

Workflows described in this document are applicable to: STD First Line Supervisors (FLS)

Workflow Category: STD FLS Activities						
Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
CS Investigation Review and Classification Approval	FLS review and approval of congenital investigation	Jurisdiction	FLS	When a worker has completed a congenital syphilis investigation and selected "Submit to FLS," event will be placed in the FLS workflow	"Supervisor Approval" is selected	Congenital Syphilis
Case Closure Approval	Cases submitted for closure by DIS that need FLS approval	Jurisdiction	FLS	When a worker has identified a case as ready for approval	"Approved for Closure" is selected by the FLS	Case Assignment/Field Record
FR Dispo Approval	Once a disposition is saved for a field record, the FLS will review and approve the disposition	Jurisdiction	FLS	A field record in case assignment is dispositioned placed in the FLS workflow for approval	Field record will be removed from the workflow once the FLS approves/disapproves of the disposition	Case Assignment/Field Record
Inadequate Treatment Approval	FLS will approve treatment if inadequate based on current CDC treatment guidelines	Jurisdiction	FLS	Treatment is determined to be inadequate by the Treatment Adequacy Processor and placed in the FLS workflow for review and approval	Will be removed from the workflow once the FLS selects "Treatment Adequacy Reviewed" and "Treatment Adequacy Override" are populated	Clinical
Reinterview Plan Approval	FLS Review of Reinterview Pursuits	Jurisdiction	FLS	Reinterview pursuits are filled out by the DIS and submitted to the FLS for review and approval	Will be removed from the workflow once the FLS selects "Supervisor Approval"	Case Assignment/Field Record
CS Investigation Pending	The patient has an identified pending congenital syphilis investigation	Jurisdiction	FLS	When a woman is identified as being pregnant during a syphilis event, CS investigation is automatically populated as "Pending"	Will be removed from the workflow once the CS investigation is changed to either "Completed" or "Not Completed"	Clinical
Open Assignment No User	Open FRs, IXs, ReIXs, and CS Investigations with no user assigned. FLS need to review these open assignments and assign them to a worker.	Jurisdiction	FLS	Assignment is open with no user assigned	User field is populated	Case Assignment/Field Record

Workflow Category: STD FLS Monitoring Activities						
Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
Open FR >3 Days	Field record initiation date is equal to or greater than 3 days	Jurisdiction	FLS	All open field records greater than 3 days will be placed in this workflow	When open field records are dispositioned, they will be removed from this workflow	Case Assignment/Field Record
Open IX >21 Days	Interview assign date is greater than or equal to 21 days for FLS review	Jurisdiction	FLS	All interview records greater than 21 days will be placed in this workflow	When the interview records are approved for closure by the FLS, they will be removed from this workflow	Case Assignment/Field Record
Open Assignments	Open FRs, IXs, ReIXs, and CS Investigations. This workflow contains all of the open assignments that have been assigned to a user in the jurisdiction.	Jurisdiction	FLS	All open assignments will be shown in this workflow per jurisdiction	Events will be removed from this workflow as assignment outcomes are populated	Case Assignment/Field Record

Workflow Category: STD Initial Assignment

Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
Field Follow-Up to be Assigned	A field record or interview only record needs to be initiated for this case.	Jurisdiction	FLS or STD Surveillance (depending on jurisdiction)	Lab came into system triggering initial status of field follow-up	Field record or interview only must be assigned for the question, "Is this a field record or interview only?" in the Case Assignment/Field Record Information section	Case Assignment/Field Record
CT/GC Initial Assignment	When pharyngeal or rectal GC is identified in a male patient through a positive lab result.	Jurisdiction	FLS	All rectal and pharyngeal and rectal GC labs for males will be initiated for public health follow-up	Initial assignment outcome is populated	Case Assignment/Field Record
New Syphilis Event Supervisor Approval	New syphilis event is created which meets the "Supervisory Approval Needed" on the syphilis reactor grid is initially assigned to the supervisor for review and decision whether to conduct PHFU or not	Jurisdiction	FLS	Lab came into the system, which triggers initial status of supervisory approval needed.	Supervisor updates initial assignment outcome	Case Assignment/Field Record
Syphilis Initial Assignment	New syphilis case is identified and is initially assigned to surveillance desk for PHFU	Jurisdiction	FLS	All syphilis events created that meet the syphilis reactor grid based on reactive labs, will be initiated for surveillance review and initiating for public health follow-up	Initial assignment outcome is populated	Case Assignment/Field Record

Workflow Name: The name of the query that describes the condition of the event. Each workflow name is a clickable link that will open a new screen that lists event(s) in that queue.

Description: Explanation of the condition of the event that caused it to be placed in this workflow

Workflow Assignment Type: Workflows are assigned and appear in a workflow queue either on an individual basis (user-based) or for multiple users who hold the same role (responsible party) and work within the same jurisdiction (jurisdiction-based). Events that appear in the queue of a user-based workflow will only be seen by a single user and must be completed by that person in order to complete the task and remove it from the queue (supervisors may also see some user-based workflows assigned to their staff for monitoring purposes, but they typically will not complete any tasks in these workflows). For jurisdiction-based workflows that appear in the queues of multiple users, the user responsible for handling specific workflow events will need to be identified by the jurisdiction itself. See chapter 5.1.1, Workflow Queue Screen, in the Core Manual for more information on this topic.

Responsible Party: The role/job function of the user who is responsible for handling the workflow

Qualifying Criteria: The conditions that trigger an event to enter the workflow

Exit Criteria: The action(s) that must be taken on the part of the THISIS user to complete the task and have it removed from the workflow queue

Question Package: The Question Package (found in the Dashboard of an event) where the workflow is located