

## Missouri DHSS Covid-19 Data Entry

*Once the EpiTrax system goes live, you will no longer enter any new cases in WebSurv. All new cases will be entered in EpiTrax. Existing cases in WebSurv will remain open for editing, but DHSS staff have been instructed to enter new labs in EpiTrax.*

### Need help?

To report issues or receive help with data entry questions:

- Contact the EpiTrax Help Desk at 573-526-9533 or [epitrax@health.mo.gov](mailto:epitrax@health.mo.gov). The Help Desk is tracking issues and can help with most basic questions.
- Email “BRDI EpiTrax Support” ([DHSS.BRDIepitraxsupport@health.mo.gov](mailto:DHSS.BRDIepitraxsupport@health.mo.gov)) if you need a provider or lab added.
  - Attaching the pdf to the email, and including the EpiTrax record ID will help us add the information more quickly.

### Logging into EpiTrax and Setting Up Your Folder

- Do NOT use a public WIFI connection. Use only password-protected internet connections. Data in EpiTrax is protected health information and should be dealt with carefully.
- Use Firefox, Chrome, or Edge as your web browser. Do NOT use Internet Explorer.

## Looking for Persons in EpiTrax

- Click the “NEW CMR” tab and search to see if the person is already in the database. Enter as much information as you have and click “search” button

### New CMR

Find or add a person.

<b>Person name</b>		<b>Last name</b>			
<input type="text" value="Last, First, Middle"/>		<input type="text"/>		<input type="button" value="Search"/> <input type="button" value="Clear"/>	
<b>First name</b>	<b>Middle name</b>	<b>DOB</b>			
<input type="text"/>	<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>		<input type="button" value="🗑"/>	
<b>Phone</b>	<b>Birth sex</b>				
<input type="text"/>	Please select... ▾				

- Clicking the search button will display a list of all existing person records in the database that partially/fully match the search criteria. The list is sorted in descending order based on the “Score ratings”. The score ratings with maximum numbers of highlighted stars are best matching for the searched names. Moreover, the birthdate along with the maximum score ratings indicates that the listed person matches very closely to the searched person

### New CMR

Find or add a person.

<b>Person name</b>		<b>Last name</b>			
<input type="text" value="Last, First, Middle"/>		<input type="text" value="Doe"/>		<input type="button" value="Search"/> <input type="button" value="+ Create Person and CMR"/> <input type="button" value="Clear"/>	
<b>First name</b>	<b>Middle name</b>	<b>DOB</b>			
<input type="text" value="John"/>	<input type="text"/>	<input type="text" value="01/01/2001"/>		<input type="button" value="🗑"/>	
<b>Phone</b>	<b>Birth sex</b>				
<input type="text"/>	Please select... ▾				

ID	Score	Last, First	Birth Date	Phone	Morbidity	Contact	
421168	★★★★★	Doe, John	01/01/2001		1	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>
115740	★★★★☆	doe, john			0	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>
80106	★★★★☆	Doe, John			0	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>
103625	★★★★☆	john, doe			0	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>

## No Person Match is Found – Create Person and CMR

- If the searched person is not in the result list, create a new person’s record by clicking “+Create Person and CMR” button.

## New CMR

Find or add a person.

**Person name**  **Last name**   **+ Create Person and CMR**

**First name**  **Middle name**  **DOB**

**Phone**  **Birth sex**

ID	Score	Last, First	Birth Date	Phone	Morbidity	Contact	
421168	★★★★★	Doe, John	01/01/2001		1	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>
115740	★★★★☆	doe, john			0	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>
80106	★★★★☆	Doe, John			0	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>
103625	★★★★☆	john, doe			0	0	<input type="button" value="Edit Person"/> <input type="button" value="+ CMR"/>

- That will bring the window as shown below.

## New CMR

Creating a new CMR for doe, john

**First reported to public health**   **Disease**   **Investigating Agency**

### Are you creating a duplicate CMR?

Please review the following events for doe, john to prevent duplicates.

LN, FN / Record #	Disease	Investigating Agency	Workflow Status	Event Date
doe, john 20191013517 – Morbidity	Dengue	KDHE	Assigned to LHD	12/31/2004

Enter:

- First Reported to Public Health: Date DHSS received the report
- Disease: COVID-19
- Investigating Agency: LPHAs will most likely be entering information on residents in their jurisdiction and can select their own agency. DHSS staff have been instructed to select Unassigned until they enter the address and the county information is returned.
- Click Save & Continue.

## Entering Test Results – Positive

At this time, DHSS is still entering negative results into a separate database but will migrate the data into EpiTrax at a later time. It is not necessary to enter negative results in EpiTrax.

