death:** select the correct choice

Selecting Yes

Selecting **Yes** will prompt the question **COVID-19 caused death?** <u>You may not be able to enter a response immediately and will have to update when you receive more information about the official cause of death.</u> However, you should save the record to populate the **Died?** and **Date of Death** fields.

⚠️ **Note:** There are several routes to determine if COVID-19 caused the patient's death:

1. Upon being notified of a death, local public health authorities may contact the certifier (physician, medical examiner, or coroner) to confirm that the death was caused by COVID.

2. Every two weeks, LHDs will receive a listing of all COVID deaths in their jurisdiction. These lists will be pushed into your FTP folders and will contain the information that you need to complete the **did COVID cause death** field in EpiTrax. DHSS is working to update this information in EpiTrax immediately after sending those lists, but it is best practice to verify that the record has been updated.

Often, this information is not received by DHSS until 4-6 weeks after the date of death. It is possible that your agency will be notified of the death before the death certificate is completed.

Entering COVID-19 Deaths in EpiTrax

Selecting No

When a physician or medical examiner has not confirmed COVID-19 as a contributing cause of death, the **COVID-19 caused death?** question should be marked as *No*. In some cases, the answer may be temporarily *Unknown*.

For example, DHSS has received reports on individuals injured in motor vehicle accidents. These patients were tested at the hospital and confirmed as positive for COVID-19. In these cases, LHDs should confirm with the physician or medical examiner if COVID-19 caused the death.

The **Investigation** tab also houses death information, but the **Clinical** tab is the main data source for mortality reporting.

⚠️ **Note:** The new Deaths in my Jurisdiction Export will show LHDs all the deaths listed in EpiTrax for people who have a state case status of Confirmed and have had a COVID-19 positive lab entered. LHDs will be able to select their jurisdiction and enter the range of dates they are interested in to see the number of deaths that have occurred during this time.

LHDs will also need to filter the export in excel to only view records where COVID-19 was marked as the actual cause of death since these records are the only ones that are uploaded into the State dashboard. This export purposefully contains all deaths where COVID-19 was marked/unmarked as the cause of death so that LHDs are able to accurately investigate whether COVID-19 was the true cause of death.

Job Aid

Assigning an Outbreak in EpiTrax

EpiTrax

Creating or Adding an Outbreak in EpiTrax

1. If this is the first outbreak at this facility/location…

To request a new outbreak be created, the LHD must request an outbreak ID by emailing covid.outbreak.notifications@health.mo.gov. All outbreaks should be named and entered into EpiTrax by DHSS staff only. The outbreak group tracks all outbreaks when outbreak IDs are requested and uses a specific naming convention for outbreak IDs. Once the outbreak ID is created, the reporting agency will be notified by the outbreak group.

2. If this is NOT the first outbreak at this facility/location…

If a facility or business has an additional outbreak since the last outbreak ID was requested, the outbreak group has a system to distinguish a new outbreak and can send another ID once requested by email. Please contact the outbreak group to request any subsequent outbreak IDs be created in EpiTrax.

Assigning an Outbreak in EpiTrax

When an outbreak occurs, any associated cases must be assigned to an outbreak ID in EpiTrax.

A COVID-19 case is entered in EpiTrax and follows the event workflow where it is assigned to an LHD and the case investigation begins.

As the LHD investigates, information about potential exposures the case had during the incubation period should be entered in the **Exposures** section as outlined below:

1. Click on the **Investigation** tab and scroll down to the **Exposures** section.

2. Click **+ Exposure.**

3. Enter the information for:
    a) **Exposure place**
    b) **Beginning** exposure date
    c) **Ending** exposure date

Assigning an Outbreak in EpiTrax
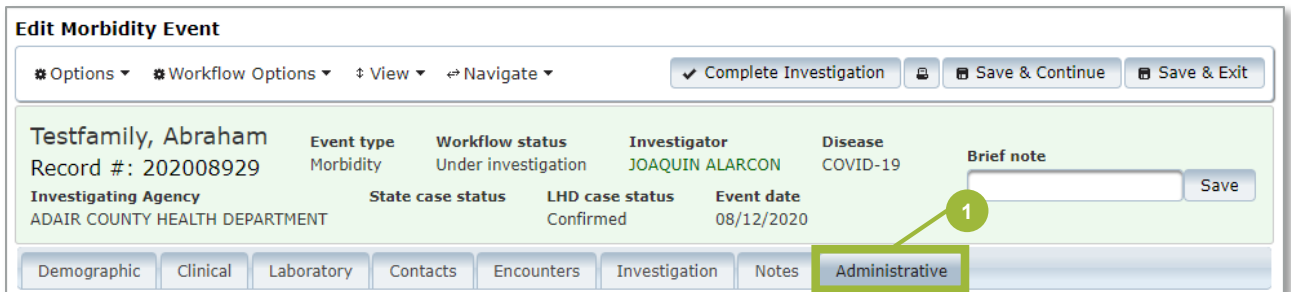
If there are other exposures at the same place and the case is considered part of an outbreak, the LHD requests an outbreak ID from DHSS.

If the exposure place/event is determined to be an outbreak, the LHD should request an outbreak ID by emailing covid.outbreak.notifications@health.mo.gov.

⚠️ **Note:** All outbreaks should be named and entered into EpiTrax by DHSS only, as the outbreak group keeps track of all outbreaks when the IDs are requested, and names them using a specific naming convention.

DHSS will create an outbreak ID in EpiTrax and inform the affected LHD(s). The outbreak ID must be added to each event that is associated with the outbreak. The LHD will add the outbreak ID to any cases associated to that outbreak by following the steps below:

