

NC COVID

Tasks Assignment and Management

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June 2022

Agenda

- Overview of Tasks
- Task Description
- Assigning Tasks via an Event
- Assigning Tasks via the “LOCAL-Lab result review required” workflow
- Edit Tasks from the Event Summary screen
- Monitoring Tasks from the Task Specific Monitors workflows
- Monitoring Task from the NC COVID Task Assignments Report

Tasks Overview

- Tasks are an excellent way to delegate work assignments on events either to yourself or others
- Tasks allow users to determine their workload on any given day
- Tasks allow supervisors/leads to be aware of staff workload on events in their county/region
- All tasks are required to have at minimum in order to save the task
 - Task Type
 - Description
 - User or Group assignment selected (*both selections recommend*)

Tasks Description

Event:

- Event ID number associated with the task assigned, disease and patient's name

Type:

- Workload Distribution or Outreach are generally selected

Status

- Selections are Pending, In Progress and Completed

Priority

- Selections are Very Low, Low, Medium, High and Very High

Add Task

Task Information
Event: 170002736 - Coronavirus (COVID-19) - Fred Flintstone
Type:
Status: Pending
Priority: Medium

Assigned Date: MM/DD/YYYY
Due Date: MM/DD/YYYY
Start Date: MM/DD/YYYY
Complete Date: MM/DD/YYYY
Description:
Notes:

Task Attachment: No file chosen
Assign to user:
Assign to group:

Tasks Description

Assigned Date:

- Date the task was assigned

Due Date:

- Date task is due

Start Date:

Date user begins the task

Complete Date:

- Date user finished the task

Description:

- A brief explanation of the task
 - Standardized descriptions are recommended
 - Ex: Vaccine Referral

Add Task

Task Information

Event: 170002736 - Coronavirus (COVID-19) - Fred Flintstone

Type:

Status: Pending

Priority: Medium

Assigned Date: MM/DD/YYYY

Due Date: MM/DD/YYYY

Start Date: MM/DD/YYYY

Complete Date: MM/DD/YYYY

Description:

Notes:

Task Attachment: No file chosen

Assign to user: [Assign to me](#)

Assign to group:

Add Task Screen

Notes:

- Can be used by the user assigning the task or the user completing the task

Task Attachment:

- Do not attach files to tasks. If you need to attach a file, you should attach the file to the event

Assign to user

- Assigns the task to the specific user

Assign to group

- Assigns task to a specific group
Ex. Durham COVID

****We strongly recommend that you assign to both a user and to a group**

Add Task

Task Information

Event: 170002736 - Coronavirus (COVID-19) - Fred Flintstone
Type:
Status: Pending
Priority: Medium
Assigned Date: MM/DD/YYYY
Due Date: MM/DD/YYYY
Start Date: MM/DD/YYYY
Complete Date: MM/DD/YYYY
Description:

Notes:

Task Attachment: No file chosen

Assign to user: [Assign to me](#)

Assign to group:

Assigning a Task via an Event

Assigning Tasks via an Event- Tasks tab

- On the Event Summary Screen, click on the 'Tasks' tab

The screenshot displays the 'Event Summary' screen. At the top, there is a toolbar with various icons. Below it, the 'Event Summary' tab is highlighted with a red box. The main content area is divided into two columns. The left column, titled 'Basic Information', contains the following details:

Event ID:	170002611
Disease:	Coronavirus (COVID-19)
Person:	Club Soda Birth Date: 01/26/2004 (18 Female)
Type:	Batch
Investigation Status:	Open
Linked Events/Contacts:	0 linked event(s)/contact(s) (View)
Attachments:	0 attachment(s) (Add)
Notifications:	Best date for illness identification is missing
	Classification: Confirmed
	Event is in workflows (View List)
	County of residence: Mecklenburg County
	Earliest COVID-19 Diagnosis Date: 01/16/2022
	[Show More]
	Active outbreak: Onslow COVID-19 Random Party February 2022 (Link to Outbreak) (Open)
	Active outbreak: Nash COVID-19 Random LTCF March 2022 (Link to Outbreak) (Open)
	Active outbreak: Gaston COVID-19 Random Cookout March 2022 (Link to Outbreak) (Open)
	Active outbreak: Mecklenburg COVID-19 Random Festival January 2022 (Link to Outbreak) (Open)
	Active outbreak: Mecklenburg COVID 19 East Mecklenburg High School May 2022 (Link to Outbreak) (Open)

Below the 'Basic Information' section is an 'Edit Event Properties' button. The right column is titled 'Notes (Add/Edit | Show My Notes)' and is currently empty. At the bottom of the screen, there is a navigation bar with several tabs: 'Event Data', 'Lab Results', 'Concerns', 'Persons', 'Tasks', and 'Event History'. The 'Tasks' tab is highlighted with a red box.

Assigning Tasks via an Event- Tasks Tab

- Under the Tasks tab, you will see
 - Tasks table that lists tasks assigned on the event
 - 'Add Event Task' button and the 'Update Task' button
 - Details section provides detailed information about tasks that are currently assigned

The screenshot shows a software interface with a top navigation bar containing tabs: Event Data, Lab Results, Concerns, Persons, **Tasks**, and Event History. The 'Tasks' tab is highlighted with a red box. Below the tabs is a table with the following columns: Type, Status, Priority, Due Date, Description, Assigned To, and Assigned To Group. Below the table are two buttons: 'Add Event Task' (highlighted with a red box) and 'Update Task'. Below the buttons is a 'Details' section, indicated by a red arrow, which contains the following fields: Type, Status, Priority, Due Date, Description, Assigned To, Assigned To Group, Create Date, Created By, Last Update, Updated By, and Notes.

