COVID-19 Community Team Outreach (CCTO) Tool

September 1, 2020

Agenda for Today's Training

Q&A will be monitored throughout each module and reviewed at the end of the presentation.

Topics	Presenters

• **Common Issues – "Monitoring Status" and "Final Monitoring Outcome"**
  • "Opted Out – Digital Monitoring" review
  • OOJ Procedure
  • Final Monitoring Outcome Variables – *see one-pager*
  • Where to find reference/support materials
	Deborah Porterfield
	Medical Consultant – DHHS
	
	Laura Farrell
	Regional Supervisor

• **Sprint 4 Updates**
  • Contact profile updates - business required/system required
  • Overview of Teams/Business Units (assigning contacts, sharing views)	

User Feedback and Q&A	

Opted Out – Digital Monitoring

CCTO| **Opt-in/Opt-Out Update** Walkthrough

Contact Interface for Opting Out of Digital Monitoring → Handling a Contact Who Has Opted Out of Digital Monitoring → Handling a Contact Who Has Opted Out of All Monitoring

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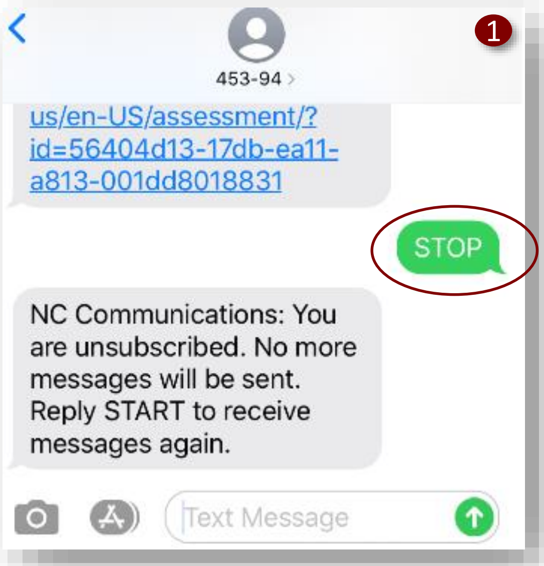

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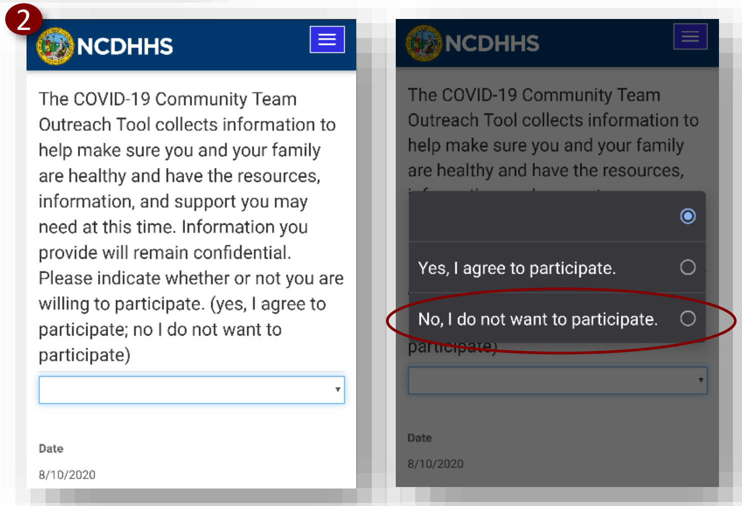


As a reminder, contacts can now opt in & out of digital monitoring via text message or inside the digital assessment link. **These actions do not opt them out of all monitoring, only digital monitoring.** As a review of what this looks like from the contact's interface:

1. For contacts receiving texts, they can now reply "STOP" to turn off text outreach immediately. If a Contact replies "STOP," they will automatically be opted out of **digital outreach** without having to click the assessment link, and they will receive a confirmation text.

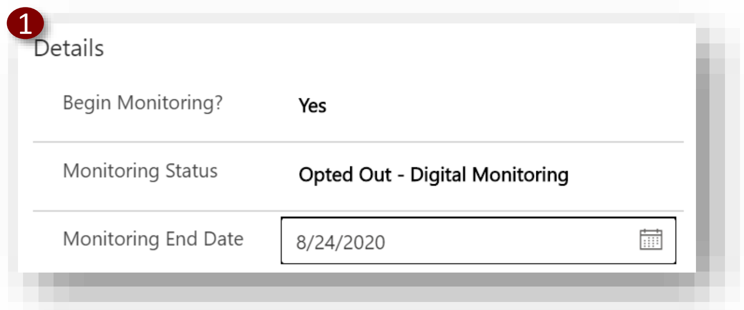
2. This is the same opt-out that occurs when a contact opts out of digital outreach received by email or text by clicking into the assessment link and selecting "No, I do not want to participate."

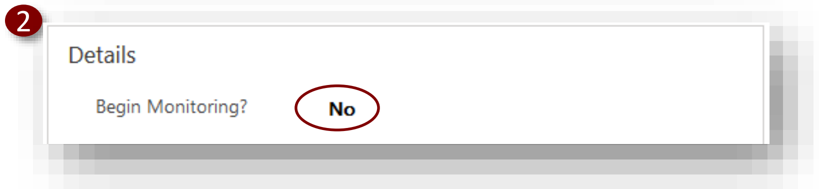
Tasks

Understand the contact interface for opting out of digital monitoring.

Key Learnings

- Opt-out via text
- Opt-out via assessment





1. Whether a contact opts out through text or within the assessment, a variable called “Opted Out - Digital Monitoring” will appear in “Monitoring Status,” and this stops the contact from receiving emails or texts; however, it does not stop the system from creating blank assessments that are not sent. **“Opted Out – Digital Monitoring” is never a variable you will select yourself, and it does not mean that the contact has fully opted out and you should close the case. It is only used by the system to show you that follow-up is needed.**
2. When you see this variable selected, there are two important actions on your part. First, you should change “Begin Monitoring?” to “No,” as this will stop the system from creating automatic assessments. **Remember that this contact is still being monitored; however, setting “Begin Monitoring?” to “No” simply stops the system from creating blank assessments until you have attempted to reach the contact by phone. You shouldn’t close the contact until you have attempted this outreach.**

