



Case Investigation and Contact Tracing Intersection in EpiTrax and MO ACTS

Contents

- How to use this Guide..... 2
- Case Investigation and Contact Tracing Overview..... 2
- Case Investigation (& Contact Gathering) in EpiTrax* 3
 - Create a Contact for a Case 3
- Sending a Contact to MO ACTS..... 6
- Data Mapping: EpiTrax to MO ACTS..... 7
- Screenshots of Contact Data in EpiTrax..... 9
- Screenshots of Contact Data in MO ACTS10

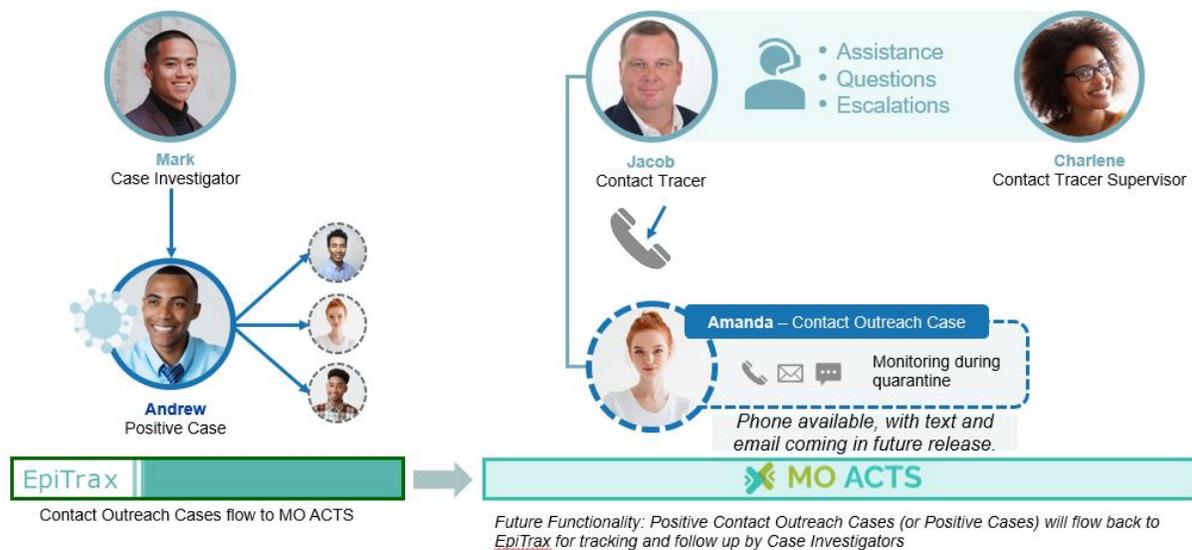
How to use this Guide

Review the instructions below. Note that any instructions in **red** explain how a user in the EpiTrax system may impact a contact tracer's work in Missouri's Advanced Contact Tracing System (MO ACTS). Before using MO ACTS, users must complete a series of trainings.

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.

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.



Missouri Department of Health and Senior Services

Case Investigation (& Contact Gathering) in EpiTrax

Login to EpiTrax.

Create a Contact for a Case

Open the CMR for the case you are investigating.

Click the “+ New”.

EpiTrax | Welcome, Damon Ferfazzo

Edit Morbidity Event

Options | Workflow Options | View | Navigate

Claus, Santa | Event type: Morbidity | Workflow status: Assigned to investigator | Investigator: Selvakumar Arumugam | Disease: COVID-19 | Investigating Agency: COLE COUNTY HEALTH DEPARTMENT | State case status: | LHD case status: | Event date: 07/21/2020

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

Contacts

Adding Contacts

Search person: Last name, First, Middle. Press Enter to search + New OR Link to an orphan contact with a record number

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

Actions	Record #	Person	Contact Type	Contact Disposition	Disposition date	Birth	Age
Options	202000016 Contact	Elf, Buddy, The	Work	Completed	07/22/2020	12/24/2000	19 (573) 999-9929 (573) 999-9929

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

Enter the new case contact basic information in the pop-up and then click on “+Add”. Please provide as much information as possible when adding contacts. This information will only be transferred one time to MO ACTS. Failure to provide a phone number will make it difficult for a contact tracer to reach out to a contact. This also prevents an EpiTrax user from using the “Send to Tracing” feature. Do not add contacts that have no way of being reached – phone number, address, place of employment, etc. If you aren’t able to reach a contact with the information you gathered, nobody else will either.

