

EMRS Tracing Toolkit: Movements, Permits, and Tracing Exercises



United States
Department of
Agriculture

EMRS Restricted Movement (1-27) Exercise

When creating a 1-27, you must have an Animal Business, Animals, and Investigation for your Premises. Investigation must be for Incident in which you are involved. Receiving Premises must have Animal Business and Investigation (same Incident) in place.

1) Create a restricted movement

- a. Select Disease Management (look to the lower left).
- b. Select Investigations.
- c. Search for the investigation for which you are creating a restricted movement.
- d. Activate the investigations ribbon options at the top of the page by selecting or highlighting the appropriate investigation record in the investigations view grid.
- e. Select Invest Follow-up in the ribbon.
- f. Choose Create a Restricted Movement (1-27).
- g. Follow the dialog to create the restricted movement.
- h. Restricted movement has been created; continue the dialog to add animals to the movement.

2) Add animals or groups to the movement

- a. Select Add animals or groups to movement.
- b. Follow the dialog to add animals or groups to the movement; repeat until all animals are added.
- c. Animals have been added; continue the dialog to process the movement to loaded status.

3) Process movement to loaded status

- a. Select Process this movement to loaded status.
- b. Follow the dialog to process the movement to loaded status.
- c. Movement is in loaded status; continue the dialog to prepare the movement for transfer.

4) Prepare movement for transfer

- a. Select Prepare movement for transfer.
- b. Follow the dialog to prepare the movement for transfer (Receiving Access Group and Receiving Site are the State to which you are transferring movement).
- c. Movement is prepared for transfer; continue the dialog to transfer the movement to another premises in your state or quit if movement is going to another state.

5) Transfer the movement to another premises (If you are receiving State, search for Movement and continue with Step 5; if Instate Movement, then just continue).

- a. Select Transfer the movement to another premises in my state.
- b. Follow the dialog to transfer the movement.
- c. Movement is transferred; continue the dialog to unload animals.

6) Receive and unload animals on movement to destination business

- a. Select Unload animals on movement to destination business.
- b. Follow the dialog to receive and unload the animals; repeat until all animals are unloaded.
- c. Animals are unloaded; continue the dialog to complete the movement.

7) Complete movement

- a. Select Complete movement, all unloaded.
- b. Follow the dialog to complete the movement.
- c. Movement is completed, finish the dialog.

EMRS Permits Exercise

When creating a Permit, you must have an Animal Business, Animals, and Investigation for your Premises. Investigation must be for Incident in which you are involved. Receiving Premises must have Animal Business and Investigation (same Incident) in place.

1) Create a permit

- a. Select Disease Management (look to the lower left).
- b. Select Investigations.
- c. Search for the investigation for which you are creating a permit.
- d. Activate the investigations ribbon options at the top of the page by selecting or highlighting the appropriate investigation record in the investigations view grid.
- e. Select Invest Follow-ups in the ribbon.
- f. Choose Create a Permit.
- g. Follow the dialog to create the permit.
- h. Permit request has been created; quit/finish the dialog.
- i. Notify person with role of Reviewer.

2) Review the permit (Origin state)

- a. Select Permits (Disease Management/Movements & Tracing/Permits)
- b. Search for the permit you are reviewing.
- c. Activate the permits ribbon options at the top of the page by **selecting** the appropriate permit record in the permits view grid to open the permit record.
- d. Select Review in the ribbon.
- e. Follow the dialog to review the permit and recommend approval. Enter the destination incident site and destination access group for receiving state.
- f. Permit has been reviewed; quit/finish the dialog. Refer Permit to receiving state for approval.

3) Locate and approve the permit awaiting approval (Receiving state)

- a. Select Disease Management.
- b. Select Queues (in My Work).
- c. Locate and open the permit awaiting approval by your state.
- d. Select Approve in the ribbon.
- e. Follow the dialog to approve the permit.
- f. Permit has been approved, finish the dialog.