Tasks

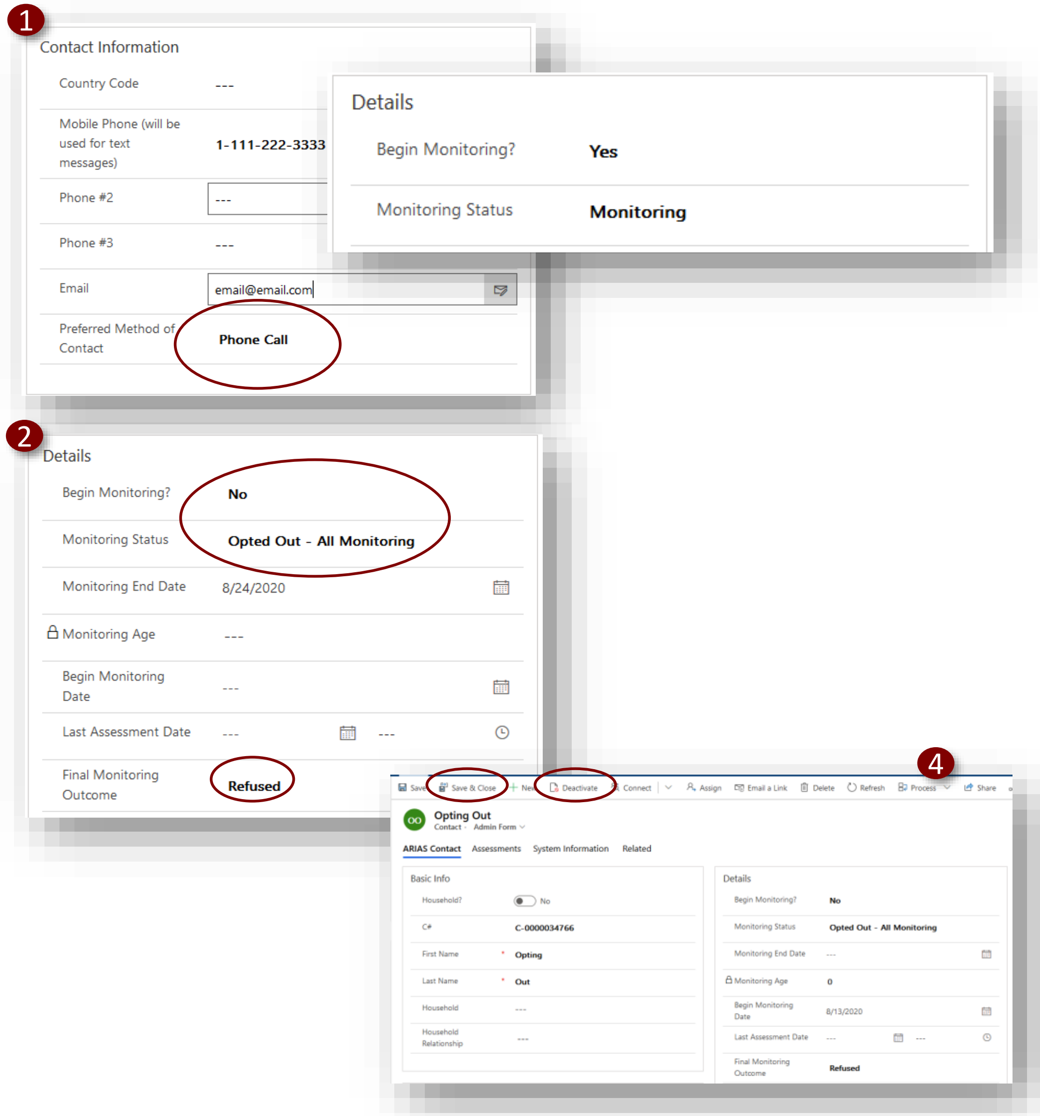
Review an opt-out of digital monitoring and make profile adjustments.

Key Learnings

- The “Opted Out – Digital Monitoring” variable
- Handling a contact who opts out of digital monitoring

CCTO| **Opt-in/Opt-Out Update** Walkthrough

Contact Interface for Opting Out of Digital Monitoring → Handling a Contact Who Has Opted out of Digital Monitoring → **Handling a Contact Who Has Opted Out of All Monitoring**



1. Next, you should begin manual outreach by phone and check if the contact prefers to be reached in a different way. If this is the case, you can reset “Preferred Method of Contact” to “Phone Call” (or another method indicated by the contact) and return “Begin Monitoring?” to “Yes” as well as “Monitoring Status” to “Monitoring.” **You would then continue monitoring this contact normally.**
2. Alternatively, if you do reach a contact by phone and confirm that they actually wish to opt out of **all** monitoring without completing any assessments, “Begin Monitoring?” should remain toggled to “No,” and “Monitoring Status” can now be updated to “Opted Out – All Monitoring.” This is the variable for you to select manually only when you have confirmed a full opt out. **In the next module, we’ll look at the difference between opting out and some other contact outcomes.**
3. Finally, “Final Monitoring Outcome” should be set to “Partially Complete” if at least one assessment was collected or “Refused” if there were no assessments.
4. You can then save your work and deactivate the contact.

Tasks

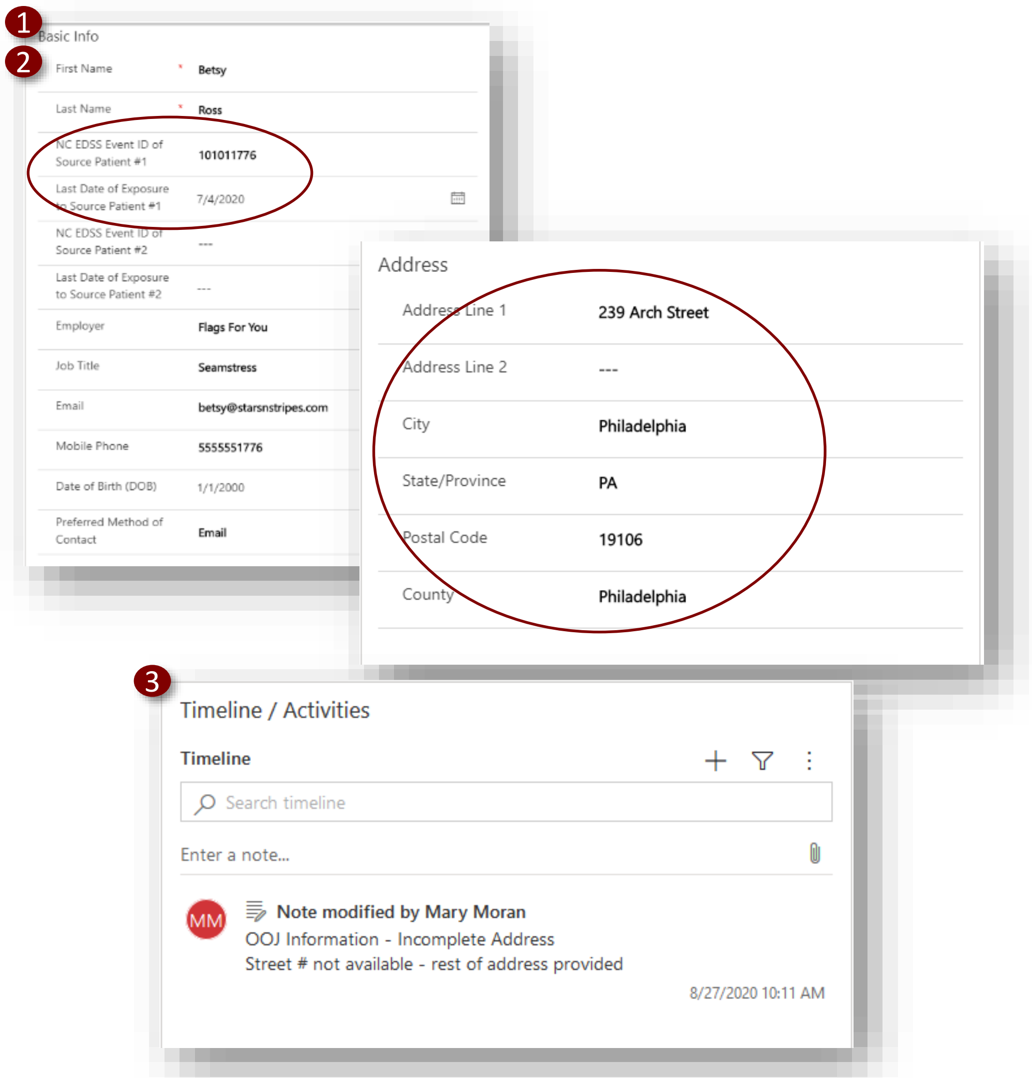
Review an opt-out of digital monitoring and make profile adjustments.