Create a New Person and Add Contact

Last name: Rudolf | First name: Reindeer | DOB: 12/25/2000 | Phone: (573) 999-9929 | + Add

The newly added contact’s basic information appears. Note the contact type, contact disposition, missing disposition date. Most of the contact’s information should be gathered in the case interview using motivational interview skills.

Contacts

(Events 1 - 2 of 2, Page: 1/1)

Record #	Person	Contact Type	Contact Disposition	Disposition date	Birth	Age
202000016 Contact	Elf, Buddy, The	Work	Completed	07/22/2020	12/24/2000	19 (573) 999-9929 (573) 999-9929
202008123 Contact	Rudolf, Reindeer			08/03/2020	12/25/2000	19 (573) 999-9999

(Events 1 - 2 of 2, Page: 1/1)

To enter contact type, contact disposition, or disposition date click the “Edit Event” button. The “Disposition date” will be used as the exposure date in MO ACTS. **Do not leave this field blank.** Leaving this field blank will mean the contact tracer will not be able to provide specific quarantine guidance to the contact. For COVID-19, we will use the Contact disposition and Contact disposition date fields to reflect the contact’s Date of last exposure to the COVID-19 case. There are plans to add a “Date of last exposure” dropdown option for this field. In the meantime, please select “Other.”

Record #	Person	Contact Type	Contact Disposition	Disposition date	Birth	Age	Phone
20200016 Contact	Elf, Buddy, The	Work	Completed	07/22/2020	12/24/2000	19	(573) 999-9929 (573) 999-9929
202008123 Contact	Rudolf, Reindeer		Completed	08/03/2020	12/25/2000	19	(573) 999-9999

After clicking “Edit” you can enter the contact type (if available), contact disposition (if available), and disposition date (if available).

Actions	Record #	Person	Contact Type	Contact Disposition	Disposition date	Birth	Age	Phone
Options	20200016 Contact	Elf, Buddy, The	Work	Completed	07/22/2020	12/24/2000	19	(573) 999-9929 (573) 999-9929
Options	202008123 Contact	Rudolf, Reindeer	Work	Other	08/04/2020	12/25/2000	19	(573) 999-9999

Please provide as much information as possible when adding contacts. This information will only be transferred one time to MO ACTS. Failure to provide a phone number will make it difficult for a contact tracer to reach out to a contact. After entering contact(s) basic information, click the “Save & Continue” button.

Click on the Record # of the contact for which you want to provide additional details and click the “Leave” button when asked, “Leave site? Changes you made may not be saved.”

Leave site?
Changes you made may not be saved.

Leave Cancel

You may now edit the contact's demographics:

Edit Contact Event

Options Workflow Options View Navigate Save & Continue Save & Exit

Rudolf, Reindeer Record #: 202008123 Event type: Contact Workflow status: Not participating in workflow. Investigator: Not assigned Disease: COVID-19 Investigating Agency: COLE COUNTY HEALTH DEPARTMENT Event date: 08/09/2020 Parent patient: Santa Claus Brief note: Save

Demographic Clinical Laboratory Contacts Encounters Investigation Notes Administrative

Name
Last name: Rudolf First name: Reindeer Middle name: Parent/Guardian

Age
Date of birth: 12/25/2000 Current age: 19 Years 7 Months 16 Days Age at onset: Unknown Age at event date: 19 Years 7 Months 16 Days

Addresses
Street: Unit number: City: State: Zip code: County: Earliest known: Moved: Note:
Address not verified
This person has had no addresses entered.
Save as Address at Diagnosis Cancel

Other Addresses

Telephones
Telephone type: (Area) Phone, Ext Country Earliest known Note:
Please select... Enter phone, click Save to add
(573) 999-9999 Earliest known Created: 08/10/2020 Note:

Email Addresses
Email Address:
Enter email, click Save to add

Demographics

To edit additional information for the contact, click on the corresponding tab. When you are finished click "Save & Continue".

Please provide as much information as possible when adding contacts. This information will only be transferred one time to MO ACTS. Failure to provide a phone number will make it difficult for a contact tracer to reach out to a contact. The following fields will be sent to MO ACTS:

Tip: Click "View" and then "Show Accordion". This will show all fields in one screen instead of tabs. You cannot edit information in the accordion view.

