COVID-19 Community Team Outreach (CCTO) Tool

October 13, 2020

Agenda for Today's Training

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

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Accessing Training Materials

CCTO | Accessing Training Materials Walkthrough

Communicable Disease Manual

AHEC

ServiceNow Knowledge Center

CCTO Resources in the Communicable Disease Manual (LINK) – Written Materials









CCTO OOJ Contact List

• Review <u>OOJ Job Aid</u> for instructions

CCTO Job Aids Page

- CCTO Micro-Trainings
- CCTO System Update Overviews
- Job aids covering basic introductory information, mandatory processes, and advanced processes

CCTO Help Desk & IT Support <u>Page</u>

- Links to ServiceNow registration & ticket submission pages
- Job aids covering ServiceNow, NCID, and CCTO login support

CCTO FAQs



CCTO | Accessing Training Materials Walkthrough

Communicable Disease Manual

AHEC

ServiceNow Knowledge Center

CCTO Resources in the AHEC Portal (LINK) – Recorded Trainings

Time Commitment 125 hours	
This video is a mini-demonstration of the COVID-19 Community Team Outreach (CCTOI Software for Contact Tracing, known as the COVID-19 Community Team Outreach Tool. This video provides an overview to showcase software capabilities at a high level.	
Learning Objectives. After watching this video, trainees should be able to	
Access the system and log-in Tinter a contact into the system manually Enter cancels in the system through a file upload Assign contacts to contact tracers from a case investigator's point of view Vind a list of contacts using Views and how to view status See tasks and assigned contacts Monitor list is assigned contacts. Identify a contact's status	
To register, go to https://www.ncahec.net/courses-and-events/63500 You will be asked to create a MyAHEC account if you do not have one already	
To help contact tracers communicate effectively with case patients and contacts, the NCAHEC program has reviewed and compiled resource list of patient education tools here.	
Vicin Lincal Health Demantment may have additional or meteored resources for galient education	

Contact Tracing for LHDs <u>Page</u>: Training Modules - CCTO

- COVID-19 Community Team Outreach (CCTO) Tool
- CCTO User Micro-trainings
- View and Downloading Training for CCTO Administrators



Webinars Page

- CCTO User Live Training Session recordings & materials
- CCTO Help Desk Training recording



CCTO | Accessing Training Materials Walkthrough

Communicable Disease Manual

AHEC

ServiceNow Knowledge Center

CCTO Tech Support Resources in ServiceNow (LINK) – Knowledge Center



Click "CCTO Job Aids & FAQ" on the <u>SNOW Homepage</u> to be redirected to the Knowledge Center

- Tech support job aids for ServiceNow, NCID, CCTO login
- Link to CCTO FAQs







You are assigned a contact in Mecklenburg County, which is out of your jurisdiction. What is the name of the OOJ User to whom this individual should be reassigned? (HINT: Check the page that links to all your written resources for CCTO!)

- 1. Marli Gringeri
- 2. Heather Singleton
- 3. Laura Farrell
- 4. Bryn Perkey

Tasks

Correctly identify the action required in each scenario.

Key Learnings

Locating training resources



CCTO | Knowledge Check Scenarios



You are assigned a contact in Mecklenburg County, which is out of your jurisdiction. What is the name of the OOJ User to whom this individual should be reassigned? (HINT: Check the page that links to all your written resources for CCTO!)

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Correctly identify the action required in each scenario.

Key Learnings

Locating training resources



October 2nd CCTO Updates

Contact Profile Updates

Phone Call Updates

Deactivation & Final Monitoring Outcome Updates

sic Info		Source Case Information	
C# C-000003390	ท	NC-COVID Event ID of Source Patient #1 101444333	
et Name Jan		(Use the number	
Last Name * Brady		Last Date of Exposure to Source Patient #1 8/11/2020	53
		Ongoing Exposure 🕢 No	
Date of Birth (DOB) 1/1/2010			
Date of Birth (DDB) 1/1/2010 Is Minor Ves	Im Brady Contact MDA Form ~ ARIAS Contact Assessments System Information Related		
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We will now provide an overview of what has changed in CCTO as a result of the most recent software updates. We are continuing to make adjustments to contact profiles as part of software update cycles to help accommodate your workflow.

- First, to help you work more efficiently, "Source Case Information" has been moved to the top of the screen, and "Address" has been moved to the left under "Contact Information."
- 2. Additionally, "Date of Birth" and "Is Minor" have been moved under "Basic Info."