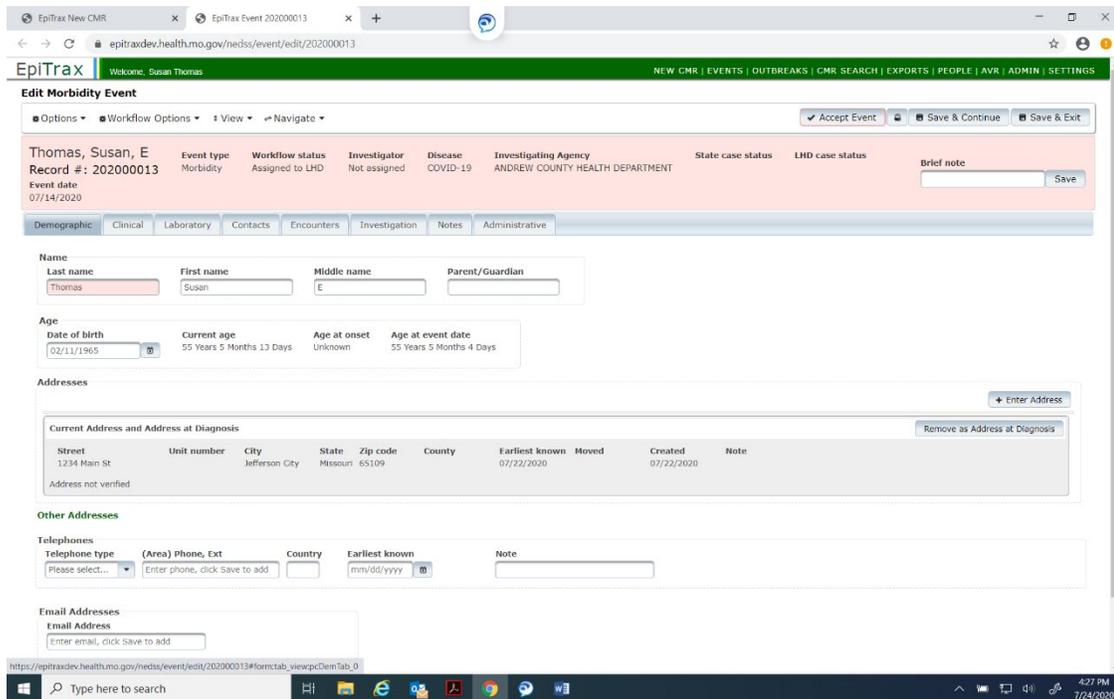
Test results may be reported in various forms so be aware of all information reported on the form/report you are using:

- Lab reports
- PUI forms
- CD-1 reports
  
- Determine the type of test conducted
  - PCR tests may have language on the lab report like: PCR, RT-PCR, Real-Time PCR, RNA, Qualitative NAAT
  - Antibody tests may have language on the lab report like: Serology, IgG, IgM
  - Antigen tests may have language on the lab report like: Antigen, Ag, Sophia Covid-19 SARS Antigen
  - LAMP tests may have language such as LAMP or Abbott.
  - If you are not certain of the test type, please enter the Test Type as Other. BRDI runs a regular report on tests entered with Other test type and follows up with the provider/lab to verify these.

### Demographics Tab:

#### Enter:

- Demographic information available. Some information may be pre-populated based on what you entered in the “new CMR.” If there are existing addresses for the person in the system, they will be displayed in the lower part of the Address sub section. There will be an option to mark the “**Address at Diagnosis**” as current. If there is a different address listed on the report, enter that as the address at diagnosis but DO NOT delete any other addresses.
- Earliest known address date = specimen collection date



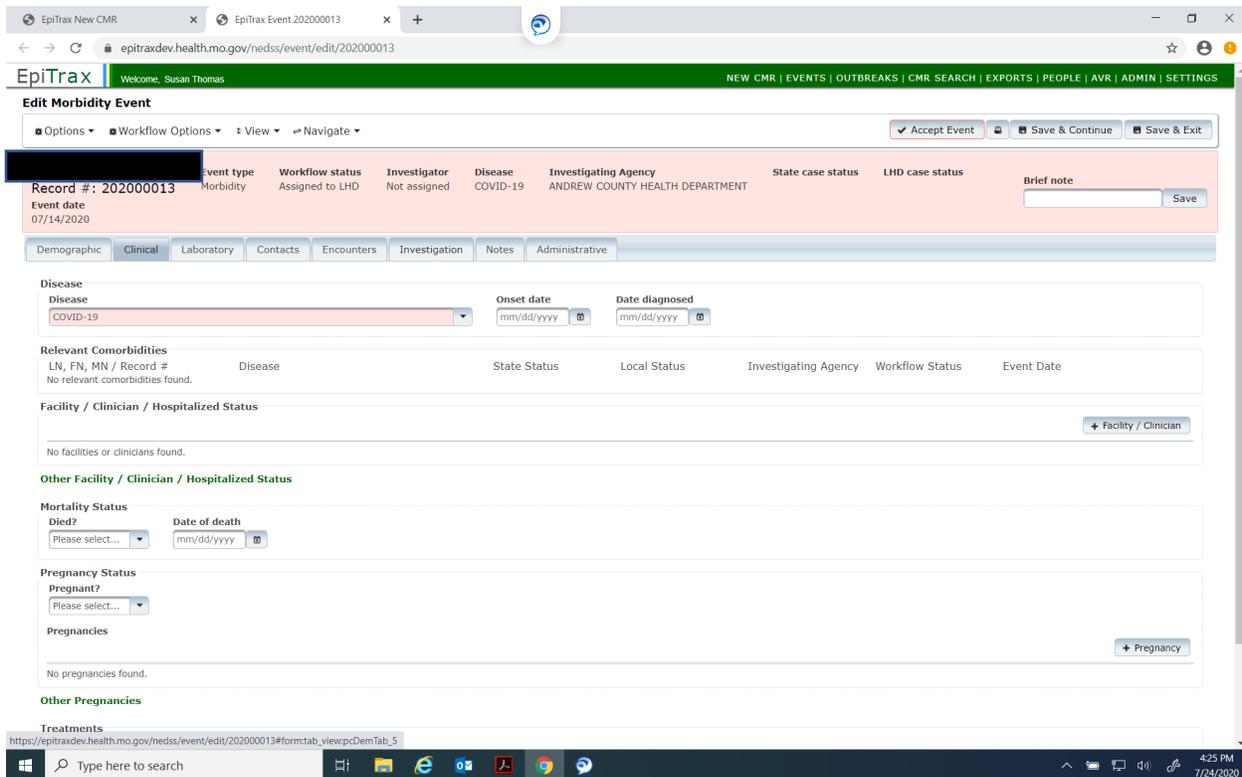
Click “Save & Continue.”

