

## Shared Portal for Outbreak Tracking (SPOT) – User Guide


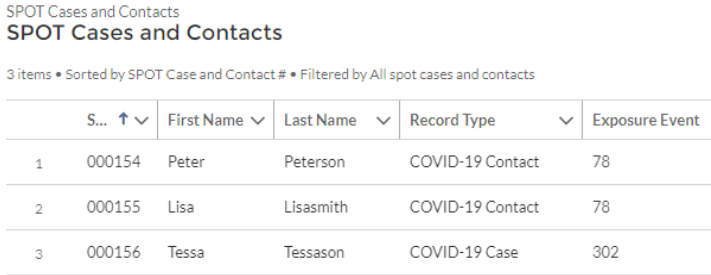
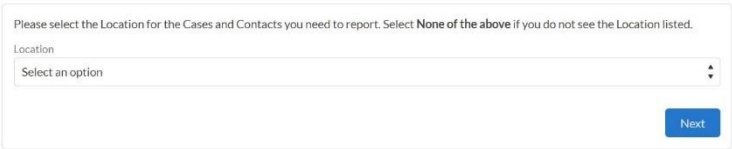
**Please contact your local health department with any additional questions.**


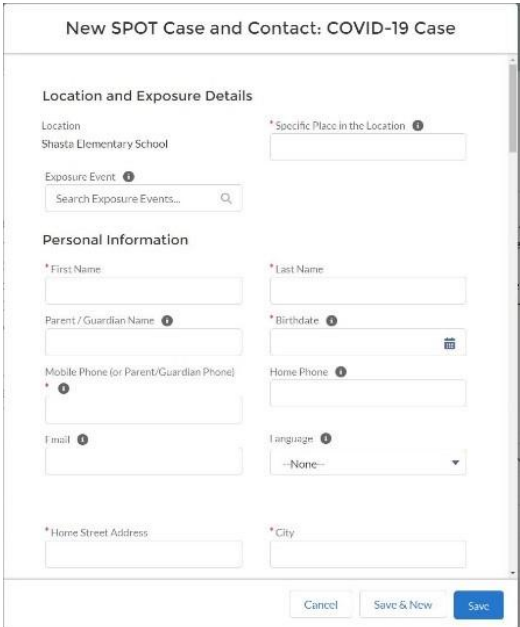
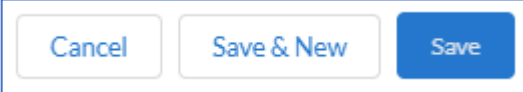
**Overview:** This Reference Guide explains how to use the Shared Portal for Outbreak Tracking (SPOT). This guide is organized by the menu options in SPOT:

