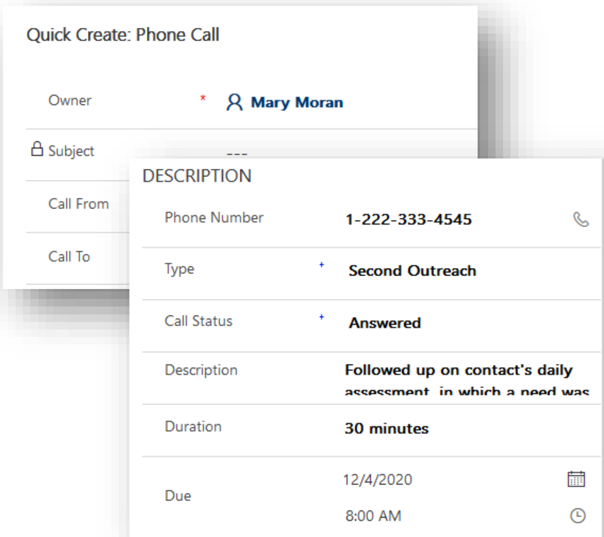
CCTO Micro-Training

# 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:

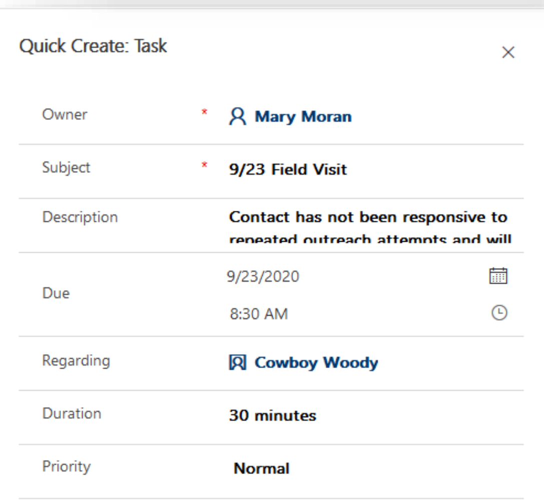
## In Timeline/Activities, click +, then select…




## Phone Call…

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

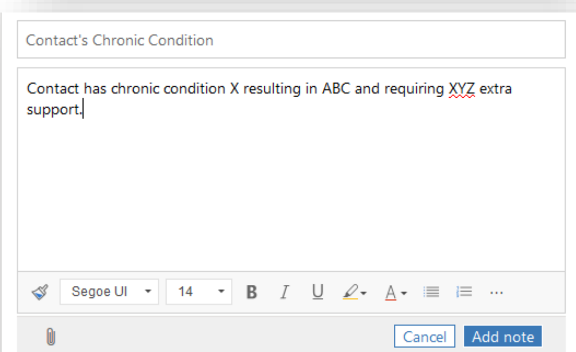
- ✓ **Must use "Type" & "Call Status"** to provide details
- ✓ Use "**Owner**" to assign
- ✓ Use "**Due**" to schedule in advance
- ✓ Follow local protocol on "Description," and **document Q&I referrals** [per the job aid]
- ✓ **Must close when complete** by clicking the checkmark in Timeline/Activities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