

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

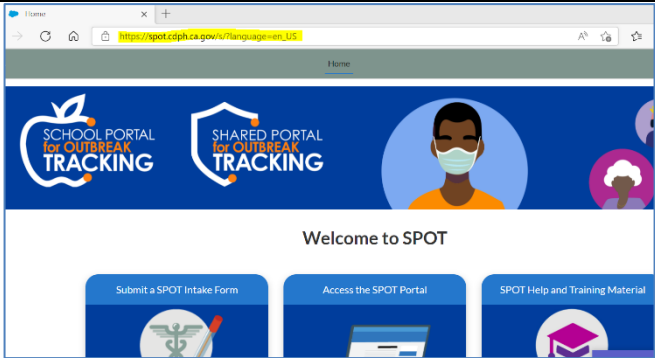

Please contact your local health department with any additional questions.

**Overview:** This Reference Guide explains how to use the Shared Portal for Outbreak Tracking (SPOT) for COVID-19 case reporting for non-TK-12 school settings, including worksites, healthcare facilities, and childcare or youth programs. For instructions on using SPOT for case reporting in TK-12 school settings, see SPOT User Guide for TK-12 Schools.

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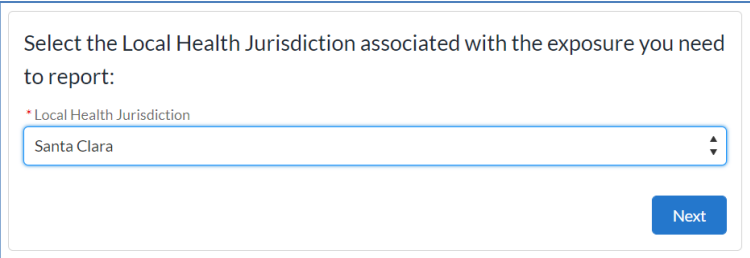
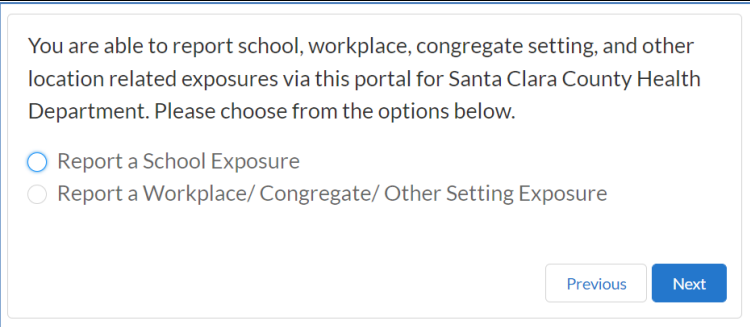
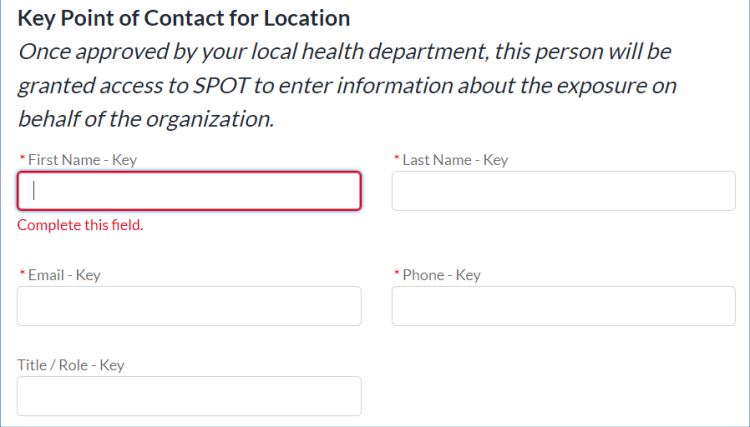
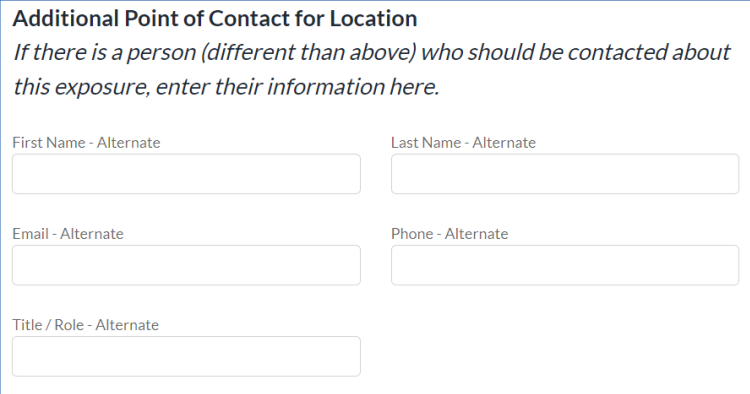
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## Access SPOT

Step	Action	Screenshot
1	Navigate to SPOT Portal by using the below URL in your search bar:  <a href="https://spot.cdph.ca.gov/s/?language=en_US">https://spot.cdph.ca.gov/s/?language=en_US</a>	
2	Navigate to this section by clicking the <b>View Exposure Events</b> button on the home page or the link at the top of any page.	