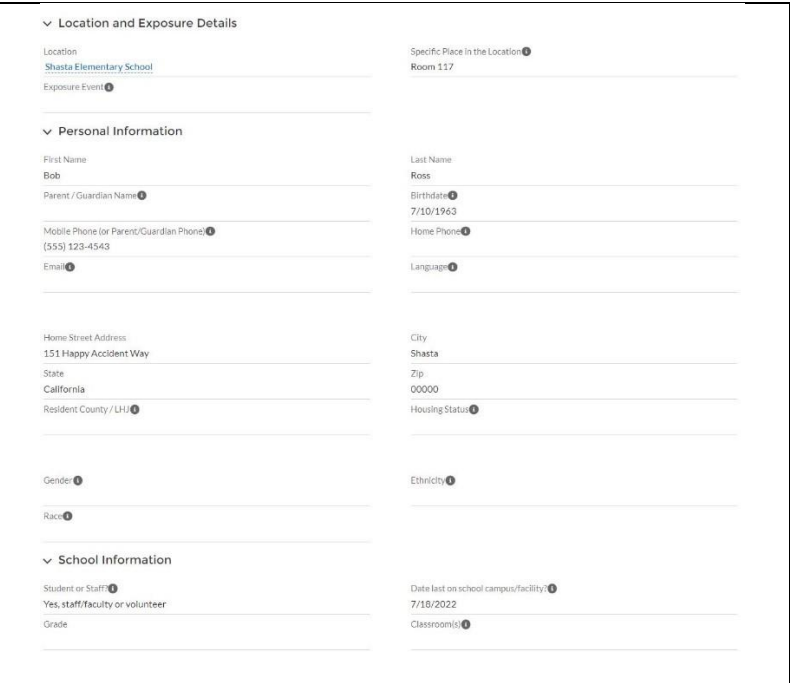
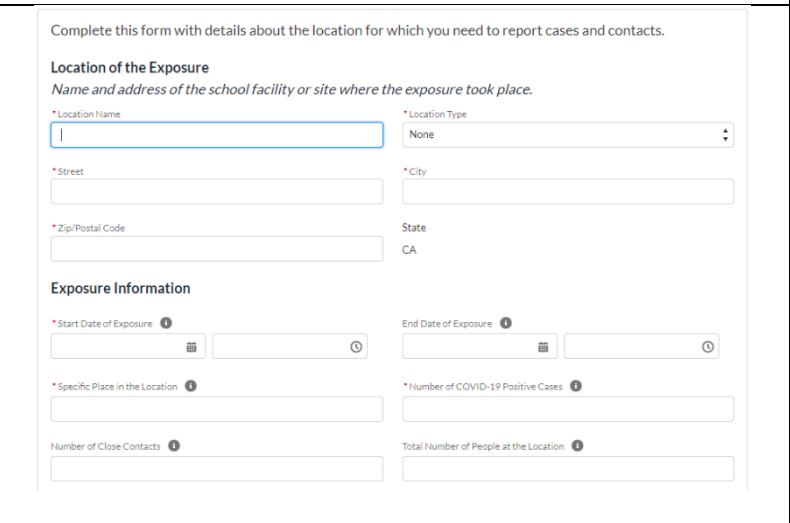
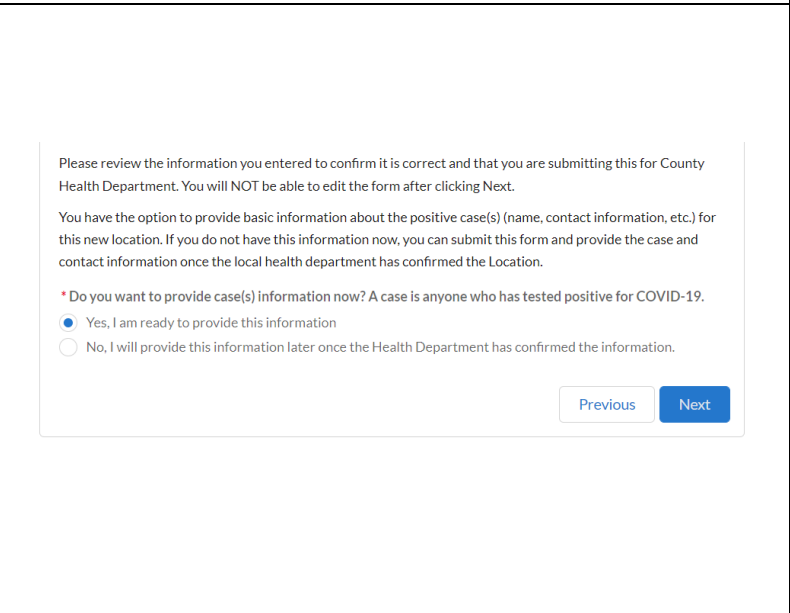
1. Report Cases and Contacts
2. View Locations and Exposures
3. Export Data
4. Summary Dashboard

### Report Cases and Contacts

On this page, you can complete a form with key information about individuals who have tested positive for COVID-19 or were in close-contact to an infected person at your workplace. You can also view all cases and contacts entered in SPOT.

