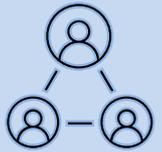


NC COVID Workflows

Trainings: ncedsstrainings@dhhs.nc.gov
Helpdesk: NCEDSSHelpDesk@dhhs.nc.gov

Updated 1-2022

Work cycle of an Event



How a new event moves through NC COVID

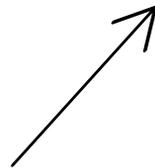


A person gets a positive COVID test.



North Carolina COVID-19 Surveillance System

The lab is imported or manually entered into NC COVID.



Workflow Queues

LHD Acknowledgement Needed

LOCAL - Lab result review required

- *The event needs to be assigned to the appropriate LHD group in the Investigation Trail of the Admin pkg*
- *Review and acknowledge the lab for the event. All imported and manually entered labs must be reviewed and acknowledged.*

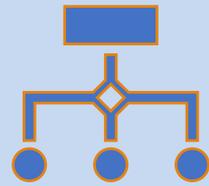


Workflow Queues

Event Classification status: 1. Original Assignment

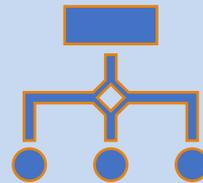
The event will stay in the Original Assignment workflow for your county until all case follow up is complete and the event is assigned to the State.

Workflows



- As an event moves through the work cycle from start to finish, it also moves through workflows.
- Workflows are lists of events that meet a specific query like “show all events that have not had their lab result marked as reviewed”.
- Events in workflows have permission restrictions, so you only see those events you have permission to see.
- Events in workflows can be created via ELR or by manual entry.
- Any event not meeting the criteria for reporting to CDC and/or closure will be found in some workflow to ensure it is not lost to further action.

Workflows



- Most columns in most workflows are sortable ascending or descending. Click on the column name and look for the up or down arrow. In the example below, sorting with the arrow ‘down’ gives all events in this workflow in most recent update order.

Event	CLASSIFICATION_Classification	Name	Status	Create Date	Disease	Last Update ▾	Jurisdiction
-------	-------------------------------	------	--------	-------------	---------	---------------	--------------

- Many workflows also have a filter capability to narrow your results. You can filter them by the same criteria as the column headers of the workflow. In the example below, the filter searched the workflow for only confirmed events.

LOCAL - Lab result review required - Wake March - December 2020 (Last Update: 01/07/2022 01:38 PM)								
<input type="checkbox"/>	Event	CLASSIFICATION_Classification	Name	Status	Create Date ▾	Disease	Last Update	Jurisdiction
<input type="checkbox"/>	170002070	Confirmed	COVID Test	Open	06/02/2020	Coronavirus (COVID-19)	06/27/2020	Wake County
Filter:		CLASSIFICATION_Classification ▾	Contains ▾	confirmed	Apply	Clear	Displaying 1...1 of 1 (Export All) << F	



Workflows to Review

- ❖ Events missing the first group in the Investigation Trail section of the Administrative package will be in the **LHD Acknowledgement Needed workflow**. To remove, add the correct county Group in the first block.

A. General

LHD Acknowledgement Needed

Workflow Queue	Category	Description
LHD Acknowledgement Needed	A. General	Acknowledge the event by updating the first group in the investigation trail [not admin trail] with the name of the owning jurisdiction

## Date Assigned-Reassigned	06/02/2020	Add New
## Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	<input type="text"/>	
## Select the reason for the assignment/reassignment	Original/Initial Assignment	▼
^ Authorized Reporter	<input type="text"/>	
## Classification status	Confirmed	▼
Notes	<input type="text"/>	



Workflows to Review

- ❖ All new labs (ELR or manually entered) cause an event to fall into one of the **C.1 LOCAL Lab result review required** workflows. These workflows are the best indicator of new labs that occur on events; either new events or previously created events. To remove an event, review the lab, confirm the event is assigned correctly to the county of residence, with the correct classification status, and acknowledge.