1. Click on the **Administrative** tab.
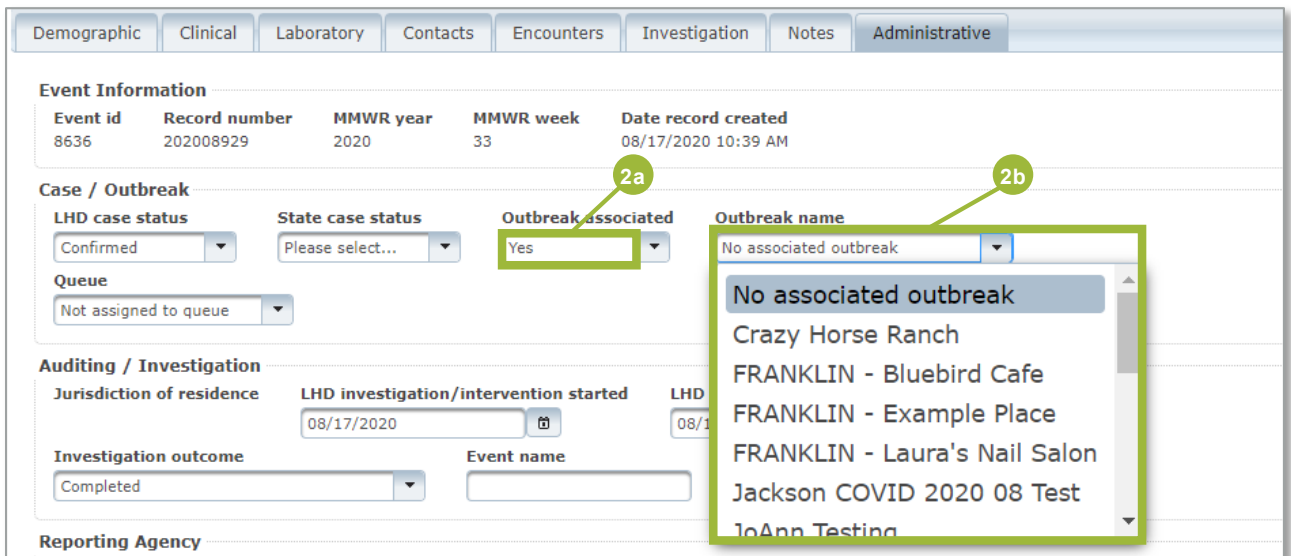
2. In the **Case / Outbreak** section:
    a) Click **Yes** in the **Outbreak associated** field.
    b) Then click the correct Outbreak ID in the **Outbreak name** field.

Assigning an Outbreak in EpiTrax

Outbreak Report

Once case investigation is complete, the LHD may link additional cases to an outbreak ID, if necessary. If an outbreak report is required, the LHD may execute the report.

To view or edit a specific outbreak:

1. Click on **Outbreaks** in the top green bar. This will bring up a list of all the outbreaks entered into EpiTrax by DHSS.

2. Search for the outbreak that you want to view and/or edit, and then click on the **Options** button on the left of the desired outbreak.

3. Choose the action you want to take.

The **Edit Outbreak** function will allow the LHD to view the cases associated with the outbreak. You can also add or remove events from the outbreak; however it is recommended that you use the steps previously described and enter an outbreak directly into the event.

Assigning an Outbreak in EpiTrax

The **Edit Outbreak** function will allow the LHD to view the cases linked to the outbreak. You can also add or remove events from the outbreak; however it is recommended that you use the steps previously described and enter an outbreak directly into the event.

4. Once all cases are associated to the outbreak ID, the LHD will then link contacts to the outbreak if applicable.
   a) Open a Contact event.(same process as opening a Morbidity event)
   b) Click on the **Administrative** tab.
   c) Click **Yes** in the **Outbreak associated** field.
   d) Click the correct outbreak in the **Outbreak name** field.

Assigning an Outbreak in EpiTrax

5. Indicating that an Outbreak Report is required will prompt several fields to complete by the LHD.
   - Outbreak Reports are not currently required for COVID-19 outbreaks but will be for other conditions in the future.

6. Once the outbreak is complete and no other cases, facilities, or contacts are associated with the outbreak, the LHD marks the outbreak **Completed**. To do this, follow the steps below:
   a) Repeat steps 1-3.
   b) Click on the **Admin** tab.
   c) Click on the **Status** field and select **Completed.**

Job Aid

Resolving Locked Records

EpiTrax

Resolving Locked Records

These are the instances when you will be locked out of a record in EpiTrax:

1. **You have timed yourself out of EpiTrax.** For security purposes, EpiTrax automatically locks after 15 minutes of inactivity. This prevents users from leaving their computer unattended and risking someone else seeing PHI in a person's record.

When this happens, you must log back into EpiTrax. To prevent this from happening, save and close cases when you are finished, and ensure you log out of EpiTrax when you will not be using the system for an extended period of time.

2. **Someone else is editing the record.** EpiTrax locks a record when a user is editing it. This prevents more than one user from modifying the same record at the same time. The lock releases when the user exits "edit mode" or when the lock has expired.

When this happens, you may force the other user out of the record by clicking **Force Unlock & Edit**. Or you may return to the record at a later time.

3. **You are editing the record in two windows or tabs.** It is possible that you are causing your own lock-out if you have the same record open on two different tabs. One of the open records will have the lock and the other open record on the other tab will not have the lock.

When this happens, you will need to **Force Unlock & Edit**. To prevent this from happening, do not work one record in multiple windows or tabs.

Resolving Locked Records

4. **You have timed yourself out of the record and your lock on it has expired.** The following error occurs when you are entering large amounts of data without saving and your lock expires.

Edit Morbidity Event

❌ **Failure** Unable to save. Your lock is no longer valid.
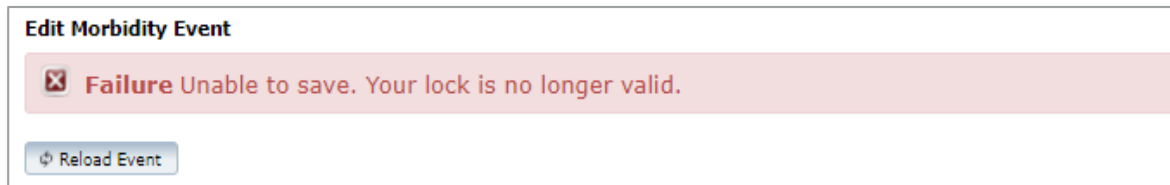
↻ Reload Event

When this happens, you need to reload the event to renter the data and save it. To prevent this happening, save frequently while entering data.

If you are locked out for any other reason, please report your experience to the EpiTrax team at epitrax@health.mo.gov or through our online help desk ticketing system.

Job Aid

Closing Cases

Missouri DHSS
Department of Health and Senior Services

EpiTrax

Closing Cases

Once you have completed a case investigation and have entered all necessary information into the event record, and once the case has met the conditions to discontinue isolation, you should close the case out by performing the below steps:

1. Click **Workflow Options.**

2. Select **Complete Investigation.**

3. The LHD will need to review the record, ensure the data is accurate, and then approve the event.

4. (Once internal review is completed) Select **Approve Event**. This is the final step before the case is sent to the state level and indicates to DHSS that the data is ready for review and submission to the CDC. However, the DHSS process will not be immediate.

Job Aid

Filtering & Exporting – Public Report Templates

Missouri
DHSS
Department of Health
and Senior Services

EpiTrax

Filtering & Exporting – Public Report Templates

To help jurisdictions identify new cases of COVID-19 in EpiTrax, DHSS has developed two exports that can be found in the "Public Exports" folder.