Step	Action	Screenshot
<b>1</b>	<p>Navigate to this section by clicking the <b>Report Cases and Contacts</b> button on the home page or the link at the top of any page.</p>	
<b>2</b>	<p>On this page, you will see a list of all information entered in SPOT for Locations you are the Liaison for.</p> <p><b>Note:</b> Information entered in SPOT will only be available for 180 days after the record was entered. After that time, reach out to your local health department for any related inquiry. If you need a copy, please download the information by following the instructions in the <b>Export Data</b> section of this guide.</p>	
<b>3</b>	<p>To report case or contact information, select the Location from the drop down and click <b>Next</b>.</p> <p>If you do not see the location listed, select "None of the above" from the drop down and click <b>Next</b>. Skip to Step 8.</p>	

<p><b>4</b> Select the radio button according to whether the individual is a COVID-19 case (someone who has tested positive for COVID-19), or a COVID-19 contact (someone who has come in close contact with a COVID-19 case).</p> <p>Note that the information collected for Cases and Contacts will be slightly different. Click <b>New</b>.</p>	
<p><b>5</b> Enter information about the individual on the form</p> <ul style="list-style-type: none"> <li>❖ Required fields are marked with a red asterisk</li> <li>❖ In the Specific Place in the Location field, enter the specific place that the Case or Contact was located in the location.</li> <li>❖ If your local health department has asked you to report records to a specific exposure, enter that Exposure Event # here. Click the magnifying glass to open full search results. You cannot enter information for Exposure Events that have been closed by the health dept. or for a location other than the one listed above.</li> </ul>	
<p><b>6</b> If you have more individuals you would like to enter, click <b>Save &amp; New</b> to open a new form. If you are finished, click <b>Save</b>.</p>	

<p><b>7</b> After clicking Save, you will see a summary view of the last form you completed.</p> <p>Click <b>Report Cases and Contacts</b> to return to the list of all information in SPOT.</p>	 <p>The screenshot shows a form with three main sections: <ul style="list-style-type: none"> <li><b>Location and Exposure Details:</b> Location (Shasta Elementary School), Exposure Event, Specific Place in the Location (Room 117).</li> <li><b>Personal Information:</b> First Name (Bob), Last Name (Ross), Parent/Guardian Name, Birthdate (7/10/1963), Mobile Phone (555) 123-4543, Home Phone, Email, Language, Home Street Address (151 Happy Accident Way), State (California), Resident County (LHJ), Gender, Race, Ethnicity.</li> <li><b>School Information:</b> Student or Staff? (Yes, staff/faculty or volunteer), Date last on school campus/facility (7/18/2022), Grade, Classroom(s).</li> </ul> </p>
<p><b>8</b> If you did not see the location and selected “None of the above” you will be taken to a form where you can fill out details for the Location and Exposure.</p>	 <p>The screenshot shows a form titled 'Complete this form with details about the location for which you need to report cases and contacts.' <ul style="list-style-type: none"> <li><b>Location of the Exposure:</b> Name and address of the school facility or site where the exposure took place. Fields include Location Name, Location Type (dropdown set to None), Street, City, Zip/Postal Code, and State (CA).</li> <li><b>Exposure Information:</b> Start Date of Exposure, End Date of Exposure, Specific Place in the Location, Number of COVID-19 Positive Cases, Number of Close Contacts, and Total Number of People at the Location.</li> </ul> </p>
<p><b>9</b> At the end of the form, you have the option to provide basic information about the positive case(s) (name, contact information, etc.) for this new location. If you do not have this information now, you can submit this form and provide the case and contact information once the local health department has confirmed the Location.</p> <p>If you are ready to provide the case information, select <b>Yes</b> and click <b>Next</b>.</p> <p>If you do not have that information now, select <b>No</b> and skip to Step 12.</p>	 <p>The screenshot shows a confirmation screen with the following text: <ul style="list-style-type: none"> <li>Please review the information you entered to confirm it is correct and that you are submitting this for County Health Department. You will NOT be able to edit the form after clicking Next.</li> <li>You have the option to provide basic information about the positive case(s) (name, contact information, etc.) for this new location. If you do not have this information now, you can submit this form and provide the case and contact information once the local health department has confirmed the Location.</li> <li>Do you want to provide case(s) information now? A case is anyone who has tested positive for COVID-19. <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Yes, I am ready to provide this information</li> <li><input type="radio"/> No, I will provide this information later once the Health Department has confirmed the information.</li> </ul> </li> </ul> Buttons for 'Previous' and 'Next' are visible at the bottom right. </p>

