



Timeline/Activities helps you document and track your outreach and monitoring. See below for a broad explanation of when and how to use each type of item:

In Timeline/Activities, click +, then select...

Quick Create: Phone Call

Owner * Mary Moran

Subject ---

Call From

Call To

DESCRIPTION	
Phone Number	1-222-333-4545
Type	+ Second Outreach
Call Status	+ Answered
Description	Followed up on contact's daily assessment in which a need was
Duration	30 minutes
Due	12/4/2020 8:00 AM

Phone Call...

... to document or schedule all attempted or successful phone outreach.

- ✓ **Must use "Type" & "Call Status"** to provide details
- ✓ Use **"Owner"** to assign
- ✓ Use **"Due"** to schedule in advance
- ✓ Follow local protocol on **"Description,"** and document Q&I referrals [per the job aid](#)
- ✓ **Must close when complete** by clicking the checkmark in Timeline/Activities (see *footnote*)
- ✗ **IGNORE** the "Made/Received" toggle when closing

Task...

... to document or schedule all other monitoring activities, such as review of assessments or other necessary follow-up activities.

- ✓ Follow local protocol on **"Subject"** and **"Description"**
- ✓ Use **"Due"** to schedule in advance
- ✓ Use **"Owner"** to assign
- ✓ **Must close when complete** by clicking the checkmark in Timeline/Activities (see *footnote*)

Note...

... to record reference information, such as resource needs or chronic conditions.

- ✓ Record reference information only
- ✗ Do **NOT** use to record tasks or phone calls

The Monitoring Event Notes box is a section for your reference where you can paste key info from notes for increased visibility as needed.

Quick Create: Task

Owner * Mary Moran

Subject * 9/23 Field Visit

Description Contact has not been responsive to repeated outreach attempts and will

Due 9/23/2020
8:30 AM

Regarding Cowboy Woody

Duration 30 minutes

Priority Normal

Contact's Chronic Condition

Contact has chronic condition X resulting in ABC and requiring XYZ extra support

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Always remember to **close out your completed phone calls and tasks** by hovering over the item, clicking the checkmark, and selecting the appropriate "State" option (*completed or canceled*) **ONLY**.