

General Information About the Events Tab

Less is more with the filters! Use the filters when you want specific criteria applied to your line list of cases. If you want to see all cases in a given field, we recommend not selecting any filters instead of selecting every option in that field. For example, if you want to see all conditions, leave the condition filter blank instead of selecting every condition. This will minimize the chance of something being unintentionally skipped or deselected. This is also important for fields such as 'State Case Status.' If you want to see all cases regardless of their case status, leave it blank. Selecting all of the options under 'State Case Status' will actually filter out any cases that have a blank state status, which is typical for many conditions that review a manual update of state case status after an investigation is complete.

The event tab works on 'and' logic versus 'or' logic. For example, if you select the investigation status of 'closed' and condition as 'COVID-19,' you will only see cases of COVID that are closed, not all closed cases and all COVID-19 cases.

Best Practices

It may be helpful for your program or agency to develop a list of views that every team member should have so that you have the same list to reference for your daily investigation processes. It may also be helpful for standard views to have the same names at each agency to create a standard language between co-workers at an agency.

Helpful Views

Views are highly customizable to your needs, but some ideas of views that could be used are below.

All Cases Assigned to My Agency

Use Case: This view will show you all cases assigned to your agency. Usually, cases are automatically assigned to an agency based on address. Still, others may be

assigned if another agency reroutes a case to you, if the case is missing an address at diagnosis but has a facility address in your jurisdiction, and in other situations. **This is the preferred view to find cases that your jurisdiction is responsible for based on assignment.**

1. Click on Events in the green menu at the top-right
2. Click on the 'Options' button
3. Click 'Add View'
4. Name your view (example: All Cases Assigned to My Agency)
5. Under event investigation status, click Assigned to LPHA
6. Choose your LPHA under 'Investigating Agency'
7. Click 'Save'
8. A line list will populate and this will be a view available for you in the dropdown

All Cases in My County

Use Case: This view will show you all cases with an address of diagnosis in your county. This is helpful if you would like to see cases being worked on by another agency or CDPHE, as it works off of address at diagnosis instead of investigating agency. **Note that this will not display cases missing an address at diagnosis or cases with an address in a different county but were routed to your agency without the address in the CMR being corrected.**

1. Click on Events in the green menu at the top-right
2. Click on the 'Options' button
3. Click 'Add View'
4. Name your view (example: All Cases in My County)
5. Choose your county under 'County at Diagnosis'
6. Click 'Save'

7. A line list will populate and this will be a view available for you in the dropdown

Cases Needing Assignment

Use Case: This view will show you any case assigned to your agency and then accepted by your agency. The next step in the workflow is to assign these cases out, which you can do at the individual level or through bulk workflow from the resulting line list. Note that this can be combined with the above view 'All Cases Assigned to My County' for a quicker way to complete the initial workflow steps, and perhaps a 'Cases To Accept and Assign' view is preferred over two separate views.

1. Click on Events in the green menu at the top-right
2. Click on the 'Options' button
3. Click 'Add View'
4. Name your view (example: Cases Needing Assignment)
5. Under event investigation status, click 'Accepted by LPHA'
6. Choose your LPHA under 'Investigating Agency'
7. Click 'Save'
8. A line list will populate and this will be a view available for you in the dropdown