



Updates to Handling Contacts Who Test Positive

Updates to "Contact or Case Patient" Field

Contact or Case Patient is now a mandatory field that will **default to blank and must be selected** to "Contact" or "Case Patient" in order to save a profile.* **This field will lock upon saving for the first time. FOR ADMINS ONLY: This field is editable after locking on the admin form.**

Because this field is now locked, the **"Contact who became a case" option has been removed.** When a contact tests positive and becomes a case, you should continue to note this by appropriately updating the **Testing Details** box and selecting the FMO for "Contact Tested Positive During Monitoring" (see *next section*) when closing out this contact.

Existing profiles that already have "Contact who became a case" selected will keep this selection unless it is edited through the admin form or other special process. **Once "Contact who became a case" is de-selected, it cannot be changed back.** Please defer to your local protocol to understand whether you are responsible for making any changes to this field.

NOTE:

The intent of this field is to describe the status of this person when they entered the system. You should choose "Contact" if this person is beginning monitoring as a contact (*not* a confirmed case). *This field will lock upon saving for the first time, so please be careful in making your selection.*

EXAMPLE: If "Contact who became a case" is de-selected through the admin form, it cannot be changed back.

*Because this field now defaults to blank, it must also be included and populated in all upload templates.

"Contact Tested Positive During Monitoring" FMO

The "Tested Positive - Became Case" FMO is now **"Contact Tested Positive During Monitoring."** You should select this if a contact tests positive and becomes a case patient. *It is no longer required or possible to update the Contact or Case-Patient field to designate these contacts, but you should continue to provide as much info as possible in the Testing Details box.*

CLOSING OUT CONTACTS WHO TEST POSITIVE

If you have a contact who has tested positive and you are continuing to monitor them, it is recommended that you close this profile and begin monitoring within a new profile labeled as a case patient (either by cloning the original profile or by monitoring the new profile labeled as a case that flows in from NC COVID, which can be [connected](#) to the original profile).