**Clinical Tab:** This tab is used to enter the related disease and treatments. Some of this information will be pre-populated based on what you have entered into the “new CMR.”

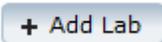
Enter:

- Date Diagnosed: Test result date
- Facility / Clinician / Hospitalized Status: If hospitalization information is provided it can be entered. Press the + facility/clinician tab and enter any hospitalization data, where and when it occurred.

Click “Save and Continue.”



## Laboratory Tab.

- Click  on the right side of the screen

The screenshot shows the 'Laboratory Tab' form in EpiTrax. The form is divided into several sections:

- Performing lab:** A text input field for 'Lab name. Press Enter to search'.
- Collection date time:** A date and time input field (mm/dd/yyyy hh:mm).
- Tests:** A section with multiple input fields:
  - Test type: Please select...
  - Result value: [Blank]
  - Test status: Please select...
  - Organism: Please select...
  - Units: [Blank]
  - Lab test date time: mm/dd/yyyy hh:mm
  - Test result: Please select...
  - Reference range: [Blank]
- Ordering facility:** A text input field for 'Facility name. Press Enter to search'.
- Specimen source:** A dropdown menu for 'Please select...'.
- Ordering clinician:** A text input field for 'Last first name. Press Enter to search' and a '+ New' button.
- Accession no:** A text input field.
- Patient address at collection:** A dropdown menu for 'Please select...'.
- Specimen sent to state lab:** A dropdown menu for 'Please select...'.

Enter:

- The performing lab
  - Search for performing lab ("Quest", "LabCorp", etc.) by pressing enter while the cursor is in the field
    - Some rapid test machines results may be reported on paper forms ("Rapid PCR", "Rapid test", "Abbott PCR", "Abbott ID Now", or "BD Max PCR"). The performing lab should be the LPHA, clinic or hospital where the test took place.

- If the lab is not listed, try a different search (e.g. “St Luke” instead of Saint Luke’s.” If the lab is still not found, 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 e-mail to [DHSS.BRDIEpiTraxSupport@health.mo.gov](mailto:DHSS.BRDIEpiTraxSupport@health.mo.gov). Provide the record ID in the body of the e-mail along with a brief note of what we need to add. Copy the lab information (e.g., address, phone number) into the e-mail. You can also attach the record if that is easier but you would need to encrypt the e-mail since you will be sending PHI. **Please send us this information as soon as you realize the lab/provider is unavailable. We want to get this added before a lot of records are entered with unknown, which will require updating.** Finish entering the rest of the information on the record and route it as needed. We do not want to hold up the record just for the lab/provider. The BRDI staff member monitoring the support account will add the lab or provider and reply to your e-mail once the changes are complete. Go back in the record using the record ID from your original e-mail and update it from unknown to the actual provider/lab. (We anticipate that we will receive a large volume of such requests, and the BRDI team members who have access to make these changes are also responsible for covering other duties at the same time. Unfortunately, we do not think we will have the capacity to make these changes for you at the current time. We can reevaluate going forward once we get a better idea of the volume.)

- Ordering facility
  - If ordering facility is not found, follow same procedure above related to labs.
- Ordering Clinician (if available)
- Patient address at collection (drop down of addresses to select)
- Collection date time
  - Specimen collection date. Time is not needed.
- Specimen source - If it is on the lab slip, if not leave blank.