Tasks

Understand the updates to CCTO as of October 2nd.

Key Learnings

 Review updates to contact profiles

Contact Profile Updates

Phone Call Updates

Deactivation & Final Monitoring Outcome Updates

Owner	* 🎗 Mary Moran		
🗄 Subject			
Call From	* 🎗 Mary Moran	•	
Call To	* 🛛 Jan Brady	Timeline / Activities	
Direction	Outgoing	Timeline	+ 7
ESCRIPTION		✓ Search timeline	
Phone Number	1-111-222-3333	Enter a note	
Туре	Initial Outreach	MM Sea Phone Call from Mary Moran Initial Outreach / Answered	
Call Status	Answered	Spoke to contact to inform her of Active	exposure, and discussed her ability to quarantin 9/30/2020
Description	Spoke to contact to in exposure, and discuss	nform her of	
Duration	30 minutes		
Dur			
Due		G	
Priority	Normal		
Regarding	🛛 Jan Brady		
		_	

The next set of updates impact phone call records and the phone call quick create screen. We encourage you to discuss these changes with your supervisor and review any updates to your local processes as a result.

1. First, "Subject" is now a locked field. Your selections for two other fields, "Type" and "Call Status," will now become the subject **line for phone calls.** Any extra information that you may previously have written in the subject line of a phone call should now be added to the description, as you will no longer be able to type free text in the subject line.

Tasks

Understand the updates to CCTO as of October 2nd.

Key Learnings

Properly log a phone call with the new functionality

Contact Profile Updates

Phone Call Updates

Deactivation & Final Monitoring Outcome Updates

Owner	* 🎗 Mary Moran			
🛆 Subject				
Call From	* A Mary Moran			
Call To	* 🛛 Jan Brady	Timeline / Activities		
Direction	Outgoing	Timeline	+	
DESCRIPTION				
Phone Number	1-111-222-3333	Enter a note		
Туре	Initial Outreach	Initial Outreach / Ans	Mary Moran swered	
Call Status	Answered	Spoke to contact to i	nform her of exposure, and discussed her ability to quara 9/31	int 0/2
Description	Spoke to contact to in exposure and discuss	nform her of ed her ability		
Duration	30 minutes			
Due				
Due		©		
Priority	Normal			
Regarding	🕅 Jan Brady			
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- 1. Additionally, on the phone call quick create screen, **"Type"** can now be selected to:
 - "Initial Outreach" for your first attempt to call the contact
 - "Second Outreach" for your second attempt if the first was unsuccessful
 - "Third Outreach" if your first and second attempts were unsuccessful (In the next update, there will be an additional option for further initial outreach)
 - "Daily Monitoring" for any call that takes places after reaching your contact for the first time and does not end monitoring
 - "End Monitoring" for your final call to your contact
 - "Other" for any other required calls

Please be careful to select the appropriate option, as "Type" now determines part of your call subject.

Tasks

Understand the updates to CCTO as of October 2^{nd} .

Key Learnings

 Properly log a phone call with the new functionality

Contact Profile Updates

Phone Call Updates

Deactivation & Final Monitoring Outcome Updates

Owner	* 🎗 Mary Moran		
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Call From	* 🎗 Mary Moran	_	
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DESCRIPTION		✓ Search timeline	
Phone Number	1-111-222-3333	Enter a note	
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Description	Spoke to contact to in exposure, and discuss	form her of	
Duration	30 minutes		
Dura			
Due		©	
Priority	Normal		
Regarding	🛛 Jan Brady		
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	s State	Completed	
	Status	Received	~

- 1. Finally, to streamline workflows, "Call Status" should now be selected to "Answered" or "Unanswered" as part of the quick create or phone call record screens and will no longer be available when closing a call.
- 2. Please note that this means that the Made/Received option that is shown on the call close-out screen is no longer functional, and you should ignore it. Only the Answered/Unanswered option on the quick create screen will impact the status of your call. We have asked to remove this extra status box on the Close-Out screen but are currently unable to do so. We appreciate your patience and feedback as we continue to work on improvements to CCTO, and we think you will find the new "Subject" fields to be very helpful when you are quickly scanning the Timeline/Activities section for a contact.

Tasks

Understand the updates to CCTO as of October 2^{nd} .

Key Learnings

 Properly log a phone call with the new functionality

Contact Profile Updates

ast Assessment Dat ---Final Monitoring Outcome Refused Never Reached Testing Details Partially Complete Referred to Test Fully Complete Other Referred to Te State OOJ, notification completed ested Positive - Became Case Testedi

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Phone Call Updates

Deactivation & Final Monitoring Outcome Updates

The final changes in this sprint impact selecting a Final Monitoring Outcome and deactivating contacts.