Referrals in CCTO

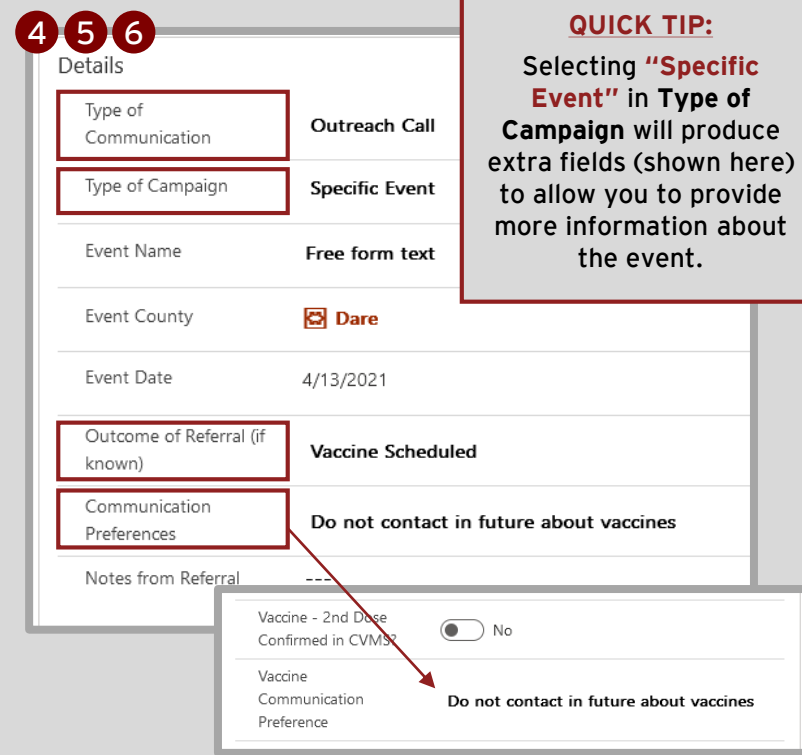
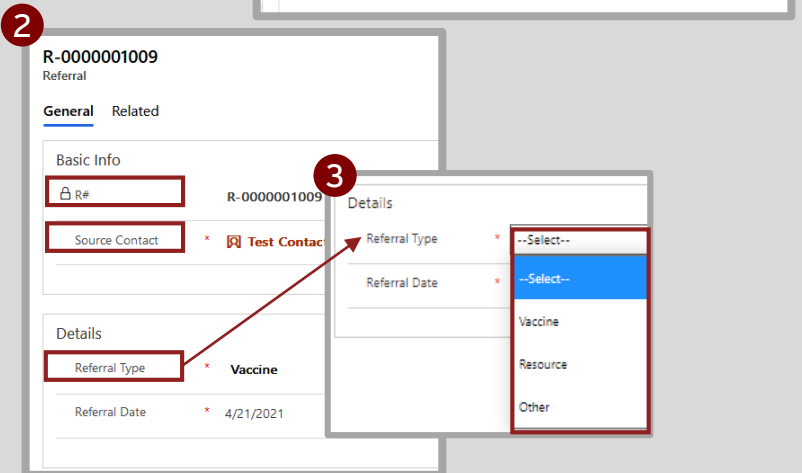
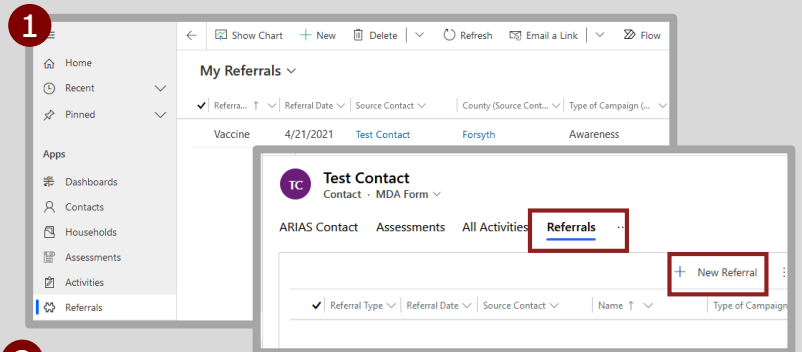
CCTO now supports the functionality to document referrals for vaccines, resources, and other types of support.

Referrals are a new type of record that connects to profiles in the same way that assessments and activities do. **Referrals do not take the place of logging a phone call in Timeline/Activities.**

You can see all referrals in the system by clicking on the new **Referrals Tab** at the left of the screen, which includes a view for **My Referrals** and a column for the referral subject's county in all views.

1. Within a profile, you can view all the referrals associated with an individual by clicking on the **Referrals Page**. Click **+New Referral** to create a new referral record for this individual.
2. **Source Contact** and **Referral Date** will automatically populate. **R#** is a unique identifier that will populate upon saving.
3. **Referral Type** can be selected to "Vaccine," "Resource," or "Other." Selecting each option will produce unique options per the descriptions below.
4. You can then indicate the **Type of Communication** and **Type of Campaign** in the designated fields.
5. **Outcome of Referral** will display different options depending on your selection in **Referral Type**. Use this field to indicate the final status of this referral.
6. **Communication Preferences** will also display different options depending on your selection in **Referral Type**. If you have selected the type "Vaccine," your selection in this field will auto-update the profile field for **Vaccine Communication Preference**. *This field can also be updated on profiles at any time.*

A referral is not a replacement for a phone call being logged. If a referral is made, it should be logged in addition to the Timeline/Activities phone call.





Referrals in CCTO

7. If you have selected "Resource Referral" in **Referral Type**, a field for **Referral Need** will appear to allow you to select one or multiple resource categories to indicate this individual's need(s).
8. If you have selected "Resource Referral," a box for **Referred To** will appear to allow you to provide **Agency, Agent Name, and How Referred**.
9. If you have selected "Other Referral," a free text field for **Referral Type Description** will appear to allow you to provide more information. Additionally, the **Outcome of Referral** field will become a free text box.