View Contact Event

Options View Navigate Person Locked

Rudolf, Reindeer Record #: 202008123 Workflow status: Not participating in workflow. Investigator: Not assigned

Demographic Clinical Laboratory Contacts Encounters Investigation

Name
Last name: Rudolf First name: Parent/Guardian

Age
Date of birth: 12/25/2000 Current age: Unknown Age at onset: Unknown Age at event date: 19 Years 7 Months 16 Days

Addresses
This person has had no addresses entered.

Other Addresses

Demographic
Clinical
Laboratory
Contacts
Encounters
Investigation
Notes
Admin
Show Accordion

View Contact Event

Options View Navigate Person Locked Force Unlock Force Unlock & Edit Edit Event

Rudolf, Reindeer
Record #: 202008123

Event Type	Workflow status	Investigator	Disease	Investigating Agency	Event date	Parent patient	Brief note
Contact	Not participating in workflow.	Not assigned	COVID-19	COLE COUNTY HEALTH DEPARTMENT	08/09/2020	Santa Claus	

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

Expand the menus by clicking the down arrow to the left of each section.

View Contact Event

Options View Navigate Person Locked Force Unlock Force Unlock & Edit Edit Event

Rudolf, Reindeer
Record #: 202008123

Event Type	Workflow status	Investigator	Disease	Investigating Agency	Event date	Parent patient	Brief note
Contact	Not participating in workflow.	Not assigned	COVID-19	COLE COUNTY HEALTH DEPARTMENT	08/09/2020	Santa Claus	

Demographic

Name

Last name	First name	Middle name	Parent/Guardian
Rudolf	Reindeer		

Age

Date of birth	Current age	Age at onset	Age at event date
12/25/2000	19 Years 7 Months 16 Days	Unknown	19 Years 7 Months 16 Days

Addresses

This person has had no addresses entered.

Other Addresses

Telephones

Telephone	Earliest known	Created	Note
(573) 999-9999		08/10/2020	

Email Addresses

Demographics

Birth sex	Current gender	Primary language	Ethnicity	Race	Country of birth

Event Info (Unable to edit this section due to lock on parent)

Contact disposition	Contact disposition date	Contact type
Other	08/04/2020	Work

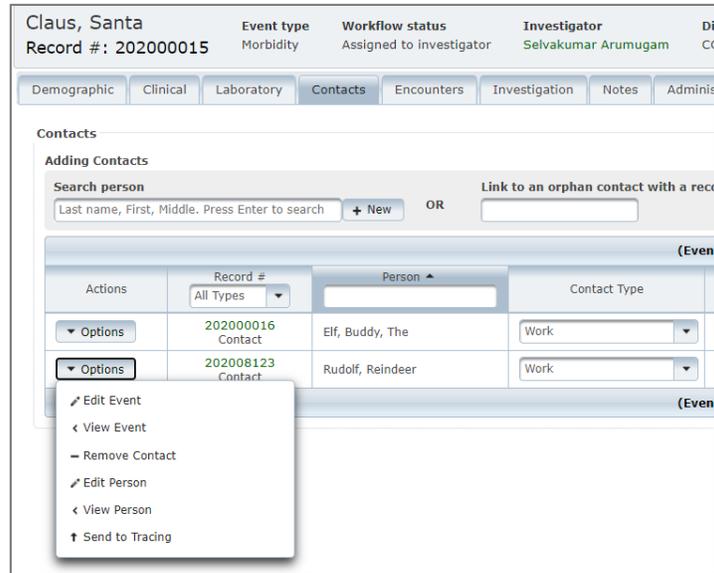
- Clinical
- Laboratory

Clicking “Edit Event” while in the Accordion view will take you back to the contact’s “Demographics”. To edit the contact’s information, click on the “Edit Event” button again.

Sending a Contact to MO ACTS

Local public health agencies using MO ACTS can send the contact data entered into EpiTrax to the MO ACTS system by following these instructions.

In order to send a contact’s data to MO ACTS, return to the case’s contact screen. Then click on the “Options Button” and select “Send to Tracing”.



After you click “Send to Tracing”, this contact’s data will be sent to MO ACTS at a set time interval, currently every 2 hours. Please note that updates made in EpiTrax will not automatically flow over to MO ACTS. You must select “Send to Tracing” for each contact that you want to send to MO ACTS.