- 1. First, please note that "Final Monitoring Outcome" can now be returned to blank if it is accidentally selected prior to the end of monitoring. We encourage you to review your contacts and take advantage of this change to help improve data quality.
- 2. Next, you will no longer be able to deactivate a contact without first selecting a Final Monitoring Outcome. Attempting to deactivate a contact without an FMO so will result in an error message.
- 3. Finally, please note that "Final Monitoring Outcome" should now be selected to "Other" if the contact will not be monitored for a reason other than opting out (e.g., if they are a duplicate or have already become a case). This is reflected in the updated Closing Out A **Contact job aid** for your reference, and we will review this now.

Tasks

Understand the updates to CCTO as of October 2nd.

Key Learnings

Closing out a contact

Quick Reference: Closing Out a Contact

Scenario	Final Monitoring Outcome	Final Monitoring Outcome Definition	Begin Monitoring?	Monitoring Status
Contact concludes monitoring without testing positive for	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
COVID-19	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 in "Contact who beco NC EDSS Event ID o	formation entered; ame a case″ selected; 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
Contact was not monitored in the Tool	Other	 Contact will not be monitored for reason other than opting out (e.g., contact is a duplicate or has already tested positive and become a case) 	No	Monitoring Ended

When you have finished selecting these options, ensure the contact profile is saved and deactivated per your local protocol.

CCTO | Knowledge Check Scenarios

Scenario 1

Scenario 2

Scenario 3

Scenario 4

Scenario 5

Which of the following statements about selecting "Other" in Final Monitoring Outcome (FMO) is true?

- 1. You can set FMO to "Other" if you accidentally select an FMO while the contact is still being monitored
- 2. You can set FMO to "Other" if you determine the contact is already a case who should not be monitored in CCTO
- 3. You can set FMO to "Other" if the contact completes some, but not all, of their assessments
- 4. You should never select an FMO of "Other"

Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Selecting the appropriate Final Monitoring Outcome

CCTO | Knowledge Check Scenarios

Scenario 1

Scenario 2

Scenario 3

Scenario 5

Which of the following statements about selecting "Other" in Final Monitoring Outcome (FMO) is true?

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- 3. You can set FMO to "Other" if the contact completes some, but not all, of their assessments
- 4. You should never select an FMO of "Other"

Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Selecting the appropriate Final Monitoring Outcome

CCTO | Knowledge Check Scenarios



You want to ensure that your phone call records the fact that you successfully reached your contact. What is now the correct way to do this?

- 1. Use the "Answered/Unanswered" toggle on the quick create screen or phone call record and then click the check mark to close the call
- 2. Use the "Made/Received" toggle on the close phone call screen and close the call
- 3. Both 1 and 2
- 4. Either 1 or 2

Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Utilizing the new phone call functionality



CCTO | Knowledge Check Scenarios



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Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Utilizing the new phone call functionality

Common Issues & Concerns

Review of "Views" Functionality

nctionality Question of the Week

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- 1. We will begin our last module by reviewing views and the ways they work within each tab in CCTO. Let's begin on the Contacts Tab.
- 2. A view is a way of filtering and displaying all the data that is stored in a tab. In this example, we are in the "My Active Contacts"
 - view, which filters down all the contact records in the system to show only active contacts who are owned by you.
- 3. To check what filters are on a view, you can click the filter icon at the top right of the screen. Notice that this view includes a filter for the contact owner as you and the contact status as active.
- 4. You can access all the contact views currently available to you by selecting the bold text at the top of any tab, which always shows the view you are in right now.
- 5. All of these views will filter contact records in a different way. For example, to see all active and inactive contacts, you can select a view for "All Contacts."

Tasks

Review of Households

Understand and use views.

Key Learnings

Review of "Views" Functionality

Question of the Week

Review of Households

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- 1. This view shows all contacts in the system, both active and inactive, owned by any user, because it has no filters applied. This is a good view to use when you are trying to search for a contact because it will return any contacts who may have been deactivated or reassigned, which "My Active Contacts" will not show.
- 2. It can be helpful to build off this view to create a list of all active and inactive contacts assigned to you. You can do this by returning to the filter icon.
- 3. Click "Add," and then click "Add Row."
- 4. Select "Owner," and "Equals Current User" will automatically populate. Click "Apply."
- 5. Unlike "My Active Contacts," this new view now shows all active *and* inactive contacts that you own.
- **6.** You can save this view by clicking the arrow next to "Create View" and selecting "Save Filters as New View." Name your view (for example, "All My Contacts") and click "Save."

