

EMRS Job Aid for Tracing Animals with ID



Tracing Animals or Animal Groups with ID

All traces involving individual animals with unique ID or identifiable documented "lots" should have at least one movement and one animal/group record.

1. Create a Trace

Before you can create a trace you must have the Premises, Animal Business, and an Investigation for the proper incident created in EMRS. Except for slaughter and market trace-backs, affected or infected herds require a Premises Status designating them as "positive" before an Index Trace can be created.

To create a trace for animals with ID or animal groups with ID, navigate to the Investigations entity.

- 1) Select Disease Management.
- 2) Select Investigations.
- 3) Find and highlight the investigation for which you are creating a trace.
- 4) Select Invest Follow-up in ribbon.
- 5) The Investigation Follow-up dialog box will open. Select Create a Trace
- 6) Select Index trace from an infected/affected herd. *Note: If this is a placeholder trace being created somewhere other than the index premises, select Placeholder trace.*
- 7) Enter the Trace Coordinator. If you do not assign a Trace Coordinator now, you can use a Trace Follow-up dialog to assign a Trace Coordinator later. A Trace Coordinator must be added before a trace can be completed.
- 8) Select the Traceline Type. This is how this trace segment is considered in relation to the index premises. Are we looking for animals or groups that moved out of the Affected/Infected herd or into that herd?
- 9) Select the Trace Segment Direction. Did the animals or groups you will be adding to this trace segment move forward to the same destination as the trace or is the trace going backwards looking for animals or groups that actually moved into the premises where you are creating the trace?
- 10) Enter a Short Narrative about Trace origination and activities.
- 11) Select Origin Trace Priority
- 12) Enter the # Items to Trace. Enter the number of animals if creating a trace for Individually Identified Animals. Enter the number of groups if creating a trace for Identifiable Animal Groups.
- 13) Select Item to Trace. Select Individually Identified Animals for individual animals with unique ID. Select Identifiable Animal Groups for identifiable documented animal "lots."
- 14) Select Primary Species.
- 15) Enter Additional Item Description.
- 16) Enter the # of individual shipments between the trace origin and trace destination.
- 17) Enter the beginning date for shipment series.
- 18) Enter the ending date for shipment series.
- 19) Enter Name of Destination Premises or Contact.
- 20) Enter Primary Phone.
- 21) Enter Trace Destination Address.
- 22) Enter Trace Destination City.
- 23) Enter Trace Destination State.
- 24) Enter Trace Destination Zip.

You will have an opportunity to review the trace information before creating the trace. Since you are creating a trace for animals with ID or for a group of animals with a group identifier, you will create movements for this trace. You can continue the dialog now or quit and return to the dialog later to create movements for the trace.

2. Create Movements for a Trace

When a trace is created for animals with ID or for a group of animals with a group identifier, you must create movements for the trace.

To add movements to a trace, navigate to the Investigations entity.

- 1) Select Disease Management.
- 2) Select Traces.
- 3) Find and highlight the investigation for which you are creating a trace.
- 4) Select Trace Follow-ups in ribbon.
- 5) Select Create a Trace Movement for this segment.
- 6) Review the trace information.
- 7) Select a date that the movement occurred.
- 8) Enter the number of items on this movement.
- 9) Select the units of items being moved.
- 10) Enter additional item description.
- 11) Select movement type.
- 12) Select movement reason (this is the movement reason at the time the movement occurred).
- 13) The movement has been created. Select I want to associate the animals/groups to the movement I just created.
Note: If you quit the dialog now, you can navigate to Movement Follow-ups to associate animals/groups later.
- 14) Review the movement information.
- 15) The dialog will display the number of animal or group records for the selected species on the origin premises. If the number is greater than 50, enter a partial ID to narrow the search. If the number is less than 50, you do not need to enter ID here.
- 16) Select the status of the animals or groups you are associating/loading to the movement.
- 17) The animals or groups of the selected species on the origin premises will appear in the dropdown. Select the first animal or group you are associating to the trace movement.
- 18) Select Load animal selected to movement. *Note: If the animal/group you are loading does not appear in the dropdown, you can add animals or groups to the origin premises. Note: You will receive a prompt if the animal you are loading does not an associated global record. If the animal has a unique ID, you should add a global record before proceeding.*
- 19) Continue the dialog to add animals to the movement until all the animals have been loaded.
- 20) The dialog will notify you when the declared number of animals has been loaded. If the number is correct, select Yes, I have finished loading and want to change the status to "Loaded."
- 21) Confirm movement information. If everything is correct, select # is correct change status of movement to loaded.
- 22) Movement has been processed to loaded. If you have additional movements on the trace, continue the dialog to add more movements. If all the movements have been added to the trace, and all animals or groups associated with the movements, the trace is ready to prepare for transfer to the destination premises. You can continue the dialog to prepare the trace for transfer now, or quit the dialog and return to prepare the trace for transfer later.

