NC COVID
Tasks Assignment and Management

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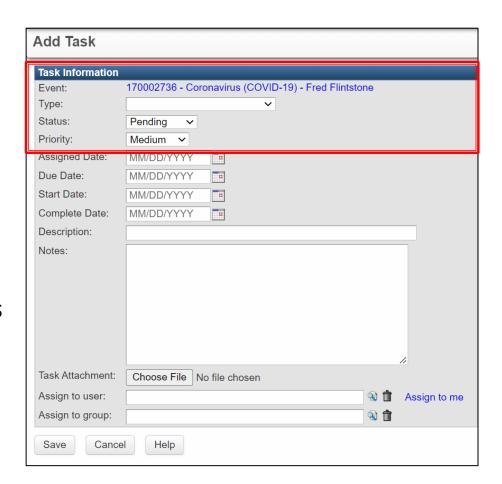- Event ID number associated with the task assigned, disease and patient's name

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:	Choose File No file chosen
Assign to user:	Assign to me
Assign to group:	

Save   Cancel   Help

Tasks Description

Assigned Date:
- Date the task was assigned

Due Date:
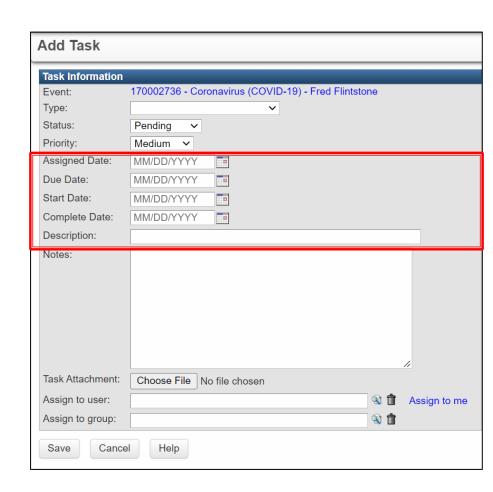- Date task is due

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 Screen

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

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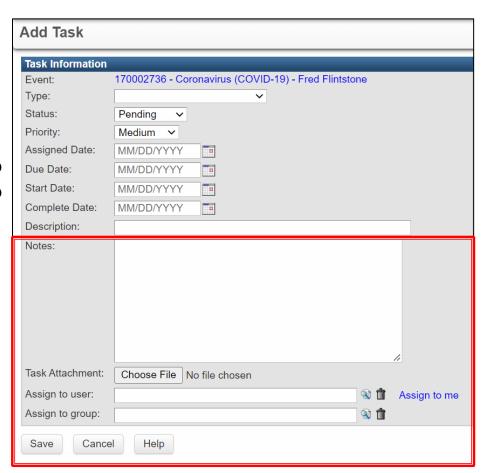- Do not attach files to tasks. If you need to attach a file, you should attach the file to the event

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: Choose File No file chosen

Assign to user: Assign to me

Assign to group:

Save   Cancel   Help

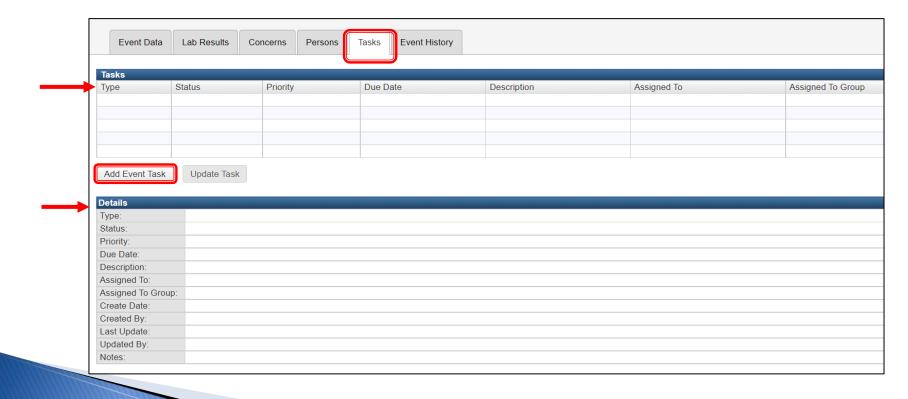# Assigning a Task via an Event

Assigning Tasks via an Event- Tasks tab

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

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

Assigning Task via an Event- Add Task screen

Add Task screen

- Complete the following field(s):

  - Type
  - Status
  - Assigned Date
  - Due Date
  - Description
  - Notes (if applicable)
  - Assigned to user
  - Assign to group