**10** Complete the form with information about the case related to the location and exposure from the previous page.

Click **Next**.

- Complete this form with information on the case related to the exposure you entered on the previous page. A case is anyone who has tested positive for COVID-19.
- Do not click the back button in your browser.
- Do not refresh this page.
- Do not exit the flow before reaching the confirmation screen.
- You will have a chance to submit multiple cases, if needed.

\* First Name  \* Last Name

\* Birthdate  Gender

Parent/Guardian Name  \* Mobile Phone (or Parent/Guardian Phone)

Home Phone

Home Street Address  City

**11** After clicking **Next**, you can review the details about the individual.

At the end of the form, you can choose whether you have more cases to report.

- Select **Yes** to enter details for additional case(s). You will be taken back to Step 8.
- Select **No** if you are finished entering case information.

Is person athlete or coach?

None

Education Group

Test Date

July 14, 2022

Test Type

None

Classroom(s)

Notes

\* Do you have more case(s) to report?

Yes, I have more cases to report

No, I am finished entering case information

[Next](#)

**12** After finishing the form, you will be able to review the information you entered.

Click **Finish**.

Your form has been submitted successfully and your local health department will be contacting you shortly.

If you have any questions in the meantime, you can reach out the health department directly. Contact information can be found at the link below.

[California Local Health Services/Offices](#)

**Additional Resources**

[State of California Safe Schools For All Hub](#)

[CDPH Guidance on Assembly Bill 685](#)

[Return to Work Guidance](#)

[Coronavirus 2019 \(COVID-19\) Resources for Employers and Workers](#)

Please print this page for your own records.

