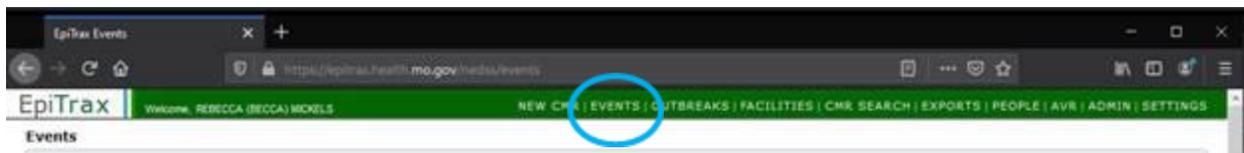


How to Identify New Cases in EpiTrax

We continue to receive many questions about the best way to generate a list of newly received cases in EpiTrax. Several BRDI staff and the District Epis met yesterday to experiment, and the method we recommend is described below.

The Workflow feature in EpiTrax updates when certain actions are completed. When BRDI staff enter a case and route it to an agency, Workflow status is set to Assigned to LHD. When an LPHA 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 LPHA 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.

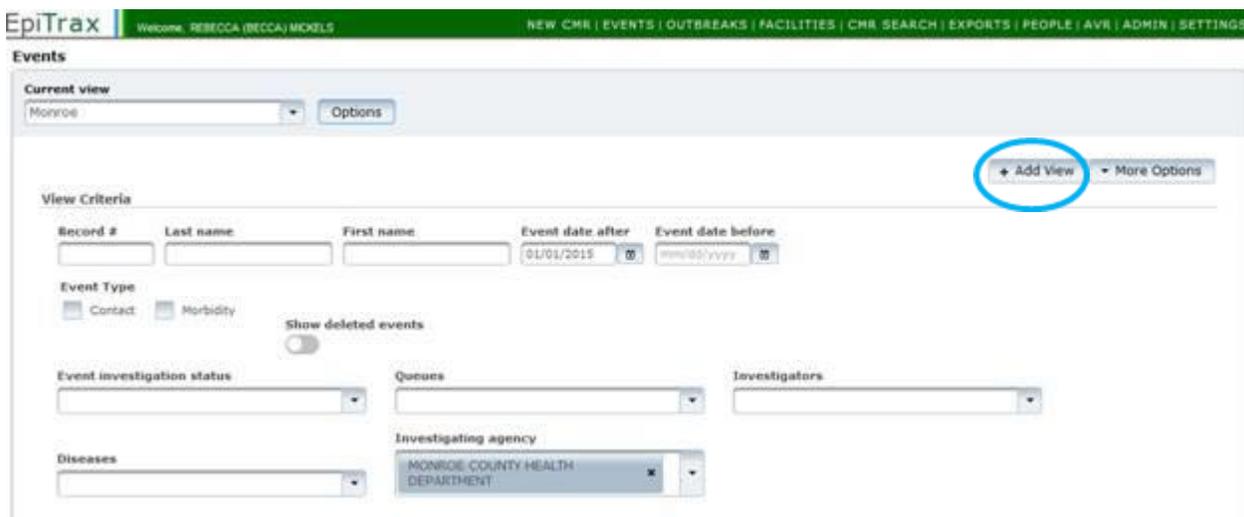
1. Click on the Events link in the green bar.



2. Click the Options button.



3. Click +Add View.



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 – I chose Adair in this example.
 - e. Click Save next to the New view name box (in pink).



The screenshot shows the EpiTrax interface for configuring a new view. At the top right, there are buttons for '+ Add View' and '+ More Options'. Below this is a 'New view name' section with a text input field containing 'New Cases', a 'Save' button, and a 'Cancel' button. The 'New Cases' text is highlighted in pink. Below the 'New view name' section is the 'View Criteria' section, which includes several filters: 'Record #' (empty), 'Last name' (empty), 'First name' (empty), 'Event date after' (01/01/2015), 'Event date before' (mm/dd/yyyy), 'Event Type' (Contact, Morbidity), 'Show deleted events' (toggle), 'Event investigation status' (Assigned to LHD), 'Queues' (empty), 'Investigators' (empty), 'Diseases' (COVID-19), and 'Investigating agency' (ADAIR COUNTY HEALTH DEPARTMENT).

The events list should now display all of your new cases, all of which should be shaded in pink. You only have to set up and save this query once. When you want to pull your list of new cases, you just have to go back to the Events tab and select New Cases from your 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.

If a case is reassigned to a different LPHA, 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 at epitrax@health.mo.gov.