- Click the 'Save' button

Assigning Tasks via an Event- Task assigned
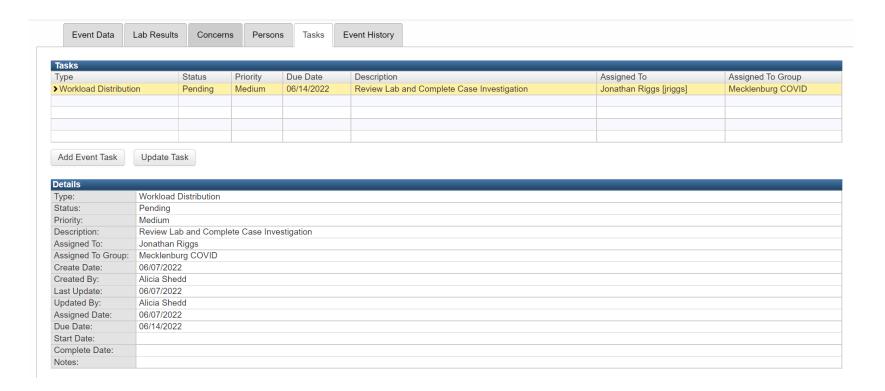
- Under the Tasks tab, saved tasks are listed in the 'Tasks' table

- 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 [jriggs]	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

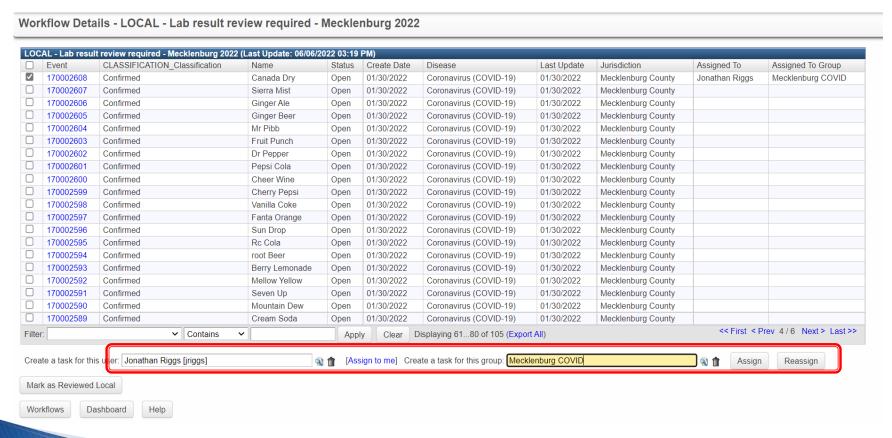- Click on the LOCAL-Lab Result Review Required workflow hyperlink

Workflows	
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 ...

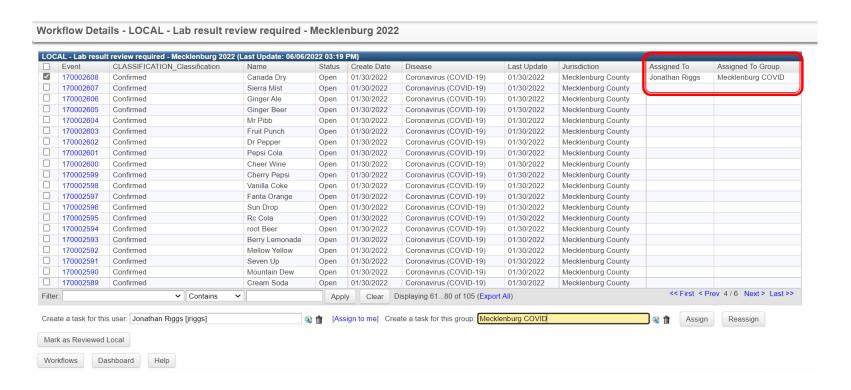| C.1 CD Lab Review Workflows	
LOCAL - Lab result review required - Buncombe	3 (0)
LOCAL - Lab result review required - Durham	1 (0)
LOCAL - Lab result review required - Mecklenburg 2021	82 (0)
LOCAL - Lab result review required - Mecklenburg 2022	45 (4)
LOCAL - Lab result review required - Pitt	3 (0)
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)

