



CALiCo SOLUTIONS

CASPIR Users Guide

Administrators



CASPIR

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www.calicosol.com

California's System for Pesticide Incident Reporting

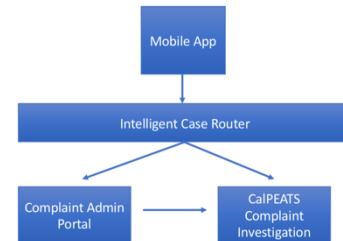
Users Guide for Administrators

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Overview

Fieldworkers are now able to submit pesticide related incident reports via the CASPIR mobile app. These reports are routed to an administrative portal monitored by DPR. The Incident Reports will be submitted from the mobile app to the Intelligent Case Router which determines the incident county.

If the Intelligent Case Router is not able to determine the incident county, the Incident Report is displayed in the Admin Portal where an administrator can make the determination as to which county the Incident Report should be routed and assigned to.



If sufficient information is available to determine the county where the incident took place, it is automatically routed and accessible to the County Agricultural Commissioner (CAC) staff via CalPEATS. In those cases, there is no need for the DPR user to deal with this Incident Report at all.



The county will receive these Incident Reports via CalPEATS. County investigators will see a new section on their dashboard listing incoming Incident Reports and can evaluate the incidents and determine whether to start an investigation within CalPEATS.

If there is not sufficient information to make an automatic determination of the incident county, the DPR user will need to step in and see if they can make that assignment after reading the Incident Report. If the incident county can be determined, the DPR user will simply forward the Incident Report to that county. If the incident county cannot be determined, the DPR user has options for how to deal with the report, discussed in more detail below.

CASPIR Admin Portal

The CASPIR Admin Portal is a web interface to the Incident Reports database providing a portal for administrators to access to all submitted Incident Reports. The portal has two main pages: The Dashboard and the Query page.

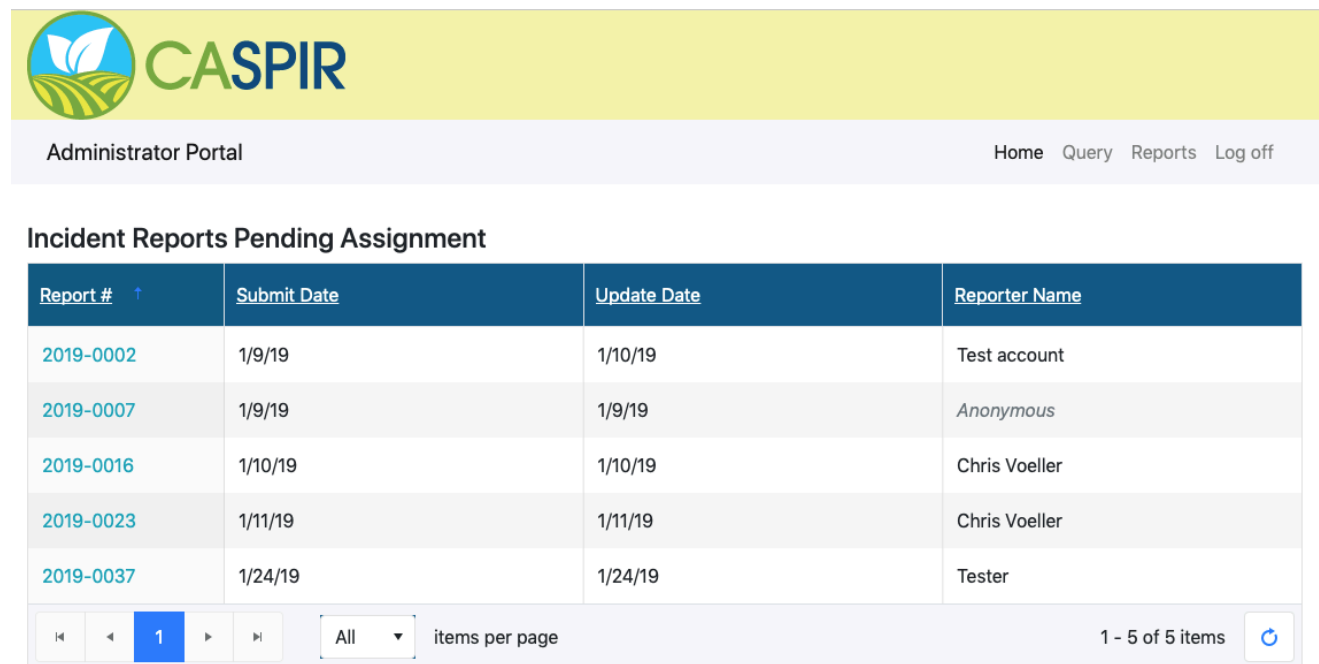
The Dashboard presents a list of Incident Reports that could not be assigned to a county automatically and need attention from the administrator to make that determination.

