Updates to Household Phone Calls

Users can now create a phone call from within a household profile and have it transfer onto members' individual contact/case profiles, replacing the need to log a phone call manually for each household member when making a household phone call.

1. In Timeline/Activities on a household profile, click + → "Phone Call."

2. In **Call To**, add the individual names of the household members who are included in the phone call. *Clicking on the magnifying glass will limit the names displayed to only those in the household.*

> Any names you add in "Call To" will have this phone call **transfer onto the Timeline/Activities section of their individual profile** (even if they are not part of the household); *however, this phone call **will not appear on the All Activities** page within any household member profiles.*

3. Continue filling out the remaining phone call fields as normal. When you save, **each member you listed in the Call To section of the household phone call will display this phone call in the Timeline/Activities section of their profile.** Any updates you make to this call (including closure or deletion) will transfer automatically to the Timeline/Activities section of all individuals listed in the **Call To** field.

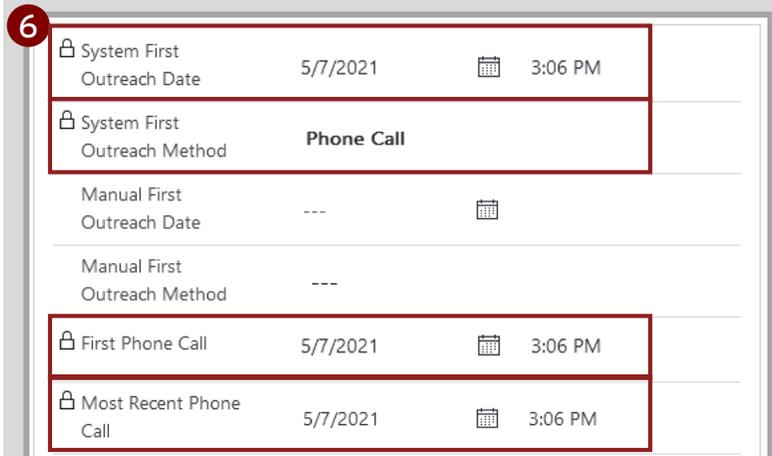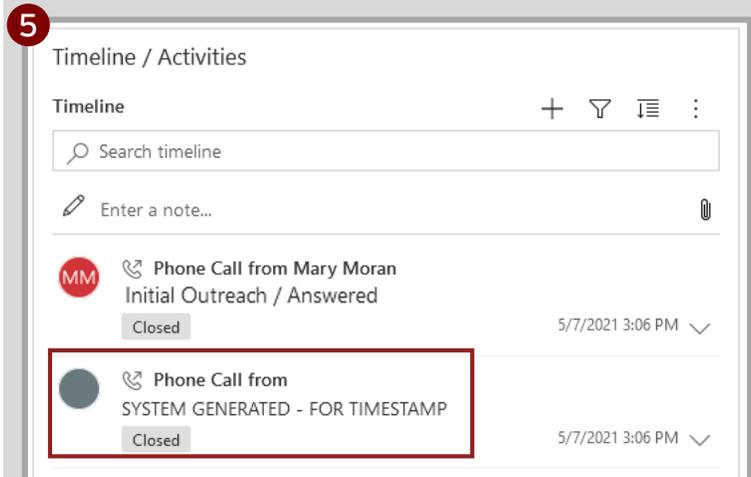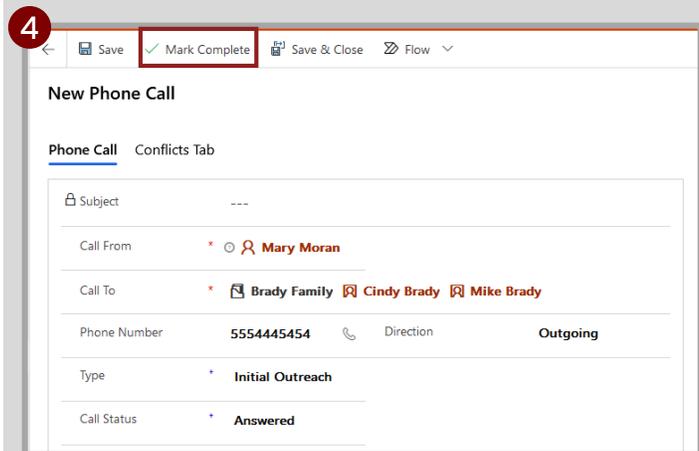> Read on for further information about these updates to household phone calls.

Clicking the magnifying glass will display the members of this household so that you can easily select one or several household members as needed.

Updates to Household Phone Calls

4. When you have completed the phone call, close it by clicking **Mark Complete** or by using the checkmark in Timeline/Activities, and each instance of this phone call will also close.