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
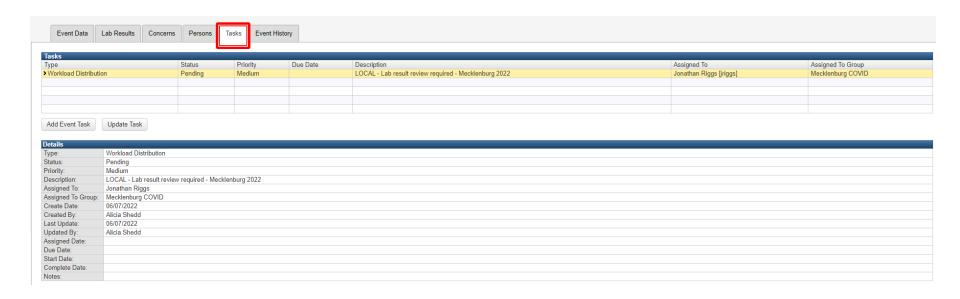- Click the 'Assign' button

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
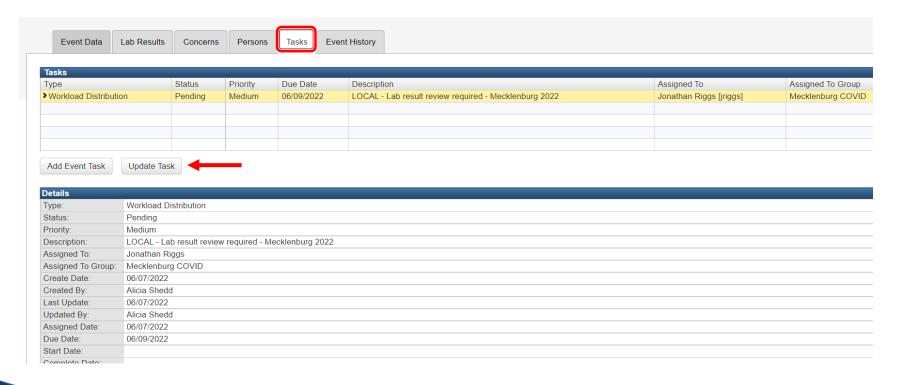
Local-Lab Result Review Workflow

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

Assigning Tasks via
Lab Results Review Required Workflow
Demonstration

Edit Tasks
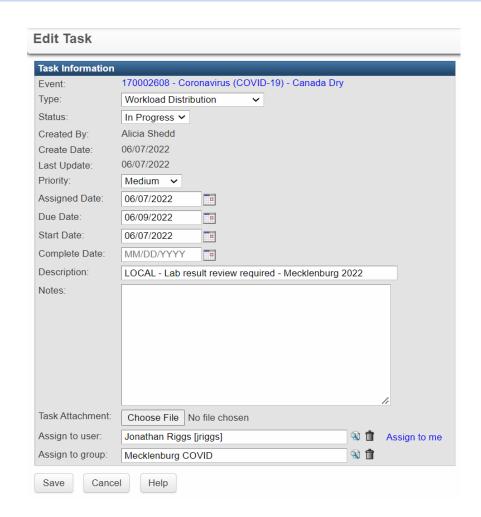# from Event Summary screen

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

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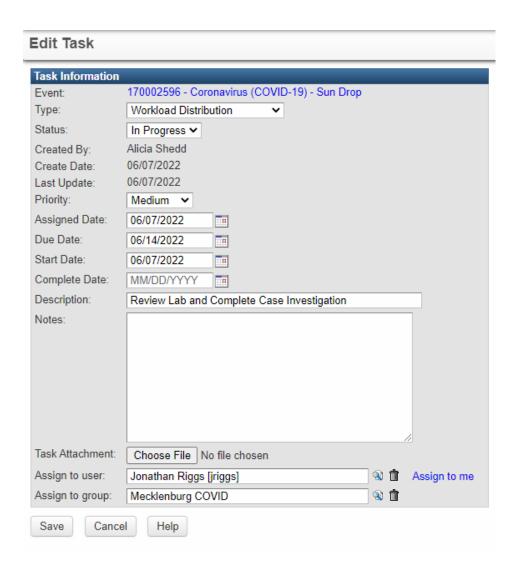
Tasks assigned to events should be updated as completed in the 'Status' and 'Complete Date' fields before assigning the event to the state

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 [jriggs] Assign to me
Assign to group:	Mecklenburg COVID