Tasks

Understand and use views.

Key Learnings

Review of "Views" Functionality

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V

 You can access this view at any time by selecting the bold text and looking under "My Views," which shows all the views that you have made or that other users have made and shared with you. "System Views" are views that are created by administrators and are automatically available to all users of CCTO.

Question of the Week

- 2. If you are interested in creating more complex views that incorporate new columns or in sharing views with other users, we encourage you to watch the Administrator Training posted to the AHEC portal or to review the <u>Create A View job aid</u> posted to the CD Manual. You can also always attend office hours to see a demonstration and ask additional questions.
- 3. Another thing that is important to understand about views is that there are options for you to use different views across each tab in CCTO, not just the Contacts Tab. Click on the Assessments Tab.

Tasks

Review of Households

Understand and use views.

Key Learnings

Review of "Views" Functionality

Question of the Week

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- 1. Notice that the data on this tab is tagged to contacts, but it is for assessment records, not contact records. Each of these records is an individual assessment, and clicking into an item will show you the full assessment text.
- 2. The current view displayed is for "Active Assessments," which means that you will see assessments for all contacts who are active in the system.
- 3. Clicking on this bold text allows you to see the other assessment views available to you. Just like the contact views, these views can filter down all these assessments into a more narrow list.
- 4. Click "Assessments from Contacts I Own," and you will now only see assessments for your contacts.

Tasks

Understand and use views.

Key Learnings

Review of "Views" Functionality

Question of the Week

Review of Households

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1. Now, click on the Activities Tab. This tab can show items that appear in the Timeline/Activities section of a contact's profile, such as tasks or phone calls. Just like the Assessments Tab, every activity that you see here is linked to a contact, but it is also its own record. Clicking on any of these items, such as a phone call, will allow you to see and update that item's record in the same way you would in Timeline/Activities. 2. Notice that this tab defaults to the "My Activities" view, which only shows open activities that are assigned to you. You can use this view as a to-do list for all your open items. Some other views that may be helpful for organizing your open items include "My Tasks" or "My Phone Calls."

3. If you would like to change the default view on this tab or any tab, you can also click the pin icon next to its title. This will pin your favorite view to display automatically the next time you open the tab.

Tasks

Understand and use views.

Key Learnings

• Review of "Views" Functionality

Question of the Week

Due	Overdue	\sim	Activity Type Phone Call \checkmark	
~	Activity Type 🗸		Subject \lor	Regarding 🗸
	Phone Call		Second Initial Outreach	Alli Gator
	Phone Call		Торіс	Jan Brady
	Phone Call		Daily Monitoring / / Due 10/2/2020 8:00 AM	Picture Frame

- In addition to the phone call and task views already available to you, there are also some quick filters built into the top of the Activities Tab to help you narrow the items in your view by due date and type.
- 2. For example, selecting "Due" to "Overdue" can help you see any outstanding items that haven't yet been closed out, and you can also narrow by "Type" if you would like to see only a certain kind of item, such as a phone call. Using both of these filters can also help you to turn the Activities Tab into a more effective to-do list that suits your workflow. As always, remember to check with your supervisor to see what views are recommended for you and how you can use them to work more efficiently.

Now that we have discussed the topic of views, we would like to highlight a great question we received from a CCTO user through the help desk this week.

Tasks

Understand and use views.

Key Learnings

Question of the Week

I have logged into the live system for CCTO and clicked into the Contacts Tab, but I can't see anything. When I search a contact name or C#, nothing appears. What should I do?

Tasks

Correctly identify the action required in each scenario.

Key Learnings

Review of "Views" Functionality

Question of the Week

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			✓ Last Name N	/ First Name N	✓ Household ✓	Household .	🗸 Mobile Pho	Monitoring N	Preferred Ia V
58	Pinned	\sim							
			jones	apple	jones1		1-123-123-1	234	
			bill	habb			1 010 555 5	EEE Monitoring	English
Ар	ps		DIII	daoa			1-910-000-0	55: Monitoring	English
<u>111</u>	Dashboards		bird	blue			1-123-123-1	234 Monitoring	
8	Contacts		Jacob	John	Jacob Family				
		_							

	2 7	peters*n		×	
	1 ∨ Phone	#2 🗸 🕴 Cor	ntact or `	∽ Local Healt	
		Co	ontact	Dare	
All Contacts	~				
\checkmark Last Name \lor	First Name \checkmark	Household \lor	Household	ee Mobile Pho ee	Monitori
Petersen	Petey			1-333-444-343	4
Peterson	Peter			1-555-000-101	(

The first step you should take if you are not able to find a contact is to **check your view**. If you are in "My Active Contacts," you will not be able to search for any contacts who are not currently assigned to you or who have been deactivated.