- The **New Labs Download** will show the number of people already within your jurisdiction who have a positive, indeterminate, pending, or inconclusive lab result entered into EpiTrax.

- The **Routed to LHD Download** will show you labs with positive, indeterminate, pending, and inconclusive results that were entered into EpiTrax and newly routed to your jurisdiction.

To download the reports:

1. Navigate to the **Exports** link in the upper right-hand corner of the green banner.
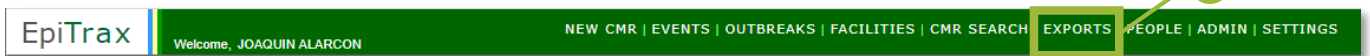
2. Choose **Public Exports.**
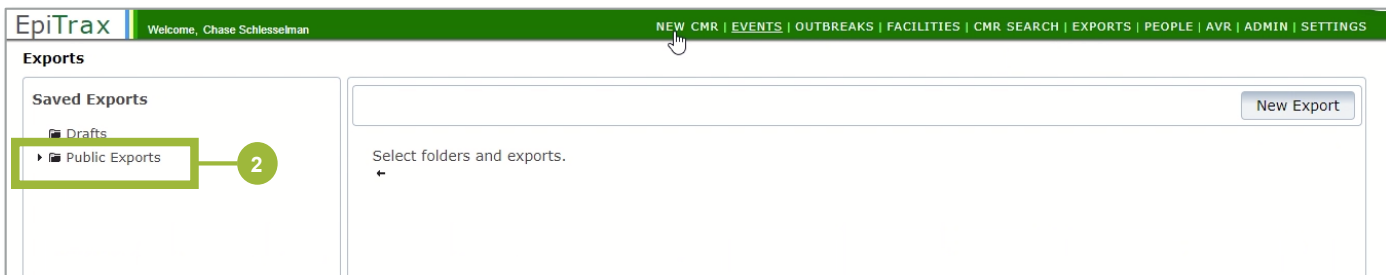
3. Scroll down to the folder **DHSS Export Templates**.

4. Click **New Labs Download** (or **Routed to LHD Download**).

5. Click the **Copy** button.
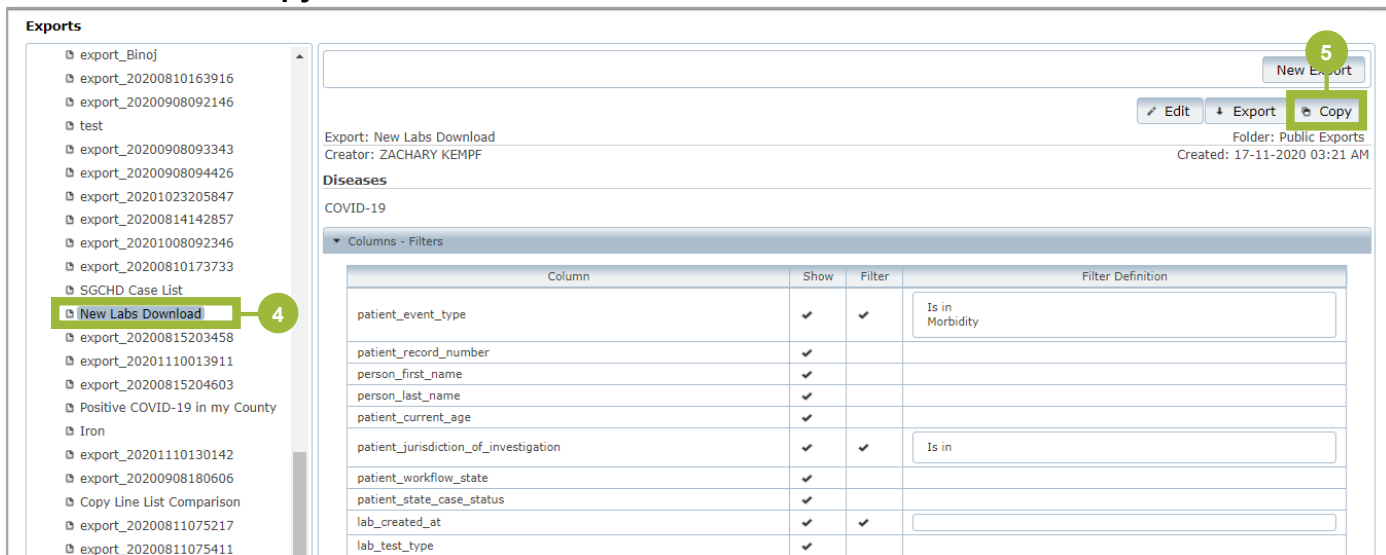
Filtering & Exporting – Public Report Templates

6. Click the **Is in** button and select your jurisdiction.
7. Enter the desired date range.

8. Change the name of the export.
9. Click **Save.**
10. Click **Export**.

Filtering & Exporting – Public Report Templates

10. The saved export template will now appear under the **Drafts** folder.
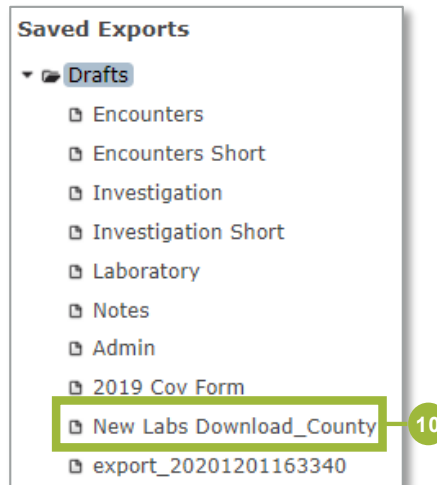
For future exports of this data, you can click the **Drafts** folder (screenshot above) and readjust the filters. When viewing the export data in Microsoft Excel, please ensure the **lab_created_at** values are in a readable format.

⚠️ **Note:** These templates are intended to identify new labs/cases but may not be comprehensive. If you notice positive cases that are not captured using these exports, please email epitrax@health.mo.gov.

Together, the two reports will communicate:

- The number of people within a jurisdiction who have had a positive lab entered into EpiTrax.

- The number of people with a positive lab that have been routed to a jurisdiction.

⚠️ **Note:** Cases will likely overlap and appear on both reports, especially if someone tests positive and is routed to your LHD on the same day. You will need to compare the cases between your lists to make sure you are not duplicating your efforts in case investigation.