Save   Cancel   Help

Edit Tasks from Event Summary screen

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

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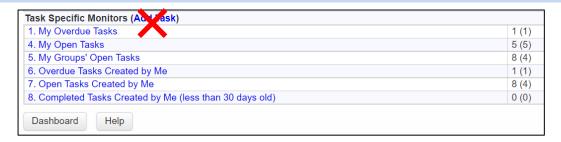- Add the Start Date

Click the 'Save' button

Edit Event Task from

the Event Summary screen

Demonstration

Monitoring Tasks from the Task Specific Monitors workflows

Task Specific Monitors Workflow

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
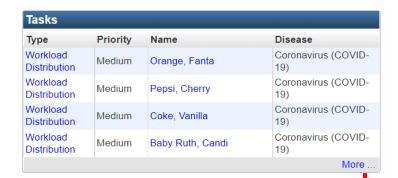
Open Tasks Created by Me
Tasks created by you which are not yet completed

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
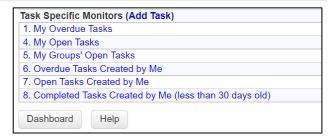
Task Specific Monitors Workflow

- 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
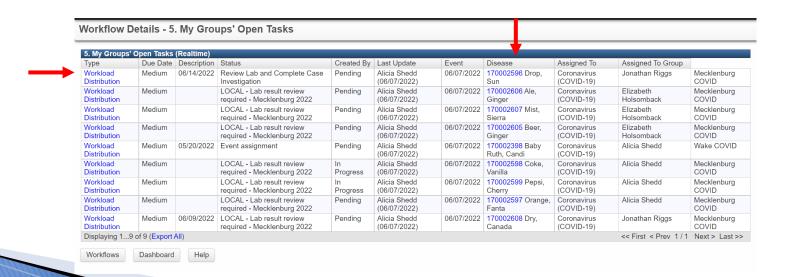
Tasks

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

- 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)
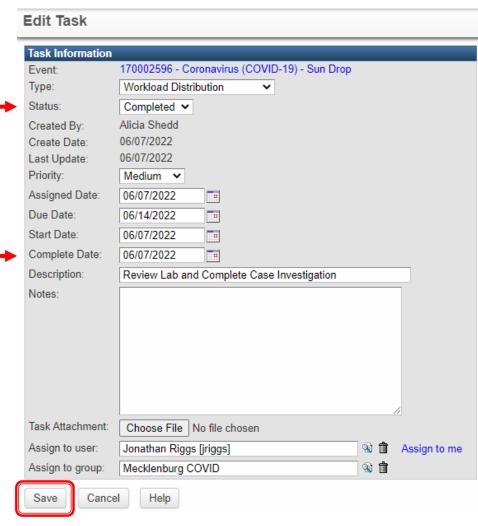
Task Specific Monitors Workflow- Edit Task- Completed

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
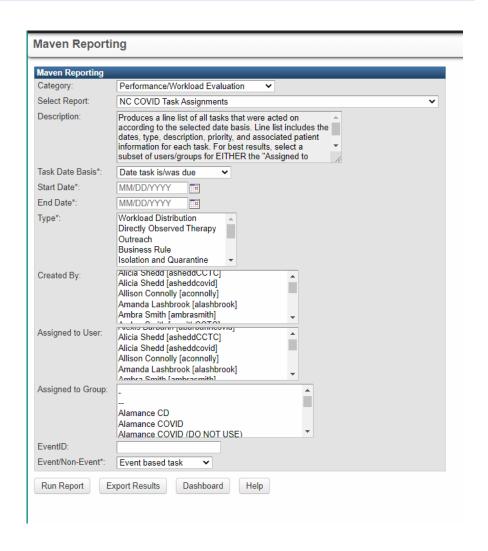
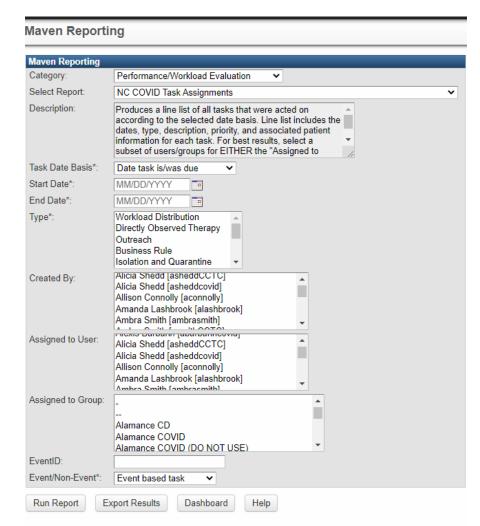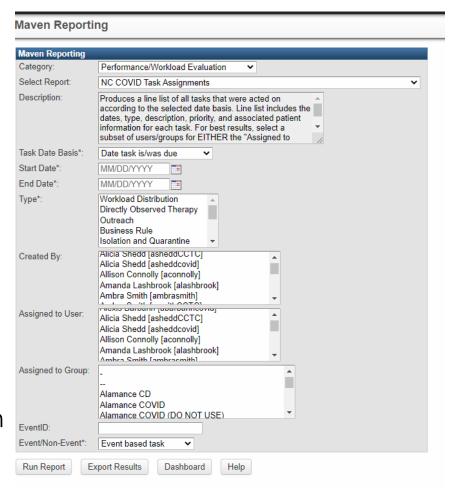- Click on Reports icon on the tool bar