C.1 CD Lab Review Workflows

[LOCAL - Lab result review required](#)

C.1 CD Lab Review Workflows	Review needed for lab results: After review, select the event and click on "marked as reviewed locally" tab below.
-----------------------------	--

LOCAL - Lab result review required - Wake (Last Update: 0		
<input type="checkbox"/>	Event	CLASSIFICATION_Classification
<input checked="" type="checkbox"/>	COVID_106237644	Confirmed
<input type="checkbox"/>	COVID_106237640	Confirmed
<input type="checkbox"/>	COVID_106237614	Confirmed

Mark as Reviewed Local

- Workflows
- Dashboard
- Help



Workflows to Review

- ❖ Any event that has an LHD group in the Investigation Trail and currently has the Reason for assignment field set to “Original/Initial Assignment” will be in the **C. 2 Event Classification Status: 1. Original Assignment workflow** for that county and year of lab. Events remain here while the LHD works them until they are ready to be assigned to the State or another LHD group if the person’s residence of diagnosis is determined to be another county.

C.2 CD Review and Approval Workflows

Event Classification status: 1. Original Assignment -

Category	Description
C.2 CD Review and Approval Workflows	This workflow contains events initially assigned to your group. To clear, reassign once investigation is completed and ready to submit to state or other LHD group.

## Date Assigned-Reassigned <input type="checkbox"/>	06/02/2020 <input type="text"/> <input type="button" value="Add New"/>
## Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake COVID <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Delete"/>
## Select the reason for the assignment/reassignment	Original/Initial Assignment <input type="button" value="v"/>
^ Authorized Reporter	<input type="text"/>
## Classification status	Confirmed <input type="button" value="v"/>
Notes	<input type="text"/>



Workflows to Review

- ❖ Events where one LHD has transferred the event to another LHD can be found in the **Event Classification status: 2. LHD to LHD Transfer**

C.2 CD Review and Approval Workflows

Event Classification status: 2. LHD to LHD Transfer

Category	Description
C.2 CD Review and Approval Workflows	This workflow contains events assigned to your group by another LHD group. To clear, reassign once investigation is completed and ready to submit to state or other LHD group.

NC County of Residence for the Event	
If a different county is investigating this event, the county of residence must share this event. If patient is not a NC resident, enter the NC investigating county here.	
## NC County of Residence for the Event	Wake County
Investigation Trail: Add a new entry for each group to which the event transfers during the investigation	
## Date Assigned-Reassigned	01/17/2021
## Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Granville COVID
## Select the reason for the assignment/reassignment	Original/Initial Assignment
^ Authorized Reporter	
## Classification status	Confirmed
Notes	Pt confirmed to live in Wake Cd
## Date Assigned-Reassigned	01/17/2021 Add New
## Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake COVID
## Select the reason for the assignment/reassignment	LHD to LHD transfer
^ Authorized Reporter	
## Classification status	Confirmed
Notes	



Workflows to Review

- ❖ If the State has returned the event to the Region for any reason, the event will fall into the workflow **Event Classification status: 3. Reassign to LHD from State** with the expectation that the region will update and return to the State.

C.2 CD Review and Approval Workflows

Event Classification status: 3. Reassign to LHD from State

Category	Description
C.2 CD Review and Approval Workflows	This workflow contains events assigned back to your LHD group by the State for additional investigation/information. To clear, reassign once investigation is completed and ready to submit to state.

## Date Assigned-Reassigned	06/02/2020
## Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	State Disease Registrar
## Select the reason for the assignment/reassignment	Assign to State
^ Authorized Reporter	Beth Rhodes
## Classification status	Does not meet criteria
Notes	Not out of State. Peace Univ Student
## Date Assigned-Reassigned	06/03/2020 Add New
## Group: (You cannot change your group selection unless you clear this entry by erasing the Date Assigned)	Wake COVID
## Select the reason for the assignment/reassignment	Reassign to LHD from state
^ Authorized Reporter	
## Classification status	Confirmed
Notes	

Tasks (Optional)

NC COVID has the capability of assigning tasks on events to help manage user workloads

Tasks can be assigned through some workflows and through any event

If your LHD would like to use tasks, please contact the TATP Nurse or NCEDSS trainings for further instruction

Assign Tasks via Workflows



- ❖ Returning to the **C.1 LOCAL Lab result review required** workflows, these workflows allow a user to assign a task directly from the workflow.