Assigning Task via an Event- Add Task screen

Add Task screen

- Complete the following field(s):
 - Type
 - Status
 - Assigned Date
 - Due Date
 - Start Date
 - Complete Date
 - Description
 - Notes (if applicable)
 - Assigned to user
 - Assign to group
- Click the 'Save' button

Add Task

Task Information

Event: 170002596 - Coronavirus (COVID-19) - Sun Drop

Type: Workload Distribution

Status: Pending

Priority: Medium

Assigned Date: 06/08/2022

Due Date: 06/16/2022

Start Date: MM/DD/YYYY

Complete Date: MM/DD/YYYY

Description: Review Lab and Complete Case Investigation

Notes:

Task Attachment: Choose File No file chosen

Assign to user: Jonathan Riggs [jriggs]   [Assign to me](#)

Assign to group: Mecklenburg COVID  

Save Cancel Help

Assigning Tasks via an Event- Task assigned

- Under the Tasks tab, saved tasks are listed in the 'Tasks' table
- If there is more than one task, click to highlight the task to view the information in the 'Details' section

Event Data Lab Results Concerns Persons **Tasks** Event History

Tasks						
Type	Status	Priority	Due Date	Description	Assigned To	Assigned To Group
▶ Workload Distribution	Pending	Medium	06/14/2022	Review Lab and Complete Case Investigation	Jonathan Riggs [riggs]	Mecklenburg COVID

Add Event Task Update Task

Details	
Type:	Workload Distribution
Status:	Pending
Priority:	Medium
Description:	Review Lab and Complete Case Investigation
Assigned To:	Jonathan Riggs
Assigned To Group:	Mecklenburg COVID
Create Date:	06/07/2022
Created By:	Alicia Shedd
Last Update:	06/07/2022
Updated By:	Alicia Shedd
Assigned Date:	06/07/2022
Due Date:	06/14/2022
Start Date:	
Complete Date:	
Notes:	

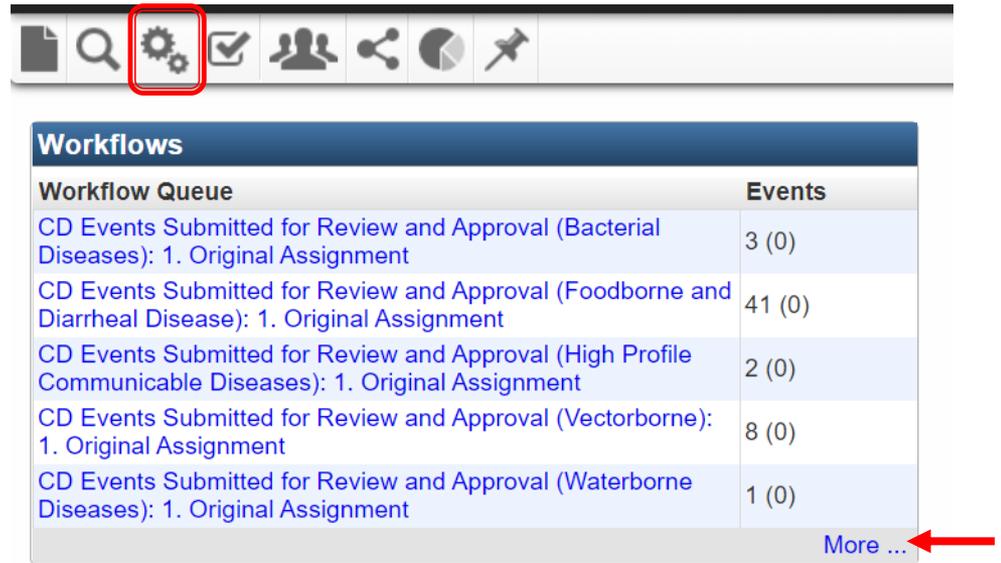
Assigning Tasks via an Event Demonstration



Assigning Tasks via Lab Results Review Required Workflow

Local-Lab Result Review Required Workflow

- On the homepage, click on the workflow icon or the 'More' hyperlink to access user workflow queue
- Click on the LOCAL-Lab Result Review Required workflow hyperlink



Workflow Queue	Events
CD Events Submitted for Review and Approval (Bacterial Diseases): 1. Original Assignment	3 (0)
CD Events Submitted for Review and Approval (Foodborne and Diarrheal Disease): 1. Original Assignment	41 (0)
CD Events Submitted for Review and Approval (High Profile Communicable Diseases): 1. Original Assignment	2 (0)
CD Events Submitted for Review and Approval (Vectorborne): 1. Original Assignment	8 (0)
CD Events Submitted for Review and Approval (Waterborne Diseases): 1. Original Assignment	1 (0)

More ...

