EpiTrax Frequently Asked Questions

How to Find Additional Assistance

1. Whom 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 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, call 573-526-9533 or submit a ticket here. (Please do not contact BRDI staff directly without going through the Help Desk first, except in the situations listed in the bullet points below.

- General EpiTrax questions should go to EpiTrax@health.mo.gov.
- If you need a provider or lab added, please e-mail DHSS.BRDIEpiTraxSupport@health.mo.gov.
- If you notice duplicates in EpiTrax that need to be addressed, please e-mail DHSS.BRDIEpiTraxSupport@health.mo.gov.
- If you need additional address/phone contact information, please e-mail DHSS.DCPH-SDP- DiseaseInvestigationDispatch@health.mo.gov during the hours of 8-5 Monday-Friday. Outside of these hours, you can contact DHSS.ClinicalApprovals@health.mo.gov, which is monitored between 4AM and midnight daily.

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

The help desk supports both EpiTrax and MO ACTS 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. The Help Desk is currently available 8:00a-8:00p, Monday-Sunday. The help desk phone is answered on weekdays, but email and ticket submissions are available every day.

System Access

3. Is MO ACTS available to all EpiTrax users at this time?

Yes, MO ACTS will be available to most EpiTrax users. If you are interested in bringing in volunteers or temporary staff to assist with contact tracing, please contact EpiTrax@health.mo.gov.

4. **What if we did not receive EpiTrax welcome emails?**

   If you did not receive a welcome e-mail, 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 573-526-9533 or 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.

5. **How will EpiTrax account credentials be sent?**

   You will receive an e-mail from an EpiTrax account.

6. **Do we need to work in Chrome for EpiTrax?**

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

7. **How can I get access to Chrome or Firefox?**

   DHSS staff can 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. LPHA staff should check with their IT support staff.

Training Opportunities

8. **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.

9. **I found the EpiTrax Demo to be very helpful! Thank you!! Do you have any plans to share this demo with the LPHAs?**

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

Notifications and Other Reports

10. Will the notification system still be up so we do not lose new cases during this process?

Yes, but there will be some modifications:

- EpiTrax and related tools contain a notifications feature that will send hourly e-mails. However, the feature does not have the capacity 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 e-mail and text notifications.
  - Documents that are received through fax, mail, etc., will continue to be dropped into the LPHA folders as they are received.
  - Many submitters have started sending electronic messages for ingestion, which means there is no 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 LPHAs 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 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 LPHA workflows. It is anticipated that the existing staff-intensive notification process will be phased out at that point after adequate messaging is given to LPHAs.

11. Will LPHAs still receive a list of negative results daily?

Yes, the same lists will be provided for the time being since COVID-19 data are now stored in multiple databases. Eventually all 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. LPHAs 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.

12. 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.

Finding Information in the Systems/Data Migration

13. Starting with implementation, all new labs will go into EpiTrax, so Websurv will more be like an archive. Is that correct?

Yes. All new labs will be entered in EpiTrax. As of 10/1/2020, WebSurv screens will be locked so that new cases cannot be added. However, LPHAs will still be able to view cases in WebSurv for reference.

14. Will 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.

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

For COVID-19 data, the determination was made to allow all users to see data from all jurisdictions, 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.

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

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

- Click on Events in the green bar. Then click the Options button.
- Click +Add View and make the following selections:
  - New view name: New Cases
  - Event investigation status: Assigned to LHD
  - Diseases: COVID-19
  - Investigating Agency: Select your agency.
- Click Save next to the New View Name box.

The EpiTrax User Guide and EpiTrax Event Workflow bulletin also provide guidance on how to utilize this feature.

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

Any information entered into EpiTrax fields can be viewed on the screens. 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.

18. How do we search name variations accurately?

Using the Last Name, First Name, Middle Name, and DOB to search existing person records in EpiTrax will sort the list of results in descending order based on the "Score Ratings". The score ratings with maximum numbers of highlighted stars are the best matches for the searched name. Moreover, the birthdate along with the maximum score ratings indicates that the listed person matches very closely to the searched person.

19. **Is there a note 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. DHSS is still researching the full implications of that instruction.

20. **In one of the demos, the person's name was entered in the Last, First box instead of into the separate fields shown in another demo. Is there a difference?**

    Using the Last Name, First Name boxes yields more accurate results than using the single Person Name box.

21. **Will current data including PUI forms be migrated into EpiTrax from WebSurv.**

    Yes. Data for positive patients in WebSurv who <u>did not</u> have data in EpiTrax were migrated on 10/4/2020.

Attachments

22. **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."**

    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.

Reporting Features

23. **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.

24. **How can I learn more about exporting?**

    Check out the Exporting positive lab results from EpiTrax bulletin on the EpiTrax website. 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.

Assigning/Reassigning/Accepting Cases

25. How do we reassign cases to another jurisdiction?

All LPHA 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 bulletin provides a guide on how to complete this procedure. Send out-of-state case reassignments to DHSS.BRDIEpiTraxSupport@health.mo.gov.

26. How do we accept cases?

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

27. 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. If the most recent workflow action is "Investigation Complete," then the LHD can re-open the investigation by clicking on "Workflow Options," then clicking "Re-open LHD." 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.

28. 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 user guide Page 60 for guidance on completing General User Information as a new investigator. To add an investigator to a case, see user guide Page 62.

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

Yes, if the address is valid. If the address is not valid, DHSS staff can search for it using the DHSS geocoder. If you do not find a valid address, you will need to send it to someone who can research the person for you in LexisNexis or Missouri Health Connect. During regular business hours you can e-mail DHSS.DCPH-SDP-DiseaseInvestigationDispatch@health.mo.gov. Outside of regular business hours you can e-mail DHSS.ClinicalApprovals@health.mo.gov, which is monitored between 4AM and midnight daily.