**Key Point of Contact for Location**

First Name - Key \*  Last Name - Key \*

Email - Key \*  Phone - Key \*

Title / Role - Key

**Location of the Exposure**

Location Name - Exposure \*  Street - Exposure

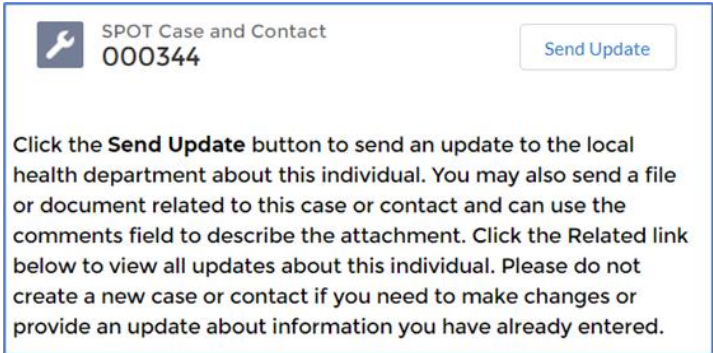
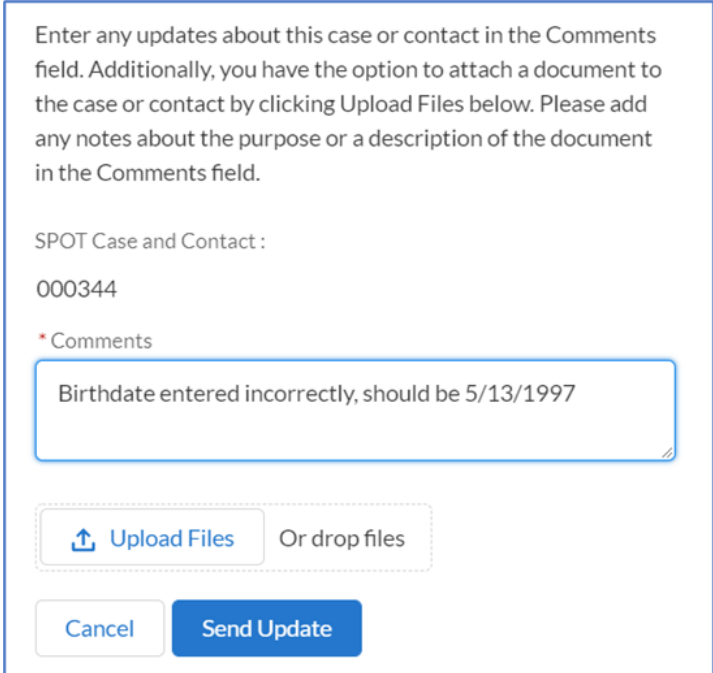
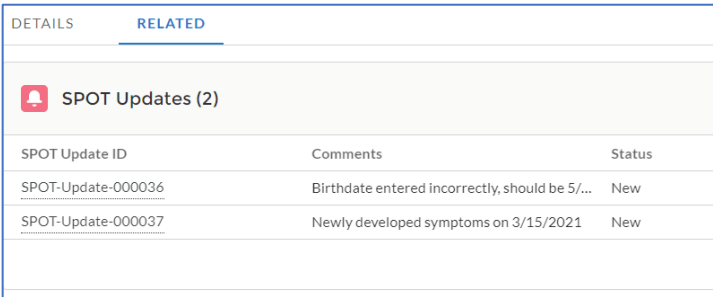
**13** If you need to send an update or correct data for an individual, do not submit a new case or contact entry form. Instead, click the number in the **SPOT Case and Contact #** column next to the individual's name.

SPOT Cases and Contacts

### SPOT Cases and Contacts

9 items • Sorted by SPOT Case and Contact # • Filtered by All spot cases and c

SPOT ... ↑ ↓	First Name ↓	Last Name ↓
1	<u>000190</u>	Patty Brockman

<p><b>14</b> Click the <b>Send Update</b> button.</p>											
<p><b>15</b> In the <b>Comments</b> field, enter information about the update.</p> <p>There is the option to attach a document or file related to the case or contact. Click Upload Files and select the file from your computer.</p> <p>Click <b>Send Update</b>. The update will be sent to the local health department.</p>											
<p><b>16</b> To view all updates for this individual, click the <b>Related</b> link.</p>		 <table border="1"> <thead> <tr> <th>SPOT Update ID</th> <th>Comments</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>SPOT-Update-000036</td> <td>Birthdate entered incorrectly, should be 5/...</td> <td>New</td> </tr> <tr> <td>SPOT-Update-000037</td> <td>Newly developed symptoms on 3/15/2021</td> <td>New</td> </tr> </tbody> </table>	SPOT Update ID	Comments	Status	SPOT-Update-000036	Birthdate entered incorrectly, should be 5/...	New	SPOT-Update-000037	Newly developed symptoms on 3/15/2021	New
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SPOT-Update-000037	Newly developed symptoms on 3/15/2021	New									

## View Locations and Exposures

In this section, you can view all Locations and Exposure Events in your workplaces. You will see two list views that show the workplaces you are linked to and any Exposure Events for those Locations.

Step	Action	Screenshot
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**1** Navigate to this section by clicking the **View Locations and Exposures** button on the home page or the link at the top of any page.



**2** On this page, you will see the Workplaces you are linked to. Further down the page, you will see the Exposure Events for those workplaces.

Note: You cannot enter information for Exposure Events that have been closed by the health department. Contact your health department directly if you have additional information to report.