Upon saving your referral, you will notice that there is an option to deactivate at the top of the screen. This is similar to the deactivate option for assessments, and there is no requirement that you use this option unless instructed by your local protocol for tracking purposes.

STAY TUNED FOR MORE GUIDANCE TO COME:

Further guidance about the use of referral records within CCTO is forthcoming. Currently, the referral package is available to be used to track vaccine, community health worker, and other referrals and can be used at local discretion. If CCTO is used to support vaccine referral (either by using records to identify people needing vaccines or by using the blast text functionality), tracking these referrals in CCTO will allow evaluation of these processes and is recommended. **Please see the next page or some helpful guidance on using the referrals functionality.**

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Details	
Type of Communication	Monitoring Call
Type of Campaign	Awareness
Referral Need	Employment, Legal, Wellness
Outcome of Referral (if known)	Pending Action
Communication Preferences	Would like future calls and texts about resources available
Notes from Referral	Notes here

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Referred To:	
Agency	CHW
Agent Name	Sample Agency Name
How Referred	Transferred to person (warm transfer)

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Details	
Referral Type	Other
Referral Type Description	Free text here
Referral Date	MM/DD/YYYY

Details	
Type of Communication	Monitoring Call
Type of Campaign	Awareness
Outcome of Referral - Other	Free text here
Notes from Referral	Notes here

REMEMBER: A REFERRAL SHOULD NOT REPLACE A PHONE CALL ITEM

A referral is not a replacement for a phone call being logged. If a referral is made, it should be logged in addition to the phone call that took place. For example, you are making an outbound phone call to a previous contact to let them know about a vaccine event, this activity should be recorded in a phone call item in Timeline/Activities as well as within a referral record.

What type of phone call is being made or received?

TYPE OF COMMUNICATION	Outreach Call if this is an outbound call being made for the purpose of a referral.	EXAMPLE	Calling a contact to let them know about a vaccine event.
	Monitoring Call if this is a referral made as part of a standard initial or daily monitoring call (inbound or outbound).	EXAMPLE	Contact notes a resource need during initial assessment conversation, and you refer them to support.
	Incoming Request if this is an inbound call from a contact or case being made for the purpose of receiving a referral.	EXAMPLE	Contact calls seeking information about food assistance.

What was the context of the referral?

TYPE OF CAMPAIGN	Awareness if you are providing general support information that is not connected to a specific event or request. (Typically an Outreach Call.)	EXAMPLE	Providing education to a contact about vaccine availability in their area.
	Specific Event if you are providing this individual with information about an upcoming event. (Typically an Outreach Call.)	EXAMPLE	Calling a contact to let them know about an upcoming vaccination event in their area.
	Specific Request if this individual requests information about a specific need. (Typically a Monitoring Call or an Incoming Request.)	EXAMPLE	On a monitoring call, a contact lets you know they need assistance with housing.

What type of referral is being made?