## Submit a SPOT Intake Form

Follow the steps below to submit a SPOT Intake Form to report cases and/or outbreaks of COVID-19 to the Public Health Department.

Step	Action	Screenshot
1	<p>Select your Local Health Jurisdiction (LHJ) from the drop down about halfway down the page.</p> <p>After selecting your LHJ click 'Next'.</p>	
2	<p>The next screen will prompt you to choose which type of exposure you would like to report.</p> <p><b>Note:</b> Depending on which exposure you choose the information asked for the liaison to provide will be different.</p>	
3	<p>The first piece of information that will be asked to provide is information for the liaison which will be the key point of contact for the location.</p> <p><b>Note:</b> Red asterisks will mark information that is required.</p>	
4	<p>A secondary key point of contact will be asked to be provided. This person would be able to answer questions and provide information on the exposure if the first key point of contact is unavailable.</p>	

5	<p>Next location information for the exposure will be asked to be provided.</p>	<div> <div>Location of the Exposure</div> <div>Name and address of the business facility or site where the exposure took place.</div> <div> <div>* Location Name</div> <div></div> </div> <div> <div>* Location Type</div> <div>None</div> </div> <div> <div>* Street</div> <div></div> </div> <div> <div>* City</div> <div></div> </div> <div> <div>* Zip/Postal Code</div> <div></div> </div> <div> <div>State</div> <div>CA</div> </div> </div>
6	<p>Exposure Information will be the next field of information asked to provide.</p> <p>A notes section is at the bottom of this section where you can provide additional information that might not have been asked for.</p>	<div> <div>Exposure Information</div> <div> <div>* Start Date of Exposure ⓘ</div> <div></div> </div> <div> <div>End Date of Exposure ⓘ</div> <div></div> </div> <div> <div>* Specific Place in the Location ⓘ</div> <div></div> </div> <div> <div>* Number of COVID-19 Positive Cases ⓘ</div> <div></div> </div> <div> <div>Number of Close Contacts ⓘ</div> <div></div> </div> <div> <div>Total Number of People at the Location ⓘ</div> <div></div> </div> <div> <div>* Do people live at this location? ⓘ</div> <div>--Select an Option--</div> </div> <div> <div>If yes, what is the resident capacity? ⓘ</div> <div></div> </div> <div> <div>NAICS Code of the Workplace ⓘ</div> <div></div> </div> <div> <div>Industry of the Workplace ⓘ</div> <div></div> </div> <div> <div>Reason(s) for Report ⓘ</div> <div> <input type="checkbox"/> Individual Case Report  <input type="checkbox"/> Multiple Case Report  <input type="checkbox"/> Outbreak  <input type="checkbox"/> Requesting Assistance/Call-back  <input type="checkbox"/> Other </div> </div> <div> <div>Reason for Report - Specify Other</div> <div></div> </div> <div> <div>Was the exposure indoors or outdoors? ⓘ</div> <div>None</div> </div> <div> <div>Notes ⓘ</div> <div></div> </div> </div>

Some of the basic information asked to provide will include:

- First and Last name
- Birthdate
- Mobile Phone
- Home Address
- City, State and Zip Cde
- Occupation/Job Title
- Last Day on Site

Please fill out as many fields as possible.

* First Name <input type="text"/>	* Last Name <input type="text"/>
<small>Complete this field.</small>	
* Birthdate <sup>?</sup> <input type="text"/>	Language <sup>?</sup> <input type="text"/>
* Mobile Phone <sup>?</sup> <input type="text"/>	* Home Street Address <input type="text"/>
* City <input type="text"/>	* State <input type="text"/>
* Zip <input type="text"/>	* Occupation/Job Title <sup>?</sup> <input type="text"/>
Resident/Staff in Congregate Setting <sup>?</sup> <input type="text"/>	* Last Date On Site <sup>?</sup> <input type="text"/>
Date entity notified of positive test <sup>?</sup> <input type="text"/>	Has person received COVID-19 vaccine? <sup>?</sup> <input type="text"/>
Work Area/Department (for Staff) <sup>?</sup> <input type="text"/>	# People in Their Unit/Floor/Area/Dept <input type="text"/>
Race <sup>?</sup> <input type="text"/>	Ethnicity <sup>?</sup> <input type="text"/>
Gender <sup>?</sup> <input type="text"/>	Ever Symptomatic <sup>?</sup> <input type="text"/>
Symptom Onset Date <sup>?</sup> <input type="text"/>	Test Date <sup>?</sup> <input type="text"/>
Test Result <sup>?</sup> <input type="text"/>	Test Type <input type="text"/>
Notes <sup>?</sup> <input type="text"/>	

**Note:** The following User Guide sections are applicable to COVID-19 case and outbreak reporting requirements for **high-risk settings ONLY** (i.e. healthcare facilities or congregate living settings).