C.1 CD Lab Review Workflows

LOCAL - Lab result review required - Buncombe	3 (0)
LOCAL - Lab result review required - Durham	1 (0)
LOCAL - Lab result review required - Mecklenburg 2021	82 (0)
LOCAL - Lab result review required - Mecklenburg 2022	45 (4)
LOCAL - Lab result review required - Pitt	3 (0)
LOCAL - Lab result review required - Wake	23 (1)

Local-Lab Result Review Required Workflow

- Workflow Details – LOCAL – Lab Result Review Required Workflow screen will populate
- In order to create a task on an event or events, click the check box next to the Event ID(s)

Workflow Details - LOCAL - Lab result review required - Mecklenburg 2022

LOCAL - Lab result review required - Mecklenburg 2022 (Last Update: 06/01/2022 09:27 PM)

<input type="checkbox"/>	Event	CLASSIFICATION_Classification	Name	Status	Create Date	Disease	Last Update	Jurisdiction	Assigned To	Assigned To Gr
<input checked="" type="checkbox"/>	170002736	Confirmed	Fred Flintstone	Open	06/01/2022	Coronavirus (COVID-19)	06/01/2022	Mecklenburg County		
<input type="checkbox"/>	170002666	Probable	SpongeBob SquarePants	Open	04/19/2022	Coronavirus (COVID-19)	04/19/2022	Mecklenburg County		
<input type="checkbox"/>	170002661	Probable	Peanut Brittle	Open	04/19/2022	Coronavirus (COVID-19)	04/19/2022	Mecklenburg County		
<input type="checkbox"/>	170002611	Confirmed	Club Soda	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002610	Confirmed	Tonic Water	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002609	Confirmed	Green Tea	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002608	Confirmed	Canada Dry	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002607	Confirmed	Sierra Mist	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002606	Confirmed	Ginger Ale	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002605	Confirmed	Ginger Beer	Open	01/30/2022	Coronavirus (COVID-19)	06/01/2022	Mecklenburg County		
<input type="checkbox"/>	170002604	Confirmed	Mr Pibb	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002603	Confirmed	Fruit Punch	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002602	Confirmed	Dr Pepper	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002601	Confirmed	Pepsi Cola	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002600	Confirmed	Cheer Wine	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002599	Confirmed	Cherry Pepsi	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002598	Confirmed	Vanilla Coke	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002597	Confirmed	Fanta Orange	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002596	Confirmed	Sun Drop	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002595	Confirmed	Rc Cola	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		

Filter: Contains Apply Clear Displaying 1...20 of 51 (Export All) << First < Prev 1 / 3 Next > >

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

Mark as Reviewed Local

Workflows Dashboard Help

Local-Lab Result Review Required Workflow

- Create task for a user and group by completing the 'create a task for this user' and 'create a task for this group' fields
- Click the 'Assign' button

Workflow Details - LOCAL - Lab result review required - Mecklenburg 2022

LOCAL - Lab result review required - Mecklenburg 2022 (Last Update: 06/06/2022 03:19 PM)										
<input type="checkbox"/>	Event	CLASSIFICATION_Classification	Name	Status	Create Date	Disease	Last Update	Jurisdiction	Assigned To	Assigned To Group
<input checked="" type="checkbox"/>	170002608	Confirmed	Canada Dry	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County	Jonathan Riggs	Mecklenburg COVID
<input type="checkbox"/>	170002607	Confirmed	Sierra Mist	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002606	Confirmed	Ginger Ale	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002605	Confirmed	Ginger Beer	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002604	Confirmed	Mr Pibb	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002603	Confirmed	Fruit Punch	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002602	Confirmed	Dr Pepper	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002601	Confirmed	Pepsi Cola	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002600	Confirmed	Cheer Wine	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002599	Confirmed	Cherry Pepsi	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002598	Confirmed	Vanilla Coke	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002597	Confirmed	Fanta Orange	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002596	Confirmed	Sun Drop	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002595	Confirmed	Rc Cola	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002594	Confirmed	root Beer	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002593	Confirmed	Berry Lemonade	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002592	Confirmed	Mellow Yellow	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002591	Confirmed	Seven Up	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002590	Confirmed	Mountain Dew	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002589	Confirmed	Cream Soda	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		

Filter: Contains Apply Clear Displaying 61..80 of 105 (Export All) << First < Prev 4 / 6 Next > Last >>

Create a task for this user: Create a task for this group:

Local-Lab Result Review Required Workflow

- In the workflow, the 'Assigned To' and 'Assigned To Group' fields will display
- To see the actual task, click the event hyperlink

Workflow Details - LOCAL - Lab result review required - Mecklenburg 2022

LOCAL - Lab result review required - Mecklenburg 2022 (Last Update: 06/06/2022 03:19 PM)

