

Workflows described in this document are applicable to: HIV/STD Disease Intervention Specialists (DIS) Staff

Workflow Category: HIV Data To Care Activities

Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
Data to Care Require Follow-Up	When a data to care initiation date is populated, the record will then be placed in a DIS work queue	Jurisdiction	DIS or Data to Care DIS	A Data-to-Care Assignment is initiated and placed in worker's queue based on jurisdiction to which it is assigned	Assignment Outcome for the data-to-care assignment is populated	Case Assignment/Field Record

Workflow Category: HIV/STD DIS Activities

Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
Infected Dispo Missing Morb	An infected disposition has been entered on a field record, but morbidity was not created for the case.	User	DIS	An infected disposition is selected for an instance of an STD and no morbidity created for the event. Workflow is based on the worker assigned to the field record.	Worker will create morbidity for the event and answer "Is this a new case?" = Yes for dispositions C and D and "Is this a new case?" = Yes or No for disposition E.	Case Assignment/Field Record
K Dispos - No/Incomplete OOS Assignment	A 'K' disposition was entered on the field record, but the case has not been assigned for out of state investigation	User	DIS	When a DIS closes a field record out and does not create an OOS assignment	Worker will create an OOS assignment	Case Assignment/Field Record
Expected In	Once the expected in date of a patient has past, the DIS will be prompted to either check the status of the appointment or attempt to contact patient again to set up another expected in date.	User	DIS	When a patient is identified as expected in in the Field Record case assignment and the expected in date has past, this will be placed in the workers workflow.	Worker will disposition the field record or change the expected in date to a future date	Case Assignment/Field Record
FR Pending Labs	Once three days post pending labs of a patient has passed, the DIS will be prompted to check the status of the labs (USER SPECIFIC)	User	DIS	When a patient is identified as having pending labs within the Field Record case assignment, and the auto-generated date is more than 3 days, event will be placed in the worker's workflow	Worker will disposition the field record	Case Assignment/Field Record
Open CS Investigation	Congenital Investigations assigned to user	User	DIS	When a Congenital Investigation is assigned to a worker, event will be placed in the worker's workflow	Assignment outcome will be completed for the Congenital Investigation assignment	Case Assignment/Field Record
Open Field Records	All Open Field Records (i.e. no disposition)	User	DIS	When a Field Record case assignment is assigned to a worker, the event will be placed in the worker's workflow	Field record will be removed from the workflow once the field record has a disposition	Case Assignment/Field Record
Open Interview Records	List of open interview records assigned to user	User	DIS	When an Interview is case assignment is assigned to a worker, the event will be placed in the worker's workflow	Interview Record will be removed from the workflow once the FLS approves the case for closure	Case Assignment/Field Record
Open Reinterview Records	Reinterviews assigned to user	User	DIS	When a reinterview case assignment is assigned to a worker, the event will be placed in	Reinterview will be removed from the workflow once the worker selects an assignment outcome for the Reinterview case assignment	Case Assignment/Field Record
Partner/Cluster FR Needed	A field record needs to be generated for a partner or cluster	User	DIS	When a Partner/Cluster is created and no field record is generated for that partner/cluster	Field record needs to be generated for a partner or cluster on this event or referral basis needs to be changed to "M - Marginal"	Partner/Clusters

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