CCTO Micro-Training

Timeline/Activities: Quick Reference

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...

**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.

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.