Review an opt-out of all monitoring and make profile adjustments.

Key Learnings

- Handling a contact who opts out of digital monitoring
- Handling a contact who opts out of all monitoring

Handling OOJ Contacts



Out-of-jurisdiction, or OOJ, contacts are individuals exposed to COVID-19 who reside outside of your local jurisdiction. These contacts may be within or outside of North Carolina. As a contact tracer, you are responsible for reassigning these individuals to the right parties.

1. If you are also responsible for entering an OOJ contact in the system, you should always enter as much information as you can, with an emphasis on:
   - Source Patient NC EDSS Event ID
   - Last Date of Exposure
   - Address
2. These areas help others who will be working the contact to identify and track this individual. You should never input or reassign an OOJ contact without source patient information. **Work with your LHD colleagues to ensure you have included a Source Patient NC EDSS Event ID.**
3. If you coordinate with your colleagues and are still missing Last Date of Exposure or a full Address, please leave a note in Timeline/Activities indicating that this information is unavailable.

Tasks

Understand OOJ contacts and how to reassign them.

Key Learnings

- Understanding OOJ Contacts
- Handling OOJ contacts within NC
- Handling OOJ contacts outside of NC

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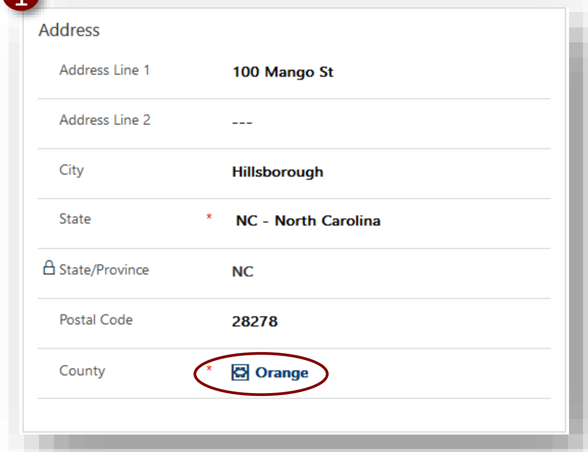

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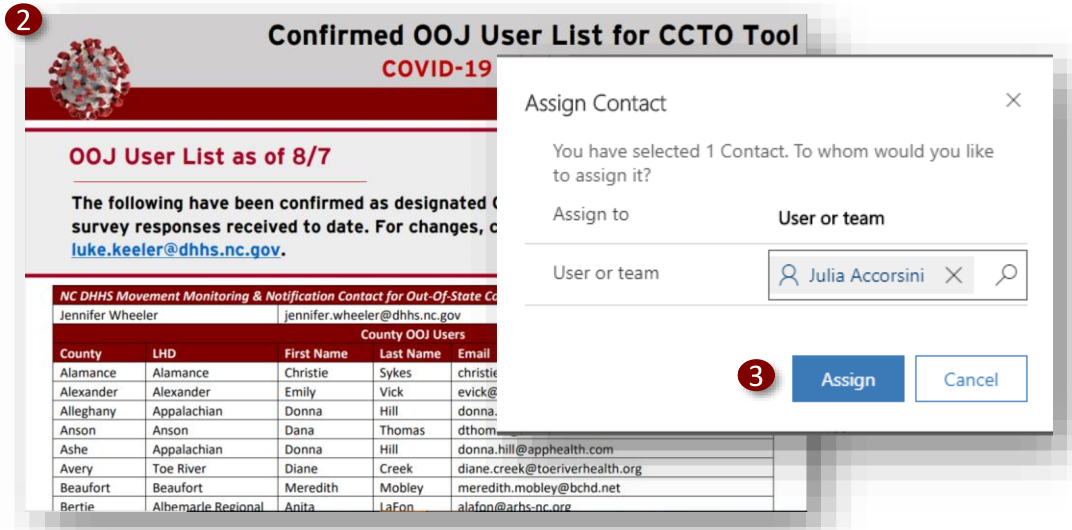


1. Next, if your finished contact profile is for someone within North Carolina but outside of your jurisdiction, **do not close the case or conclude monitoring.**
2. Your responsibility is to reassign this contact to the designated OOJ Contact Tracer for their county. **To identify this person, see the "CCTO OOJ Contact List" in the** [Communicable Disease Manual.]() **This is updated on a weekly basis.**
3. After you have identified this individual, use the "Assign" button at the top of the contact's profile to reassign the contact. The contact will be removed from your workspace, and no further action or changes are required on your part.

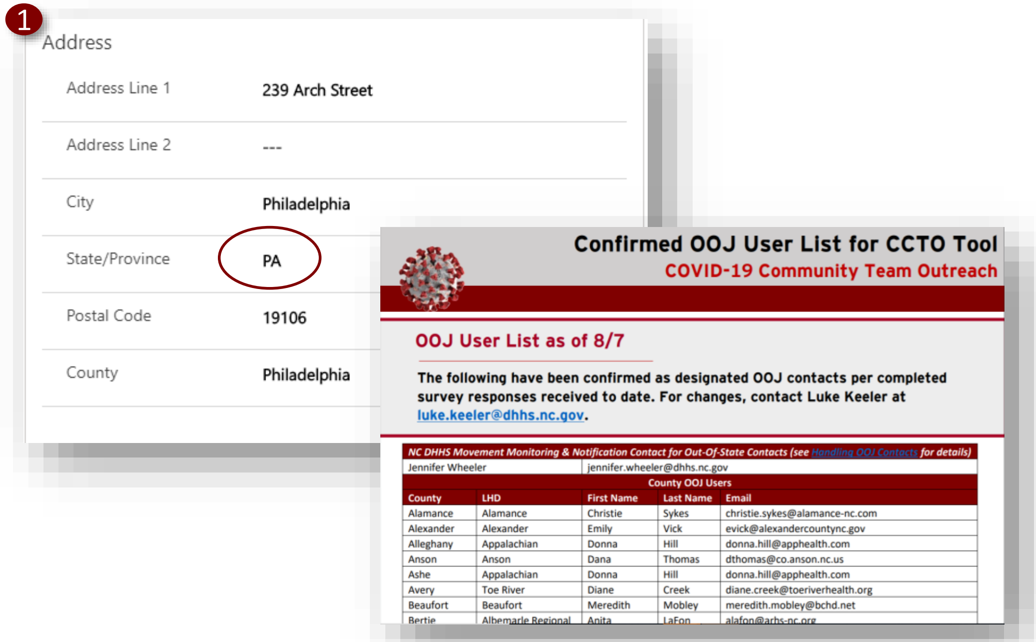
Tasks

Understand OOJ contacts and how to reassign them.