For more on reporting requirements for your business or facility, visit the webpage(s) below:

Employers (High-Risk and Non-High-Risk Settings): Click [here](#).



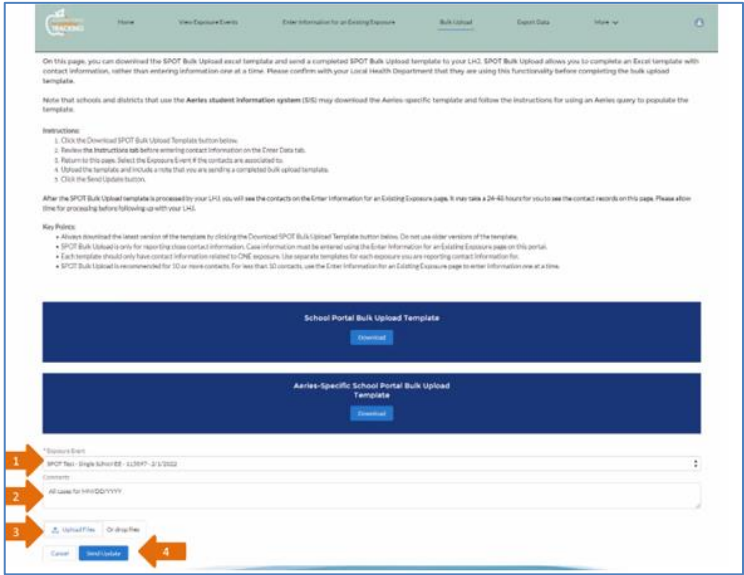
Childcare or Youth Programs: Click [here](#).

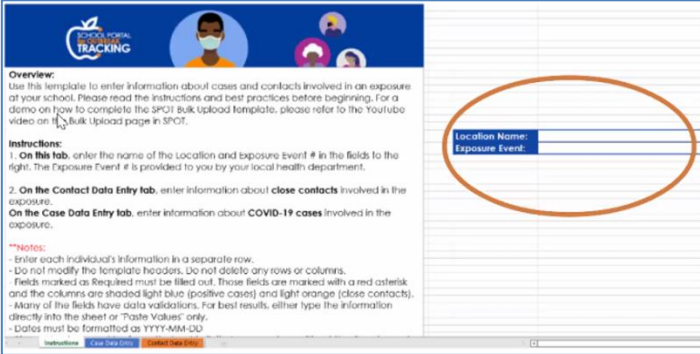
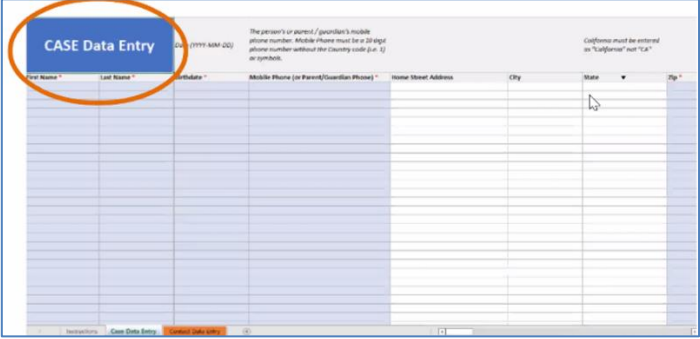

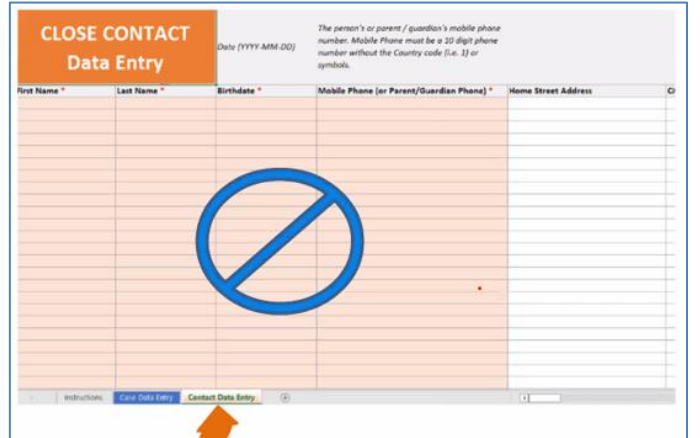
Healthcare Facilities: Click [here](#).