SPOT Locations ▼

0 items • Sorted by Name • Filtered by All accounts - Account Record Type • Updated 2 minutes ago

Name + ↑	Street	City	Zip/Postal Code	Location Type
1 Shasta Elementary School	123 Test Avenue	Test City	12345	Elementary School
2 Shasta High School	645 Westward Lane	Shasta	12345	High School
3 Shasta Middle School	123 Test St	City	12345	Middle School

SPOT Exposure Events ▼

0 items • Sorted by Exposure Event Record # • Filtered by All exposure events

Exposure Event Record #	Location	Specific Place In...	Start Date of Exposure...	End Date...	Assigned...	Status of Exposure Etc...	Intake Form #
1 193657	Shasta Elementary School	Classroom 104	7/4/2022, 2:16 PM			Awaiting Outreach	SP-134938
2 193658	Shasta High School	Cafeteria	7/7/2022, 2:13 PM			Awaiting Outreach	SP-134937
3 193661	Shasta High School	Classroom 245	6/4/2022, 12:00 PM			Under Investigation	
4 193662	Shasta Middle School	Classroom 4	6/1/2022, 4:09 PM			Awaiting Outreach	SP-134942
5 193666	Shasta Middle School	Classroom 100	3/15/2022, 12:00 PM			Under Investigation	
6 193667	Shasta Middle School	Classroom 5	7/1/2022, 4:33 PM			Awaiting Outreach	SP-134940

**3** To view more details about a specific Location, click the Location name in the Name+ column.

## SPOT Locations ▼

50+ items • Sorted by Name + • Filtered by All accounts - f

Name + ↓

1 Zeal Wheels

**4** To Report a new Exposure event for that Location, click the **Report New Exposure** button to the right of the Location Name.

Accounts > Zeal Wheels Exposure Events

0 items • Updated a few seconds ago

Exposure Event Record #	Specific Place in the Location	Start Date of Exposure Period	End Date of Exposure Period	Status of Exposure Event

**5** Completing this form will report a new exposure to the health department. Once reviewed, this form may be processed into a new Exposure Event. Please allow for processing time.

Complete all the fields you have information for and click **Next**. Required fields are marked with a red asterisk \*. After clicking **Next**, you can review the data you entered. Click **x** to exit the form.

New Exposure Event

Exposure Event Information

Exposure Event Record #

Specific Place in the Location


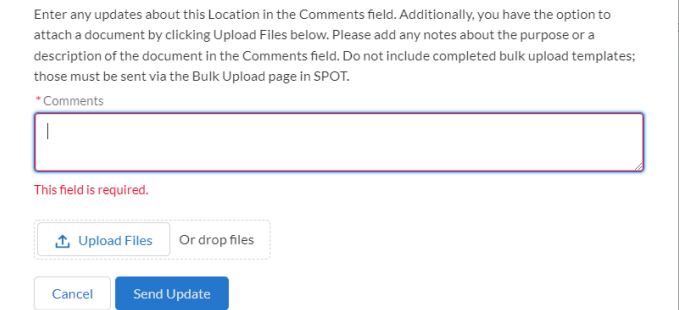
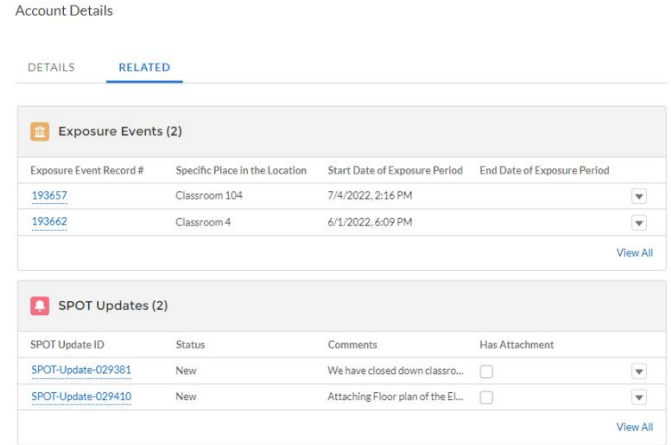
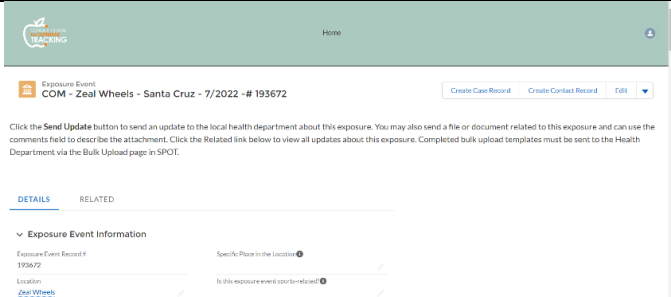
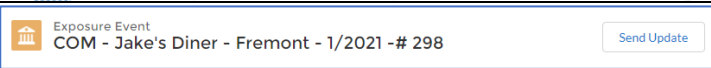
Location: Zeal Wheels