You will need to adjust the **last_routed_to_lhd_date** variable to match the dates you used in the **New Labs Download** export to make sure you are comparing the same dates between both exports. You will also need to reformat your date fields when you export this list to excel.

The reason why you need to compare these two lists separately is because if you try to filter both date variables on the same export, you will only end up with cases that tested positive AND routed to you on the same day.

Running and comparing both reports should ensure you are not missing any cases in your jurisdiction.

⚠️ **Note:** Exports will contain confidential patient data. Please follow all appropriate data privacy guidelines.

Job Aid

Filtering & Exporting – Custom Reports

Filtering & Exporting – Custom Reports

To build custom reports:

1. Navigate to the **Exports** link in the upper right-hand corner of the green banner.
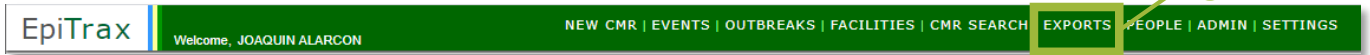
2. Choose **Drafts.**
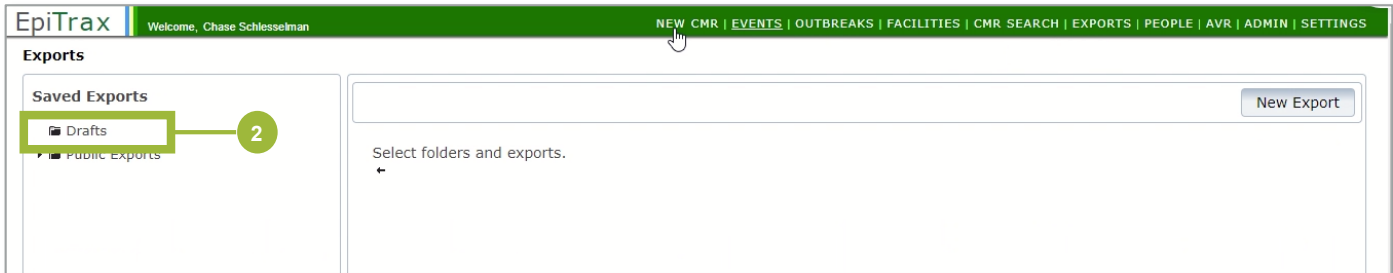
3. Click **Create Export Here.**
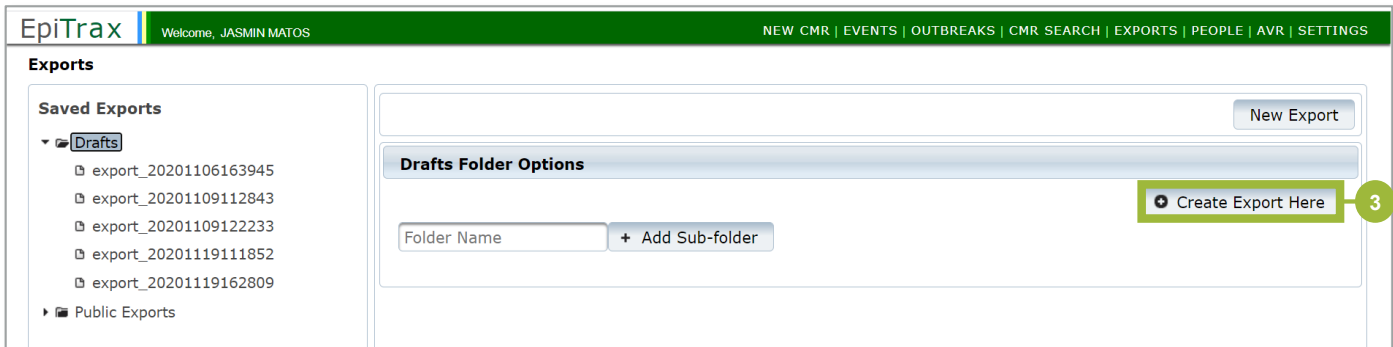
4. In the **Diseases** tab, click **CD Data** and then click **COVID-19.**
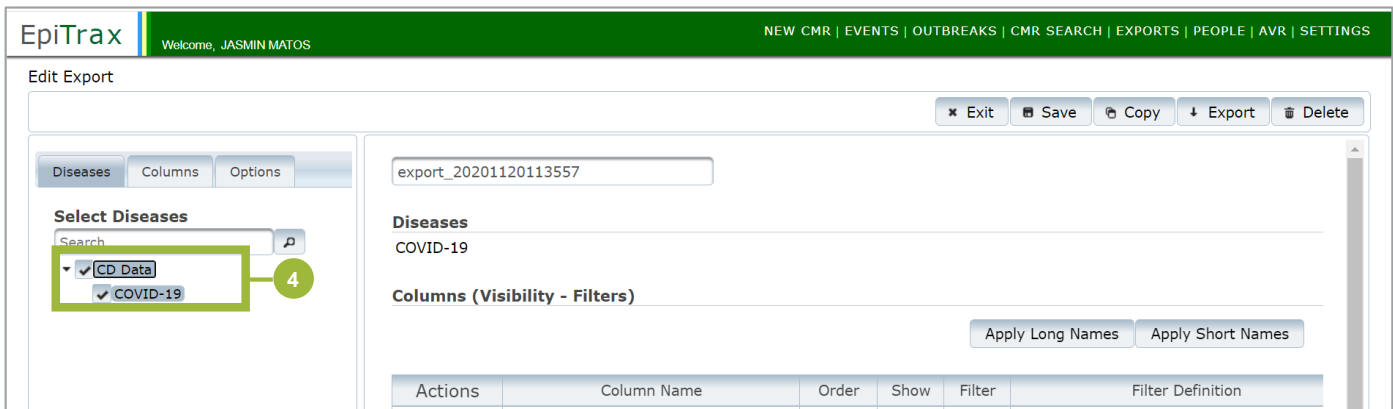
Filtering & Exporting – Custom Reports

5. Under the **Columns** tab, select the fields you would like to see on your export, which correspond with the record tabs in EpiTrax.

6. Click **Save.**

7. Once you save, you will see the **Form Columns** appear under **Core Columns**. All the information about symptoms and pre-existing conditions are found in the **2019_nCoV** subtab.

Filtering & Exporting – Custom Reports

8. Click on the **Filter** checkbox to add a filter in the **Filter Definition** column. For example, to add a filter for jurisdiction, click the **Filter** checkbox for the **Patient_jurisdiction_investigation** field, and select the jurisdiction from the dropdown menu.

9. Click **Save.**

10. Click **Export.**

Note: Exports will contain confidential patient data. Please follow all appropriate data privacy guidelines.