3. Prepare a Trace for Transfer

Once a trace has been created, it must be processed to "Prepare for Transfer" which shares the trace with the receiving state, if crossing state lines. Currently, it is best if you email a link to the epidemiologist in the receiving state.

To prepare a trace for transfer, navigate to the Traces entity.

- 1) Select Disease Management.
- 2) Select Traces.
- 3) Find and highlight the trace you need to prepare for transfer.
- 4) Select Trace Follow-ups in the ribbon.
- 5) The Add Follow-ups to Trace dialog will open. Select Review/Prepare trace segment for transfer.

You will have an opportunity to review the information before continuing to prepare the trace for transfer.

- 6) Review the loaded movements. If the number of movements matches the number of shipments, select Yes, it is correct, to change the status of the trace segment to Anticipating Transfer.
- 7) Select the trace destination access group (usually the destination state).
- 8) Select the destination incident site (usually the destination state).

The trace has been prepared for transfer. If the trace is being transferred to a premises in your state (or to a state to which you have access in EMRS), you can continue the dialog to Transfer Trace to Destination Premises. If the trace is being transferred to a premises in a state to which you do not have access in EMRS, Quit the dialog.

- 9) Select Quit, I am done.

4. Transfer a Trace

Once a trace has been prepared for transfer, the receiving state can Transfer, or connect, the trace to an existing or new investigation on the traced premises for the same incident. Once a trace is transferred and assigned to an investigator, it has a status of "Under Investigation" where it remains while contacts are made to determine if the animals were ever present on the traced premises.

To transfer a trace, navigate to the Traces entity.

- 1) Select Disease Management.
- 2) Select Traces.
- 3) Find and highlight trace you are transferring.
- 4) Select Trace Follow-ups in the ribbon.
- 5) The Add Follow-ups to Trace dialog will open. Select Transfer Trace Segment.
- 6) Select the premises to which the trace is being transferred.
- 7) Select Proceed to transfer trace to premises selected.
- 8) Select Business. If a premises has more than one business, select the business associated with this trace.
- 9) Select Investigation. If a premises has more than one active investigation, select the investigation associated with this trace.
- 10) Select Trace Investigator.
- 11) Enter the Date Destination Investigator assigned.
- 12) Select Destination Priority.

The trace has been transferred to the destination investigation.

5. Unload Movements

Once an on-farm investigation is conducted at the destination premises, since individually identified animal or identifiable animal group records and movements are associated with the trace, the animals/groups need to be **unloaded** and the movements need to be **completed** before the trace can be extended, split, or completed.

To unload movements, navigate to the Movements entity.

- 1) Select Disease Management.
- 2) Select Movements.
- 3) Find and highlight the movement you need to unload.
- 4) Select Movement Follow-ups in the ribbon.
- 5) The Movement Follow-ups dialog opens. Select Unload animals/groups to receiving premises.
- 6) The animals/groups loaded on the movement will appear in the dropdown. Select the first animal/group to unload.
- 7) Select the action – was the animal/group received at the destination premises or never received at the destination premises?
- 8) The dialog will report the number of animals or groups unloaded and the number of animals or groups still loaded. If there are still animals/groups loaded, continue unloading animals/groups.

The dialog will report when all animals or groups have been unloaded and the status of the movement is Unloaded/Complete. The trace can now be completed.

6. Complete a Trace

Once a trace has been transferred to the destination premises, it has a status of “Under Investigation” where it remains while contacts are made to determine if the animals or groups were ever present on the traced premises. After the information has been gathered, and the animals or groups have been unloaded from the movements:

- If you have a disposition for all animals/groups on the trace, you can **complete the trace segment**.
- If your investigation reveals that some or all of the animals/groups on the trace were on the destination premises, but some or all of the animals/groups have moved on to other premises, you will **continue or split the trace**.
- If your investigation determines that the animals/groups were never on the destination premises, and you have information about a different premises to which the animals/groups were sent, you will **redirect the trace**.

COMPLETE THE TRACE SEGMENT

If you have a disposition for all animals/groups on the trace, you can complete the trace segment. To complete the trace, navigate to the Trace entity.