Is this exposure event sports-related? None

Indoors/Outdoors: None

\* Start Date of Exposure Period: Date Time


Buttons: Cancel, Save & New, Next

<p><b>6</b></p>	<p>If you need to send an update to the local health department about the Workplace, or send a file or document related to the Workplace, click the <b>Send Update</b> button.</p>	
<p><b>7</b></p>	<p>In the <b>Comments</b> field, enter information about the update.</p> <p>There is the option to attach a document or file related to the exposure. Click Upload Files and select the file from your computer.</p> <p>Click <b>Send Update</b>. The update will be sent to the local health department.</p>	
<p><b>8</b></p>	<p>When viewing a location, you can click the <b>Related</b> link to see Exposure Events for that Location and any updates sent for that Location.</p>	
<p><b>9</b></p>	<p>To view more details about a specific Exposure Event, click the number in the <b>Exposure Event Record #</b> column in the SPOT Exposure Events list.</p>	
<p><b>10</b></p>	<p>If you need to send an update to the local health department about the</p>	

	<p>exposure, or send a file or document related to the exposure, click the <b>Send Update</b> button.</p>									
<p><b>11</b></p>	<p>In the <b>Comments</b> field, enter information about the update.</p> <p>There is the option to attach a document or file related to the exposure. Click Upload Files and select the file from your computer.</p> <p>Click <b>Send Update</b>. The update will be sent to the local health department.</p>	<p>Enter any updates about this exposure in the Comments field. Additionally, you have the option to attach a document to the exposure by clicking Upload Files below. Please add any notes about the purpose or a description of the document in the Comments field.</p> <p>* Comments</p> <p>Attaching floor plan</p> <p>Upload Files Or drop files</p> <p>Building 23A Floor Plan.docx</p> <p>Cancel Send Update</p>								
<p><b>12</b></p>	<p>To view all updates for this exposure, click the <b>Related</b> link.</p>	<p>DETAILS RELATED</p> <p>SPOT Updates (1)</p> <table border="1"> <thead> <tr> <th>SPOT Update ID</th> <th>Status</th> <th>Comments</th> <th>Has Attachment</th> </tr> </thead> <tbody> <tr> <td><a href="#">SPOT-Update-000102</a></td> <td>New</td> <td>Attaching floor plan</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>View All</p>	SPOT Update ID	Status	Comments	Has Attachment	<a href="#">SPOT-Update-000102</a>	New	Attaching floor plan	<input checked="" type="checkbox"/>
SPOT Update ID	Status	Comments	Has Attachment							
<a href="#">SPOT-Update-000102</a>	New	Attaching floor plan	<input checked="" type="checkbox"/>							

## Export Data

In this section, you can download a file containing all information entered in SPOT. Information entered on this site will only be available for 180 days after the record was created. After that time, you will need to reach out to your local health department for any related inquiry.

Step	Action	Screenshot
<p><b>1</b></p>	<p>Navigate to this section by clicking the <b>Export Data</b> button on the home page or the link at the top of any page.</p>	
<p><b>2</b></p>	<p>You have the option to download data based on location, exposure event, only your data, or all data entered in SPOT for locations you are associated to.</p>	



The file will download in CSV format.