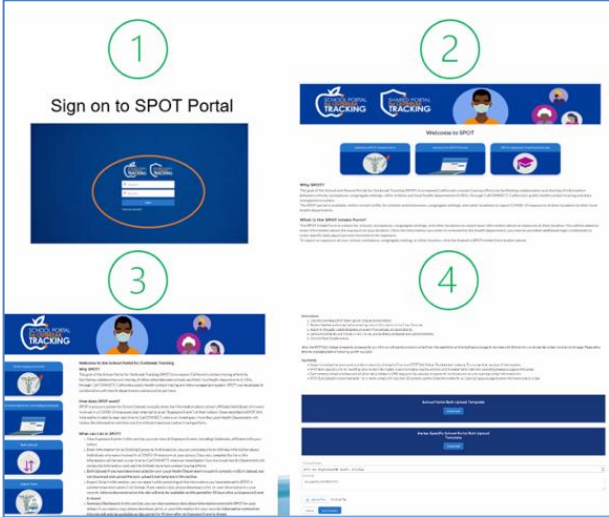
Long-term Care Facilities (LTCFs) or Skilled Nursing Facilities (SNFs): Click [here](#).

## Bulk Upload

In this section you can submit cases via Bulk Upload where you can download and upload the bulk upload Excel template.

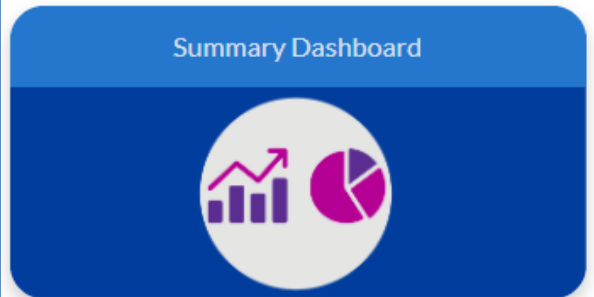
Step	Action	Screenshot
1	Log-In to SPOT.	
2	Navigate to the Bulk Upload option within SPOT.	
3	<p>Choose which Bulk Upload Template you would like to use. Both General and Aeries are available. The below fields will ask you for Exposure Event and Comments. This allows you to enter what period of time you are using this bulk upload form for.</p> <p>Example:</p> <ol style="list-style-type: none"> <li>Exposure Event: SPOT Single Schools EE – 123456 – 02/17/22</li> <li>Comments: All cases for 02/17/22</li> <li>Upload File</li> <li>Send Update</li> </ol>	

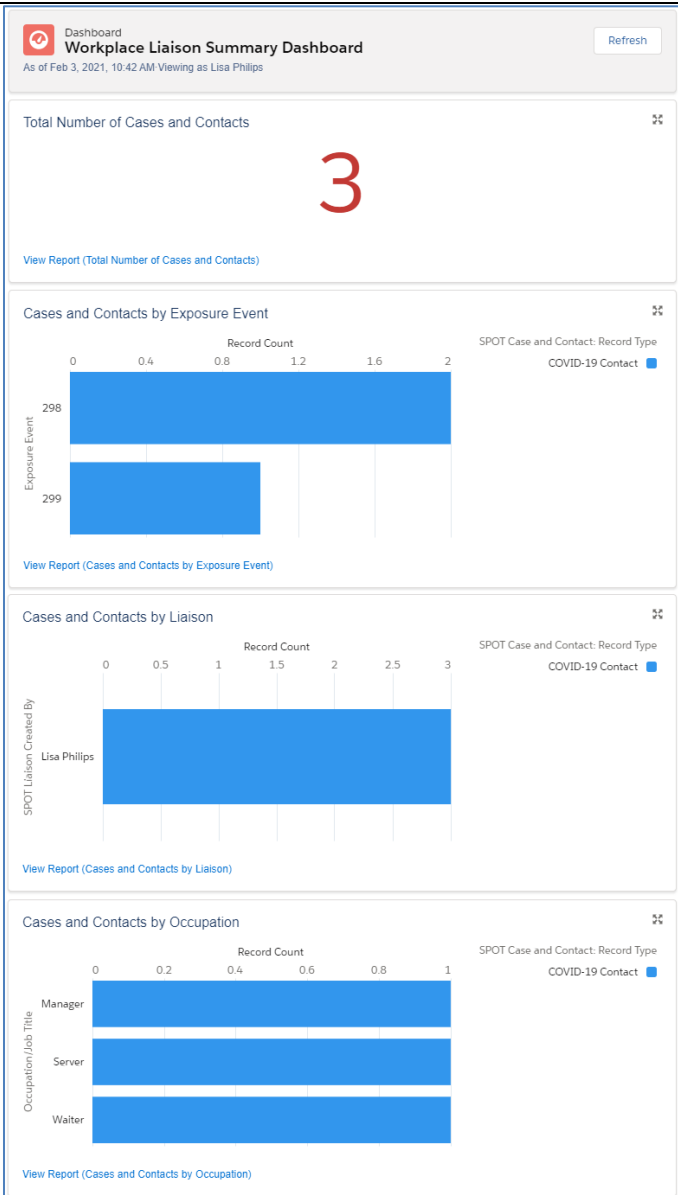
<p><b>4</b></p>	<p>Enter the school's name and exposure event for that school.</p> <p>Only use the single exposure event for that school (provided by Public Health).</p> <p>Only put cases for one school (location name) on each bulk upload form.</p>	
<p><b>5</b></p>	<p>Required fields will be in blue.</p> <ul style="list-style-type: none"> <li>• First name</li> <li>• Last Name</li> <li>• Birthdate (YYYY-MM-DD)</li> <li>• 10 Digit phone number (Parent or Guardian Phone)</li> <li>• Zip code</li> <li>• Student or Staff?</li> <li>• Date last on school campus/facility?</li> </ul> <p>*Grade field not included but please populate if you have info.</p>	
<p><b>6</b></p>	<p>Please do not put any information in the blue columns marked for the Health Department.</p>	
<p><b>7</b></p>	<p>Close contact information is currently NOT required.</p>	