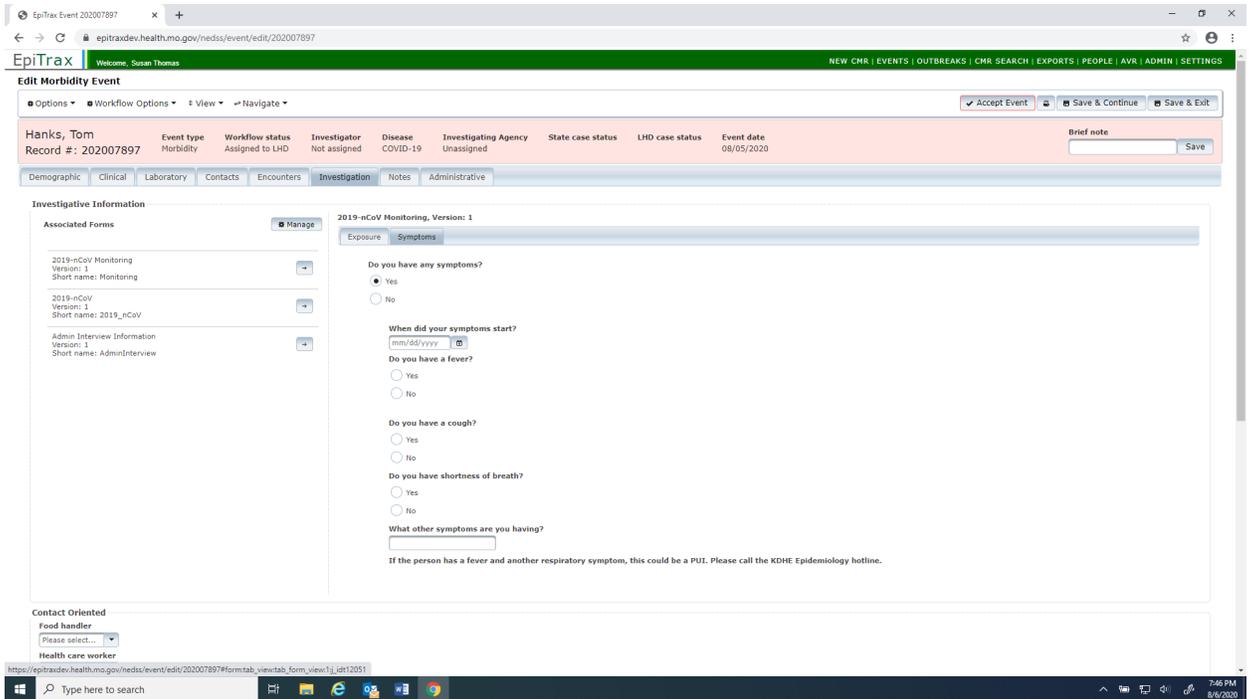
<u>Test Name</u>	<u>In Range</u>	<u>Out Of Range</u>	<u>Ref. Range</u>
SARS CORONAVIRUS W/CoV 2 RNA,QL REAL TIME RT PCR - Varied			
SARS CORONAVIRUS W/CoV 2 RNA,QL REAL TIME RT PCR			
PATIENT SYMPTOMATIC?	NOT GIVEN		
SOURCE:	NOT GIVEN		
<b>OVERALL RESULT:</b>	NOT DETECTED		NOT DETECTED
<p>The specimen is NEGATIVE for SARS-CoV-2, the coronavirus associated with COVID-19. A negative result does not rule out the possibility of COVID-19 and should not be used as the sole basis for patient management decisions.</p>			
<b>SARS-CoV-2 RNA:</b>	NEGATIVE		NEGATIVE
<b>PAN-SARS RNA:</b>	NEGATIVE		NEGATIVE

- Test Type: Enter what's on the lab slip or Other if uncertain.
  - If a lab is Pan-SARS RNA positive, but SARS-CoV-2 negative, the overall result is negative/not detected, and the patient is negative.
- Test Result
  - PCR – Not Detected = Negative
  - PCR – Detected = Positive
  - Rapid PCR – Positive/Reactive
  - Rapid PCR - Negative/Non-reactive
  - Antibody – Positive or negative
  - Antigen – Positive or negative
- Lab test date time: 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.
  - If a rapid PCR test like the Abbott or BD Max was done, the Collection date and Lab test date will be the same
- If there is both an IgG and an IgM antibody test result, enter both.
  - Enter either one first, then Save & Continue, then click  + Add Test
  - Additional fields will appear to enter the other antibody result
  - Click Save and Continue

### Investigation tab

Enter:

- Symptoms – if included
  - Click the “Symptoms” subtab and click “yes” for symptoms. Additional results related to symptoms can be entered.