- 1. The best view to start your search is "All Contacts," which will allow you to search all contacts in the system, *including* inactive ones.
- 2. Next, you should make sure you are optimizing your search by including wildcards if you need them. In the CCTO search bar, an asterisk (*) is interpreted as a wildcard, or a placeholder for unknown text. For example, if you are not sure whether your contact's name is spelled "Petersen" or "Peterson," you can search "Peters*n" to return both spellings.



Tasks

Understand and use views and the search function.

Key Learnings

Review of "Views" Functionality

Question of the Week

✔ Last Name ∨	First Name 🗸	Household \lor	Household	· ↓ Mobile Pho ↓ Mor
Hansen	Michael			1-444-555-0000
Hansen	Mary			1-333-777-565€
Hansen	Marty			1-333-777-4545

1-444-555-000C ----1-999-555-000C Mo

1-919-555-000C Mo

Hansen

Frame

Clown

Michael

Picture

Koko

- 1. You can also use the wildcard to search for multiple missing characters. This can be useful if you only have a first initial. For example, "M* Hansen" will return Marty, Mary, and Michael Hansen.
- 2. CCTO will also allow you to search by part of a primary phone number. For example, "*555-0000" will return all phone numbers starting with any area code and ending in "555-0000."

Tasks

Understand and use views and the search function.

Key Learnings



Review of "Views" Functionality

🕼 Show Chart 🕂 New 🛍 Delete 🗸 🖒 Refresh 🖙 Email a Link 🗸 🖉 Flow 🗸 💷 Run F All Households ~ H# 🗸 Household Name 🗸 Primary Contact (OLD) V H-0000001129 Cow Family Brown Cow H-0000001365 Brown H-000000629 Brown Family H-000000630 Brown Family H-000000940 Brown-Michaels, Michaels, Brown Household H-000000966 Brown Family H-0000001090 Peanuts Family Charlie Brown H-0000001228 Brown 2 *Brown* 🔚 Save 🕼 Save & Close 🕂 New 🕞 Deactivate 🧏 Connect 🗸 Peanuts Family C Recent Household Summary Household Members System Information Related Peanuts Family HOUSEHOLD INFORMATION Add to Pinned ₿H# H-0000001090 **Brown Family** My Active Househol Household Name Peanuts Family All Contacts Primary Contact My Active Contacts Preferred Language English **Picture Frame** Michael Hanser Mary Hansen Source Case Info Pinned NC-COVID Event ID 101333555 of Source Patient #1

1. As a note, this same process also works on the Households Tab. You can select the "All Households" view to search both active and inactive households across the system.

Question of the Week

- 2. If you search by household name, the asterisk will substitute any words you are not sure about. For example, if you know a family's last name but do not know how the household was titled, you can search their last name, for example, "Brown," with asterisks on either side ("*Brown*"). This will return households with "Brown" anywhere in the title or in the primary contact name.
- 3. As an additional tip, if you would like to keep this household profile or any page in CCTO easily accessible while you are working on it, you can use the "Pin" feature.
- 4. Once you are on the page you'd like to pin, click "Recent" at the top left, and then select the pin icon. The item will now appear in your "Pinned" section and can be directly accessed at any time.

Tasks

Review of Households

Understand and use views and the search function.

Key Learnings

Question of the Week

I have logged into the live system for CCTO and clicked into the Contacts Tab, but I can't see anything. When I search a contact name or C#, nothing appears. What should I do?

Answer: If you cannot find a contact...

- 1. Try the "All Contacts" view to show active and inactive contacts owned by all users.
- 2. Try searching with an asterisk "*" as a wildcard to catch any variations in spelling or titles.

Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Utilizing the household functionality

Review of "Views" Functionality

Question of the Week

R.