<p><b>8</b></p>	<p>There will be times were filling out the bulk form might take you longer than one day, if this is the case log in and follow the previous steps.</p> <ol style="list-style-type: none"> <li>1. Sign on to SPOT Portal</li> <li>2. Access SPOT Portal</li> <li>3. Select Bulk Upload</li> <li>4. Finish bulk upload update</li> </ol>	
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## Summary Dashboard


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

Step	Action	Screenshot
<p><b>1</b></p>	<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>	

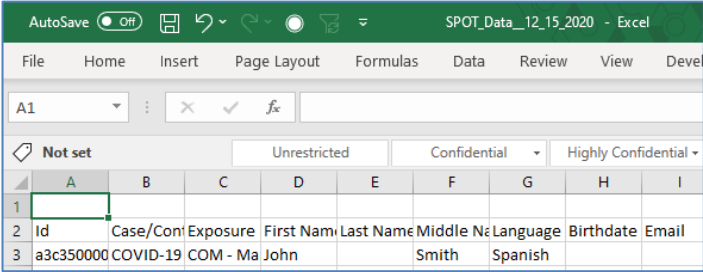
<p><b>2</b></p>	<p>You can see dashboards for:</p> <ul style="list-style-type: none"> <li>• Total Number of Cases and Contacts</li> <li>• Cases and Contacts grouped under your schools single Exposure Event.</li> <li>• Cases and Contacts grouped by the Liaison who entered them</li> <li>• Cases and Contacts grouped by their occupation</li> </ul>	 <p>The screenshot displays the 'Workplace Liaison Summary Dashboard' as of Feb 3, 2021, 10:42 AM, viewed as Lisa Phillips. It features three main sections:</p> <ul style="list-style-type: none"> <li><b>Total Number of Cases and Contacts:</b> A large red number '3' is displayed.</li> <li><b>Cases and Contacts by Exposure Event:</b> A horizontal bar chart showing record counts for two exposure events (298 and 299).</li> <li><b>Cases and Contacts by Liaison:</b> A horizontal bar chart showing record counts for one liaison (Lisa Phillips).</li> <li><b>Cases and Contacts by Occupation:</b> A horizontal bar chart showing record counts for three occupations: Manager, Server, and Waiter.</li> </ul>
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## Export Data

In this section, you can download a file containing information entered in SPOT. Information available on this page only includes data for open Exposure Events and Exposure Events that have closed within the last 90 days. 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>The screenshot shows a blue button labeled 'Export Data' with a circular icon containing a medical symbol and a person using a laptop.</p>

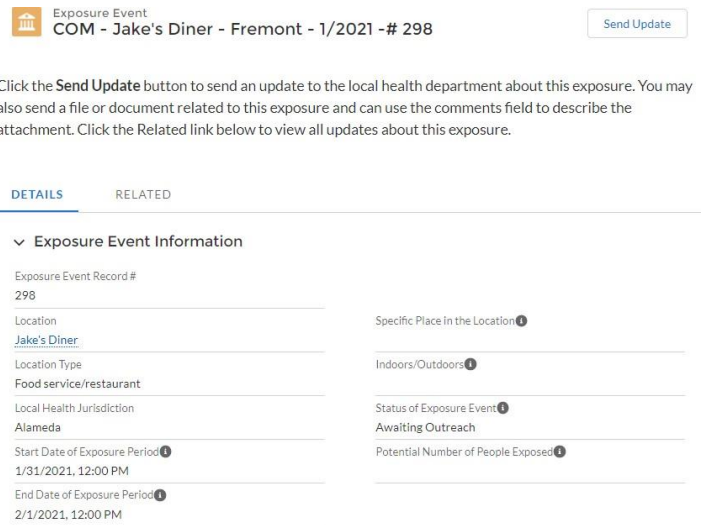
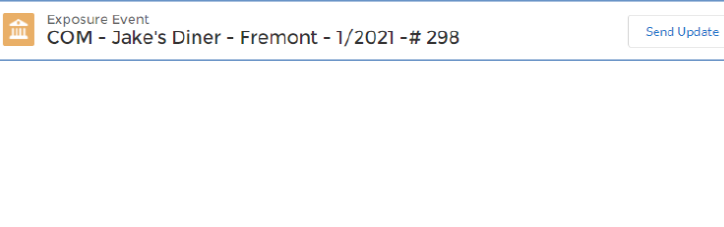
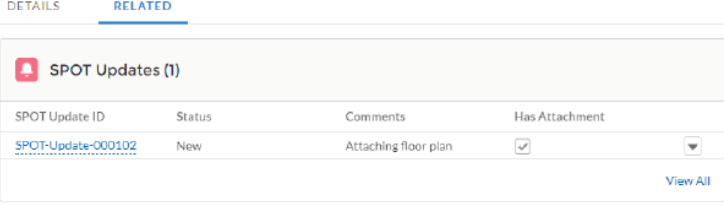