The Query screen gives the administrator the ability to find any current or past Incident Report, which becomes important when somebody is requesting a status update on an Incident Report.

The administrator can click on any Incident Report in the list to get detailed information including the county to which the investigation has been assigned. From here, the administrator can also assign the report to the appropriate county, request additional information from the submitter, or close out the report altogether.

Dashboard

The CASPIR dashboard provides immediate access to reports that need attention by CASPIR's administrative staff. These reports could either not automatically be assigned to a county or have been sent back by the county for various reasons. Click on the Report Number to view the details of the report.



The screenshot shows the CASPIR Administrator Portal. At the top left is the CASPIR logo, which consists of a green circle containing a white leaf and a green field, followed by the text "CASPIR" in green. Below the logo is a navigation bar with the text "Administrator Portal" on the left and "Home Query Reports Log off" on the right. The main content area is titled "Incident Reports Pending Assignment" and contains a table with the following data:


| Report # | Submit Date | Update Date | Reporter Name |
|---------------------------|-------------|-------------|---------------|
| 2019-0002 | 1/9/19 | 1/10/19 | Test account |
| 2019-0007 | 1/9/19 | 1/9/19 | Anonymous |
| 2019-0016 | 1/10/19 | 1/10/19 | Chris Voeller |
| 2019-0023 | 1/11/19 | 1/11/19 | Chris Voeller |
| 2019-0037 | 1/24/19 | 1/24/19 | Tester |

Below the table is a pagination control showing "1" of 5 items, a dropdown menu set to "All" items per page, and a refresh button. The text "1 - 5 of 5 items" is also visible.

The reports are sorted by their Report Number by default, so the oldest report shows up on top. The sort order can be changed by clicking on the column headers.

Query

It is important for the administrator to have access to all reports submitted, not just those in need of attention. The Query screen in the CASPIR Admin Portal provides the administrator with access to all submitted reports. Search criteria are provided to help find a specific report should they receive a question from a fieldworker or county staff about the status of an Incident Report.


Home Query Reports Log off

Administrator Portal

Report Number

Status

Any
▾

Assigned To:

Filter Destination...
▾

Submitted On or After

12/25/2018
📅

Submitted Before

Date
📅

Search

| Report # | Submit Date | Update Date | Reporter Name | Assigned To | Status |
|-----------|-------------|-------------|---------------|---------------------------|-----------------------------|
| 2019-0040 | 1/25/19 | 1/25/19 | Test user | San Joaquin County | Pending Investigation |
| 2019-0039 | 1/25/19 | 1/25/19 | Test user | San Joaquin County | Pending Investigation |
| 2019-0038 | 1/24/19 | 1/24/19 | Tester | Complainant Update Needed | Awaiting Complainant Update |
| 2019-0037 | 1/24/19 | 1/24/19 | Tester | CDPR Assignment Needed | Needs Assignment |
| 2019-0036 | 1/24/19 | 1/25/19 | Anonymous | Complainant Update Needed | Awaiting Complainant Update |
| 2019-0035 | 1/24/19 | 1/24/19 | Test User | San Joaquin County | Pending Investigation |
| 2019-0034 | 1/23/19 | 1/23/19 | Stefan Mehlig | San Joaquin County | Pending Investigation |
| 2019-0033 | 1/22/19 | 1/22/19 | Stefan Mehlig | San Joaquin County | Pending Investigation |
| 2019-0032 | 1/16/19 | 1/16/19 | Chris Voeller | Fresno County | Pending Investigation |
| 2019-0031 | 1/16/19 | 1/16/19 | Tester | San Joaquin County | Pending Investigation |