C.1 CD Lab Review Workflows
LOCAL - Lab result review required

- ❖ The event must be checked and then a task can be assigned to a user and/or a group prior to acknowledging the event.

Lab Results - Viral Diseases - Lab result review required (local) (Last Update: 01/30/2021 12:58 PM)

<input type="checkbox"/>	Event	Name	Status	Create Date	Disease	Last Update	Jurisdiction	Assigned To	Assigned To Group
<input checked="" type="checkbox"/>	170002070	COVID Test	Open	06/02/2020	Coronavirus (COVID-19)	06/27/2020	Wake County		

Filter: Jurisdiction Contains wake Apply Clear Displaying 1...1 of 1 (Export All) << First < Prev 1 / 1 Next > Last >>

Create a task for this user: [Assign to me] Create a task for this group: Assign Reassign

Lab Results - Viral Diseases - Lab result review required (local) (Last Update: 01/30/2021 01:05 PM)

<input type="checkbox"/>	Event	Name	Status	Create Date	Disease	Last Update	Jurisdiction	Assigned To	Assigned To Group
<input type="checkbox"/>	170002070	COVID Test	Open	06/02/2020	Coronavirus (COVID-19)	06/27/2020	Wake County	Christy Crowley	Wake CD

Filter: Jurisdiction Contains wake Apply Clear Displaying 1...1 of 1 (Export All) << First < Prev 1 / 1 Next > Last >>

Workflows to Review



- ❖ Your LHD may or may not use Tasks. If they do, you can see Tasks for the Groups (if you assigned to your LHD group) you have as well as Tasks directly assigned to you.

Task Specific Monitors (Add Task)	
1. My Overdue Tasks	0 (0)
4. My Open Tasks	1 (1)
5. My Groups' Open Tasks	4913 (0)
6. Overdue Tasks Created by Me	0 (0)
7. Open Tasks Created by Me	1 (1)
8. Completed Tasks Created by Me (less than 30 days old)	0 (0)

4. My Open Tasks (Realtime)										
Type	Due Date	Description	Status	Created By	Last Update	Event	Disease	Assigned To	Assigned To Group	
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg	Pending	Christy Crowley (04/22/2021)	04/22/2021	COVID_108345860 Person Case, Fake	Coronavirus (COVID-19)	Christy Crowley	Mecklenburg COVID

Displaying 1...1 of 1 ([Export All](#)) << First < Prev 1 / 1 Next > Last >>

Workflows to Review



- ❖ From either the Tasks workflow or the Tasks tab in the event, you can click the Task to create, update, and close.

Task Information

Event: COVID_108345860 - Coronavirus (COVID-19) - Fake Person Case

Type: Workload Distribution

Status: Pending

Created By: Christy Crowley

Create Date: 04/22/2021

Last Update: 04/22/2021

Priority: Medium

Assigned Date: MM/DD/YYYY

Due Date: MM/DD/YYYY

Start Date: 01/26/2021

Complete Date: 01/26/2021

Description: LOCAL - Lab result review required - Mecklenburg

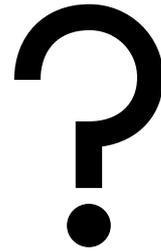
Notes: completed interview

Task Attachment: Choose File No file chosen

Assign to user: Christy Crowley [ccrowley] Assign to me

Assign to group: Mecklenburg COVID

Save Cancel Help



Helpdesk: NCEDSStrainings@dhhs.nc.gov