2	<p>You have the option to download data based on location, exposure event, only your data, or all data entered in SPOT for locations you are associated to.</p> <p>The file will download in CSV format.</p>	<p>In this section, you can download an export of data entered in SPOT, in CSV format. You have 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.</p> <p>Location: <span>All</span></p> <p>Export SPOT Data by Location</p> <p>Exposure Event: <span>All</span></p> <p>Export SPOT Data by Exposure Event</p> <p>Created By: <span>All</span></p> <p>Export SPOT Data by Liaison</p> 
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## View Exposure Events

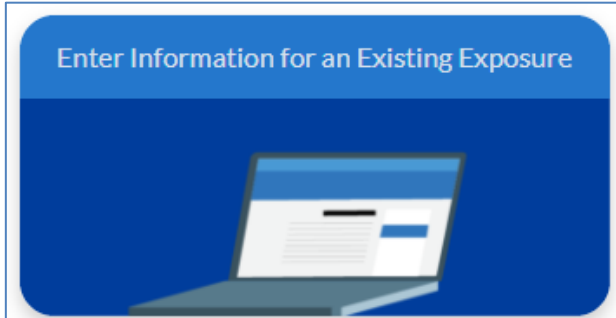
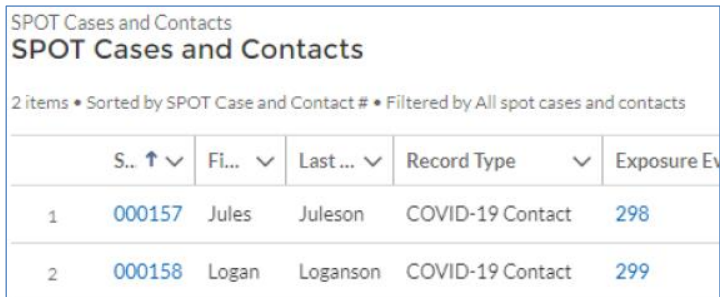
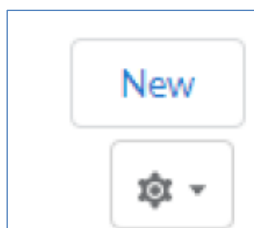
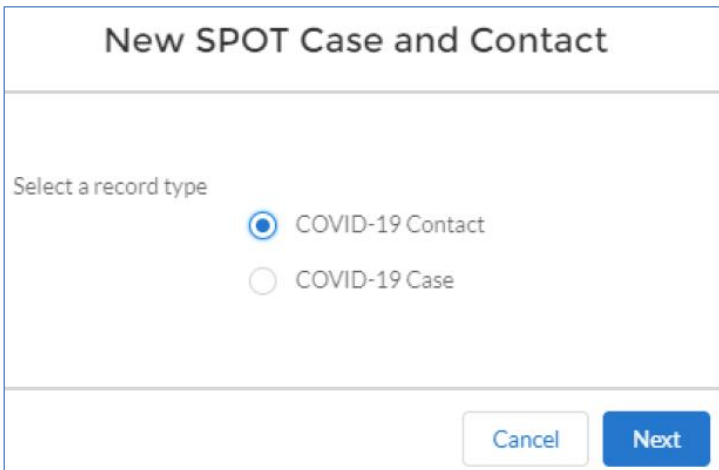
In this section, you can view all Exposure Events in your school. You will need to know the Exposure Event Record # in order to enter information in SPOT about individuals who were involved in a COVID-19 exposure at one of your school.