17

Review of Households

Shover the New 🛍	Delete 🛛 🗸 🕐 Refresh	
Home My Active Household	ds \sim	
) Recent V	1	
Pinned V H# V	Household Name ↑ 🗸	
H-000000951	Banks Family	
H-000000802	Brady Family	
Dashboards H-000001196	Family Household123	
Contacts H-0000001200	Glass Family	
Households H-000000672	House Trial Household	
Assessments		
Summary Household Members System Information	Contact Information Country Code	
Household Name * Ingalls Family	Mobile Phone (will be	
Primary Contact	messages)	1-555-444-7777
Preferred Language English	Phone #2	0.2228
	Phone #3	
	Email	ingalls family@littlehouse.com
Source Case Info	Preferred Method of	Phone Call
of Source Patient #1 101200300	Contact	
Last Date of Exposure to Source Patient #1 9/24/2020		
Ongoing Exposure Yes	ADDRESS	
NC-COVID Event ID	Street 1	123 Little House Lane
of Source Patient #2	Street 2	
to Source Patient #2	City	Duck
Source Patient Name	Pico X	

We will now wrap up today's training by providing a review of households. As a reminder, the purpose of the household feature is to allow you to create a grouped profile for contacts *if it helps to streamline your data entry or outreach*. Households are for your convenience only and are not used for official reporting, so you should work with your supervisor if you are unsure whether to create a household for a group of contacts.

- 1. To create a new household, you should now begin on the Households Tab and select "New."
- In the "Household Name" field, type an identifying name for your household per your local guidance.

Tasks

Understand and use the updated household functionality.

Key Learnings

 Understanding households

Review of "Views" Functionality

Question of the Week

Review of Households

New Househo	ld embers System Information	on			
OUSEHOLD INFORM	ATION		Contact Information		
вн≠			Country Code	***	
Household Name *	Ingalls Family		Mobile Phone (will be used for text messages)	1-555-444-7777	ŝ.
Primary Contact			Phone #2		
Preferred Language	English 2		Phone #3	5 - 200 C	
			Email	ingallsfamily@littlehouse.com	57
DUTCE Case Info NC-COVID Event ID of Source Patient #1	101200300		Preferred Method of * Contact	Phone Call	
Last Date of Exposure to Source Patient #1	9/24/2020	前	l. To preserve o		
Ongoing Exposure	Yes		ADDRESS		
NC-COVID Event ID of Source Patient #2			Street 1	123 Little House Lane	
Last Date of Exposure to Source Patient #2	1770		City	Duck	
Source Patient Name	1222				

- If known, you can then use "Primary Contact" to indicate a member of this household who may be speaking on behalf of others; however, it is recommended that you create the whole household first before creating this contact. You can return to the household profile and add this primary contact at any time. Remember that the primary contact is only for your reference and is not used for reporting, so it is no problem if you need to change this contact later.
- 2. Next, indicate the primary language of this household in "Preferred Language."

Tasks

Understand and use the updated household functionality.

Key Learnings

 Understanding households

Review of "Views" Functionality

Question of the Week

Review of Households

New Househo mary Household M	ld embers System Information			1	
USEHOLD INFORM	ATION		Contact Information		
H#	100		Country Code		
Household Name *	Ingalls Family		Mobile Phone (will be used for text	1-555-444-7777	G
Primary Contact			Phone #2	1.22	
Preferred Language	English		Phone #3		
·			Email	ingallsfamily@littlehouse.com	57
DUTCE Case Info NC-COVID Event ID of Source Patient #1	101200300		Preferred Method of * Contact	Phone Call	
Last Date of Exposure to Source Patient #1	9/24/2020	前			
Ongoing Exposure	Yes		ADDRESS		
NC-COVID Event ID of Source Patient #2			Street 2	123 Little House Lane	
Last Date of Exposure to Source Patient #2	1000		City	Duck	
Source Patient Name	1222				

Ingalls Family Household Summar Household Members system Information Related	3
	then Content C Herten 🖷 Hur Seport - :
✓ Last Name ↑ ∨ First Name ∨ Household ∨ Mathle Phone ∨ Menturing Status ∨	Pedarol k₂ ∨ Pederol Nehol el Contact ∨ b Wine ∨ b Stadent ∨ Stadent ∨ Stadent ∨ Lost Associated Date ∨ Lost Date w, ∨ Ms
	Res statu scoolidda.
×	,

- 1. Fill out the boxes for "Source Case Info," "Contact Information," and "Address" with information appropriate to the whole household. This information will carry over to new contacts you create within this household to help reduce data entry; however, you are always able to edit and adjust information as needed for individual contacts.
- Click "Save" when you are finished. You can now create new contacts within this household from the "Household Members" page. This process has not changed with the household functionality updates.
- 3. Select "New Contact" on the **RIGHT** of the screen to add a new contact (who does not currently exist in the system) to this household.