- Occupation If listed on the report

**Contact Oriented**

**Food handler**  
Please select... ▼

**Health care worker**  
Please select... ▼

**Group living**  
Please select... ▼

**Day care association**  
Please select... ▼

**Occupation**

- Employer If listed on the form
  - Select “+ Exposure” under the Occupation field, on the right side of the screen
  - Search “Exposure place” by typing name of work in, push enter
    - Select a matching exposure place
    - If no match is found, select “+ New” and type in information

**Exposure place**

**+ New**

**Description**

Click Save and Continue

## Notes Tab

- Attach lab report
  - Click + attachment
  - Category of lab attachment = Laboratory Results
  - Select “Attachment uploader and find the file you want to attach
  - “Upload the selected files”

When uploaded you should see the file name attached

The screenshot displays the EpiTrax web application interface for editing a morbidity event. The top navigation bar includes 'NEW CMR | EVENTS | OUTBREAKS | CMR SEARCH | EXPORTS | PEOPLE | AVR | ADMIN | SETTINGS'. The main content area is titled 'Edit Morbidity Event' and shows details for 'Hanks, Tom' with record number 202007897. The 'Attachments' section is currently empty, and the '+ attachment' button is highlighted with a red circle. The 'Notes' section features a text editor with a rich text toolbar and a list of notes, including one created by Susan Thomas on 08/06/2020. The 'Tasks' section is also empty.

- DHSS staff are asked to copy and paste the file name to the lab test report in the notes section.

## Administrative Tab:

- DHSS staff have been instructed to select State Case Status but may not complete Local Case Status.

Reminder: If you cannot determine the test type, enter the test type as Other.

- If the patient was previously positive and is already marked as a “confirmed” case status, do NOT change the case status regardless of any new tests

- PCR tests
  - Positive/Presumptive Positive - State Case Status = Confirmed
  - Negative - State Case Status = Not a case (DHSS will enter these in a separate database, not EpiTrax)
  - Inconclusive/Indeterminate/Invalid/Specimen Not Tested/Specimen unsatisfactory for evaluation = Pending case status
- LAMP tests
  - Positive/Presumptive Positive = Confirmed (If the person was previously positive and is already marked as a “confirmed” case status, do NOT change the case status regardless of any new tests.
  - Negative = Not a case (DHSS will enter in a separate database, not EpiTrax)
  - Inconclusive/Indeterminate/Invalid/Specimen Not Tested/Specimen unsatisfactory for evaluation = Pending case status
- Antibody tests
  - Positive/Presumptive Positive/Inconclusive/Indeterminate/Invalid/Specimen Not Tested/Specimen unsatisfactory for evaluation = Pending
  - Negative = Not a Case (DHSS will enter in a separate database, not EpiTrax)
- Antigen tests
  - Positive/Presumptive Positive = Suspect
  - Negative = Not a case (DHSS will enter in a separate database, not EpiTrax)
  - Inconclusive/Indeterminate/Invalid/Specimen Not Tested/Specimen unsatisfactory for evaluation = Pending case status
- Other tests
  - Positive/Presumptive Positive Inconclusive/Indeterminate/Invalid/Specimen Not Tested/Specimen unsatisfactory for evaluation = Pending
  - Negative = Not a case (DHSS will enter in a separate database, not EpiTrax)

Reporting facility – Enter the name of the organization that submitted the report.

Click Save and Continue

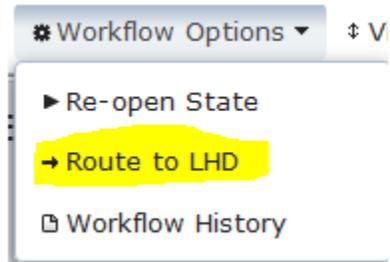
The screenshot displays a web-based data entry form with the following sections and fields:

- Event Information:**

Event id	Record number	MMWR year	MMWR week	Date record created
717949	20201151172	2020	12	03/25/2020 09:18 AM
- Case / Outbreak:**
  - LHD case status: Please select...
  - State case status: Confirmed
  - Outbreak associated: Please select...
  - Outbreak name: No associated outbreak
- Auditing / Investigation:**
  - Jurisdiction of residence: Sumner County
  - Intervention started: 04/09/2020
  - LHD investigation completed: 04/09/2020
- Reporting Agency:**
  - Facility: Sumner Co Health Dept
- Reporter:** (Section header visible)

## Final Steps:

- Check Workflow Status (near the patient’s name at the top of the CMR)
  - **FOR POSITIVE TESTS ONLY** If you enter a positive COVID result into a CMR that has a Workflow Status of “Closed” or “Unassigned”, change the workflow status so that the local health department knows this patient needs to be investigated.
  - If you did not enter the correct jurisdiction when creating the CMR you must assure the correct jurisdiction is selected and routed to.
  - Hover over “Workflow Options” and click on “Route to LHD”



- A dropdown list of counties will appear. Select the appropriate county and click “Route to LHD.” This resets the Workflow Status to “Assigned to LHD.”