5. *After closing this call, you may notice an extra phone call appearing on household member profiles marked "SYSTEM GENERATED – FOR TIMESTAMP." This is created by the system in order to update the timestamps on household member profiles for* **Most Recent Phone Call**, **First Phone Call** *(if applicable), and* **System First Outreach Date/Method** *(if applicable).* **No action is required on this phone call record, and it will disappear automatically within 2 minutes.**

6. Once the call has been closed, the **Most Recent Phone Call**, **First Phone Call** (if applicable), and **System First Outreach Date/Method** (if applicable) fields for each individual will all reflect this household phone call. Timestamps may vary by 1-2 mins. *You may need to refresh to see these changes.*

4

	Save	✓ Mark Complete	Save & Close	Flow ⌄

New Phone Call

Phone Call Conflicts Tab

🔒 Subject	---
Call From	* ⊙ 👤 **Mary Moran**
Call To	* 🏠 **Brady Family** 👤 **Cindy Brady** 👤 **Mike Brady**
Phone Number	**5554445454** 📞 Direction **Outgoing**
Type	* **Initial Outreach**
Call Status	* **Answered**

5

Timeline / Activities

Timeline   + ▽ ⫿ ⋮

🔍 Search timeline

✏️ Enter a note...   📎

MM 📞 **Phone Call from Mary Moran**
Initial Outreach / Answered
Closed   5/7/2021 3:06 PM ⌄

⬤ 📞 **Phone Call from**
SYSTEM GENERATED - FOR TIMESTAMP
Closed   5/7/2021 3:06 PM ⌄

6

🔒 System First Outreach Date	5/7/2021	📅 3:06 PM
🔒 System First Outreach Method	**Phone Call**	
Manual First Outreach Date	---	📅
Manual First Outreach Method	---	
🔒 First Phone Call	5/7/2021	📅 3:06 PM
🔒 Most Recent Phone Call	5/7/2021	📅 3:06 PM

Read on for further information about general updates to CCTO in this release.

COVID-19 Community Team Outreach Tool
# May 7th CCTO Updates

General CCTO Updates

Updates to Text Notification Status Fields

The status of automated text messages will now be checked **two minutes after the text has been sent.** This is being done to reduce the number of texts shown as "Sent," "Queued," or "Sending." **It will provide more time for texts to be confirmed as either "Delivered" or "Undelivered."**

As a result of this change:
- Texts will not appear in the **All Activities** page until two minutes after notifications are created.
- **Notification Status Date** will now display a timestamp for two minutes after the notification was created.
- **Text Notification Status** field will continue to update one time only as of this delayed time stamp rather than immediately after the text is sent.

Text Communication Info

Send Notification   ● Yes

Text Notification Status   delivered

Notification Status Date   5/4/2021   🗓 3:21 PM
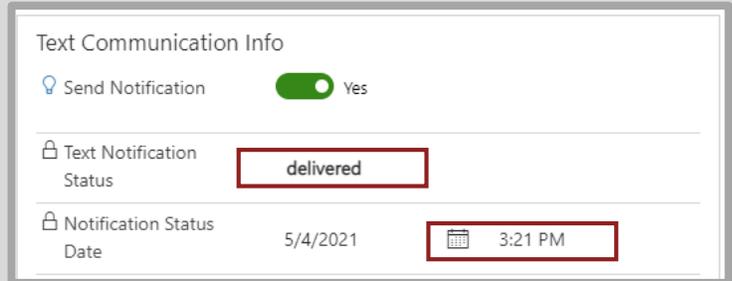
TEXT NOTIFICATION STATUS DEFINITIONS:

- **Delivered:** Text successfully delivered.
- **Sent:** Text sent but delivery unknown as of timestamp.*SEE NOTE
- **Queued, Sending, or Accepted**: Text not yet sent as of timestamp.*SEE NOTE
- **Undelivered or Failed:** Text unsuccessful, likely due to the number being a landline.
- **Blank:** No text created.

NOTE: Text Notification Status only updates one time; therefore, texts labeled as "Sent," "Sending," or "Queued" were not yet delivered as of the timestamp shown in **Status Date** but likely were delivered.

Misc. Updates

1. **Out-of-state contacts can now be cloned** per the process in the [Multiple Exposures](#) & [Cloning, Connecting & Deduplicating](#) job aids.
2. A column for "Contact or Case Patient" is now displayed on the **Recent Monitoring History** page of contact profiles.

1

← 🗐 + New 🗋 Activate ☍ Clone ⅍ Connect | ∨ ⅍ Assign ⌷
🔒 Read-only This record's status: Inactive

SF **Smiley Face**
    Contact · MDA Form ∨

CCTO Contact   Assessments   All Activities   Recent Monitoring History   Re

State   *   MA – Massachusetts

2

CC **Coffee Cup**
    Contact · MDA Form ∨

CCTO Contact   Assessments   All Activities   Recent Monitoring History   Referrals   System Information   R

✓ Connected To ↑ ∨ | Event # (Con... ∨ | C# (Connected To) ∨ | Contact or Case Patient (Connected ... ∨

Coffee Cup   2   C-0000991187   Contact