<input type="checkbox"/>	Event	CLASSIFICATION_Classification	Name	Status	Create Date	Disease	Last Update	Jurisdiction	Assigned To	Assigned To Group
<input checked="" type="checkbox"/>	170002608	Confirmed	Canada Dry	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County	Jonathan Riggs	Mecklenburg COVID
<input type="checkbox"/>	170002607	Confirmed	Sierra Mist	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002606	Confirmed	Ginger Ale	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002605	Confirmed	Ginger Beer	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002604	Confirmed	Mr Pibb	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002603	Confirmed	Fruit Punch	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002602	Confirmed	Dr Pepper	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002601	Confirmed	Pepsi Cola	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002600	Confirmed	Cheer Wine	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002599	Confirmed	Cherry Pepsi	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002598	Confirmed	Vanilla Coke	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002597	Confirmed	Fanta Orange	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002596	Confirmed	Sun Drop	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002595	Confirmed	Rc Cola	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002594	Confirmed	root Beer	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002593	Confirmed	Berry Lemonade	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002592	Confirmed	Mellow Yellow	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002591	Confirmed	Seven Up	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002590	Confirmed	Mountain Dew	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		
<input type="checkbox"/>	170002589	Confirmed	Cream Soda	Open	01/30/2022	Coronavirus (COVID-19)	01/30/2022	Mecklenburg County		

Filter: Contains Apply Clear Displaying 61...80 of 105 (Export All)

<< First < Prev 4 / 6 Next > Last >>

Create a task for this user:



[Assign to me]

Create a task for this group:



Assign

Reassign

Mark as Reviewed Local

Workflows

Dashboard

Help

Local-Lab Result Review Workflow

- On the Event Summary screen, under the 'Tasks' tab, you will now see the task just assigned

Event Data Lab Results Concerns Persons **Tasks** Event History

Type	Status	Priority	Due Date	Description	Assigned To	Assigned To Group
Workload Distribution	Pending	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Jonathan Riggs [jriggs]	Mecklenburg COVID

Add Event Task Update Task

Details

Type:	Workload Distribution
Status:	Pending
Priority:	Medium
Description:	LOCAL - Lab result review required - Mecklenburg 2022
Assigned To:	Jonathan Riggs
Assigned To Group:	Mecklenburg COVID
Create Date:	06/07/2022
Created By:	Alicia Shedd
Last Update:	06/07/2022
Updated By:	Alicia Shedd
Assigned Date:	
Due Date:	
Start Date:	
Complete Date:	
Notes:	

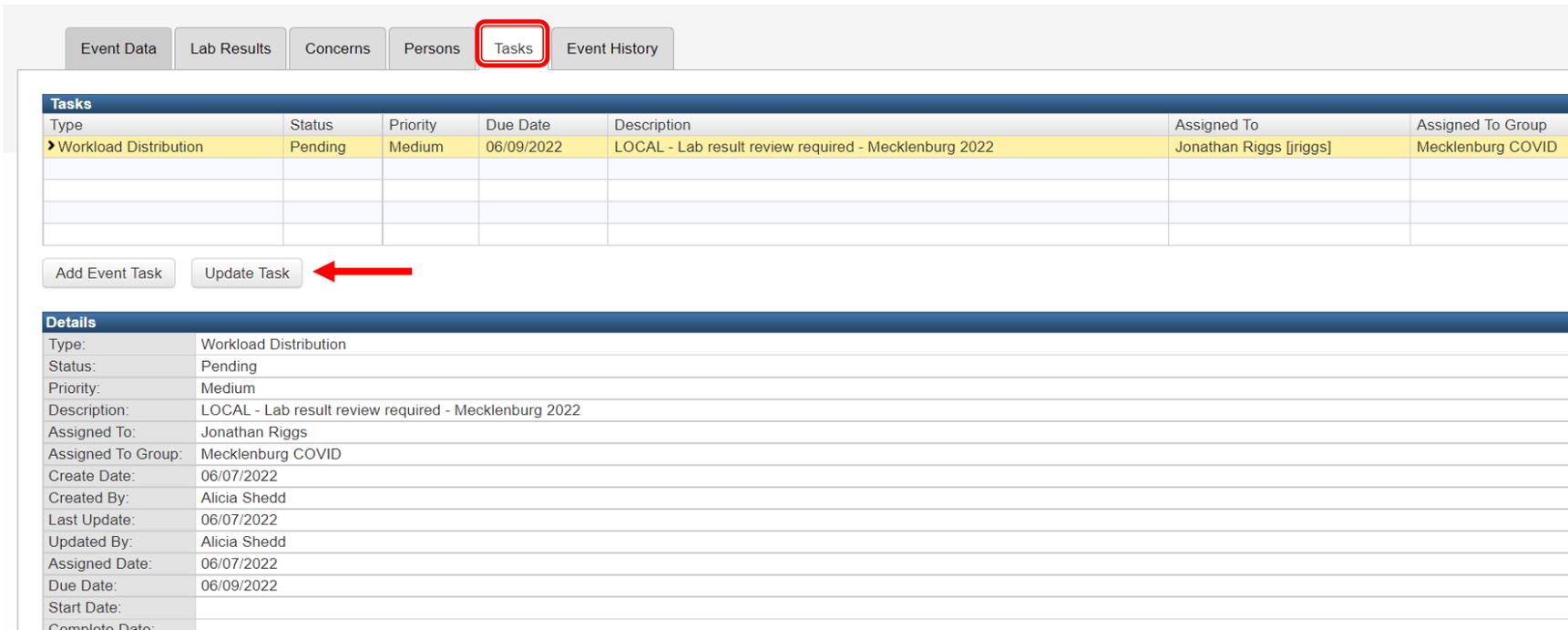
Assigning Tasks via Lab Results Review Required Workflow Demonstration



Edit Tasks from Event Summary screen

Edit Tasks from Event Summary screen

- On the Event Summary screen, click on the 'Tasks' tab
- Under the Tasks section, click to highlight the task
- Select the 'Update Task' button



The screenshot shows the 'Event Summary' screen with the 'Tasks' tab selected. The 'Tasks' section contains a table with the following data:

Type	Status	Priority	Due Date	Description	Assigned To	Assigned To Group
Workload Distribution	Pending	Medium	06/09/2022	LOCAL - Lab result review required - Mecklenburg 2022	Jonathan Riggs [jriggs]	Mecklenburg COVID

Below the table are two buttons: 'Add Event Task' and 'Update Task'. A red arrow points to the 'Update Task' button.