Tasks

Understand and use the updated household functionality.

Key Learnings

 Understanding households

Review of "Views" Functionality

Question of the Week

Review of Households

AS Contact Assessn	nents System Information				
asic Info		Monitoring Details			
ic#		Begin Monitoring?	(****)		
First Name	Laura	Monitoring Status	(****)		
Last Name	Ingalis	Monitoring End Date			<u>61</u>
Household	🖾 Ingalls Family	A Monitoring Age			
Household Relationship		A Begin Monitoring Date			
Requires Provy	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	🛱 Last Assessment Date	222	m	
		Final Monitoring Outcome	1000		
ontact Information					
Country Code	112) 	Testing Details			
Mobile Phone (will be used for text	1-555-444-7777	%Referred to Test?	(****)		
Phone #2	122)	Referred to Test Date	222		
		Tested?			
Phone #3					
Phone P3 Email Preferred Method of Contact	ingalitamily@ittitheuse.com Phone Call Ingalitamily@ittitheuse.com Ingalitamily@Ittith	Family sehold Members System Information	Related		=
Prone #3 Email Prefared Method of Contact	Phone Call Phone Call Phone Call Commany How Call Commany	Test Date Test D	Related	Monitoring Tense V	Forthead Ia: v Portnered Monte English Phone Call
Save 4 Pagenet Method of Contact Save 4 PI Palng Contact RIAS Contact	Ingalitizmity@ittitheuse.com Phome Call Phome Call Summary Hou Construct Summary Hou Construct Summary Summary Hou Construct Summary Su	Test Date Test D	Related Instato Provo v 1-555-444-7777 Sha Assign	Kontantoj tanar V. 	Forboad Ia V Parkend Metric English Phone Call
Prome 23 Email Preferred Method of Cantact Save PD Paling Contact RIAS Contact Basic Info	and the second	Test Date Test D	Related Status Proce v 3 1-555-401-7777 By Assign	Kontong Yanu V.	Portnesd Ia V Portnesd Manna English Phone Call
Prome 23 Email Preferred Method of Cantact Save Cantact PD Paling Contact RIAS Contact Basic Info A C#	Ingalitamiy@ittishouse.com Phome Call Phome Call Countries Countries C-0000037430	Test Date Family sectod Members System Information (7) Pertinence Information (8) Participation (8) Parti	Related	Northerg Tenur ↓	Instruct to a local former Carl
Prome 23 Email Preferend Method of Contact Save (4 P) Paing Contact RIAS Contact RIAS Contact Basic Info A C# First Name	Phone Call Phone Call Phone Call Summary Hou C-0000037430 Pa	Test Date	Related	Konborg Brus V.	Forboard Ia V Forbeard Jointy English Phone Call

- Because you started from the "Household Members" page, a New Contact screen will appear with pre-populated information from the household profile. Input the remaining information about your new contact or adjust any of the pre-populated information as needed.
- 2. Click "Save and Close" when finished to return to the "Household Members" page, and repeat the process if necessary for new contacts.
- 3. As a reminder, the process for adding existing contacts to households has changed, and you now need to do this from a contact profile and not the "Household Members" page. Under "Basic Info," you should use the "Household" field to search and select the household you have created that applies to this contact.
- 4. Saving your work will add this contact to the "Household Members" page.

Tasks

Understand and use the updated household functionality.