Looking for help?

Contact the EpiTrax Helpdesk with questions:
Email: EpiTrax@health.mo.gov
Hours: 8:00 am – 5:00 pm, Monday – Friday

Missouri
DHSS
Department of Health
and Senior Services

EpiTrax

EpiTrax FAQs

Frequently Asked Questions

Contents

EpiTrax vs MO ACTS

1.   What is EpiTrax?

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. Kansas, Utah, and some large cities currently use EpiTrax.

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.

2.   What is MO ACTS?

MO ACTS is a centralized contact tracing system shared between the Department of Health and Senior Services (DHSS) and local public health agencies (LHDs). This platform will enable agencies to more easily track, manage, and monitor cases. For more information, please check out the MO ACTS website, view the MO ACTS Simulation, or email moacts@health.mo.gov.

3.   Who uses EpiTrax vs who uses MO ACTS?

Case Investigators use EpiTrax during case investigations, while Contact Tracers use MO ACTS. After a Case Investigator routes a case for tracing, data will automatically flow from EpiTrax to MO ACTS. Note that, depending on your role and responsibilities, you may need to use both systems.

4.   Is MO ACTS available to all EpiTrax users currently?

EpiTrax users that have been granted a dual role of case investigator and contact tracer will be granted access to MO ACTS. If you are interested in bringing in volunteers or temporary staff to assist with contact tracing, please contact EpiTrax@health.mo.gov.

Getting Started with EpiTrax

5. How will I receive my EpiTrax account credentials?

You will receive an email from an EpiTrax account.

6. I did not receive an email from an EpiTrax account. What does that mean?

If you did not receive a welcome email, you will not have an EpiTrax account set up prior to implementation. All individuals who had a WebSurv account should have been migrated into EpiTrax with a similar role, but it is possible that someone may have been missed. In that case, please reach out to the EpiTrax Help Desk at epitrax@health.mo.gov and they will initiate an account request for you. You can also enter an account request yourself at https://redcap.link/maet_access.

7. Which web browsers are compatible with EpiTrax?

EpiTrax works well in Chrome, Firefox, and most versions of Edge. EpiTrax does not work well in Internet Explorer.

8. How can I get access to Chrome or Firefox?

DHSS Staff:

• Use the Software Center by clicking on Windows start and typing "Software Center" in the search box to select additional applications.

• Or, by submitting a ticket to ITSD.

LHD Staff:

• Check with IT support staff.

9. If I have watched the old WebSurv training videos, am I required to complete the EpiTrax training simulation?

It is recommended that you complete the EpiTrax training simulation even if you are an experienced WebSurv user as there are several key differences between entry in the two systems.

10. Is the EpiTrax Training Simulation available to all LHDs?

Yes. Demos, reference guides, and training simulations are posted on the EpiTrax website.

Transition from WebSurv to EpiTrax

11. Can I still use Websurv?

The implementation of EpiTrax only affects reporting and management of COVID-19 cases. All other disease conditions will continue being entered into Websurv.

Effective 10/1/2020, all new COVID-19 labs will be added into EpiTrax. WebSurv screens will be locked so that new COVID-19 cases cannot be added, and will serve as an archive for historical records. LHDs will still be able to view cases in WebSurv for reference.

A schedule for migrating other reportable conditions managed by BRDI and the environmental conditions managed by the Bureau of Environmental Epidemiology will be established at a later time.

12. Will current data, including PUI forms, be migrated into EpiTrax from WebSurv?

Yes. Data was migrated on 10/4/20 from Websurv to EpiTrax for positive patients in WebSurv who did not have data in EpiTrax.

13. Is there an estimate for when API access (akin to API access to the WebSurv data warehouse) will be available to local health departments for EpiTrax?

EpiTrax has a built-in Export feature that will allow users to pull the same type of data available through the WebSurv data warehouse. If API access becomes available, users will be notified.

EpiTrax Functionality

14. Will the notification system still be up so we do not lose new cases reported by labs/clinicians?

Yes, but there will be some modifications:

- EpiTrax and related tools contain a notifications feature that will send hourly emails. However, the feature does not have the capability to send text messages. This capability may be available through a separate product. For the time being, the existing SFTP folders will be used as they allow both email and text notifications.

  - Documents that are received through fax, mail, etc., will continue to be dropped into the LHD folders as they are received.

  - Many submitters have started sending electronic messages for ingestion, which means there is no physical document for the notifications team to sort and send. DHSS will run a report out of EpiTrax hourly and drop it into the existing notification folders so that LHDs will still be notified of the ingested cases.

- As data submitters continue to be transitioned to electronic reporting and reports can be immediately ingested, the number of actual physical documents received will be reduced and there will no longer be a lag between receipt of a report and entry into the disease registry system. Cases will appear immediately in LHD workflows. It is anticipated that the existing staff-intensive notification process will be phased out at that point after adequate messaging is given to LHDs.

15. Will LHDs continue to receive a list of negative results daily?

Yes, the same lists will be provided for the time being since COVID-19 data is now stored in multiple databases. Eventually, all COVID-19 negative results data will be moved to EpiTrax and the line lists will likely end at that point as all data will be accessible in one place. COVID-19 negative results data migration into EpiTrax is expected to be completed by 11/7/20. LHDs will be able to use the Export feature to pull lists of results.

DHSS can assist with setting up Export reports, which can be saved and re-run whenever needed.

16. Will priority condition emails still be sent when a priority disease condition has been entered?

This functionality is not currently available in EpiTrax. DHSS will continue to send priority condition emails for other conditions using WebSurv.

17. Will Persons Under Investigation (PUI) information be available in EpiTrax?

If information is entered into the correct fields in EpiTrax, it will be available through the Export feature. Please make every effort to find the correct field to enter the information rather than putting information in notes or just attaching the document. If the information is not entered in the correct fields, it cannot be pulled for analysis.

18. What access will local health departments have to the data from PUI forms in EpiTrax? In which format will that be available?

Local health departments will have the ability to view any information entered into EpiTrax fields, as long as that case has either been assigned to their jurisdiction or assigned to a jurisdiction with which there is an existing data sharing agreement.

Data in many fields can be pulled through the Export feature. DHSS staff are also instructed to attach documents on the Notes tab. Electronic messages that are ingested show the original HL7 message on the Notes tab.

19. How do we search name variations accurately?

Use the fields below to search existing person records in EpiTrax:

- Last Name
- First Name
- Middle Name
- DOB

Based on the search criteria, EpiTrax will sort the list of results in descending order according to the Score Ratings. The Score Ratings with more stars indicate a better potential match with the searched name. Moreover, the birthdate along with the maximum Score Ratings indicates that the listed person matches very closely to the searched person.