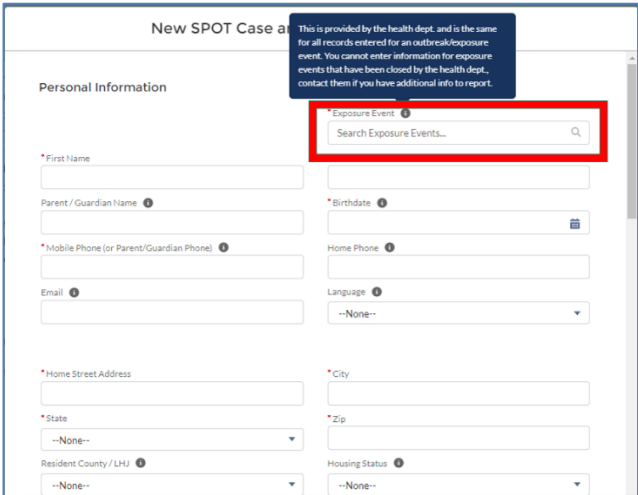
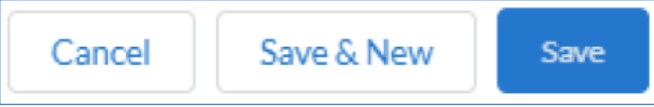
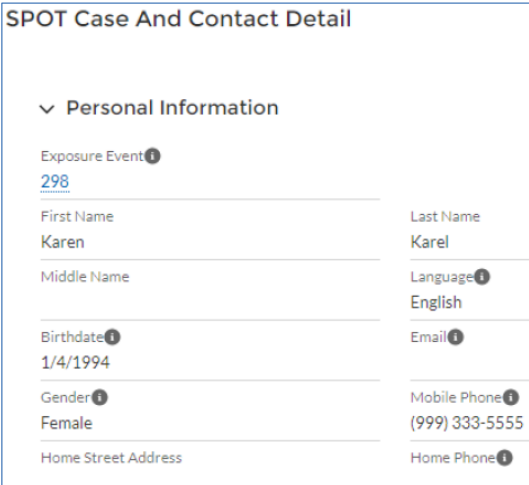
Step	Action	Screenshot																
1	Navigate to this section by clicking the <b>View Exposure Events</b> button on the home page or the link at the top of any page.																	
2	<p>On this page, you will see Exposure Events in your school.</p> <p><b>Note:</b> You cannot enter information for Exposure Events that have been closed by the health department. Contact your health department directly if you have additional information to report.</p>	<div><div>EXPOSURE EVENTS</div><table><tr><th>Exposure Event Record #</th><th>Location</th><th>Start Date of Exposure Period</th><th>Status of Exposure Event</th></tr><tr><td>298</td><td>Jake's Diner</td><td>1/31/2021, 12:00 PM</td><td>Closed</td></tr><tr><td>299</td><td>Jake's Dessert Place</td><td>2/1/2021, 12:00 PM</td><td>Awaiting Outreach</td></tr><tr><td>301</td><td>Jake's Dessert Place</td><td>2/2/2021, 12:00 PM</td><td>Awaiting Outreach</td></tr></table></div>	Exposure Event Record #	Location	Start Date of Exposure Period	Status of Exposure Event	298	Jake's Diner	1/31/2021, 12:00 PM	Closed	299	Jake's Dessert Place	2/1/2021, 12:00 PM	Awaiting Outreach	301	Jake's Dessert Place	2/2/2021, 12:00 PM	Awaiting Outreach
Exposure Event Record #	Location	Start Date of Exposure Period	Status of Exposure Event															
298	Jake's Diner	1/31/2021, 12:00 PM	Closed															
299	Jake's Dessert Place	2/1/2021, 12:00 PM	Awaiting Outreach															
301	Jake's Dessert Place	2/2/2021, 12:00 PM	Awaiting Outreach															

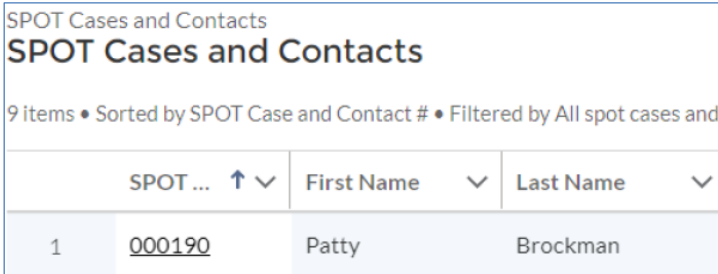
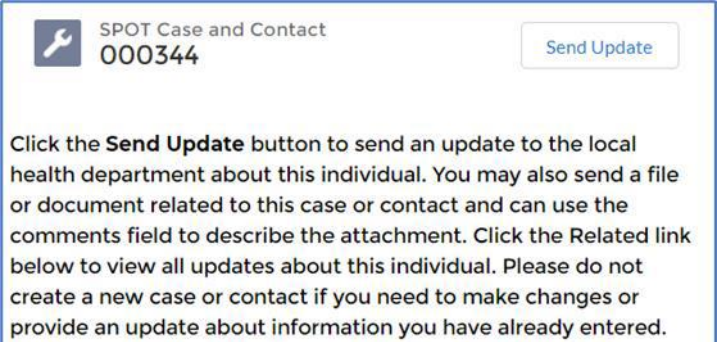
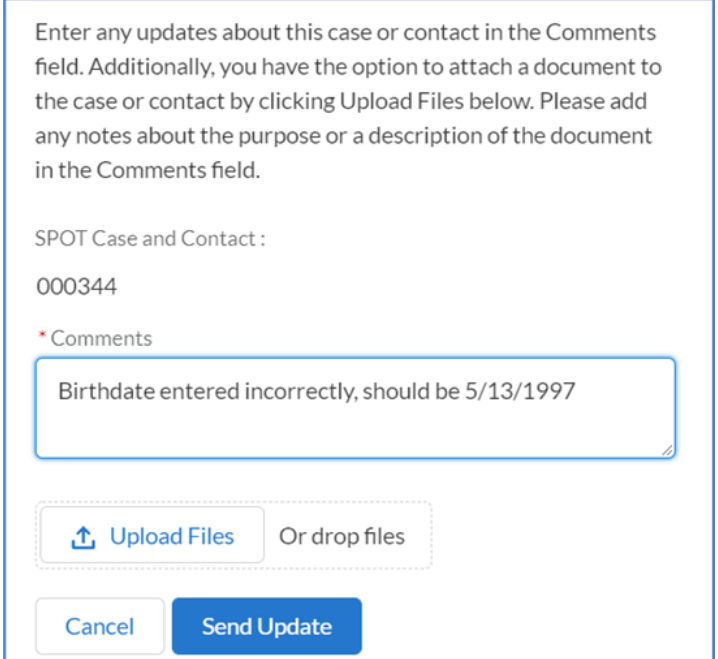
3	<p>To view more details about a specific Exposure Event, click the number in the Exposure Event Record # column.</p>	 <p>Click the <b>Send Update</b> button to send an update to the local health department about this exposure. You may also send a file or document related to this exposure and can use the comments field to describe the attachment. Click the Related link below to view all updates about this exposure.</p>
4	<p>If you need to send an update to the local health department about the exposure, or send a file or document related to the exposure, click the <b>Send Update</b> button.</p>	
5	<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>
6	<p>To view all updates for this exposure, click the <b>Related</b> link.</p>	