Key Learnings

 Understanding households

Review of "Views" Functionality

Question of the Week

Review of Households

- 🖬 Sava & Sava & Close + New 🔓 Descrivers 🦷 Connect 🚊 Dente 🔘 Rafrach 👘 Process 👻 💣 Share 🐭 Flow 🛩 🔤 Run Rapos Ingalls Family Household Members System Information Related ngelo harady 1, 500,444,5125 Michildring English English -Ingalls Family 🕖 🖬 Save & Save & Close 🕂 New 🗋 Deactivate 🖓 Connect 🖂 🖓 Assign 🖽 Er Household Members System Information Related Ingalls Family Summary Summary Household Members System Information Related Owner Q Julia Covid-Temp V Lot Barri V luia Covid-Ten incialis Ingels Femily 1-555-444-5123 Monitoring Enclish Julia Costd-1 🕥 + New 🖸 Activate 🧏 Connect 🗸 🔗 Assign 🖓 Email a Link 🗓 Delete A Read-only This record's status Inactive **Ingalls Family** Household Summary Household Members 🖾 Show Chart 📑 Activate 🔂 Deactivate 1 Delete Y 🔗 Assign 🖆 Share 🖄 Email a Link 🖂 🥜 Flow 🖂 🔟 Run Rep My Active Contacts ~ Deactivate ✓ Latt Name ∨ First Name W V Last Name V First Name V Deactivate these Contacts. Pa ngall Art Gallery Laura You can reactivate these Contacts from the Inactive Contacts View. Picture Frame Ingalls Pa Ingalls Family ----1-555-444-5123 Monitoring English Email No Ingalls Laura Ingalls Family 1-555-444-7777 ----English Phone Call Yes
- Finally, remember that reassigning a household using the "Assign" button from the household profile will reassign all its contacts; however --
- 2. Deactivating a household will not deactivate any of the contacts within it. Contact members must be deactivated by profile after deactivating the household. Similarly, deactivating all household contacts will not deactivate the household, and it must be deactivated independently.

We will now proceed to our last knowledge check for today.

Tasks

Understand and use the updated household functionality.

Key Learnings

 Understanding households



CCTO | Knowledge Check Scenarios



You want to search for a contact using their C#, but you are not sure who is the owner or whether this contact is currently active. Which view should you use?

- 1. My Active Contacts
- 2. Active Contacts
- 3. All Contacts
- 4. My Inactive Contacts

Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Using views to find contacts



CCTO | Knowledge Check Scenarios



You want to search for a contact using their C#, but you are not sure who is the owner or whether this contact is currently active. Which view should you use?

- **1. My Active Contacts**
- 2. Active Contacts
- 3. All Contacts
- 4. My Inactive Contacts



Correctly identify the action required in each scenario.

Key Learnings

 Using views to find contacts





BONUS: You are assigned a contact who resides outside of your state. After ensuring that the contact's exposure and outreach details are as complete as possible, what is the only action required on your part?

- 1. Assign the contact to the Movement Monitoring & Notification (MMN) Team Contact (*Jennifer Wheeler*)
- 2. Select a Final Monitoring Outcome of "State OOJ, Notification Completed"
- 3. End monitoring and deactivate the contact
- 4. Delete the contact profile

Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Correctly handling out-of-jurisdiction contacts



CCTO | Knowledge Check Scenarios



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Tasks

Correctly identify the action required in each scenario.

Key Learnings

 Correctly handling out-of-jurisdiction contacts



Exposure Notification App: SlowCOVIDNC







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 the CD Manual & ServiceNow Knowledge Center for NCID/ServiceNow/CCTO access support



- Review <u>"CCTO Help Desk & IT Support" on the CD Manual</u> to review job aids for access support
- Visit the <u>ServiceNow Knowledge Center</u> for job aids on tech issues (login, NCID, password reset, etc.)

Refer to support materials for CCTO Tool help

	=

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

ServiceNow for CCTO support and CCTO enhancement suggestions



<u>Register</u> for ServiceNow and then visit the <u>DHHS Contact Tracing ServiceNow Portal</u> to log in using your NCID and submit **CCTO questions and suggestions.**

REMINDER: Tip of the Week Submissions

Always check the newsletter for tips submitted by contact tracers, and use the <u>tip</u> <u>submission link</u> to submit a tip of your own!

HEALTH AND HUMAN SERVICES	Tip of the Week This week's tip is from Steffanie Sanchez in Durham county:	
NC Outreach Team Newsletter	Maximize the use of the CCTO Tool Activities/Timeline functionality. Using these features can help immensely with call preparation. Specific elements and how to best use them include:	
In this snapshot	Tasks to log every email/text exchange Dhene collect to log who you encode to (if not contact) and/or the best	
Tip of the Week	• Phone cans to log who you speak to (if not contact) and/or the best time to call next	
System Updates	Notes to log:	
Job Aid	 Household Information (who lives with the contact and the source of exposure - this occasionally identifies other contacts that need to be monitored and weren't in CCTO) Health Updates (anything in the assessment that should be flagged, such as high risk reasons or resource needs, so 	
	they can quarantine safely)	Tin
	Thank you for the wonderful tip, Steffanie!	Submission
	We want to hear your tips related to the CCTO tool and overall contact tracing efforts, so we can continue to build a	Link
	community where we are learning from each other and sharing best practices. If you have a tip that you would like to	
	submit, which makes your contact tracing efforts more efficient and/or effective, please fill out <u>this form</u> r a chance of	

Participant Feedback

Questions?