

Workflows described in this document are applicable to: HIV surveillance staff

Workflow Category: HIV Initial Assignment

Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
HIV/AIDS Initial Assignment	New HIV/AIDS case is identified and is initially assigned to surveillance desk for reporting and PHFU	Jurisdiction	HIV Surveillance	Initial Status section is populated from a newly identified HIV lab. Surveillance desk will decide whether or not medical chart abstraction and/or partner services needs to be conducted	Initial assignment outcome is populated in the initial status section	Case Assignment/Field Record
AIDS Assignment	Positive HIV case with evidence of AIDS. Needs follow-up to determine if a medical record abstraction for the case is needed.	Jurisdiction	HIV Surveillance	AIDS Investigation case assignment type is selected and investigation outcome is blank	Investigation outcome is updated and entered by user	Case Assignment/Field Record

Workflow Category: HIV Surveillance Activities

Workflow Name	Description	Workflow Assignment Type	Responsible Party	Qualifying Criteria	Exit Criteria	Question Package
HIV Medical Record Abstraction Needed	HIV Case that needs a medical record abstraction	Jurisdiction	HIV Surveillance	Medical record abstraction assignment is created and the assignment outcome is blank	Assignment outcome is updated and entered by the user	Case Assignment/Field Record
Open HIV Surveillance Follow-Up	Case assignments for HIV Surveillance Desk	Jurisdiction	HIV Surveillance	HIV Surveillance assignment is created and the assignment outcome is blank	Assignment outcome is updated and entered by the user	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