In this section, you can download an export of data entered in SPOT, in CSV format. You have the option to download data based on location, exposure event, only your data, or all data entered in SPOT for locations you are associated to.

Location: All

Export SPOT Data by Location

Exposure Event: All

Export SPOT Data by Exposure Event

Created By: All

Export SPOT Data by Liaison

AutoSave Off SPOT\_Data\_11\_22\_2020 - Excel

File Home Insert Page Layout Formulas Data Review View Dev

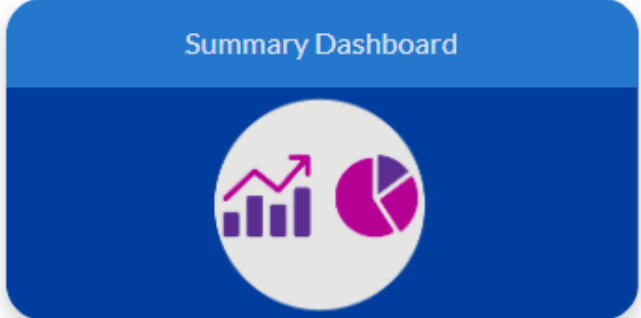

A1

Not set Unrestricted Confidential Highly Confidential

	A	B	C	D	E	F
1						
2	Id	First Name	Last Name	Birthdate	Street Ad	City
3	a3c350000	Kyle	Smith			
4	a3c350000	Nick	Jones			
5	a3c350000	Harold	Jones	Sat Oct 07 00:00:00 GMT 2000		Imperial

## Summary Dashboard

In this section, you can view summary data about information entered in SPOT for your workplaces.

Step	Action	Screenshot																		
1	<p>Navigate to this section by clicking the <b>Summary Dashboard</b> button on the home page or the link at the top of any page.</p>																			
2	<p>You can see dashboards for:</p> <ul style="list-style-type: none"> <li>Total Number of Cases and Contacts</li> <li>Cases and Contacts grouped by Exposure Event</li> <li>Cases and Contacts grouped by the Liaison who entered them</li> <li>Cases and Contacts grouped by their occupation</li> </ul>	 <p><b>Workplace Liaison Summary Dashboard</b> As of Feb 3, 2021, 10:42 AM Viewing as Lisa Phillips</p> <p><b>Total Number of Cases and Contacts</b> 3 <a href="#">View Report (Total Number of Cases and Contacts)</a></p> <p><b>Cases and Contacts by Exposure Event</b></p> <table border="1"> <thead> <tr> <th>Exposure Event</th> <th>Record Count</th> </tr> </thead> <tbody> <tr> <td>298</td> <td>~1.8</td> </tr> <tr> <td>299</td> <td>~0.8</td> </tr> </tbody> </table> <p><a href="#">View Report (Cases and Contacts by Exposure Event)</a></p> <p><b>Cases and Contacts by Liaison</b></p> <table border="1"> <thead> <tr> <th>SPOT Liaison Created By</th> <th>Record Count</th> </tr> </thead> <tbody> <tr> <td>Lisa Phillips</td> <td>~2.8</td> </tr> </tbody> </table> <p><a href="#">View Report (Cases and Contacts by Liaison)</a></p> <p><b>Cases and Contacts by Occupation</b></p> <table border="1"> <thead> <tr> <th>Occupation/Job Title</th> <th>Record Count</th> </tr> </thead> <tbody> <tr> <td>Manager</td> <td>~0.8</td> </tr> <tr> <td>Server</td> <td>~0.8</td> </tr> <tr> <td>Waiter</td> <td>~0.8</td> </tr> </tbody> </table> <p><a href="#">View Report (Cases and Contacts by Occupation)</a></p>	Exposure Event	Record Count	298	~1.8	299	~0.8	SPOT Liaison Created By	Record Count	Lisa Phillips	~2.8	Occupation/Job Title	Record Count	Manager	~0.8	Server	~0.8	Waiter	~0.8
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