Click Save and Exit

## Exact Person Match Is Found

- If you find an exact person match, click on the person information bar. This will bring 3 tabs: Demographics, Events, and Lab

ID	Score	Last, First	Birth Date	Phone	Morbidity	Contact	
421168	★★★★★	Doe, John	01/01/2001		1	0	<a href="#">Edit Person</a> <a href="#">+ CMR</a>
▶ Demographic							
▶ Events							
▶ Labs							
319683	★★★★☆	Dow, John	01/12/1973	(620) 663-3505	1	0	<a href="#">Edit Person</a> <a href="#">+ CMR</a>
551342	★★★★☆	Dow, John	01/12/1973	(620) 200-5897	0	1	<a href="#">Edit Person</a> <a href="#">+ CMR</a>

- Click the “Events” tab to see if one of the events is COVID-19

## No COVID-19 Event is Found– Create New CMR

- If the searched person matches (same name and DOB, or same name and address with DOB missing), but there is not a Covid-19 Event, create a new CMR for the existing person. Select the record from the search result list and click “+CMR” button:

### New CMR

Find or add a person.

**Person name**  **Last name**  Search + Create Person and CMR Clear

**First name**  **Middle name**

**DOB**  **Phone**

**Birth sex** Please select...

ID	Score	Last, First	Birth Date	Phone	Morbidity	Contact
421168	★★★★★	Doe, John	01/01/2001		1	0
319683	★★★★☆	Dow, John	01/12/1973	(Score:100) Click to expand	0	0
551342	★★★★☆	[Redacted]			0	1

Follow instructions for entering test results above. Much of the demographic information may already be populated, check for completeness and update any needed information.

## A COVID-19 Event is Already in the Patient Record

- Click on the COVID 19 event.
- The event may be a Morbidity event or a Contact event:
  - Morbidity:

ID	Score	Last, First				
745212	★★★★☆	[Redacted]				
<div style="background-color: #e0e0e0; padding: 5px;"> <p>Demographic</p> <p>Events</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>LN, FN, MN / Record #</th> <th>Disease</th> </tr> </thead> <tbody> <tr> <td>[Redacted] 20201151172 – Morbidity</td> <td>Coronavirus Disease 2019 (COVID-19)</td> </tr> </tbody> </table> <p>Labs</p> </div>			LN, FN, MN / Record #	Disease	[Redacted] 20201151172 – Morbidity	Coronavirus Disease 2019 (COVID-19)
LN, FN, MN / Record #	Disease					
[Redacted] 20201151172 – Morbidity	Coronavirus Disease 2019 (COVID-19)					

- Contact:

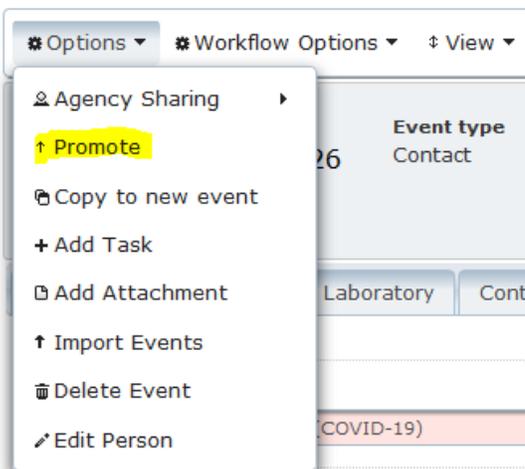
ID	Score	Last, First
746974	★★★★★	[Redacted]
▶ Demographic		
▼ Events		
LN, FN, MN / Record #	Disease	
[Redacted]	Coronavirus Disease 2019 (COVID-19)	
20201153227 – Contact		
▶ Labs		

- If the event you are preparing to enter already exists, click on that EpiTrax number and ensure all fields as noted above in the lab entry section are completed
- Check the laboratory tab to see if there are any laboratory results already entered for the person.
  - If the event contains a lab test with the same information you are trying to enter (date, lab, test result), copy the document file name into the notes tab and attach the pdf to the CMR. Also enter any other additional information not already in EpiTrax (e.g., demographics, symptoms).
  - If the report you have is for a different lab for the person, you will need to enter that lab under the current COVID-19 event by clicking on the Laboratory tab. Choose Add Lab and enter information as described above in the “Entering Test Results” section.

Once you have entered everything from the report, attach the document.

- If the person has a “Contact” record and has pending testing, positive or negative COVID lab results, promote the Contact record to a Morbidity record.
- Click “Options” above the patient’s name in the header, and click “Promote”