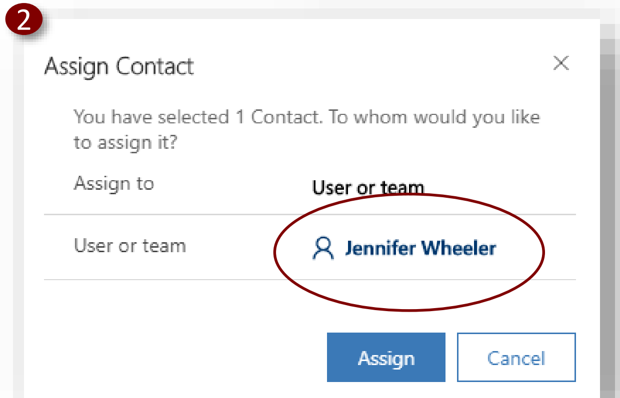
Key Learnings

- Understanding OOJ Contacts
- Handling OOJ contacts within NC
- Handling OOJ contacts outside of NC

Understanding OOJ Contacts | Handling OOJ Contacts Within North Carolina | **Handling OOJ Contacts Outside of North Carolina**



1. If your contact is located outside of the state of North Carolina, **you should reassign this contact to the NC DHHS Movement Monitoring and Notification (MMN) Team Contact,** who is currently Jennifer Wheeler. Her name is located at the top of the CCTO OOJ Contact List for your reference.
2. Use the assign button to reassign the contact, and no further action or changes are required on your part. **As a tracer outside of the MMN Team, you will never use the "State OOJ, notification completed" button in "Final Monitoring Outcome." The MMN Team will decide if this option is appropriate to select after they have notified the appropriate parties.**



Tasks

Understand OOJ contacts and how to reassign them.

Key Learnings

- Understanding OOJ Contacts
- Handling OOJ contacts within NC
- Handling OOJ contacts outside of NC

Final Monitoring Outcomes

Recap: Closing Out a Contact

Scenario	Final Monitoring Outcome	Final Monitoring Outcome Definition	Begin Monitoring?	Monitoring Status
Contact concludes monitoring without testing positive for COVID-19	Fully Complete	• Contact does not test positive for COVID-19 • Contact completes at least initial assessment • Contact completes at least one assessment within 48 hours of ending quarantine	No	Monitoring Ended
	Partially Complete	• Contact does not test positive for COVID-19 • Contact completes at least initial assessment • May include contacts who opt out midway	No	Monitoring Ended
Contact becomes a case	Tested Positive – Became Case	• Contact tests positive for COVID-19 during the monitoring period and becomes a case patient	No	Monitoring Ended
			ACTION: *Testing information entered; “Contact who became a case” selected; NC EDSS Event ID of Case entered*	
Contact opts out of monitoring	Refused	• Contact explicitly declines to participate in monitoring (opts out) at the beginning • No assessments completed	No	Opted Out – All Monitoring
Contact is unreachable	Never Reached	• Contact is unreachable per standards determined by LHD and not informed of exposure	No	Monitoring Ended

You speak with a contact on the phone and complete an initial assessment. During the monitoring period, you cannot always reach this contact, and they do not complete regular assessments. At the end of monitoring, they complete a final assessment within 24 hours of the end of their quarantine period. What is the proper final monitoring outcome for this individual?

1. **Fully complete**
2. **Opted Out - Digital Monitoring**
3. **Partially Complete**
4. **Refused**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

Scenario 1 | Scenario 2 | Scenario 3 | Scenario 4 | Scenario 5 | Scenario 6

You speak with a contact on the phone and complete an initial assessment. During the monitoring period, you cannot always reach this contact, and they do not complete regular assessments. At the end of monitoring, they complete a final assessment within 24 hours of the end of their quarantine period. What is the proper final monitoring outcome for this individual?

1. **Fully complete, because there is an initial and a final assessment**
2. **Opted Out - All Monitoring**
3. **Partially Complete**
4. **Refused**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You speak with a contact on the phone and inform them of their exposure. They receive the exposure notification but do not agree to complete an initial assessment or continue with monitoring. What is the proper monitoring status and final monitoring outcome for this individual?

1. **Monitoring Ended/Partially Complete**
2. **Opted Out - All Monitoring/Partially Complete**
3. **Monitoring Ended/Never Reached**
4. **Opted Out - All Monitoring/Refused**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You speak with a contact on the phone and inform them of their exposure. They receive the exposure notification but do not agree to complete an initial assessment or continue with monitoring. What is the proper monitoring status and final monitoring outcome for this individual?

1. Monitoring Ended/Partially Complete
2. Opted Out - All Monitoring/Partially Complete
3. Monitoring Ended/Never Reached
4. **Opted Out - All Monitoring/Refused, because the contact was notified of exposure but did not complete any assessments.**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You are monitoring a contact. During monitoring, your contact tests positive for COVID-19. When it is time to close the case, which "Contact or Case" and "Final Monitoring Outcome" options should have been selected?

1. **Contact/Monitoring Ended**
2. **Contact who became a case/Tested Positive - Became Case**
3. **Case patient/Tested Positive - Became Case**
4. **Contact who became a case/Monitoring Ended**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You are monitoring a contact. During monitoring, your contact tests positive for COVID-19. When it is time to close the case, which "Contact or Case" option and final monitoring outcome should have been selected?

1. Contact/Monitoring Ended
2. **Contact who became a case/Tested Positive - Became Case, because this contact became a case patient.**
3. Case patient/Tested Positive - Became Case
4. Contact who became a case/Monitoring Ended

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You are monitoring a contact. During monitoring, your contact is responsive and completes several assessments following the initial assessment. Two days before the end of the monitoring, this contact stops responding to assessments and you no longer hear from them. Which "Final Monitoring Outcome" is appropriate?

1. **Fully Complete**
2. **Opted Out - All Monitoring**
3. **Tested Positive - Became Case**
4. **Partially Complete**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You are monitoring a contact. During monitoring, your contact is responsive and completes several assessments following the initial assessment. Two days before the end of the monitoring, this contact stops responding to assessments and you no longer hear from them. Which "Final Monitoring Outcome" is appropriate?

1. **Fully Complete**
2. **Opted Out - All Monitoring**
3. **Tested Positive - Became Case**
4. **Partially Complete, because the contact completed an initial assessment but not a final one.**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You are assigned a contact. You call them, and they hang up before you are able to inform them off their exposure. The contact does not respond to any of your repeat outreach attempts. What is the appropriate final monitoring outcome?

1. **Refused**
2. **Never Reached**
3. **Fully Complete**
4. **Partially Complete**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You are assigned a contact. You call them, and they hang up before you are able to inform them off their exposure. The contact does not respond to any of your repeat outreach attempts. What is the appropriate final monitoring outcome?

1. **Refused**
2. **Never Reached, because you were unable to inform the contact of their exposure.**
3. **Fully Complete**
4. **Partially Complete**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

Scenario 1 | Scenario 2 | Scenario 3 | Scenario 4 | Scenario 5 | **Scenario 6**

You notice your assigned contact lives in another state. You review that the Source Patient NC EDSS Event ID, Last Date of Exposure, and Address are filled out. What action is required?

1. **Reassign the contact to your supervisor.**
2. **Reassign the contact to the MMN Team Contact indicated in the CCTO OOJ Contact List.**
3. **Select "State OOJ, Notification Completed" and close the case.**
4. **Begin monitoring as usual per your training.**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

You notice your assigned contact lives in another state. You review that the Source Patient NC EDSS Event ID, Last Date of Exposure, and Address are filled out. What action is required?

