



Quick Reference Guide to Workflows

Updated 10-15-2010

The Workflow Queues screen is accessed by clicking on the following icon from the Dashboard toolbar



Workflow	How Event gets onto the workflow	How Event gets off of the workflow	Last Update	Visible by Group	Refresh Rate <i>in minutes</i>
1. General Childhood Lead					
Childhood Lead Events with System Generated Concerns	NCLEAD has detected a data entry issue for this event (e.g. data missing, data values are implausible, etc.)	Once it is corrected, it will no longer appear in this workflow or in the Concerns Tab. It is possible that what you've entered is correct, or the missing information is unattainable. In such situations, the concern will remain active until the event is closed. LHDs do not close events.		ALL	30
Childhood Lead Events with User Generated Concerns	Events where a user- not the system- has added a concern. *Only concerns marked as "very high" severity will appear on the dashboard in red.*	Resolve the concern and mark it as resolved under the Concerns tab.		ALL	30
Shared Cases - Cases shared by me	Events I've shared with another person or group.	When the event is no longer shared.		ALL	15
Shared Cases - Cases shared with me or my group(s)	Events shared with me or my group(s).	"Unshare" event(s) shared with you if you no longer need to access event.		ALL	15

Workflow	How Event gets onto the workflow	How Event gets off of the workflow	Last Update	Visible by Group	Refresh Rate <i>in minutes</i>
3. Clinical					
Children In Need of Follow-up Testing	(EBLL or CLP child) and no two consecutive test results < 10 µg/dL after last confirmation date.	Child has two consecutive test results < 10 µg/dL after last confirmation date.		CLINICAL	15
Diagnostic testing needed	(Last test result ≥ 10 µg/dL and not a confirmed EBLL and not a CLP) OR (last test result ≥ 20 µg/dL & not a CLP).	(Child is a CLP) OR (child is a confirmed EBLL and last test result < 20 µg/dL) OR (child is not a confirmed EBLL and not a CLP and last test result < 10 µg/dL).		CLINICAL	30
Refugee Children in need of testing	(Refugee child and age ≥ 6 months and age < 16 years) AND ((no lead test) or (one lead test and ≥ 90 days after test date)).	Refugee child AND ((one test result and < 90 days after test date) or (2 test results at least 90 days apart)).	5/25/2010	CLINICAL	30

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6. Environmental Health					
1. Children with EBLs in need of environmental follow-up	All of the following: Child is an EBLL; here is no investigation; no refusal date; no unable to locate patient date; no failure to respond date.	Environmental Activity= Investigation (in property event) OR there is a Refusal Date (in child event- Environmental Follow-Up Wizard) OR there is an Unable to Locate Patient Date (in child event- Environmental Follow-Up Wizard) OR there is a Failure to Respond Date (in child event- Environmental Follow-Up Wizard).		EHS	8hrs <i>updated 10/15/10</i>
2. Children with CLPs in need of environmental follow-up	Child is a CLP AND (there is no investigation of primary address or supplemental address question ≠ "yes").	Environmental Activity= Investigation (in property event) and Investigation of Supplemental Address question = YES (in child event- Environmental Follow-Up Wizard).		EHS	8hrs <i>updated 10/15/10</i>
3. Active Property Investigations	(Property has investigation) AND ((Required notices/order sent is not checked) OR (Date sent is empty) OR (Remediation required selection has not been made)). Note: Last three items are in Remediation package.	Required notices/order sent is checked (property event- Remediation Qpak) AND Date sent (property event- Remediation Qpak) is entered AND Remediation required selection has been made (property event- Remediation Qpak).	5/24/2010	EHS	30

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4. Remediation Incomplete	<p>Questions in property event- Remediation Qpak: (Remediation required selection is "No, but voluntary remediation" OR "Yes, by Division of Child Development" OR "Yes, by local ordinance" OR "Yes, by NC General Statute") AND</p> <p>Questions in property event- Environmental Qpak: ((there is no passed clearance date) OR (there is a failed monitoring after passed clearance date)).</p>	Passed Clearance Date (property event- Clearance Activity).		EHS	30
Properties in need of Annual Monitoring	Annual Monitoring is required to be performed on the property.	<p>Questions are on the Environmental Activity Qpak below the RED bar. "Do you want to track this property for annual monitoring...?" = YES. Below the above question is "Enter the date....". It must have a date in this date field.</p>		EHS	Daily
Abandonment Monitoring	This workflow tags the properties that have been Cleared, and the remediation was abandonment. It checks to see if the Abandonment was verified 6 months from the clearance date. The abandonment must be verified every 6 months.	<p>Questions are on the Environmental Activity Qpak below the RED bar. "Do you want to be reminded to check for abandonment?" = YES Below the above question is "Enter the date....". It must have a date in this date field.</p>		EHS	Daily
Remediation Past Due	If the remediation has not been completed within the 60 day time period. On the PROPERTY-REMEDIATION Qpak, the question "Remediation complete within 60 days?" is NO.	Verify the remediation work has been complete and fill in the Remediation Verification Date (property event- Remediation Qpak).		EHS	

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Task Specific Monitors (Add Task)					
Completed Tasks Created by Me (less than 30 days old)	Tasks that you (specifically) created which are now complete. This workflow is FYI only.	Events will automatically drop out of this workflow 30 days after completion date.		ALL	15
My Groups' Open Tasks	Tasks assigned to your group(s) which are not yet completed. Anyone in the group can complete the task.	To clear, open task and mark the "Status" field as "Completed." If task is not completed by due date, it will drop out of this workflow and appear in "My Overdue Tasks" workflow.		ALL	15
My Open Tasks	Tasks assigned specifically to you. Anyone in your group can complete task.	To clear, open task and mark the "Status" field as "Completed."		ALL	15
My Overdue Tasks	Tasks assigned to you or your group that have not been completed by the assigned due date.	To clear, open task and mark the "Status" field as "Completed." Anyone in your group can do this.		ALL	15
Open Tasks Created by Me	Tasks created by you specifically which are not yet completed. It is FYI only.	After task is completed, tasks will move to the "Completed Tasks Created by Me" workflow. Or, if task is not completed by due date, it will drop out of this workflow and move to "Overdue Tasks Created by Me." You do not clear this workflow.		ALL	15
Overdue Tasks Created by Me	Tasks created by you which have not been completed by due date. This workflow is FYI only.	After assigned individual or group completes task, it will move to the "Completed Tasks Created by Me" workflow. Note that if you change the task due date to a date in the future, the event will drop out of this workflow.		ALL	15