20. Is there a Notes section viewable only to the people who have access? If someone has access to the database, why would they not have access to the information?

During trainings from the vendor and other EpiTrax states, it was recommended to DHSS that some caution be exercised when considering whether to enter sensitive information into the Notes tab. Currently, everyone user has access to view the information in the Notes tab.

21. I am trying to view an attachment, but I keep getting the error message "URL NOT FOUND – The requested URL was not found on this server." What does this mean?

You may be working with an electronic record that was ingested. If this is the case, there is no attachment as the report was sent to DHSS as an electronic message, not as an actual document. The way to tell if this is the case is to check the Notes tab to see if there is a note stating that it is an Original HL7 Message. You can view the laboratory information on the Laboratory tab. If you would like to see all information available in the record, choose View – Show Accordion.

22. How can I learn more about exporting?

Check out the Exporting section of the User Guide. A step-by-step video showing how to complete this process is also available.

It is important that when exporting, the file name is modified to have a character that is not a number as the leading character. For example, 2019_nCoV_col_case_cdcreport_dt should be modified to read _2019_nCoV_col_case_cdcreport_dt in order to properly export.

23. How do I accept a case?

The EpiTrax User Guide contains a step-by-step explanation of how to accept a case using the Event Workflow.

24. How do I reopen a case in EpiTrax once it is closed?

The Workflow History section under the Workflow Options tab displays a history of the workflow actions. Depending on the most recent workflow action, you will follow different steps to reopen an investigation.

If the most recent workflow action is Investigation Complete:

1.   Click on **Workflow Options**
2.   Click **Re-open LHD**

Note: If the most recent workflow action is Approved by LHD or Closed, the LHD should reach out to their District Epis to let them know that the case needs to be re-opened and why.

25. How do I add an investigator to the system or a case?

To request access to EpiTrax and be added as an investigator to the system, you will need to complete the redcap survey.

See the User Guide for guidance on completing General User Information as a new investigator. Click here to see how to add an investigator to a case.

26. How do I add a new outbreak?

To request a new outbreak be created, the LHD must request an outbreak ID by emailing covid.outbreak.notifications@health.mo.gov. All outbreaks should be named and entered into EpiTrax by DHSS staff only. The outbreak group tracks all outbreaks when outbreak IDs are requested and uses a specific naming convention for outbreak IDs.

27. How do I link a case to an outbreak?

To link a case to a previously added outbreak, follow the steps below:

1. Click on the **Administrative** tab on the Edit Morbidity Event page

2. Under the Case / Outbreak section, update **Outbreak associated** to **Yes**

3. Click on the **Outbreak name** field and select the appropriate outbreak name.

    a) You can find the name by scrolling through the alphabetical list or typing the first letter of the outbreak name to be taken to that section of the list.

4. Click **Save & Continue**

28. What is the difference between the Save and Continue and the Save and Exit buttons?

Save and Continue will save the work you have done up to that point, but you will remain in the record and can continue editing it. It will appear to other users as "locked", and they will not be able to edit it.

Save and Exit will save your work and take you out of the record. Other users will be free to edit the record.

Note: It is recommended that you save frequently as you work, at a minimum when you move from one tab to the next. Certain pieces of information will not be loaded into subsequent fields if the record is not saved.

29. What do I do when I am locked out?

There are at least two instances when you will be locked out of EpiTrax:

Instance 1:

For security purposes, EpiTrax automatically locks after 15 minutes of inactivity. This prevents someone from leaving their computer unattended and risking someone seeing PHI in a person's record. When this happens, you must log out and back into EpiTrax.

To prevent this from happening, save and close cases when you are finished working on them and assure you log out of EpiTrax when you will not be using the system for an extended period of time.

Instance 2:

EpiTrax is designed to lock a record when the system goes into "edit mode". This is to prevent 2 users from modifying the same record at the same time. When the user exits edit mode on the record the lock is released.

It is possible that you are causing your own lock-out if you have the same record open on two different tabs. One of the open records will have the lock and the other open record on the other tab will not have the lock.

Note: You can do a "force unlock" by pressing the Force Unlock button in the top right of the screen. However, be mindful if there are 2 users attempting to edit the same record the record could get saved with mixed edits and some edits could get lost.

Here are some other hints that might help you avoid getting locked out:

1. Only click buttons once to avoid multiple commands. It takes several seconds for EpiTrax to process a command. Look for the loading icon in your browser tab to confirm that the system is working on your command.

2. Click the EpiTrax logo at the top of the screen to return to the home screen.

If you are locked out for any other reason, please report your experience to the EpiTrax team at epitrax@health.mo.gov or through our online help desk ticketing system.

30. Can notes be removed?

No. However, users can click the Strikethrough button on the upper right-hand side of the Notes tab to cross out information.

31. EpiTrax is not letting me edit a record. Why is that?

EpiTrax is designed to lock a record when the system goes into "edit mode". This is to prevent 2 users from modifying the same record at the same time. When the user exits edit mode on the record the lock is released.

32. If I am assigned as the investigator to a case, can other people in my LHD edit my assigned case?

Anyone with EpiTrax permissions can edit a case. However, as long as you are the investigator assigned to the case, your name will appear as such under the "Assigned Investigator" label. Additionally, if any questions about the case arise at the state level, you will be the person contacted by the state. Keep in mind that EpiTrax does not track version history, so you will not be able to see which changes were made by whom. Be careful to only have one person editing a case at a time to avoid locking the event.

33. What is the best way to get all the cases for any given day?

The best way to view all cases of new labs and cases routed to your LHD is by running two exports:

- New Labs Download
- New Cases Routed to LHD

Together, the two reports will communicate:

- The number of people within a jurisdiction who have had a positive lab entered into EpiTrax.
- The number of people with a positive lab that have been routed to a jurisdiction.

Please see the Filtering & Exporting – Public Report Templates in the User Guide for more information.

34. What is the minimum amount of information required to create a new CMR?

To create a CMR, the only data needed is the patient's positive lab, full name, and phone number. Before creating a new person, it is best practice to search for the person first, to not create duplicates.

Note: the patient may already be in the system as a contact, in which case you could just promote the contact event to a morbidity event.

As you conduct your case investigation, please review the data dictionary for all the minimum required data fields.

Jurisdictions

35. If a case is assigned to a wrong jurisdiction, will LHDs be able to see that?

For COVID-19 data, the determination was made to allow all users to see data from all jurisdictions but not edit the data. Meaning that you would be able to see a case if you search for the record, even if it's not assigned to your jurisdiction. However, the assigned jurisdiction or DHSS would need to route the case to your jurisdiction in order for it to appear in your workflow. There are detailed instructions on completing this process in the EpiTrax User Guide.