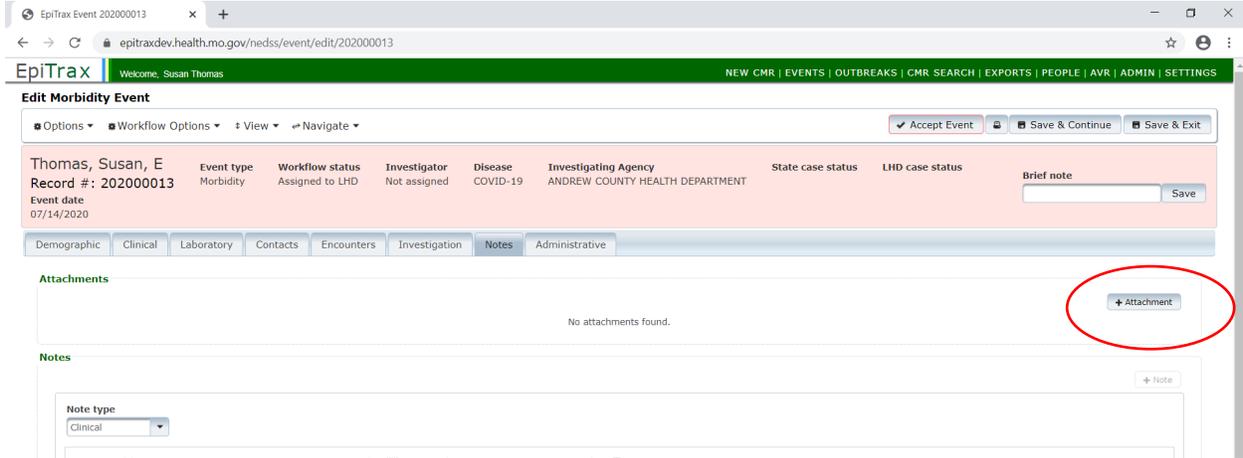
#### Edit Contact Event



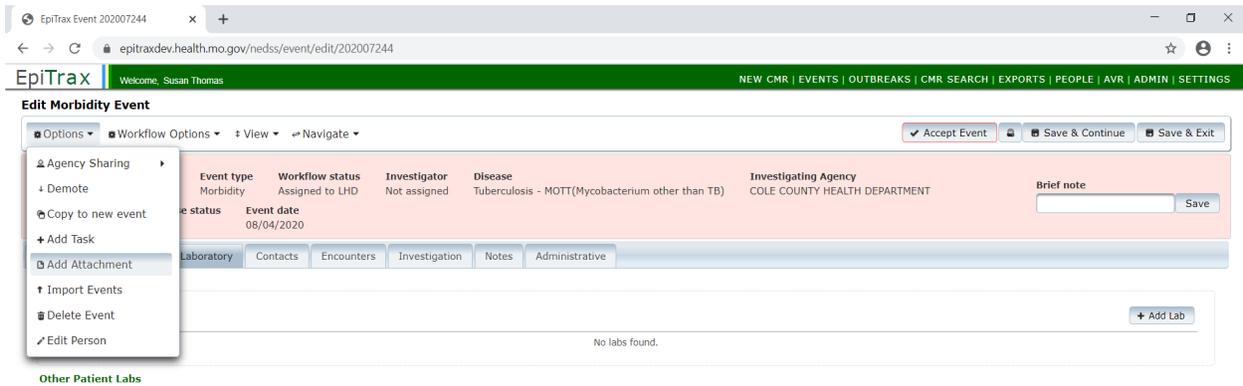
# How to Attach a PDF to the Record

There are two ways to attach a PDF to the record:

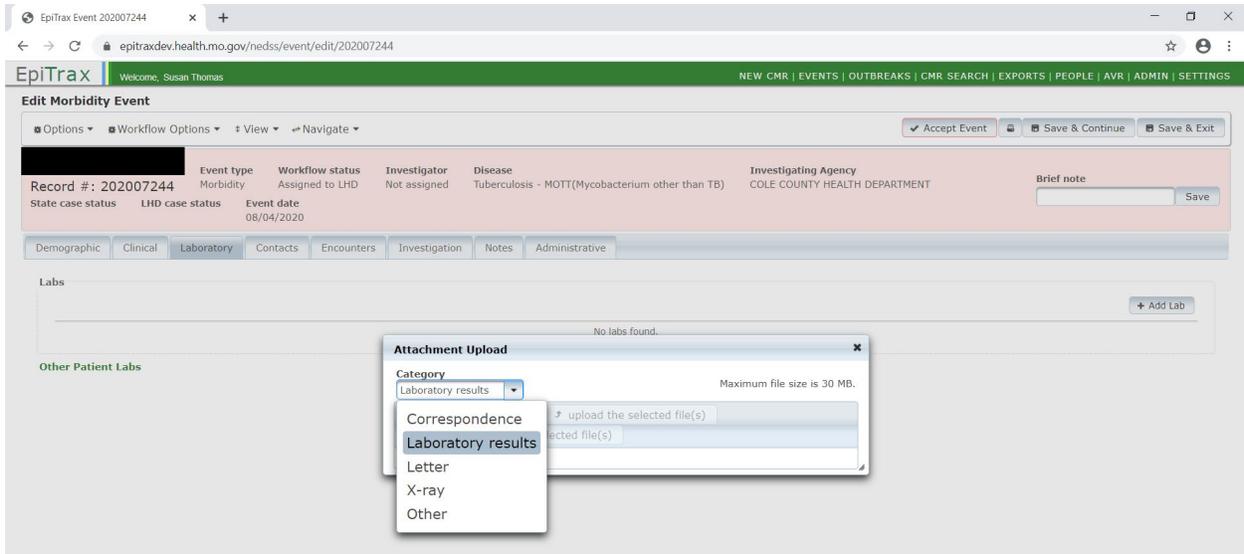
- On the notes tab select “+ Attachment”