1. **Reassign the contact to your supervisor.**
2. **Reassign the contact to the MMN Team Contact indicated in the CCTO OOJ Contact List.**
3. **Select "State OOJ, Notification Completed" and close the case.**
4. **Begin monitoring as usual per your training.**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- Understanding Final Monitoring Outcomes, OOJ Contacts, and Opting Out

Support Resources

Where to go for support *(all users of CCTO)*

Contact your supervisor with contact tracing process questions

If you have process-based questions about contact tracing workflows, policies, and procedures beyond the CCTO software, **contact your supervisor directly**, as these may vary on local levels

Refer to support materials for CCTO help

- FAQs, Job Aids, Process Documentation and Scripts (Found in the NC DPH Communicable Disease Manual Coronavirus Page)
- Patient Education Tools, CCTO trainings and slides and recorded live sessions posted to the AHEC Portal
- ***Check your email for ongoing CCTO office hours opportunities and regular live trainings***

Help desk email for CCTO support and CCTO training suggestions

Email Covid19CTSoftwareQuestion@dhhs.nc.gov with **questions about the CCTO software and suggestions for new CCTO trainings**

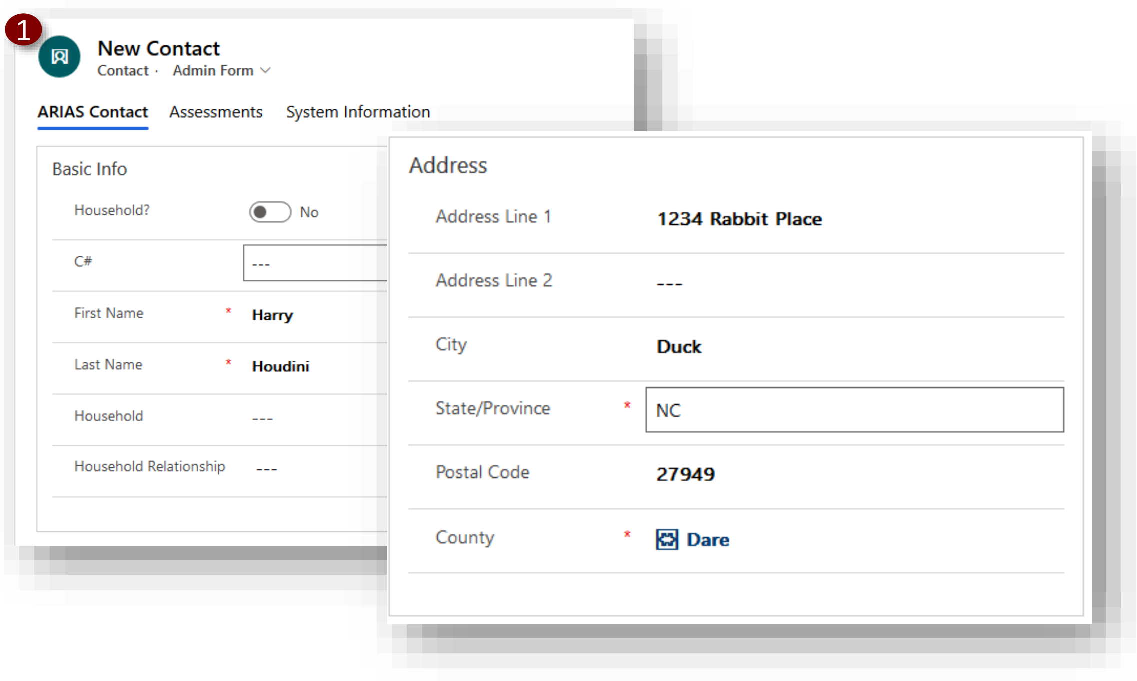
Work with your NCID administrator for access support

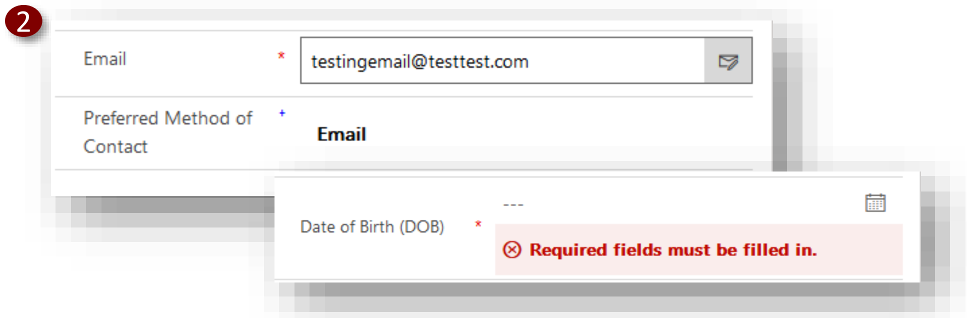
Work with your local NCID administrator to submit a ticket or call the NCID help desk for support

Sprint 4 Updates

CCTO| **Sprint 4 Update** Walkthrough

System Required & Business Required Fields | Business Units & Teams





As you are aware, we continue to improve and adjust CCTO to help our COVID-19 Community Outreach Team work more efficiently and effectively. **Full walkthroughs of sprint changes are always posted to the job aids page in the communicable disease manual, and you should review these carefully to help your work.** One of these recent updates changes the way required information is shown in a contact's profile to help you prioritize and focus your efforts.

1. As you have seen before, all the fields required to create a contact's profile are indicated by a red asterisk (*). These always include **First** and **Last Name**, **State**, and **County**.
2. If you begin digital monitoring, these required fields will also include **Date of Birth**, which is required for a contact to verify their identity on the digital assessment, and **Email** or **Mobile Phone**, depending upon which **Preferred Method of Contact** you select. If **Preferred Method of Contact** is set to **Phone Call**, **Email** and **Mobile Phone** will not be required.