36. How will a user find new open COVID cases that need to be followed up on?

Cases will be assigned to a jurisdiction in EpiTrax. The case will appear in the county's workflow and on the dashboard. The How to Identify New Cases in EpiTrax job aid outlines how to set filters on the EpiTrax Events page to view new cases only.

You can also use the Tasks functionality to create reminders. Tasks will appear in a list with a due date, case number, patient name, status, and priority.

37. How are cases reassigned to a different jurisdiction?

All LHD users have been given access to reassign a case to another jurisdiction. Under Workflow, choose Route to LHD and select the appropriate agency. The Re-Routing Cases in EpiTrax job aid provides a guide on how to complete this procedure. Send out-of-state case reassignments to DHSS.BRDIEpiTraxSupport@health.mo.gov.

38. If I enter an address with no county will the system assign a county?

If the address is deemed valid by the geocoder, yes. If the address is not valid, a county will not be automatically added. To fix this, either:

1. DHSS staff can search for it using the DHSS geocoder.
2. Send it to someone who can research the person for you in LexisNexis or Missouri Health Connect.
   1. During regular business hours you can email DHSS.DCPH-SDP-%20DiseaseInvestigationDispatch@health.mo.gov.
   2. Outside of regular business hours you can email DHSS.ClinicalApprovals@health.mo.gov. This account is monitored daily from 4AM to midnight.

39. If I update a jurisdiction, will the newly responsible county be notified?

Yes, the case will appear in the new county's workflow.

40. Can a case be routed to a county different than the county assigned using the provided address?

Yes. You can go to Workflow and choose Route to LHD to assign the case.

41. If the home address is not listed on a report and you are adding a new person into EpiTrax will the jurisdiction be assigned based on the medical provider's address?

Instance 1 – Home address found in WebSurv:

If a report comes in without an address, the notifications team at DHSS will first check WebSurv to see if the person already has a case. If so, they will add a text box with the WebSurv address to the document.

Instance 2 – Home address found in EpiTrax:

If the person does not have a COVID case in WebSurv, the data entry team will check EpiTrax to see if an address is available there from a prior case. However, they will not add a text box with the EpiTrax address to the document because the address will already be available in the system when the entry team retrieves the record.

Instance 3 – Home address not found in either system:

If the person does not have a COVID case in either system, the notifications team will research using other tools and note any address found on the report. If no address can be determined after all of these steps are taken, the report will be entered without a patient address and the case will be assigned based on the address of the medical provider.

Instance 4 – Medical provider address not found:

If there is no medical provider address, the case will be assigned based on the address of the lab.

Instance 5 – No address found at all:

If no addresses are available, the case will be assigned to DHSS to make calls. This is the same method of jurisdiction used by WebSurv and recommended by the CDC.

42. What happens if a case does not have the correct locator information, and it cannot be assigned to the correct jurisdiction?

EpiTrax staff will perform research to identify the correct address and assign to the proper jurisdiction. On the back end, BRDI will work with labs and providers to improve the data collection process.

43. How should I record cases for homeless or transient populations?

Most transient individuals will have an address that they can use for mail or to be contacted. Where this is not the case, investigators may use the address of the lab that is providing the results.

Best practice is for case investigators to also add information about the individual's situation to the Notes tab. (Note: do not use the Brief Notes field. Any information in this field, including sensitive personal information, is available to all users in the system.)

44. How is the jurisdiction assigned for out-of-state residents who test positive in Missouri?

The individual should be assigned to the jurisdiction where the lab results came from. In these cases, investigators should also add additional context to the Notes tab. (Note: do not use the Brief Notes field. Any information in this field, including sensitive personal information, is available to all users in the system.)

45. How is the jurisdiction assigned for Missouri residents who test positive out-of-state?

Cases for individuals who test positive out of the state should be assigned to the jurisdiction where the individual resides. In these cases, investigators should also add additional context to the Notes tab. (Note: do not use the Brief Notes field. Any information in this field, including sensitive personal information, is available to all users in the system.)

EpiTrax Data Entry

46. Is there a difference between searching a person's name as First, Last and using the separate Last Name and First Name fields?

Using the separate Last Name and First Name fields yields more accurate search results than using the Last, First field.

47. Sometimes when I am entering information and try to save, I receive a message stating the following: "Failure Unable to save. Your lock is no longer valid" (Screenshot below). What are the appropriate next steps?

Edit Morbidity Event

❎ **Failure** Unable to save. Your lock is no longer valid.
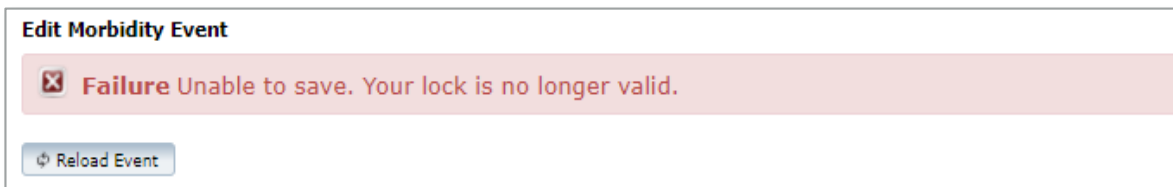
[⟳ Reload Event]

This may mean you have timed yourself out. You need to reload the event to complete the data entry.

⚠️ **Note:** It is recommended that you save frequently to prevent having to re-enter large amounts of information.

48. Sometimes when I am entering information and try to save, I receive a message stating the following: "Failure Unable to save. Person is locked by [User Name]" (Screenshot below). What are the appropriate next steps?

Edit Morbidity Event

❎ **Failure** Unable to save. Person is locked by ▆▆▆▆▆▆

[⟳ Reload Event]

This may mean that someone else has accessed that record to edit. You may force them out of the record by clicking Force Unlock. Or you may return to the record at a later time.

49. Is there an option to enter more than one telephone number?

Yes, more than one telephone number can be entered, but they must still be added individually in EpiTrax.

50. Are negative test results going to be entered into EpiTrax?

For the time being, this will vary depending on how the record is received. Negatives from data submitters (ex: Labs, Clinicians, Schools, etc.) whose reports are being ingested will be loaded into EpiTrax. Negatives requiring manual entry will also be entered into EpiTrax. Negatives from data submitters reporting via spreadsheet formats that cannot be ingested into EpiTrax will continue to be loaded into the existing negatives database. Negatives in this separate database will be migrated into EpiTrax by 11/7/20.

