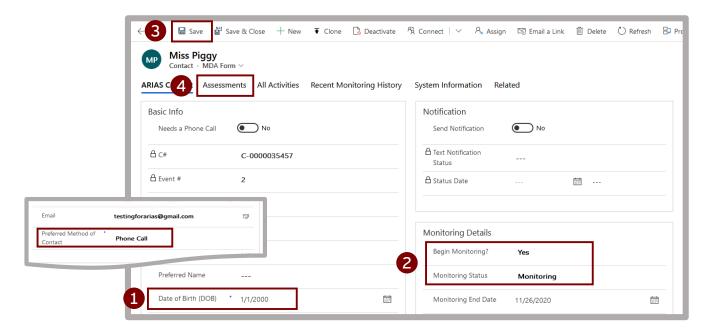# Beginning Monitoring & Initial Assessment

This guide shows you how to begin monitoring and assessments. **Note: your contact may have already received an electronic notification from the system and opted to begin digital monitoring through the contact portal.** If so, you may already see an initial assessment created or completed, and you do not need to re-initiate monitoring.

#1: Review key information:

- **Date of Birth** may or may not contain data. Contacts will need this to verify their identity and access their digital assessments later on. If this is blank, you will not be able to turn on "Begin Monitoring?" (which begins *digital* monitoring) until you can obtain a DOB or a DOB placeholder from your contact, and this is okay. *See the last page for more info*.

- **Preferred Method of Contact** defaults to "Phone Call," and you can leave this until you determine your contact's preference. Updating this will allow your contact to receive assessments via text or email. *Note: if a contact has responded to a digital notification, they may have already updated this preference.*

#2: Start monitoring: Set **Monitoring Status** to "Monitoring" and **Begin Monitoring?** to "Yes."

- **Monitoring Status** indicates if you are actively monitoring this contact.

- **Begin Monitoring?** initiates the digital monitoring process if **Preferred Method of Contact** is set to "Text Message" or "Email." It also starts the system's calculations for **Monitoring Age** and **Begin Monitoring Date** and creates an initial assessment regardless of **Preferred Method of Contact.** You will not be able to turn on **Begin Monitoring?** if a contact does not yet have a **Date of Birth**, but you should still set **Monitoring Status** to "Monitoring."

#3: Save your work: This creates an initial assessment if **Begin Monitoring?** is on.

#4: Begin collecting assessment information: Visit the "Assessments" page at the top of your contact's profile.

- If **Begin Monitoring** was turned on successfully, an assessment marked "Initial" will already be created. Click into this assessment.

- If **Begin Monitoring** is set to "No," click "+New Assessment" in the top right corner of the screen.
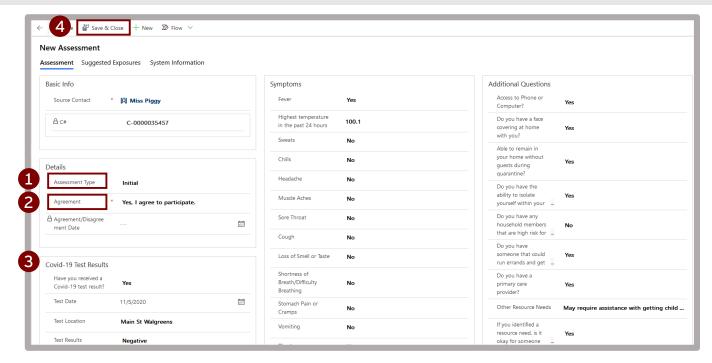
This process is only for **manual assessments,** which are completed by a contact tracer while speaking with a contact on the phone**. Before you create a new manual assessment, check if a blank assessment is already available** per #4 on the first page:
- If this is your contact's first assessment and an assessment marked "Initial" already exists (created by turning on **Begin Monitoring?**), click into that assessment.
- If there is not an assessment marked "Initial," or if this is not your contact's first assessment, click **"+New Assessment"** in the **top right corner** of the screen.
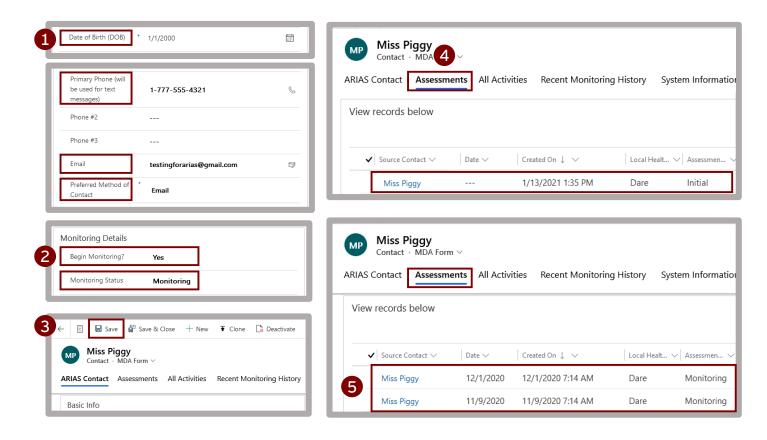

#1: Assessment Type: This should read "Initial" if this is your contact's first assessment and "Monitoring" if it is not.
- Both types collect the same symptom and test result information.
- **Initial** assessments display a full list of resource need questions. **Monitoring** assessments ask contacts: "Do you have a new resource need?" and only request more info if contacts respond "Yes."

#2: Agreement: Select "Yes, I agree to participate" if your contact agrees.
- Completing this field and saving will update the **Last Assessment Date** field on contact profiles.

#3: Remaining Fields: Complete per your contact's responses.
- Each time *COVID-19 Test Results* is completed, a contact profile section for *Contact Reported Test Results* will appear and update. The contact profile section for *Testing Details* will not update automatically. Defer to your local guidance on how you should use this section.
- The first time any symptom (except "Highest Temperature in the Past 24 Hours" or "Other Symptoms") is indicated, the contact profile field for **First Date Symptoms Reported** will update.
- Each time any resource need (except "Is there any other information you would like to provide?") is indicated, the contact profile field for **Most Recent Date Resource Need Reported** will update.

#4: Save & Close: Click to save your work and record the assessment.

Digital assessments are sent to contacts as links within automated daily texts or emails, and they can complete these assessments on their own. **To ensure that this is properly turned on** and to review completed assessments:

#1: Confirm or update key information:

- **Date of Birth.** Contacts will use this to verify their identity and access their digital assessments.
- **Email** or **Primary (mobile) Phone Number** for contacts to receive assessments.
- **Preferred Method of Contact** to "Text Message" or "Email" depending on your contact's preference. This tells the system how to send assessment links.
- **Monitoring Status** to "Monitoring."

#2: Begin Monitoring?: Setting this to "Yes" turns on automatic digital outreach if you have completed the other fields properly.

#3: Save: This turns on digital outreach and sends the assessment link.

#4: Confirm creation: Click "Assessments" at the top of your contact's profile to confirm that the assessment has been created.

#5: Review completed assessments: You can review any assessment completed by your contact by returning to the Assessments Page in their profile and selecting an assessment from the list.