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

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

31. Can a case be routed to a county different than the address?

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

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

To link a morbidity event to a previously added Outbreak, click on the "Administrative" tab on the "Edit Morbidity Event" page. Under the "Case / Outbreak" section, update "Outbreak associated" to "Yes." Then click on the "Outbreak name" field and select the appropriate outbreak name. 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. Click on the appropriate Outbreak name, then click "Save & Continue."

Data Entry Questions

33. I need to enter a provider/lab that is not in EpiTrax. What should I do?

E-mail the provider/lab information DHSS.BRDIEpiTraxSupport@health.mo.gov.

34. Once EpiTrax is implemented, are we to make all case updates in EpiTrax and stop making updates to Websurv?

As of 10/1, all new reports received are to be processed into EpiTrax, regardless of whether a record already exists in WebSurv. LPHAs and DHSS entry staff will not be using WebSurv to document COVID-19 cases any longer. This will ensure that cases are available in the EpiTrax workflow and also for contact tracing through MO ACTS.

35. 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 working. Save and exit will take you out of the record. 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.

36. Sometimes when I am entering information and try to save, I receive a message that EpiTrax "cannot save as my lock is no longer valid." What should I do?

This may mean that someone else has accessed that record and the system will not allow two people to make updates at the same time. You will have to exit out of the record and go back into it to complete your entry. We recommend saving frequently to prevent having to re-enter large amounts of information.

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

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

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 a period of time.
- 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 if end up with the same record open on two different tabs. One of the instances will have the lock and the other will not.

- You can do a "force unlock" by pressing the 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:

- While you are entering information into EpiTrax, remember to save and continue after entering information in each tab and save and exit when you are finished entering information before you go to another case.
- 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.
- Click the EpiTrax logo at the top of the screen to return to the home screen. Check back on the record you left to make sure your information saved.

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.

38. Can notes be removed?

No, but they can be crossed out.

39. Is there an option to enter more than one telephone number? WebSurv required adding each number individually.

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

40. Are negatives going to be entered into EpiTrax?

For the time being, this will vary depending on how the record is received. Negatives from data submitters 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 in the future but we do not have an exact date for this yet.

41. When we migrate to EpiTrax will we check in MOHSAIC if they are not in that system?

EpiTrax is not part of MOHSAIC so this search will no longer be available.

42. If we were to find a Lab or Ordering facility that is not entered an early guidance draft stated we are to contact the administrator to enter those. When we ask to add it do we need to include the report name? Do we not finish that report and hold it in our folder until we hear from someone that it has been added and then go back in EpiTrax to add it?

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 e-mail to DHSS.BRDIEpiTraxSupport@health.mo.gov. Provide the record ID in the body of the e-mail along with a brief note of what needs to be added.

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. You will then need to 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.) At least for the current time, please reserve the e-mail account above for these types of requests so that we can make these changes quickly.

Other questions should be directed to the EpiTrax Help Desk at 573-526-9533 or epitrax@health.mo.gov.

43. If the 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?

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. If the person does not have a COVID case in WebSurv, the team will check EpiTrax to see if an address is available there but they will not type it on the report since it will be available in the system when the entry team retrieves the record. 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. If there is no medical provider address, the case will be assigned based on the address of the lab. 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.

44. Are there required fields before you are able to 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.

45. 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.

46. 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.

47. If I am entering a record that indicates a person was hospitalized or died, should I set the Died from COVID-19 and/or Hospitalized from COVID-19 to Yes?

LPHAs will complete those fields as they conduct their investigation and determine the cause of death or hospitalization. A person may have been hospitalized or died from something completely unrelated and just happened to have COVID. For example, we have received multiple reports on individuals who were severely injured in motor vehicles and found to have COVID-19 upon admission to the hospital because many hospitals are now screening all incoming patients for COVID.

48. Does 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.

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

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

50. **Is there a place to put symptoms?**

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

Attaching Documents

51. **How do I attach a document to the case?**

    Instructions are provided in the "How to attach a PDF to the record" section of the EpiTrax entry guide.

52. **Is there a maximum 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.

General Questions About EpiTrax/Implementation

53. **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.

54. **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, this can be shared. Kansas has already shared their ingestion format, which has allowed us to start ingesting records from some labs upon system implementation.

55. **Are all fields set? Do you have access to move things around? For example, on the first page where you can see the assigned jurisdiction, can that be moved to the address area? Is it possible to put a hyperlink in the "i" next to provider and labs fields that will open a new email addressed to the Admin group that adds providers and labs? Also, it is possible to put on the screen somewhere the EpiTrax help desk number?**

    The EpiTrax platform operates on a regular implementation/update schedule. 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 EpiTrax/MO ACTS Change Management Workgroup, which will engage with leadership about platform updates, please send an email to the address above.

56. Is there another way to show required fields without using the pink bar?

DHSS will have to research options for customizing the screens.

57. Will other Disease Conditions continue to be entered into Websurv until we hear otherwise?

Yes. Only COVID-19 is being moved to EpiTrax at the current time. 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.

Contact Tracing/MO ACTS

58. 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.

59. What is MOACTS?

MO ACTS is a centralized contact tracing system shared between DHSS and LPHAs. 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.

Improving Data Quality from Reporting Entities

60. How can we get submitters to provide correct locator information so the correct jurisdiction can be assigned?

BRDI is reaching out to providers to improve reporting quality. If you are aware of specific issues, please let us know so we can follow up. If BRDI receives reports without an address listed, staff perform research and will note any address found on the report.

Electronic Reporting

61. Do LPHAs 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. We appreciate the offer for help!

62. How long will it take EpiTrax to start ingesting data?

EpiTrax began ingesting data immediately upon implementation. Hundreds of records were ingested on the first night.