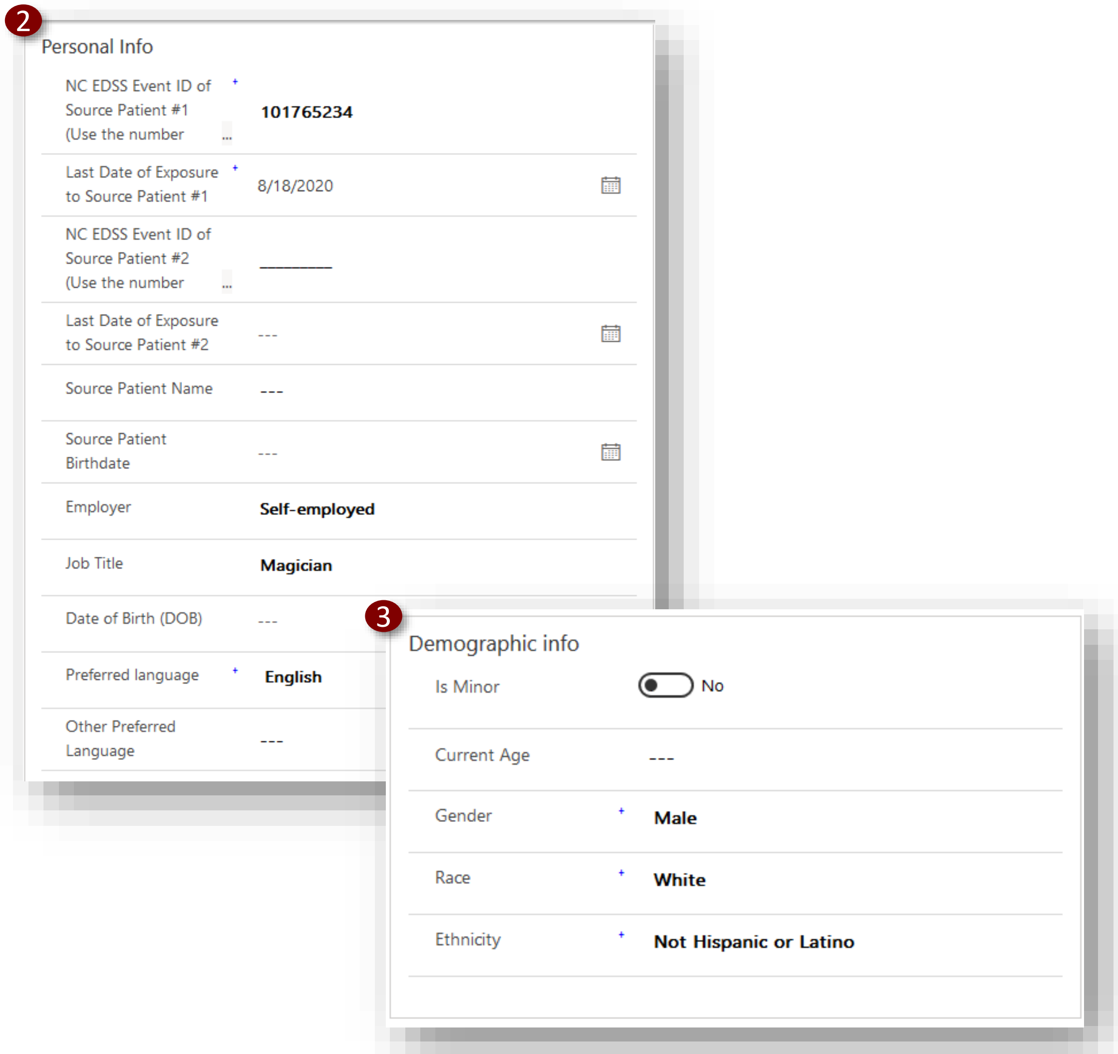
Tasks

Understand the system enhancements for Sprint 4.

Key Learnings

- Understanding the system and business required fields on a contact's profile

System Required & Business Required Fields | Business Units & Teams



1. An update in this sprint is the addition of the blue plus (+). Fields with a blue plus are not strictly required to create a contact's profile, but they are required by the state to help track data and understand the success of our monitoring efforts. You should make every effort to complete these "business required" fields if the information is available to you.
2. In "Personal Info," **NC EDSS Event ID, Last Date of Exposure, Date of Birth,** and **Preferred Language** are all business required. These fields are critical to helping us track this contact and ensure monitoring efforts are timely and useful.
3. In "Demographic Info," **Gender, Race,** and **Ethnicity** are business required. These fields help us understand if we are effectively reaching and helping people of all backgrounds. *Note that you can now choose "Prefer Not To Answer" for Race or Ethnicity to indicate that you have inquired even if your contact doesn't disclose this information.*

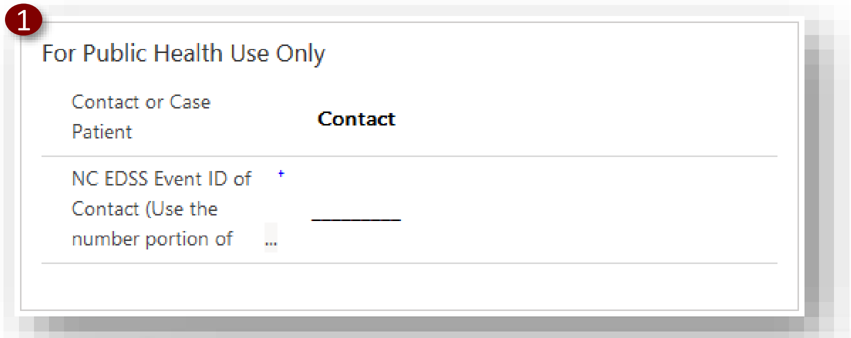
Tasks

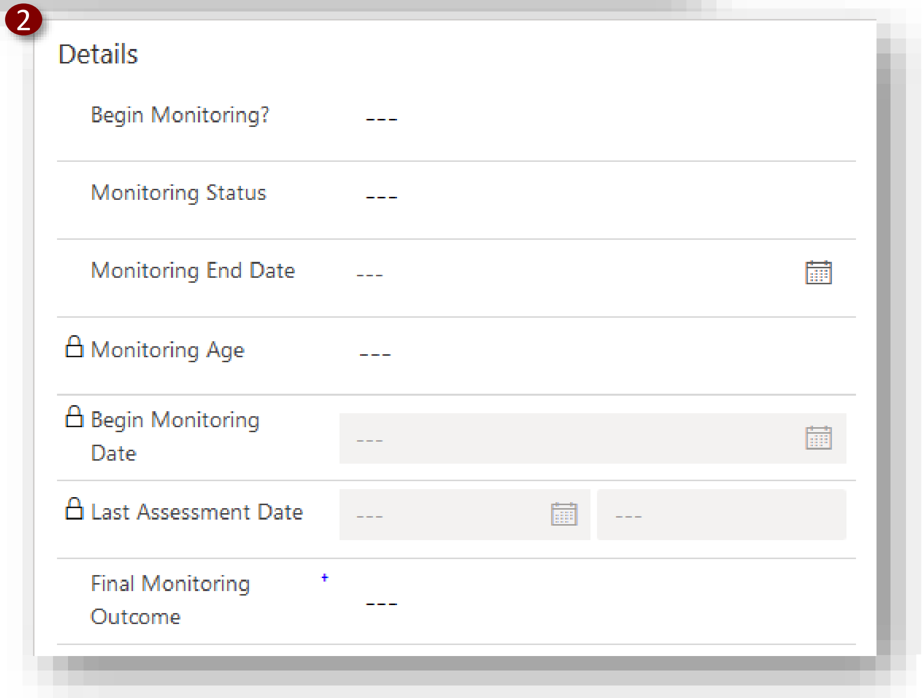
Understand the system enhancements for Sprint 4.

Key Learnings

- Understanding the system and business required fields on a contact's profile

System Required & Business Required Fields | Business Units & Teams





1. In “For Public Health Use Only,” the NC EDSS Event ID of the Case is also marked with a blue plus to indicate that, if your contact does become a case, it will be critical to indicate their NC EDSS Event ID here. If your contact does not test positive, you can still leave this field blank.
2. Finally, in “Details,” Final Monitoring Outcome is also marked. As we discussed in our previous module, this helps us understand how effectively our current methods are reaching and helping residents. It also helps track the efforts you have put in to reach a contact.

This concludes our overview of the “business required” blue plus sign marked fields on a contact’s profile. We greatly appreciate your efforts to report as much information as possible and the most valid information possible.

