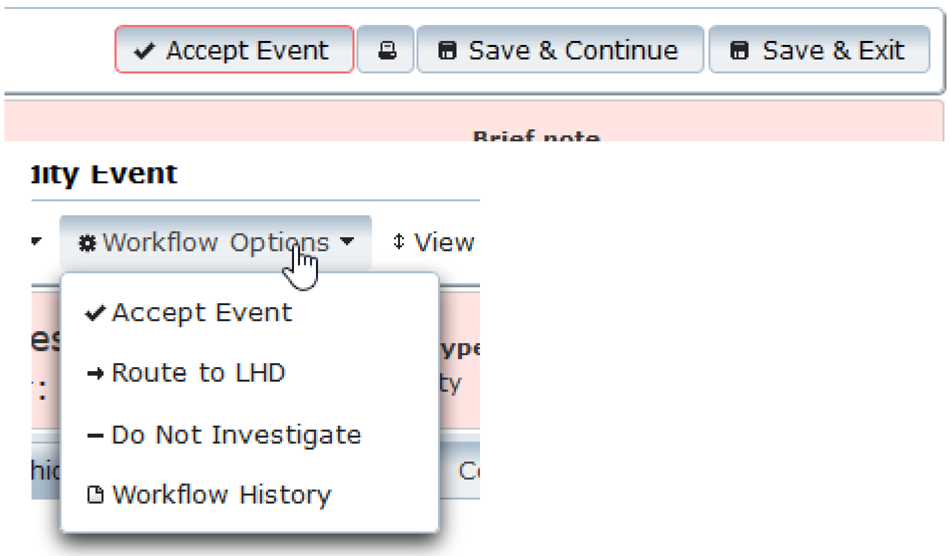
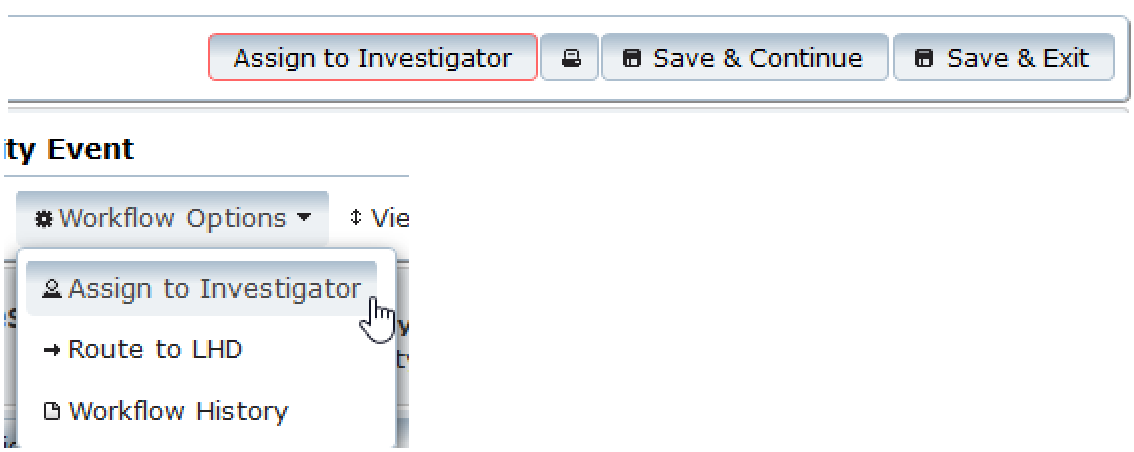
Event Workflow

When a record is assigned to a local health department, it must be transitioned through the workflow.

1. Upon entering a record for the first time, the LHD will click on the “Accept Event” button in the top right corner or click on Workflow Options in the top left corner and click on “Accept Event” to accept the CMR.