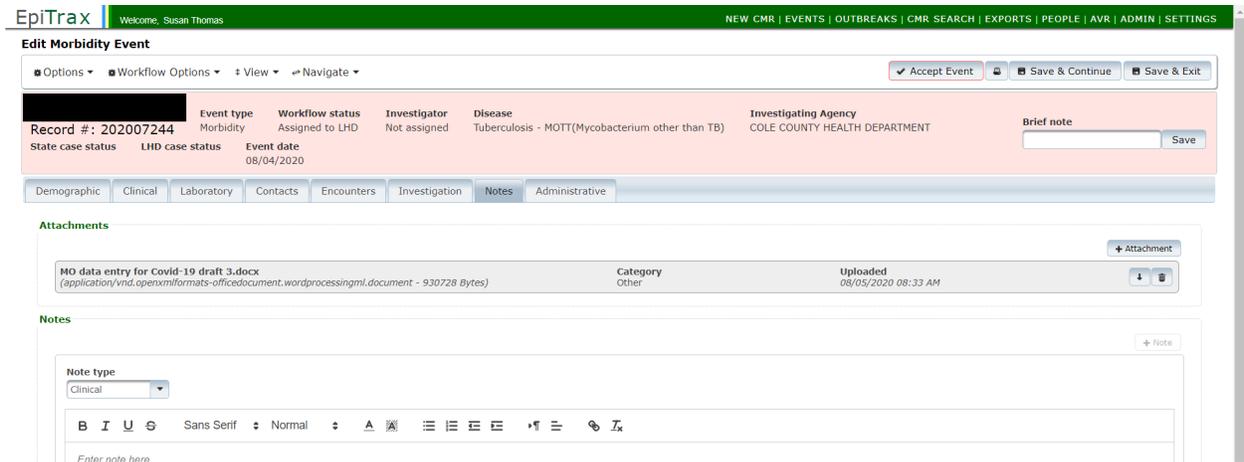
- While in the person’s event, click “Options” and “add attachment”



- Either of these options will bring up the following selection – choose Laboratory Results:



- Choose “attachment uploader” and locate the find the file you want to attach.
- Select “upload the selected files”
- When the file has been uploaded you will be able to see it in the “Notes” tab as seen below



## Entering Death Related Data

If a report indicates that a patient is deceased, look the person up as instructed above.

Locate the person and their COVID 19 event - complete the following:

- Clinical tab
  - Death fields
    - Died? = Yes
    - Date of death = date indicated on form
    - Coronavirus...caused death? DHSS staff have been instructed not to complete this. District Epi will work with the LPHA to determine if COVID was the cause of death for the person and they will handle complete this field

The screenshot shows a web-based form for entering patient data. At the top, there are fields for 'Clinician' (with a search bar and '+ New' button), 'Visit start' (03/24/2020), and 'Visit end' (04/08/2020). Below this is a 'Facility comment' section with a text area. The main section is titled 'Was the patient hospitalized?' and contains three radio buttons: 'Yes' (selected), 'No', and 'Unknown'. Under 'Yes', there are two date fields: 'admission date (MM/DD/YYYY)' set to 03/24/2020 and 'discharge date (MM/DD/YYYY)' set to 04/08/2020. The 'Mortality Status' section has a 'Died?' dropdown menu set to 'Yes' and a 'Date of death' field set to 04/08/2020. Below that is a 'Coronavirus Disease 2019 (COVID-19) caused death?' dropdown menu set to 'Yes'.

- Hospitalization fields
  - If the patient was hospitalized, select Yes
  - Use date of death as the date of discharge
  - If asked if COVID cause the hospitalization, DHSS staff have been asked to leave this blank. District Epi and LPHAs will make this determination.
- Investigation tab
  - Hospitalization and Death sub-tab
    - Did the patient die as a result of this illness? DHSS staff have been instructed not to complete - District Epi will work with the LPHA to determine if COVID was the cause of death for the person and they will handle complete this field. Same applies for COVID as the cause of hospitalization.
  - Date of death = date indicated on form

**Did the patient die as a result of this illness?**

Yes

No

Unknown

**Date of Death (MM/DD/YYYY)**

04/08/2020 

- Attach the pdf to the CMR (see instructions above)
- Save & Exit

## Address Searching

If you need assistance with locating contact information on an individual, you can e-mail [DHSS.DCPH-SDP-DiseaseInvestigationDispatch@health.mo.gov](mailto:DHSS.DCPH-SDP-DiseaseInvestigationDispatch@health.mo.gov) during regular business hours. Outside of regular business hours, you can e-mail [DHSS.ClinicalApprovals@health.mo.gov](mailto:DHSS.ClinicalApprovals@health.mo.gov), which is monitored between 4AM and midnight daily.