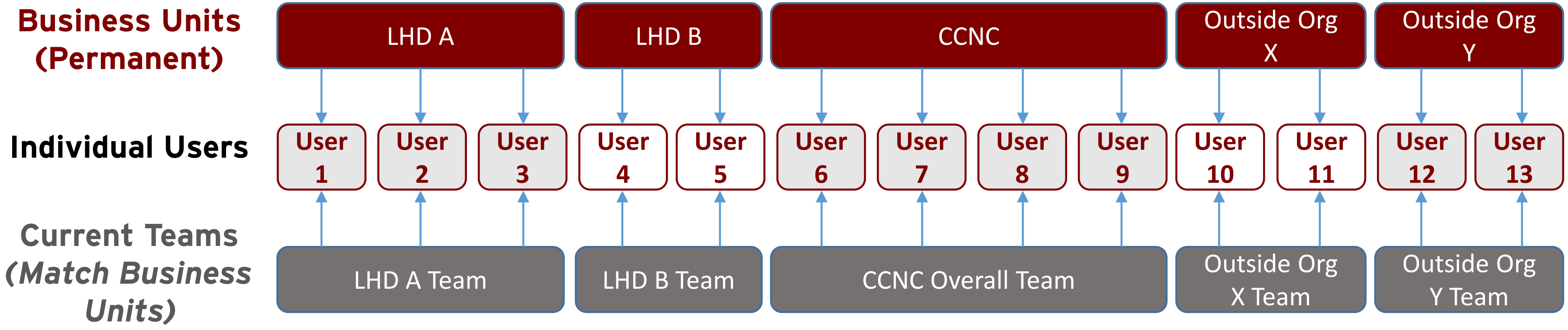
Tasks

Understand the system enhancements for Sprint 4.

Key Learnings

- Understanding the system and business required fields on a contact’s profile

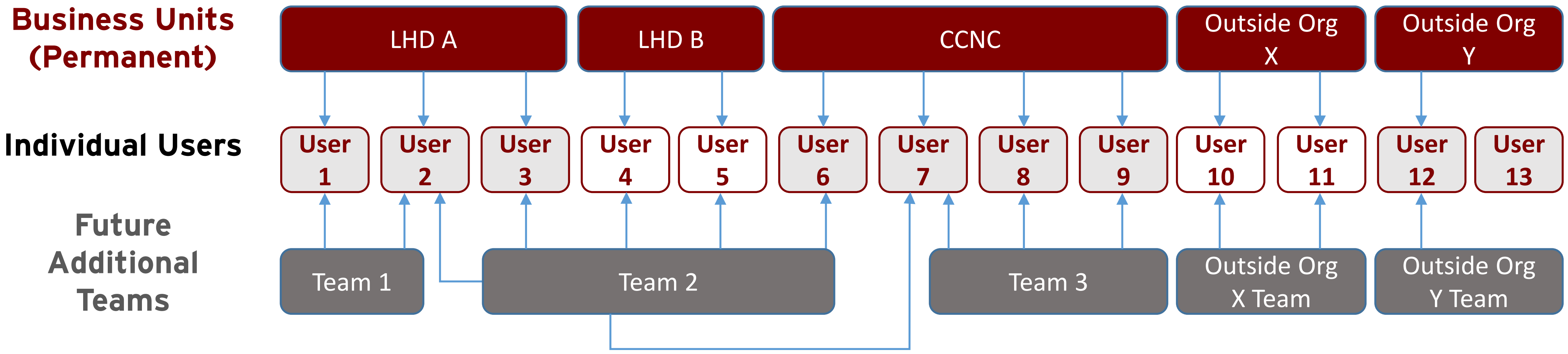
Current Functionality –
Teams Match Business Units



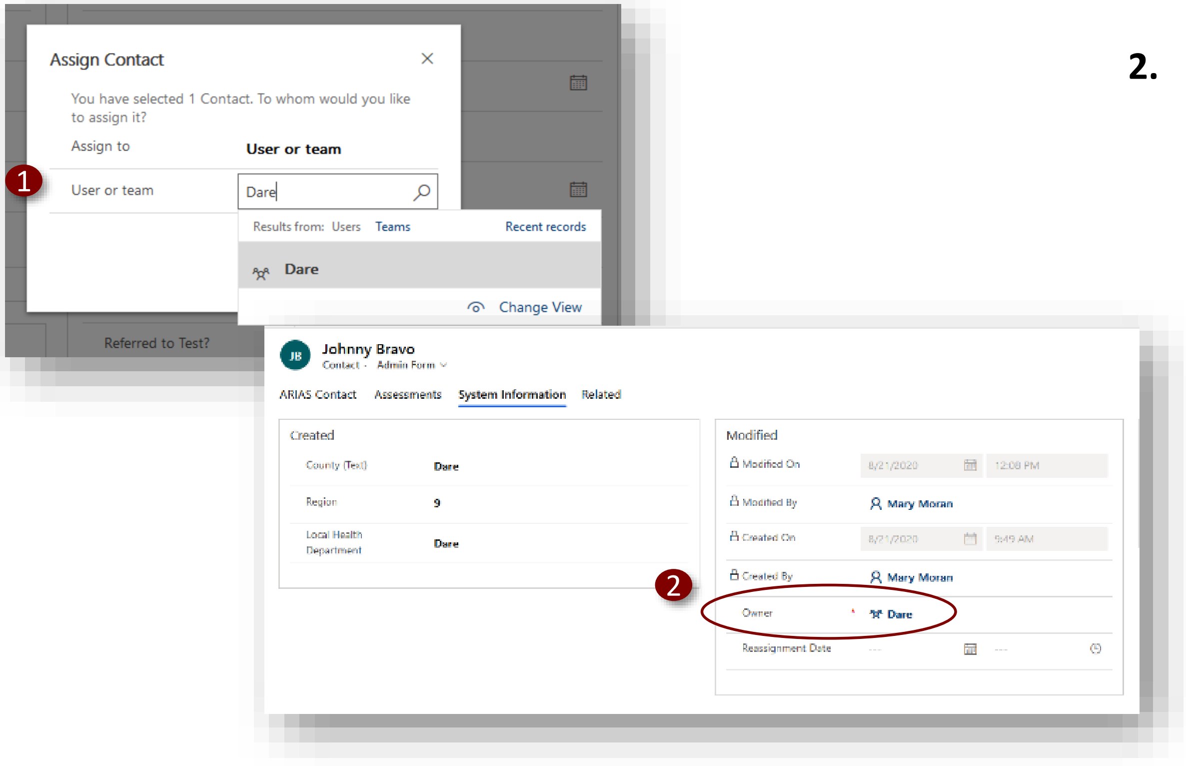
System Required & Business Required Fields

Business Units & Teams

Forthcoming Functionality -
Custom, Cross-Cutting Teams & Multiple Teams per User



System Required & Business Required Fields | **Business Units & Teams**



1. As we mentioned, **contacts can now be assigned to a Team rather than an individual user by typing the name of the Team in the "Assign" function.**
2. **The owner of the reassigned contact will now show as the Team,** and the contact will now be removed from an individual user's "My Active Contacts" view. For the LHD or organization Team that has already been created for you, this can be used to create a "pool" of contacts who require attention from other users at your LHD or organization. ***For now, this should not be used to assign OOJ contacts to other counties. Continue to follow the existing OOJ process for assigning contacts to individual tracers on the OOJ Contact List per the process we discussed earlier and the job aid.***

Tasks

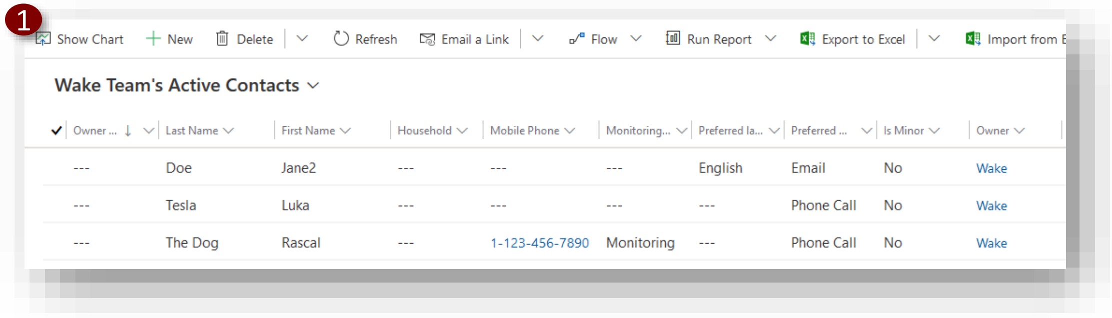
Understand the system enhancements for Sprint 4.