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1
2
3
4
▶
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10
▾

items per page

1 - 10 of 40 items
🔄

Incident Report Details

To view the details of an Incident Report, you can click on the Report Number in either the CASPIR Dashboard or the query results. To quickly search for any report that is in the system, navigate to the Query screen and enter any of the search criteria, like a part of the Report Number.

CalPCS Administrator Portal
Home Query Log off

Report Number

Status

Assigned To:

Submitted On or After

Submitted Before

| Report # | Submit Date | Update Date | Reporter Name | Assigned To | Status |
|-----------|-------------|-------------|---------------|------------------------|------------------|
| 2018-0004 | 11/7/18 | 11/7/18 | Jeff Smith | CDPR Assignment Needed | Needs Assignment |

items per page

1 - 1 of 1 items

Reporter Name

Reporter Email

Reporter Phone

Incident Details

Incident County

Incident Date

Incident Time

Location of Incident


No GPS location is associated with this incident report.

Location Description

Incident Description

The reporters's device had a language setting of "English (United States)".

Attachments



0091984e-c145-4609-8a90-c9e7a81fa080.jpg

CDPR Information

Remarks:

Remarks will be visible to county investigators.

You are able to change the sort order by clicking on a specific header. An arrow appears to the right of the header title to indicate the current sort order. By default, the list is sorted in reverse order of the Report Number. The reports are listed in the grid with a link that opens the Incident Report details page.

The details page contains all of the submitted information as well as any internal remarks added by counties or DPR users.

Incident Report Header

The top section of the Incident Report displays the current status of the report.

The screenshot shows the 'Administrator Portal' header with navigation links for 'Home', 'Query', 'Reports', and 'Log off'. Below the header, there are two input fields: 'Report Number' containing '2019-0036' and 'Status' containing 'Awaiting Complainant Update'. A section titled 'Current Details Displayed on Fieldworker Device' contains a text box with the message: 'Hi, this is Stef. In order to see this Incident Report in CalPEATS you need to give yourself the correct permissions. Documentation will come next week. Who is this? Contact me and I can walk you through the setup.' At the bottom right of the form are two blue buttons: 'Designate Report' and 'View PDF'.

You can also see the text that is currently displayed on the reporter's mobile app. That is the text under '*Current Details Displayed on Fieldworker Device*' in the above screenshot. To enter text into this field you need to click on the 'Designate Report' button, choose the '*Complainant Update Needed*' option where you can find the text entry field.

This section also has two buttons; View PDF – for creating a PDF version of this Incident Report – and Designate Report which the administrator can use to re-assign the report to the appropriate party.

Personal Information

This section displays the personal information volunteered by the reporter.

Personal Information

Reporter has chosen to remain anonymous. If more information is needed you can still set the incident report as "information needed" and the reporter will see any notes you provide on their mobile device.

If the Reporter has chosen to stay anonymous, the text above is displayed. The only way to contact this person is to set the Incident Report to status '*Update Needed*'. The text you entered into the explanatory input field will be displayed on the reporter's mobile app.

Incident Details

The reporter is able to set the location of the incident. This is not just a point location, but a region which is displayed as a red square on the map below.