Tip: You may want to only send a select few contacts to MO ACTS. Perhaps you are a case investigator and a case’s contacts includes their children. While you are speaking with an individual, you should gather information about their children and remind the individual that they are to instruct their children to quarantine for a recommended number of days.

Data Mapping: EpiTrax to MO ACTS

EpiTrax Fields Location: Person > Demographics

EpiTrax Field	MO ACTS Field
Record # (Person ID)	Person ID (New field)
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Date of Birth	Birthdate
Ethnicity	Hispanic
Race	Race
Email Address	Email
Telephone Type1	Phone 1 Type
Country Code	Phone number
Area Code	
Phone Number	
Extension	Extension 1

EpiTrax Field	MO ACTS Field
Telephone Type2	Phone2 Type
Country Code	Phone number
Area Code	
Phone Number	
Extension	Extension 2
Telephone Type3	Phone 3 Type
Country Code	Phone number
Area Code	
Phone Number	
Extension	Extension 3
Birth Sex	Gender
Primary Language	Language
Street	Mailing Street (House/Bldg #, Street Name)
Unit Number	Street 2
County	County
City	Mailing City
State	Mailing State, State
Zip Code	Mailing Zip Code
Parent/Guardian	Parent/Guardian/Next of Kin Name

EpiTrax Fields Location: Case

EpiTrax Field	MO ACTS Field
Contact CMR	EpiTrax Contact CMR
Case CMR	EpiTrax Case CMR

EpiTrax Fields Location: Investigation > Assessment > Contact Oriented

EpiTrax Field	MO ACTS Field
Occupation	Occupation

EpiTrax Fields Location: Case > Contacts

EpiTrax Field	MO ACTS Field
Contact Type	Relationship to case
Contact Disposition Date	Last Exposure date
Contact Disposition	Closed Reason

Screenshots of Contact Data in EpiTrax

Demographic:

Record #	Person	Contact Type	Contact Disposition	Disposition date	Birth	Age	Phone
No contacts found.							
This patient is a contact of							
Record # 202000015 Morbidly	Name Claus, Santa	Contact type Work	Disposition Other	Disposition date 08/04/2020			Phone

Contacts:

Record #	Person	Contact Type	Contact Disposition	Disposition date	Birth	Age	Phone
No contacts found.							
This patient is a contact of							
Record # 202000015 Morbidly	Name Claus, Santa	Contact type Work	Disposition Other	Disposition date 08/04/2020			Phone

Investigation:

Rudolf, Reindeer	Event Type	Workflow status	Investigator	Disease	Investigating Agency	Event date	Parent patient
Record #: 202008123	Contact	Not participating in workflow.	Not assigned	COVID-19	COLE COUNTY HEALTH DEPARTMENT	08/09/2020	Santa Claus
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Demographic Clinical Laboratory Contacts Encounters Investigation Notes Administrative </div>							
Investigative Information							
Associated Forms <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> COVID-19 Contact Form Version: 1 Short name: Contact </div>				COVID-19 Contact Form, Version: 1 <div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Monitoring Assessment </div> <p>Interviewer Name:</p> <p>Interview Date</p> <p>Is the contact with the case ongoing (household)?</p> <p>Date of last exposure:</p> <p>Last day of quarantine:</p> <p>Name of Employer:</p> <p>Employer Address</p> <p>Employer City:</p> <p>Are you experiencing any of the following symptoms?</p> <p>Do you have a thermometer?</p> <p>How would you prefer to be contacted?</p>			
Contact Oriented <ul style="list-style-type: none"> Food handler Health care worker Group living Day care association Occupation Laborer 							

Screenshots of Contact Data in MO ACTS

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). The Birth Date and Age fields will inform the Contact Tracer whether or not 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.

The screenshot displays the MO ACTS interface for a contact tracing case. On the left, the 'Contact Details' pane shows the following information:

Name	Reindeer Rudolf
Home Phone	(573) 999-9999
Birth Date	12/25/2000
Age	19 years

On the right, the 'Details' pane shows the following information:

Last Exposure Date	8/4/2020
Status	Awaiting Outreach
Date/Time Opened	8/4/2020, 12:06 PM

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.

This close-up screenshot focuses on the 'Details' pane, showing the following information:

Last Exposure Date	8/4/2020
Status	Awaiting Outreach
Date/Time Opened	8/4/2020, 12:06 PM