4) Add a Movement to the Permit (Origin state)

- a. Select Disease Management.
- b. Select Queues (in My Work).
- c. Locate and open the permit.
- d. Select Permit Follow-ups in the ribbon.
- e. Choose Add a movement to this permit.
- f. Follow the dialog to create a movement.
- g. Choose Associate animals or Groups to this movement.
- h. Follow the dialog to add animals and change permit to Loaded.
- i. Choose Prepare Movement for Transfer; follow dialog and select:
 - Transfer this movement to another premises in my state (If ready to complete Movement, continue dialog with 5g below).
 - Or Quit, I am done.

5) Receive and unload animals on movement to destination (Receiving state)

- a. Select Disease Management.
- b. Select Queues (in My Work).
- c. Locate and open the permit.
- d. Select Movements in left column (in Permitted Shipments).
- e. Open the Movement.
- f. Activate the Movement ribbon options at the top of the page by selecting or highlighting the Movement.
- g. Choose Transfer to Premises; finish dialog.
- h. Choose Unload animals on movement to destination business.
- i. Follow the dialog to receive and unload the animals; repeat until all animals are unloaded.
- j. Animals are unloaded; continue the dialog to complete the movement.

6) Complete the Permit (Receiving state)

- a. If you still have the permit open, select Permit Request in left column. If you do not have the permit open, locate and open the permit.
- b. Select Permit Follow-ups in the ribbon.
- c. Choose Complete this permit (all movements and items completed).
- d. Follow the dialog to complete the permit.

EMRS Tracing Exercise

When creating a trace, you must have an Animal Business, Animals, Investigation, and Positive Diagnosis for your Premises. Investigation and Positive Diagnosis must be for Incident in which you are involved. Receiving Premises must have Animal Business and Investigation (same Incident) in place.

1) Create a Trace

- a. Select Disease Management (look to the lower left).
- b. Select Investigations.
- c. Search for the investigation for which you are creating a trace.
- d. Activate the investigations ribbon options at the top of the page by selecting or highlighting the appropriate investigation record in the investigations view grid.
- e. Select Invest Follow-up in the ribbon.
- f. Choose Create a Trace.
- g. Follow the dialog to create a trace. Note: you do not have to indicate a specific premises in another state. If trace is in your own state, you probably have that information.
- h. Trace has been created; continue the dialog to create a movement for the trace.

2) Create a Trace Movement

- a. Select Create movements for this trace.
- b. Follow the dialog to add a movement to the trace.
- c. Movement has been added; continue the dialog to associate animals or groups to the movement.

3) Associate (Add) animals or groups to the movement

- a. Select I want to associate animals/groups to the movement I just created.
- b. Follow the dialog to associate/load animals to the movement; repeat until all animals are added to the movement.
- c. Animals are associated; continue the dialog to process the movement to loaded status.

4) Process movement to loaded status

- a. Select Process this movement to loaded status.
- b. Follow the dialog to process the movement to loaded status.
- c. Movement is in loaded status; continue the dialog to prepare the trace for transfer.

5) Prepare trace for transfer

- a. Select prepare trace for transfer.
- b. Follow the dialog to prepare the trace for transfer.
- c. Trace is anticipating transfer.
- d. Quit/finish the dialog. If this is a trace in your state, you can move to step 6e, continue the dialog to transfer the trace to destination premises.

6) Locate the trace anticipating transfer to your state

- a. Select Disease Management.
- b. Select Queues (in "My Work" section; left side of screen).
- c. Locate the trace awaiting transfer to your state.
- d. Open the trace form.
- e. Select Trace Follow-ups in the ribbon; continue the dialog to transfer the trace segment.

7) Transfer trace

- a. Select Transfer the trace segment.
- b. Follow the dialog to transfer the trace to the appropriate premises in your state.
- c. Trace is transferred, finish the dialog.

At this point, you would investigate and obtain information about the animals on the trace, if not already available; then go back in and Complete the Trace (see next page).

8) Complete trace

- a. Navigate to the trace form.
- b. Open the trace form by double clicking on the line or selecting Edit in the ribbon.
- c. Select Trace Follow-ups in the ribbon.
- d. Select Complete this trace segment or edit completed.
- e. Complete the dialog to complete the trace. Note: the dialog will lead you through any required steps (for example, assigning an investigator, unloading and completing movements, trace dispositions) that have not yet been entered. You may need to restart the dialog several times to complete the trace.