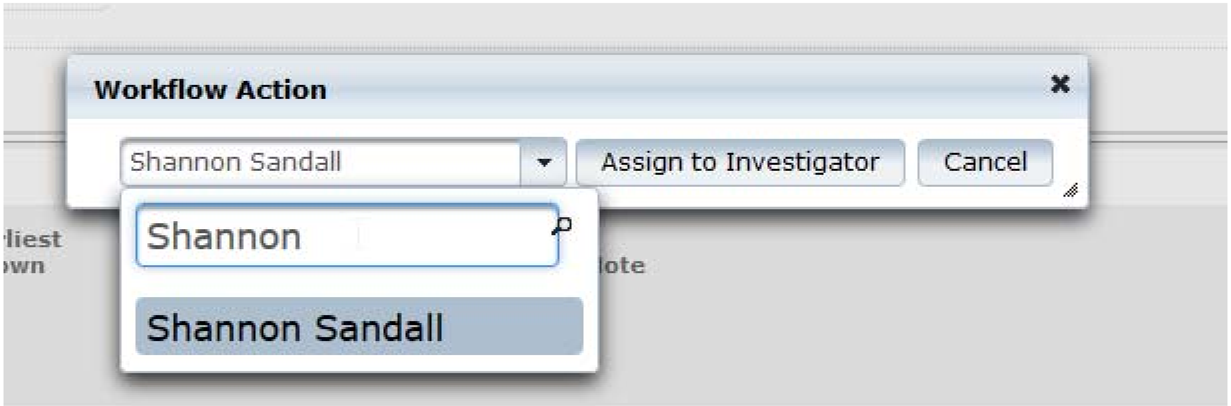


2. An investigator will need to be assigned to the record. Depending on your permissions in the system, you can either assign yourself or someone else in your jurisdiction by doing the following:
   a. Click on “Assign to Investigator” in the top right corner or click on Workflow Options in the top left corner and click on “Assign to Investigator”.

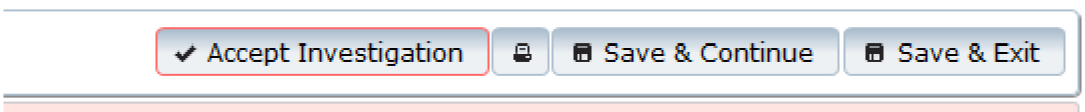


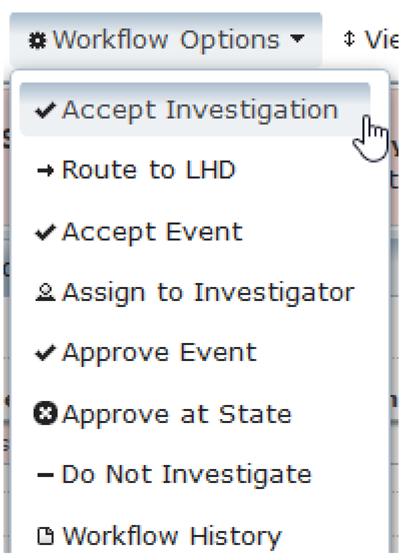
b. A Workflow Action box will appear. Type the investigator's name in the search box.

c. Click on the investigator's name when it appears and click on "Assign to Investigator".

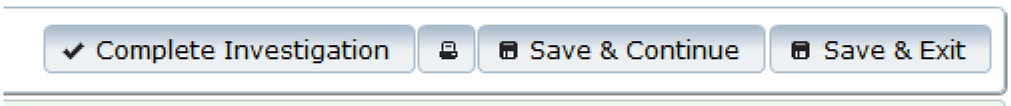


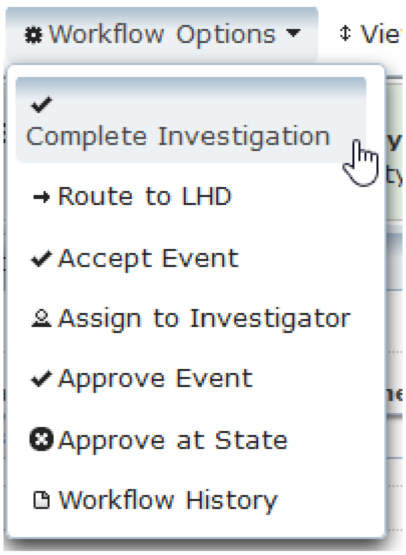
3. Once the case is assigned to an investigator, it must be accepted by the investigator. To accept investigation, click on "Accept Investigation" in the top right corner or click on Workflow Options in the top left corner and click on "Accept Investigation".





4. When the investigation is complete, the investigator will need to click on "Complete Investigation" in the top right corner or click on Workflow Options in the top left corner and click on "Complete Investigation".





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, click on "Approve Event" in the top right corner or click on Workflow Options in the top left corner and click on "Approve Event".