51. Are there required fields before you can save and continue?

Yes, required fields are shaded in pink. If a field contains an error (e.g., a date with no slashes entered), that field will be outlined in pink if you try to save.

⚠️ **Note:** In the interest of data integrity, please make sure to fill out as many fields as possible on all tabs. Without complete information, cases and contacts can not be tracked, monitored, or reported on effectively.

52. Should I use the Brief Notes field in the pink bar?

DHSS recommends that this field not be used, as any notes entered in that box will show on the person records and will appear for other conditions even if they are not relevant.

If comments need to be added to a case (e.g. noting an individual is homeless, or that they may use a different date of birth on different forms), please use the Notes tab.

⚠️ **Note:** Users without permissions to see COVID-19 events will have access to view the information in the Brief Notes field.

53. Is there an AKA/alias option for a patient? Is there a way to do this for facilities/laboratories?

This is not an option in EpiTrax.

54. If I am entering a record that indicates a person was hospitalized or died, should I select Died from COVID-19 or Hospitalized from COVID-19?

No. LHDs should complete these fields as they conduct their investigation and determine that COVID was the cause of hospitalization or death. There may be situations where a person was hospitalized or died (e.g. a motor vehicle accident), and that individual was admitted with COVID, but COVID was not the cause of their death.

55. Does the Hospital tab expand when prompted?

If you select Yes that a person has been hospitalized on the **Clinical** tab, more questions will appear. Hospital fields related to ICU/ventilation can also be found on **the Investigation tab** under the **Hospitalization and Death** subtab.

56. Does the clinical tab have an additional place for notes?

Currently the recommendation is to enter notes on the **Notes** tab.

57. Is there a place to put symptoms?

Yes, please enter symptoms on the Investigation tab under the **Symptoms and Clinical Course** subtab.

58. How do I attach a document to the case?

To attach a document to a case, follow the steps below:

1. Click **+ Attachment**
2. Select the Category as appropriate
3. Click **+ Attachment** Uploader
4. Click **Upload the selected files**

⚠️ **Note:** Contact the BRDI Team with any questions regarding document uploads.

59. Is there a maximum document size that you are able to attach in EpiTrax?

Yes. There is a file size limitation of 30 MB. If your file is larger than 30 MB, you can try optimizing the file size in adobe Acrobat Pro. Otherwise, you will need to split the document into sections and attach the sections separately.

60. Is it possible to move fields or tabs in EpiTrax around? No,
users are not able to customize their view in EpiTrax.

If you have items that you would like to see added or modified, or other feedback that you'd like to share, we encourage you to send those to EpiTrax@health.mo.gov. If you would like to be part of the COVID-19 Tech Resource Champions, who will engage with leadership about platform updates, please send an email to the address above.

61. Is there another way to show required fields without using the pink bar?
Currently this is not possible. If you have any recommendations for modifications or customizations to EpiTrax, we encourage you to send those to EpiTrax@health.mo.gov. If you would like to be part of the COVID-19 Tech Resource Champions, who will engage with leadership about platform updates, please send an email to the address above.

62. What is the appropriate process to enter a medical provider or lab if they are not found in EpiTrax?
If you search for a provider or lab and they are not found in EpiTrax, type Unknown in the search box. You will be able to choose from a number of Unknown options (e.g., Unknown Laboratory) and can choose whichever is most appropriate. Send an email to DHSS.BRDIEpiTraxSupport@health.mo.gov. Provide the record ID in the body of the email along with a brief note of what needs to be added.

A BRDI staff member monitoring the support account will add the lab or provider and reply to your email once the changes are complete. You will then need to go back in the record using the record ID from your original email and update it from Unknown to the actual provider/lab.

Other questions should be directed to the EpiTrax Help Desk at epitrax@health.mo.gov.

Getting Additional Help

63. Who do I contact if I need help?

Many helpful resources are available on the EpiTrax website that may contain the answer to your question. Your first stop in issue resolution should be the EpiTrax User Guide. If you have questions about COVID-19 guidance or public health, please call

If you are unable to find the answer to your question in the User Guide, please contact the EpiTrax Help Desk as your first line of outreach. They can assist with most basic questions. The Help Desk is tracking the number and types of questions to help refine guidance and processes. Feel free to email or submit a ticket here.

Note: Please do not contact BRDI staff directly without going through the Help Desk first, except in the situations listed in the table below:

64. Will the help desk be temporary while we implement EpiTrax or will it be long-term?

The help desk supports EpiTrax users. DHSS anticipates that the help desk will run between 12 and 24 months. As staff workloads become routine and manageable, help desk duties and staffing may shift.

General EpiTrax Information

65. What are the terms and conditions for EpiTrax users?

The proposed EpiTrax Security and Confidentiality Agreement is available for your review on the EpiTrax site. Please send any questions or comments to EpiTrax@health.mo.gov.

66. Do any other states use EpiTrax?

Yes. Kansas and Utah both use EpiTrax, as do some large cities. Missouri has joined a consortium with Kansas and Utah and meets weekly to discuss system issues. This arrangement should be beneficial as Missouri, Kansas, and Utah can work together on issues that impact all three states, such as reaching out to labs that are not reporting correctly. In addition, if one state creates a new development for EpiTrax (e.g. Kansas developed an ingestion format), this can be shared. Kansas has already shared their ingestion format.

67. Are other states doing their contact tracing on paper or using an electronic system like this?

California has a very similar system called California Connected. Like MO ACTS, this system provides virtual assistant symptom check-in service and guided scripts for users.

68. Do LHDs need to send something to their reporting facilities related to the potential of sending electronic reports to DHSS so systems can be linked up?

DHSS has already been working with most of the large volume reporters. As we move to smaller, more local reporters we can reach out if we need contacts or additional support in explaining the importance of electronic reporting.

69. What is the lab data EpiTrax ingestion process?

There are four different methods of data ingestion into EpiTrax:

Method 1: CSV file upload (excel file). Hospitals and health facilities can provide an excel file to the state for upload. These files are usually only uploaded once a day.

Method 2: Binax testing. Submitted to federal partners at the CDC.

Method 3: Hospitals manually fax all test results. This is the most time consuming method. The state team will manually upload the data to the system – often leads to a 24 hour delay.

Method 4: CMR creation by LHD. The LHD can create a CMR and add the lab test.

Looking
for help?

Contact the EpiTrax Helpdesk with questions:
Email: EpiTrax@health.mo.gov

Missouri
DHSS
Department of Health
and Senior Services

EpiTrax