The 'Details' section below the table shows the following information:

Type:	Workload Distribution
Status:	Pending
Priority:	Medium
Description:	LOCAL - Lab result review required - Mecklenburg 2022
Assigned To:	Jonathan Riggs
Assigned To Group:	Mecklenburg COVID
Create Date:	06/07/2022
Created By:	Alicia Shedd
Last Update:	06/07/2022
Updated By:	Alicia Shedd
Assigned Date:	06/07/2022
Due Date:	06/09/2022
Start Date:	
Complete Date:	

Edit Tasks from Event Summary screen

- Assigned User should update the status, start date and the complete date fields as applicable
- Click the 'Save' button each time the Edit Task screen is updated

Tasks assigned to events should be updated as completed in the 'Status' and 'Complete Date' fields before assigning the event to the state

Edit Task

Task Information

Event: 170002608 - Coronavirus (COVID-19) - Canada Dry

Type: Workload Distribution

Status: In Progress

Created By: Alicia Shedd

Create Date: 06/07/2022

Last Update: 06/07/2022

Priority: Medium

Assigned Date: 06/07/2022

Due Date: 06/09/2022

Start Date: 06/07/2022

Complete Date: MM/DD/YYYY

Description: LOCAL - Lab result review required - Mecklenburg 2022

Notes:

Task Attachment: Choose File No file chosen

Assign to user: Jonathan Riggs [riggs]   [Assign to me](#)

Assign to group: Mecklenburg COVID  

Edit Tasks from Event Summary screen

As a user begins working on an assigned task, it is recommended that the assigned user edits the following

- Status to 'In Progress'
- Add the Start Date

Click the 'Save' button

Edit Task

Task Information

Event: 170002596 - Coronavirus (COVID-19) - Sun Drop

Type: Workload Distribution

Status: In Progress

Created By: Alicia Shedd

Create Date: 06/07/2022

Last Update: 06/07/2022

Priority: Medium

Assigned Date: 06/07/2022

Due Date: 06/14/2022

Start Date: 06/07/2022

Complete Date: MM/DD/YYYY

Description: Review Lab and Complete Case Investigation

Notes:

Task Attachment: Choose File No file chosen

Assign to user: Jonathan Riggs [jriggs]  [Assign to me](#)

Assign to group: Mecklenburg COVID 

Save Cancel Help

**Edit Event Task from
the Event Summary screen
Demonstration**



Monitoring Tasks from the Task Specific Monitors workflows

Task Specific Monitors Workflow

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

Dashboard Help

My Overdue Tasks

Task assigned to you which have not been completed by due date

My Open Tasks

Tasks that have been specifically assigned to you which have not been completed

My Group's Open Tasks

Tasks that have been assigned to your group which have not been completed

Overdue Tasks Created by Me

Tasks assigned by you that have not been completed by assigned due date

Open Tasks Created by Me

Tasks created by you which are not yet completed

Completed Tasks Created by Me (Less than 30 days old)

Tasks that you created which are now complete. Events will automatically drop out of this workflow 30 days

Task Specific Monitors Workflow

- Tasks are available from the dashboard or workflow
- Click [Start Task](#) hyperlink to change the Status from Pending to In Progress
- To view event and task details click on the [Event ID](#) hyperlink

Tasks			
Type	Priority	Name	Disease
Workload Distribution	Medium	Orange, Fanta	Coronavirus (COVID-19)
Workload Distribution	Medium	Pepsi, Cherry	Coronavirus (COVID-19)
Workload Distribution	Medium	Coke, Vanilla	Coronavirus (COVID-19)
Workload Distribution	Medium	Baby Ruth, Candi	Coronavirus (COVID-19)
			More ...

Tasks									
My tasks (specifically assigned to me)									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	170002597 - Coronavirus (COVID-19) - Fanta Orange	Alicia Shedd [Start Task]	Mecklenburg COVID	
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	170002599 - Coronavirus (COVID-19) - Cherry Pepsi	Alicia Shedd [Start Task]	Mecklenburg COVID	
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	170002598 - Coronavirus (COVID-19) - Vanilla Coke	Alicia Shedd [Start Task]	Mecklenburg COVID	
Workload Distribution	Medium	05/20/2022	Event assignment	Pending	Alicia Shedd (06/07/2022)	170002398 - Coronavirus (COVID-19) - Candi Baby Ruth	Alicia Shedd [Start Task]	Wake COVID	

Task Specific Monitors Workflow

- Click on [My Groups' Open Tasks](#) hyperlink

Task Specific Monitors (Add Task)