## Enter Information for an Existing Exposure

In this section, you can complete a form with key information about individuals who were involved in a COVID-19 exposure at one of your youth programs. You can also view all information entered in SPOT.

Step	Action	Screenshot																								
1	Navigate to this section by clicking the <b>Enter Information for an Existing Exposure</b> button on the home page or the link at the top of any page.																									
2	<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 90 days after an Exposure Event is closed. 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 <a href="#">Export Data</a> section of this guide.</p>	 <table><caption>SPOT Cases and Contacts</caption><tr><th colspan="6">2 items • Sorted by SPOT Case and Contact # • Filtered by All spot cases and contacts</th></tr><tr><th></th><th>S...</th><th>Fi...</th><th>Last ...</th><th>Record Type</th><th>Exposure Ev</th></tr><tr><td>1</td><td>000157</td><td>Jules</td><td>Juleson</td><td>COVID-19 Contact</td><td>298</td></tr><tr><td>2</td><td>000158</td><td>Logan</td><td>Loganson</td><td>COVID-19 Contact</td><td>299</td></tr></table>	2 items • Sorted by SPOT Case and Contact # • Filtered by All spot cases and contacts							S...	Fi...	Last ...	Record Type	Exposure Ev	1	000157	Jules	Juleson	COVID-19 Contact	298	2	000158	Logan	Loganson	COVID-19 Contact	299
2 items • Sorted by SPOT Case and Contact # • Filtered by All spot cases and contacts																										
	S...	Fi...	Last ...	Record Type	Exposure Ev																					
1	000157	Jules	Juleson	COVID-19 Contact	298																					
2	000158	Logan	Loganson	COVID-19 Contact	299																					
3	To enter in new information about an individual involved in an exposure at your workplace, select the <b>New</b> button on the right-hand side of the page.																									
4	<p>Select the radio button for all individuals that are a case (someone who has tested positive for COVID-19). Schools team will reach out to you if contact (someone who has come in close contact with a COVID-19 case) information is needed.</p> <p>Note that the information collected for Cases and Contacts will be slightly different. Click <b>Next</b>.</p>	 <p>New SPOT Case and Contact</p> <p>Select a record type</p> <p><input checked="" type="radio"/> COVID-19 Contact</p> <p><input type="radio"/> COVID-19 Case</p> <p>Cancel Next</p>																								

<p><b>5</b></p>	<p>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 Exposure Event field, enter the Exposure Event Record # provided to you by the local health department, or select it from the menu that opens.</li> </ul>	
<p><b>6</b></p>	<p>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></p>	<p>After clicking Save, you will see a summary view of the last form you completed.</p> <p>Click <b>Enter Information for an Existing Exposure</b> to return to the list of all information you have entered in SPOT.</p>	

<p><b>8</b></p>	<p>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 <b>SPOT Case and Contact #</b> column next to the individual's name.</p> <p>Your youth program will now have a single exposure event. You can add information to this exposure event as needed.</p>	
<p><b>9</b></p>	<p>Click the <b>Send Update</b> button.</p>	
<p><b>10</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 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>11</b></p>	<p>To view all updates for this individual, click the <b>Related</b> link.</p>	