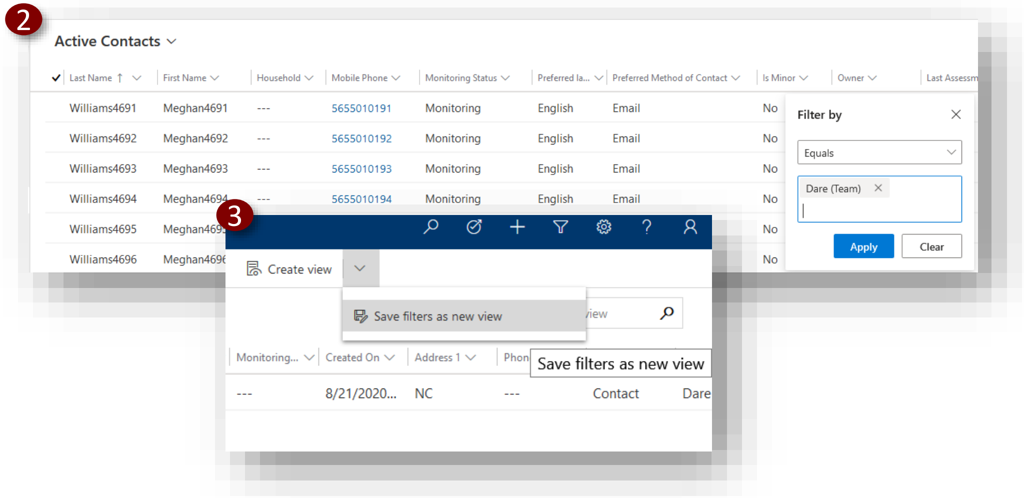
Key Learnings

- Understanding Teams

System Required & Business Required Fields

Business Units & Teams





1. To keep these Team-owned contacts visible once they are no longer assigned to a user, you should have received a view named for your Team's active contacts. **You can click the dropdown in the Contacts Tab and find this view under "My Views," titled with the name of your Team and "Active Contacts."**
2. As a reminder, you can also always filter the "Active Contacts" view by "Owner" for the name of a Team (or Teams) to see this same information.
3. You can then save this filter as a new view by clicking the down arrow next to "Create View" and selecting "Save Filters as New View."

Tasks

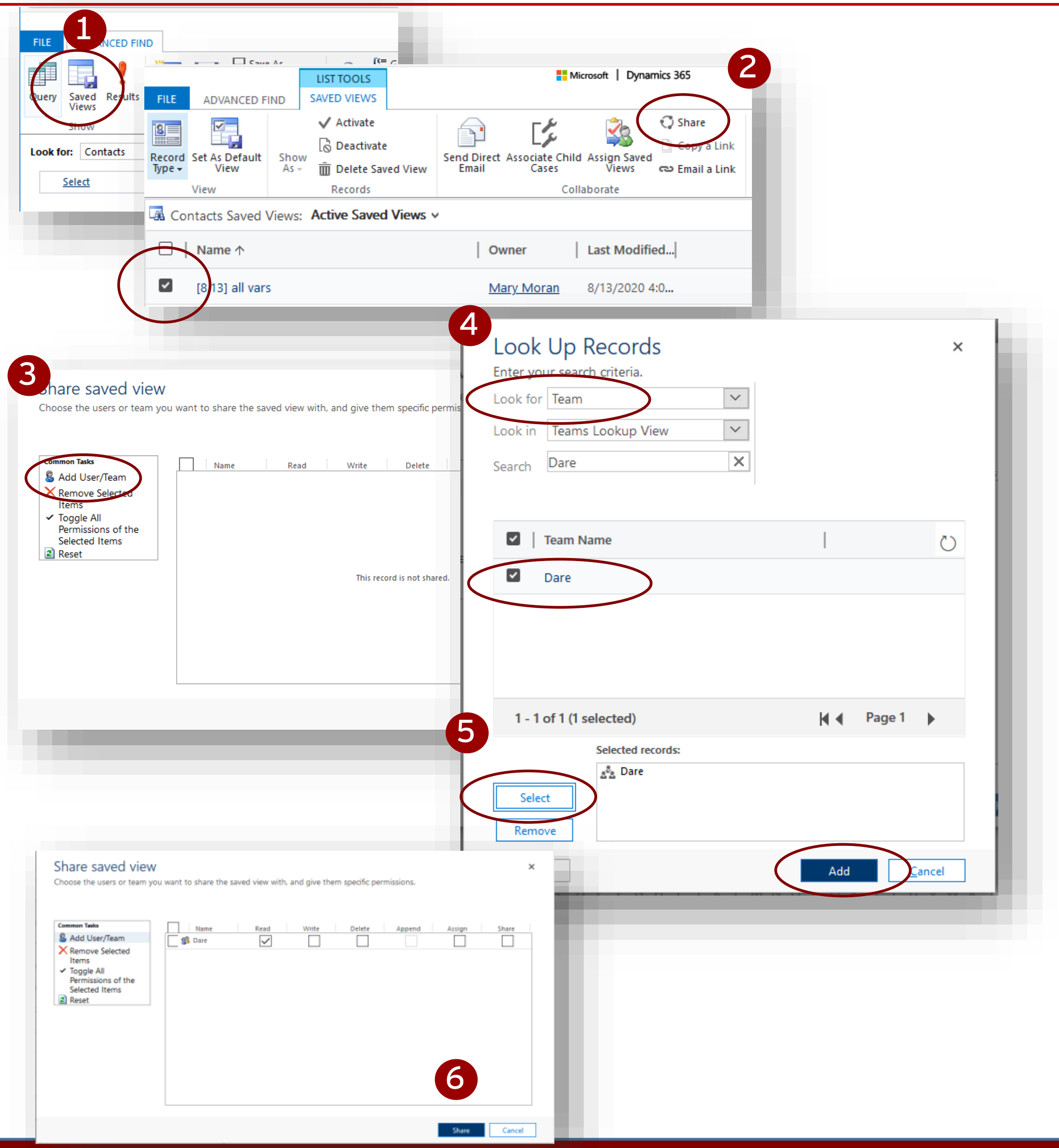
Understand the system enhancements for Sprint 4.

Key Learnings

- Understanding Teams

System Required & Business Required Fields

Business Units & Teams



In addition to supporting contact assignment, a Team can also be used to share views. Sharing a view with a Team can enable you to roll out views tailored to your LHD or organizational needs quickly and easily.

1. From the Create View screen, select “Saved Views.”
2. Choose the View you wish to share and select “Share.”
3. Choose “Add User/Team.”
4. **Change “Look For” to “Team,” type the name of your Team and select it.**
5. Click “Select” to add your Team to “Selected Records” and then choose “Add.”
6. Choose the permissions you would like to share and then select “Share.” All the users in the Team you selected can now access this view under “My Views.”

Tasks

Understand the system enhancements for Sprint 4.

Key Learnings

- Understanding Teams

Participant Feedback

Questions?