- [1. My Overdue Tasks](#)
- [4. My Open Tasks](#)
- [5. My Groups' Open Tasks](#)
- [6. Overdue Tasks Created by Me](#)
- [7. Open Tasks Created by Me](#)
- [8. Completed Tasks Created by Me \(less than 30 days old\)](#)

[Dashboard](#) [Help](#)

- Workflow Details- 5. My Groups open Tasks (Realtime) screen will load
- To access the Edit Task screen, click on Type (Ex. [Workload Distribution](#) hyperlink) in for the task assigned to you or click on the disease ([Event ID](#) hyperlink)

Workflow Details - 5. My Groups' Open Tasks

5. My Groups' Open Tasks (Realtime)										
Type	Due Date	Description	Status	Created By	Last Update	Event	Disease	Assigned To	Assigned To Group	
Workload Distribution	Medium	06/14/2022	Review Lab and Complete Case Investigation	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002596 Drop, Sun	Coronavirus (COVID-19)	Jonathan Riggs	Mecklenburg COVID
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002606 Ale, Ginger	Coronavirus (COVID-19)	Elizabeth Holsomback	Mecklenburg COVID
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002607 Mist, Sierra	Coronavirus (COVID-19)	Elizabeth Holsomback	Mecklenburg COVID
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002605 Beer, Ginger	Coronavirus (COVID-19)	Elizabeth Holsomback	Mecklenburg COVID
Workload Distribution	Medium	05/20/2022	Event assignment	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002398 Baby Ruth, Candi	Coronavirus (COVID-19)	Alicia Shedd	Wake COVID
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	In Progress	Alicia Shedd (06/07/2022)	06/07/2022	170002598 Coke, Vanilla	Coronavirus (COVID-19)	Alicia Shedd	Mecklenburg COVID
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	In Progress	Alicia Shedd (06/07/2022)	06/07/2022	170002599 Pepsi, Cherry	Coronavirus (COVID-19)	Alicia Shedd	Mecklenburg COVID
Workload Distribution	Medium		LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002597 Orange, Fanta	Coronavirus (COVID-19)	Alicia Shedd	Mecklenburg COVID
Workload Distribution	Medium	06/09/2022	LOCAL - Lab result review required - Mecklenburg 2022	Pending	Alicia Shedd (06/07/2022)	06/07/2022	170002608 Dry, Canada	Coronavirus (COVID-19)	Jonathan Riggs	Mecklenburg COVID

Displaying 1...9 of 9 (Export All) << First < Prev 1 / 1 Next > Last >>

[Workflows](#) [Dashboard](#) [Help](#)

Task Specific Monitors Workflow- Edit Task- Completed

When the assigned task is completed, it is recommended to Edit the Task to reflect completion

To mark as completed update the following fields

- Status to 'Completed'
- Complete Date

Click the 'Save' button



Edit Task

Task Information

Event: 170002596 - Coronavirus (COVID-19) - Sun Drop

Type: Workload Distribution

Status: Completed

Created By: Alicia Shedd

Create Date: 06/07/2022

Last Update: 06/07/2022

Priority: Medium

Assigned Date: 06/07/2022

Due Date: 06/14/2022

Start Date: 06/07/2022

Complete Date: 06/07/2022

Description: Review Lab and Complete Case Investigation

Notes:

Task Attachment: Choose File No file chosen

Assign to user: Jonathan Riggs [jriggs] [Assign to me](#)