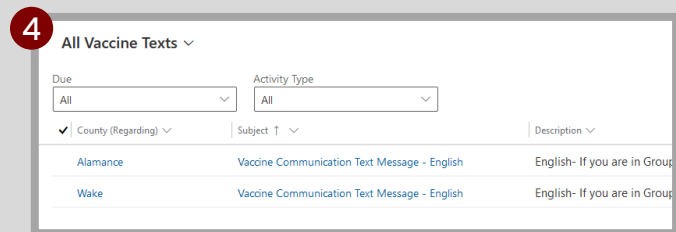
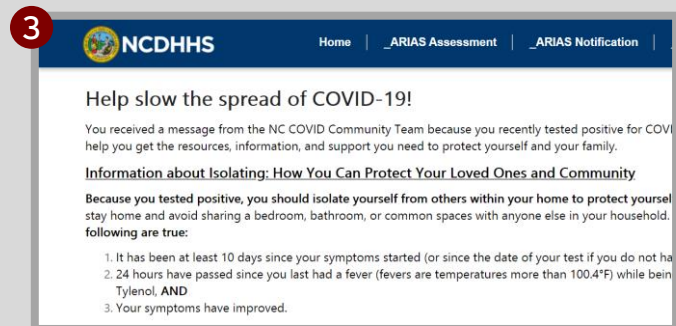
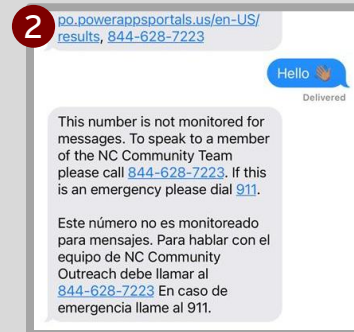
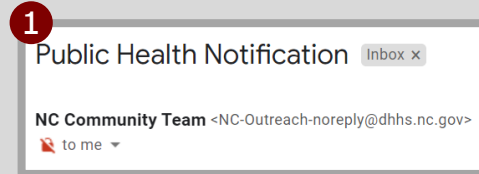
VACCINE		RESOURCE		OTHER	
KIND OF REFERRAL?	REFERRAL TYPE	REFERRAL TYPE	Resource if the referral is for another resource need, such as food assistance, legal help, or transportation.	REFERRAL TYPE	Other if the referral cannot be captured by "Vaccine" or any of the categories listed in "Resource."
	OUTCOME OF REFERRAL	REFERRAL NEED	Use this multi-select field to select one or more descriptors for this resource need.	REFERRAL TYPE DESCRIPTION	Use the free-text field to add more information about this referral.
OUTCOME OF THE REFERRAL?	<ul style="list-style-type: none"> Vaccine scheduled Already vaccinated Does not meet criteria for vaccine Does not want vaccine Transferred to LHD or vaccine hotline General information provided Other (will produce a free text field) 	OUTCOME OF REFERRAL	<ul style="list-style-type: none"> Confirmed needs met Connected with CHW (if applicable) Pending Action (if the outcome of this referral is yet to be confirmed) Other (will produce a free text field) 	OUTCOME OF REFERRAL - OTHER	Free text field for you to provide information.
		AGENCY	The organization to which you have referred this individual: <ul style="list-style-type: none"> 211 CHW Local resource Other (will produce a free text field) 		
		AGENT NAME	Free text field for the name of the person to whom you referred this individual.		
		HOW REFERRED	The process used for this referral: <ul style="list-style-type: none"> Transferred to person (warm transfer) Transferred to phone number (cold transfer) Provided contact information (no transfer) Other (will produce a free text field) 		

DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and the referral record!



Updates to Digital Outreach

1. The email that sends digital outreach from CCTO to cases and contacts is now NC-Outreach-noreply@dhhs.nc.gov and shows the display name of **NC Community Team**.
2. If receiving text outreach, contacts and cases may reply "Stop" (to opt out of all digital monitoring) or "Start" (to allow future texts). If a user replies to a text message with a non-standard response, an auto-response now is sent to the user in English and Spanish.
3. Additionally, the landing page websites for contacts and [cases](#) have been updated with **clarifying language, new CDC quarantine guidelines, and a link to sign up for a vaccine**.
4. Finally, an **All Vaccine Texts** view with a column for "County" has been added to the Activities Tab to display all vaccine text blast communications.



Bug Fixes

The fields for **Middle Name, Preferred Name, Fake DOB**, and all fields in the **Vaccination** box will now transfer automatically when cloning a profile.

Additionally, a bug that prevented phone call records within household profiles from being closed has been resolved. Phone calls can now be marked complete within the **Timeline/Activities** section on household profiles.