- 1) Select Disease Management
- 2) Select Traces.
- 3) Find and highlight the trace you are completing.
- 4) Select Trace Follow-ups in the ribbon.
- 5) The Trace Follow-ups dialog will open. Select Complete this trace segment or edit completed
- 6) Because you have individually identified animals or identifiable groups on this trace, each animal or group will need a disposition. The dialog will prompt you to add a trace disposition for each animal or group. The animals/groups needing a disposition appear in the dropdown. Select the first animal/group and select Add trace disposition.
- 7) Select the appropriate status at target destination.
- 8) Select the current status of the animal/group on the trace destination premises.
- 9) Enter any additional information or explanation for trace disposition.
- 10) The status of the selected animal/group is updated. Select Continue to Complete the Trace.

If there are additional animals/groups on the trace, you will be prompted to add a trace disposition for those animals/groups. When all animals/groups have a disposition, the dialog will prompt you to complete the trace.

- 11) Enter a Trace Close Status.
- 12) Enter Trace Close Comments.

A notification of queue items to be deactivated displays. When the trace is completed, it is removed from the Investigator’s work queue. The trace segment is completed. **Remember, this is for this segment only. If the trace was continued or split, or the trace needs to be redirected, those segments will need to be prepared for transfer, transferred, and completed.**

CONTINUE OR SPLIT THE TRACE

If your investigation reveals that some or all of the animals/groups on the trace were on the destination premises, but some or all of the animals/groups have moved on to other premises, you will continue or split the trace. Continue the trace if all of the animals/groups moved on to the same new premises. Split the trace if some animals/groups stayed on the destination premises and others moved on **or** if all of the animals/groups moved on, but went to more than one premises. You will create as many new “split” traces as premises that received animals/groups.

To continue or split a trace, navigate to the Trace entity.

- 1) Select Disease Management
- 2) Select Traces.
- 3) Find and highlight the trace you need to continue or split.
- 4) Select Trace Follow-ups in the ribbon.
- 5) Select Continue/Split this traceline.

You will have an opportunity to review the information before continuing/splitting the trace

- 6) Select the Trace Coordinator. *Note: You can select the Trace Coordinator now or later.*
- 7) Enter a Short Narrative Trace for trace segment.
- 8) Enter Origin Trace Priority.
- 9) Enter the number of items to Trace. This number will be the total number of animals/groups on the trace if all the animals/groups moved on to the new premises. The number will be less than the total if there are splits. Enter the number of animals/groups that moved on to the new premises.
- 10) Enter Additional Item Description.
- 11) Enter the number of Individual Shipments to the Destination.
- 12) Enter the beginning Date for series of shipments to destination.
- 13) Enter the ending date for series of shipments to destination
- 14) Name of Destination Premises or Contact
- 15) Primary Phone number for trace destination or contact
- 16) Enter Trace Destination Address.
- 17) Enter Trace Destination City.
- 18) Enter Trace Destination State.
- 19) Enter Trace Destination Zip.

You have created a new trace for all or part of the shipment. Since the trace includes individually identified animals or identifiable animal groups, you will create movements for the trace.

Repeat the process to create additional splits if needed, until all animals/groups are accounted for. You will then need to prepare all the new split traces for transfer. Once all animals/groups are accounted for, complete the original trace if you have not already done so.

REDIRECT THE TRACE

If your investigation determines that the animals/groups were never on the destination premises, but you now have information about a different premises to which the animals/groups were sent, you will redirect the trace to the new premises. *Note: only traces with a status of Awaiting Transfer, Transferred, or Under Investigation can be redirected.*

To redirect a trace, navigate to the Traces entity. Select Disease Management.

- 1) Select Disease Management
- 2) Select Traces.
- 3) Find and highlight the trace you need to redirect.
- 4) Select Trace Follow-ups in the ribbon.
- 5) The Trace Follow-ups dialog will open. Select Redirect Trace – wrong destination entered.
- 6) Select Redirected Trace Destination Access, if different from current.
- 7) Select Redirected Trace Destination Site, if different from current.
- 8) Enter new trace destination location name.
- 9) Enter new destination phone.
- 10) Enter new destination address.
- 11) Enter new destination city.
- 12) Enter new destination state.
- 13) Enter new destination zip.
- 14) Enter a short explanation for why the trace is being redirected.

You have successfully redirected the trace. You will now need to prepare the redirected trace for transfer.