Assign to group: Mecklenburg COVID

Save Cancel Help

**Monitoring Task from the
Task Specific Monitors Workflows
Demonstration**



Monitoring Task from the NC COVID Task Assignment Report

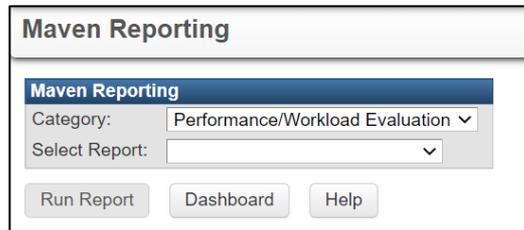


Monitoring Tasks from the NC COVID Task Assignment Report

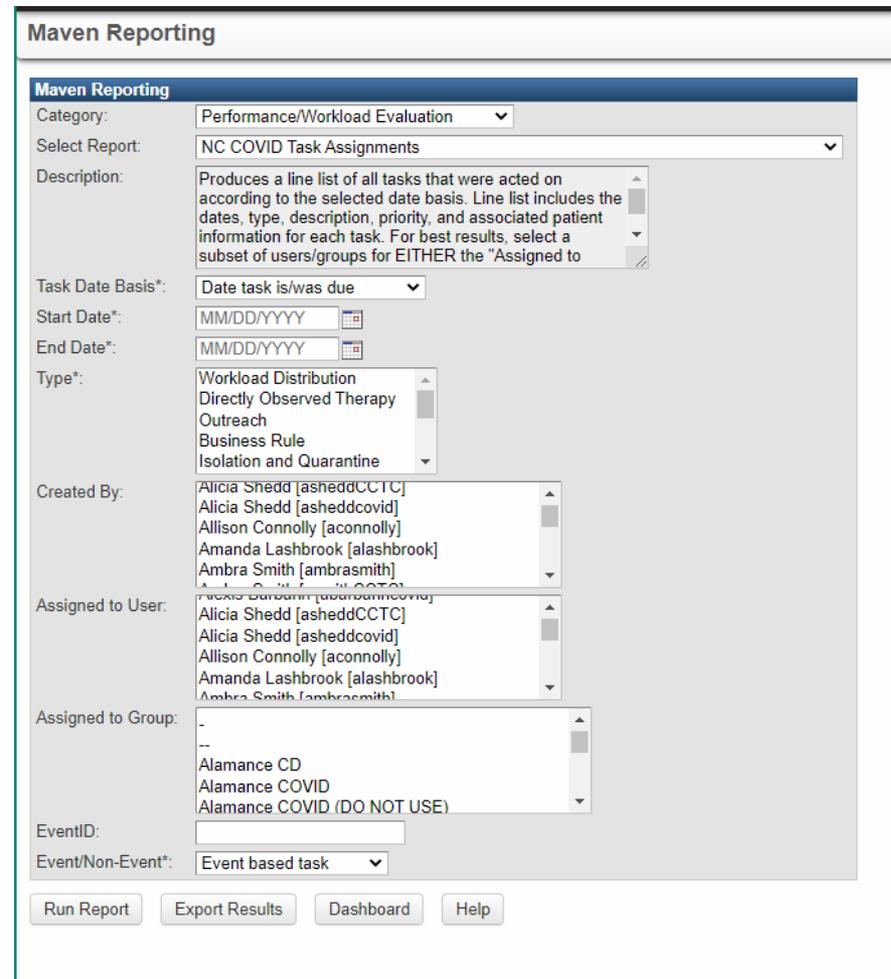
- Click on Reports icon on the tool bar



- Maven Reporting Screen will load



- Category = Performance/Workload Evaluation
- Report = NC COVID Task Assignments
- Additional Fields will populate for selection criteria



Monitoring Tasks from the NC COVID Task Assignment Report

- Required Fields(*) to Run a Report
 - Task Date Basis
 - Start Date
 - End Date
 - Type
- This report can only be run if an option for 'Assigned to User' or 'Assigned to Group' is selected. You must choose one and only one for report to be run.

Maven Reporting

Maven Reporting

Category: Performance/Workload Evaluation

Select Report: NC COVID Task Assignments

Description: Produces a line list of all tasks that were acted on according to the selected date basis. Line list includes the dates, type, description, priority, and associated patient information for each task. For best results, select a subset of users/groups for EITHER the "Assigned to

Task Date Basis*: Date task is/was due

Start Date*: MM/DD/YYYY

End Date*: MM/DD/YYYY

Type*: Workload Distribution
Directly Observed Therapy
Outreach
Business Rule
Isolation and Quarantine

Created By: Alicia Shedd [asheddCCTC]
Alicia Shedd [asheddcovid]
Allison Connolly [aconnolly]
Amanda Lashbrook [alashbrook]
Ambra Smith [ambrasmith]

Assigned to User: Alicia Shedd [asheddCCTC]
Alicia Shedd [asheddcovid]
Allison Connolly [aconnolly]
Amanda Lashbrook [alashbrook]
Ambra Smith [ambrasmith]

Assigned to Group: -
--
Alamance CD
Alamance COVID
Alamance COVID (DO NOT USE)

EventID:

Event/Non-Event*: Event based task

Run Report Export Results Dashboard Help

Monitoring Tasks from the NC COVID Task Assignment Report

- Task Date Basis
 - Date Task is/was due
 - Date Task was assigned
 - Date Task was completed
 - Date Task was created
 - Date Task was updated
 - Date Task was Started
- Start Date is the date the NC COVID Task Assignment report will begin
- End Date is the date the NC COVID Task Assignment report will stop pulling data
- Type is required to be selected in order to run this report
 - Workload Distribution is commonly selected

The screenshot shows the 'Maven Reporting' interface. The 'Category' is set to 'Performance/Workload Evaluation' and the 'Select Report' is 'NC COVID Task Assignments'. The 'Description' field contains a detailed explanation of the report's output. The 'Task Date Basis*' is set to 'Date task is/was due'. The 'Start Date*' and 'End Date*' fields are empty, with date pickers. The 'Type*' dropdown is open, showing options like 'Workload Distribution', 'Directly Observed Therapy', 'Outreach', 'Business Rule', and 'Isolation and Quarantine'. The 'Created By' and 'Assigned to User' fields list several users, including Alicia Shedd, Allison Connolly, and Amanda Lashbrook. The 'Assigned to Group' field is empty. The 'EventID' field is empty, and the 'Event/Non-Event*' is set to 'Event based task'. At the bottom, there are buttons for 'Run Report', 'Export Results', 'Dashboard', and 'Help'.

Monitoring Tasks from the NC COVID Task Assignment Report

- **Created By** runs the NC COVID Task Assignment report by who created the task(s)
- **Assigned to User** runs the NC COVID Task Assignment report by who the tasks were assigned to
- **Assigned to Group** runs the NC COVID Task Assignment report by which group(County) the event has been assigned to
- **EventID** runs the NC COVID Task Assignment report by the Event ID – to review tasks on a specific event only

The screenshot shows the 'Maven Reporting' application interface. At the top, the title 'Maven Reporting' is displayed. Below it, a form is used to configure a report. The 'Category' is set to 'Performance/Workload Evaluation'. The 'Select Report' dropdown is set to 'NC COVID Task Assignments'. The 'Description' field contains a detailed text about the report's output. The 'Task Date Basis*' is set to 'Date task is/was due'. The 'Start Date*' and 'End Date*' fields are empty, with date pickers. The 'Type*' dropdown is set to 'Workload Distribution'. The 'Created By' dropdown lists several users, including Alicia Shedd and Allison Connolly. The 'Assigned to User' dropdown lists the same users. The 'Assigned to Group' dropdown is set to 'Alamance COVID (DO NOT USE)'. The 'EventID' field is empty. The 'Event/Non-Event*' dropdown is set to 'Event based task'. At the bottom, there are four buttons: 'Run Report', 'Export Results', 'Dashboard', and 'Help'.