- Maven Reporting Screen will load

- Category = Performance/Workload Evaluation

- Report = NC COVID Task Assignments

- Additional Fields will populate for selection criteria

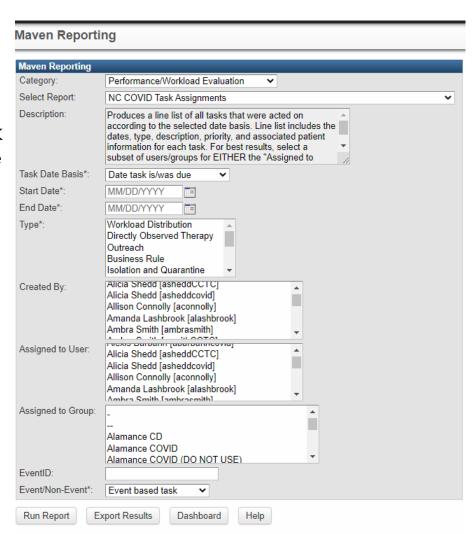# Monitoring Tasks from the NC COVID Task Assignment Report

- 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:	Alexis Durbann [aburbann/covid] / 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

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

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
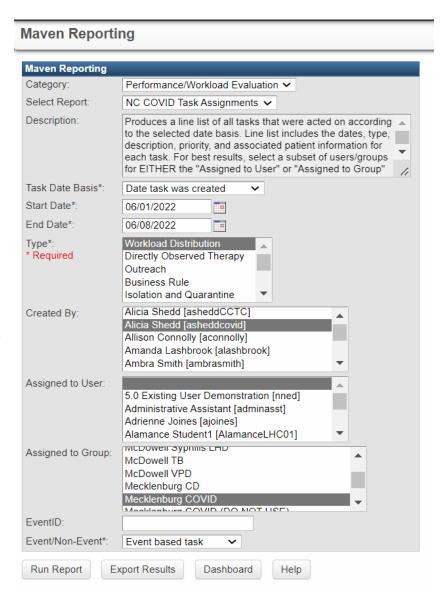
- **Type:** Workload Distribution

- **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

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 - Meckl	Pending	Alicia Shedd [asheddcovid]	170002606 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Meckl	In Progress	Alicia Shedd [asheddcovid]	170002599 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022		LOCAL - Lab result review required - Meckl	Pending	Alicia Shedd [asheddcovid]	170002607 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Meckl	In Progress	Alicia Shedd [asheddcovid]	170002597 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022		LOCAL - Lab result review required - Meckl	Pending	Alicia Shedd [asheddcovid]	170002605 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Meckl	In Progress	Alicia Shedd [asheddcovid]	170002589 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Meckl	In Progress	Alicia Shedd [asheddcovid]	170002592 - Coronavirus (CO'
Workload Distribution	Medium	06/14/2022		06/07/2022	06/07/2022		Review Lab and Complete Case Investigati	In Progress	Alicia Shedd [asheddcovid]	170002596 - Coronavirus (CO'
Workload Distribution	Medium	06/09/2022		06/07/2022	06/07/2022		LOCAL - Lab result review required - Meckl	Pending	Alicia Shedd [asheddcovid]	170002608 - Coronavirus (CO'
Workload Distribution	Medium			06/07/2022	06/07/2022	06/07/2022	LOCAL - Lab result review required - Meckl	In Progress	Alicia Shedd [asheddcovid]	170002598 - Coronavirus (CO'

Monitoring Task from the

NC COVID Task Assignments Report

Demonstration

Thank you for joining today!

Trainings: ncedsstrainings@dhhs.nc.gov

Helpdesk: NCEDSSHelpDesk@dhhs.nc.gov