Incident Details

Incident County

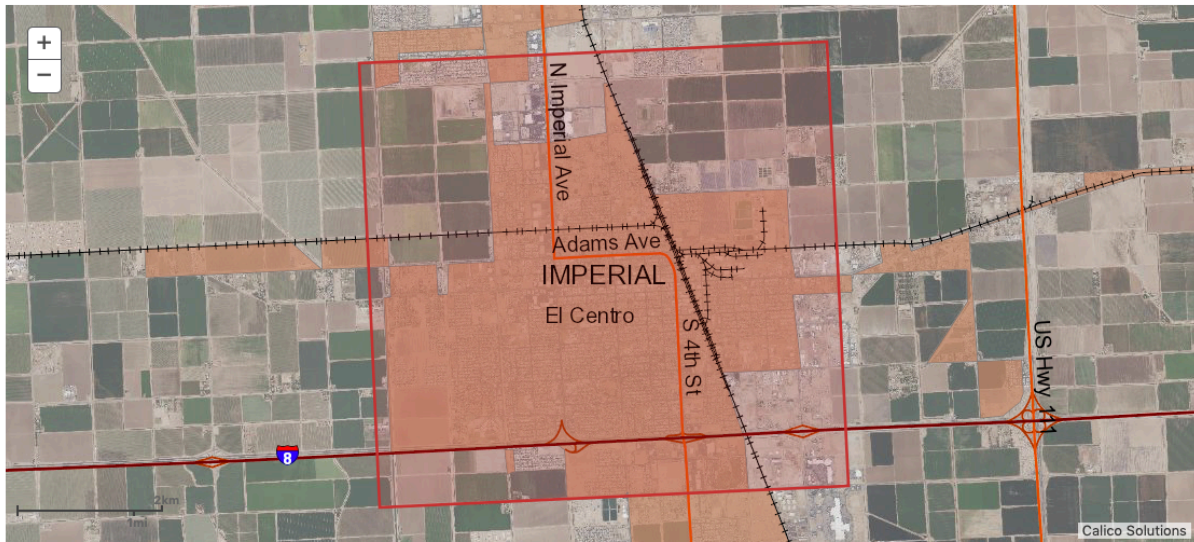
Imperial

Incident county is calculated from reported location.

Incident Date

Incident Time

Location of Incident



Location Description

TEST: Ag comm office

Alternatively, the reporter can enter a textual description of the location. This would be necessary if the user does not have Internet access to display the map data.

Incident Description

This section describes what was reported during the incident. It is up to the reporter to give as much detail as they feel is necessary.

Incident Description

TEST:
I got hand sanitizer in my eye

The reporter's device had a language setting of "English (United States)".

The Incident Description text is in the language set by the user's phone settings.

Attachments

The next section contains all the attachments for this incident report. This is currently limited to Photos and Videos.

Attachments

No attachments provided with this incident report.

You will see a thumbnail for each attachment. Clicking on the thumbnail reveals the picture or video in full resolution.

CDPR Information

In this Remarks field the administrator can enter any notes about the Incident Report. Here you can enter instructions to county staff before actually forwarding the Incident Report to the county.

CDPR Information

Remarks:

Remarks will be visible to county investigators.

Save Remarks

Any remarks entered here will not be visible to the reporter and enables internal communication between DPR and county staff.

County Investigation Details

This section shows the administrator the status of the county investigation and displays any remarks the county staff entered into the Incident Report for further explanation.

County Investigation Details

Investigation Status

Rejected as Incomplete Incident

Remarks

Assign an Incident Report

A report that could not be assigned to a county by the Intelligent Case Router must be analyzed and manually assigned. The Incident Report page has a *'Designate Report'* button to accomplish this task.

The screenshot shows the CASPIR Administrator Portal interface. On the left, there is a sidebar with the CASPIR logo, 'Administrator Portal', 'Report Number' (2019-0002), and 'Personal Information' (Reporter Name). The main content area displays a 'Designate Report' modal form. The form has a title bar with a close button (X). Below the title, it says 'Choose a designation for this incident report:'. There is a dropdown menu labeled 'Select Destination...' and a text area for 'Remarks:'. Below the text area, a note states 'Remarks will be visible to county investigators.'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. In the background, the portal navigation includes 'Home', 'Query', 'Reports', and 'Log off' links, and buttons for 'Designate Report' and 'View PDF'.