Maven Reporting

Category: Performance/Workload Evaluation

Select Report: NC COVID Task Assignments

Description: Produces a line list of all tasks that were acted on according to the selected date basis. Line list includes the dates, type, description, priority, and associated patient information for each task. For best results, select a subset of users/groups for EITHER the "Assigned to

Task Date Basis*: Date task is/was due

Start Date*: MM/DD/YYYY

End Date*: MM/DD/YYYY

Type*: Workload Distribution
Directly Observed Therapy
Outreach
Business Rule
Isolation and Quarantine

Created By: Alicia Shedd [asheddCCTC]
Alicia Shedd [asheddcovid]
Allison Connolly [aconnolly]
Amanda Lashbrook [alashbrook]
Ambra Smith [ambrasmith]
Alicia Shedd [asheddcovid]

Assigned to User: Alicia Shedd [asheddCCTC]
Alicia Shedd [asheddcovid]
Allison Connolly [aconnolly]
Amanda Lashbrook [alashbrook]
Ambra Smith [ambrasmith]

Assigned to Group: --
Alamance CD
Alamance COVID
Alamance COVID (DO NOT USE)

EventID:

Event/Non-Event*: Event based task

Run Report Export Results Dashboard Help

Monitoring Tasks from the NC COVID Task Assignment Report

Example

- **Task Date Basis:** Date task was created
- **Start Date:** 06/01/2022
- **End Date:** 06/08/2022
- **Type:** Workload Distribution
- **Created By:** Alicia Shedd [asheddcovid]
- **Assigned to Group:** Mecklenburg COVID

Select the 'Run Report' button to see the report within the database

or

'Export Results' button to view report in an excel spreadsheet

Maven Reporting

Maven Reporting

Category: Performance/Workload Evaluation

Select Report: NC COVID Task Assignments

Description: Produces a line list of all tasks that were acted on according to the selected date basis. Line list includes the dates, type, description, priority, and associated patient information for each task. For best results, select a subset of users/groups for EITHER the "Assigned to User" or "Assigned to Group"

Task Date Basis*: Date task was created

Start Date*: 06/01/2022

End Date*: 06/08/2022

Type*: Workload Distribution
* Required

Created By: Alicia Shedd [asheddcovid]

Assigned to User:

Assigned to Group: Mecklenburg COVID

EventID:

Event/Non-Event*: Event based task

Run Report Export Results Dashboard Help

Monitoring Tasks from the NC COVID Task Assignment Report

- Report exported to Excel spreadsheet

NC COVID Task Assignments Report:

Report Parameters:	
Date Basis:	Date task was created
Start Date:	06/01/2022
End Date:	06/08/2022
Task Type:	Workload Distribution
Created By:	Alicia Shedd
Assigned to Group(s):	Mecklenburg COVID
Event/Non-Event:	Event based task

Tasks:

Task Type	Task Priority	Task Due Date	Task Date Completed	Task Date Created	Task Date Updated	Task Date Started	Task Description	Task Status	Task Created By	Task Event
Workload Distribution	Medium			06/07/2022	06/07/2022		LOCAL - Lab result review required - Mecklenburg	Pending	Alicia Shedd [asheddcovid]	170002606 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Mecklenburg	In Progress	Alicia Shedd [asheddcovid]	170002599 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022		LOCAL - Lab result review required - Mecklenburg	Pending	Alicia Shedd [asheddcovid]	170002607 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Mecklenburg	In Progress	Alicia Shedd [asheddcovid]	170002597 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022		LOCAL - Lab result review required - Mecklenburg	Pending	Alicia Shedd [asheddcovid]	170002605 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Mecklenburg	In Progress	Alicia Shedd [asheddcovid]	170002589 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Mecklenburg	In Progress	Alicia Shedd [asheddcovid]	170002592 - Coronavirus (COVID-19)
Workload Distribution	Medium	06/14/2022		06/07/2022	06/07/2022		Review Lab and Complete Case Investigation	In Progress	Alicia Shedd [asheddcovid]	170002596 - Coronavirus (COVID-19)
Workload Distribution	Medium	06/09/2022		06/07/2022	06/07/2022		LOCAL - Lab result review required - Mecklenburg	Pending	Alicia Shedd [asheddcovid]	170002608 - Coronavirus (COVID-19)
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Mecklenburg	In Progress	Alicia Shedd [asheddcovid]	170002598 - Coronavirus (COVID-19)

**Monitoring Task from the
NC COVID Task Assignments Report
Demonstration**



Thank you for joining today!



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Helpdesk: NCEDSSHelpDesk@dhhs.nc.gov