An administrator can assign an Incident Report to one of the following targets:

- CDPR Closed
- Complainant Update Needed
- External Agency
- County

The following paragraphs go into detail as to what the various targets signify.

CDPR Closed

The Incident Report will be closed without any further actions. This can be used to remove test reports and reports that are clearly spam/fake. Incident Reports that are sitting in status 'Need More Information' can be closed out after a significant amount of time.

Please note that closed reports are not removed from the system and are still searchable.

Complainant Update Needed

The Incident Report does not have enough information to begin an investigation or even determine the incident county. The administrator can enter a text requesting for more information which will be displayed on the reporter's mobile app.

External Agency

The Incident Report is not pesticide related and/or needs to be handled by another agency (Cal/OSHA, CalEPA). The administrator specifies the responsible agency for documentation purposes. The reporter can see the responsible agency contact information on the mobile app and the administrator can answer requests about the status of this report.

Setting the status to 'External Agency' only documents where the current responsibility lays. The administrator is still responsible for actually sending the information about the Incident Report to the right person. This can be done by creating a PDF version of the report and attaching it to an email. BE CAREFUL when transmitting Incident Reports – they may contain HIPAA-protected information.

County

The administrator can assign an Incident Report to a county by simply picking the appropriate county from the dropdown list. An explanatory remark can address any questions the receiving county might have.

CalPCS Administrator Portal

Report Number
2018-0004

Personal Information

Reporter Name
Jeff Smith

Incident Details

Designate Report [X]

Choose a designation for this incident report:
Fresno County

Remarks:
I think this happened in Fresno county. The reporter did provide a phone number. Can you call Jeff to make sure that

Remarks will be visible to county investigators.

Cancel Submit

This Incident Report will be sent to the county and county staff will see the report on their CalPEATS dashboard. There is no need for further action from the administrator.

Common Incident Report Handling Scenarios

Here are some common scenarios and how to use the system accordingly. We will add more scenarios to this list and refine the procedure in the future.

Request more information from the Reporter

If there is not enough information in the report and contact information is missing to directly contact the reporter, you can still request more information. You can set the Incident Report to *'Needs More Information'* status and enter some explanatory text in the Remarks entry field. The mobile app periodically retrieves updates for reports including these requests for more information.

Assign Incident to a county

Any Incident Report that is listed on the dashboard has not been automatically assigned to a county, or a county sent it back to DPR. Upon reviewing the report, the administrator can press the 'Designate Report' button and pick the appropriate county from the dropdown list.

Re-Assign Incident to a different county

If county staff determines an Incident Report should have been assigned to a different county, you can easily redirect the report. In the Incident Report details page click on the *'Designate Report'* button. Select the first option *'Incident Report should be handled by a different county'*, then select the appropriate county from the drop-down list. This process can happen even if the report has been assigned to a different county already. However, if that county already started an investigation, a re-assign is not possible by the administrator and can only be initiated by the investigating county.

Dealing with non-Pesticide Incident Reports

If a county staff administrator determines that the report refers to a non-pesticide related incident, all further actions will be taken outside of CalPEATS. To retain the information from the incident, create a PDF by clicking on the View PDF button in the Incident Report Details section. Administrators can then set the status of the Incident Report accordingly by clicking the *'Reroute'* button.

Closing an Incident Report

If it turns out that an Incident Report is fake, or the reporter is unwilling to provide sufficient information to proceed, the administrator can change the status of the report to '*CDPR Closed*'. On the Incident Report details page, click on the 'Designate Report' button and pick the option '*CDPR Closed*' from the dropdown list. The report will not be purged from the system, but is marked as closed.