See below for an overview of the changes being rolled out in the Tool for August 24th:

Updated Household Members Functionality

Based on user feedback, clicking "+ New Contact" on the "Household Members" tab will produce **a full contact entry screen** with pre-populated information rather than the quick create screen. **As a reminder, the "Household?" button creates a group of contacts and should always read "No" when creating a household member.**
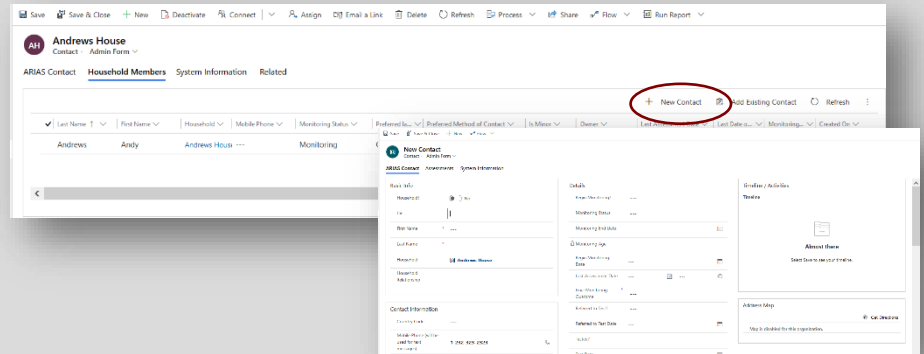

Updated System Views

Based on user feedback, **system views for contacts have been updated to include the columns used in contact outreach and evaluating outcomes**, such as "Preferred Language," "Preferred Method of Contact," "Monitoring Status," "Race," "Ethnicity," and "Final Monitoring Outcome." **Additionally, "C#" and all phone numbers are now searchable.**
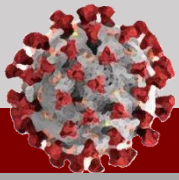

Contact Mobile Interface Improvements

Previously, the daily assessment loaded in one page, which caused some issues on mobile devices. Now, the survey will divide into two sections for Symptoms and Resources and should load more quickly on mobile devices.
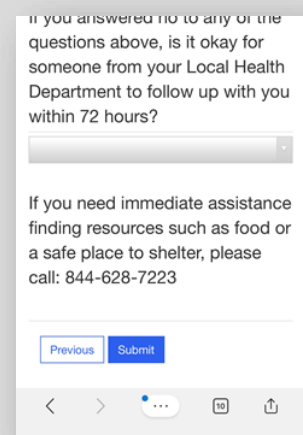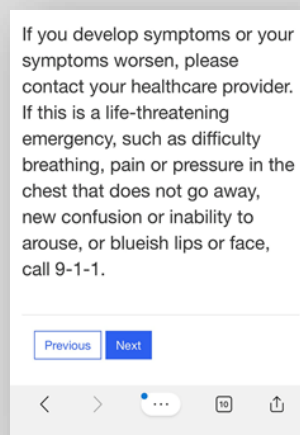
Read on for an overview of the changes to a contact's profile in this release.

See below for an overview of the changes being rolled out in the Tool for August 24th:

Contact Profile Updates

1. **"State"** is now a dropdown field. *Remember that "State" is required for all contacts, and "County" is required only for North Carolina residents.*
2. **Business Required fields are now indicated with a blue "+" to highlight the most important areas for helping us track and understand your efforts and the spread of disease,** including "Final Monitoring Outcome," "NC EDSS Event ID," "Last Date of Exposure," "Preferred Method of Contact," and other demographic fields.
3. **"Preferred Method of Contact"** now defaults to "Phone Call." If you update this field to Email or Text Message, "Email" or "Mobile Phone" will become a required field.
4. When you click the checkmark in Timeline/Activities, **Phone Calls are now closed with "Status" to "Answered/Unanswered"** rather than "Received/Made" to indicate if you reached a contact.
5. **"Prefer not to answer"** may now be selected for "Race" and "Ethnicity."

❶ **"State" Dropdown**

❷ **Business Required Fields**

❸ **"Preferred Method of Contact"**

❹ **"Answered"/"Unanswered"**

❺ **"Prefer not to answer"**

❶ State * NC – North Carolina

❷ Preferred Method of Contact +

Personal Info

NC EDSS Event ID of Source Patient #1 (Use the number ... +

Last Date of Exposure to Source Patient #1 +

❸ Preferred Method of Contact + Phone Call

❹ Close Phone Call ×

Do you want to close the selected 1 Phone Call? Select the status of the closing Phone Call.

State **Completed**

Status **Unanswered**

Close   Cancel

❺ Race + Prefer not to answer

Ethnicity + Prefer not to answer

Read on for an overview of the new "Business Unit" and "Teams" features.
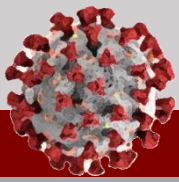
See below for an overview of the changes being rolled out in the Tool for August 24th:

Business Units and Teams

Business units have been created for LHDs, CCNC, and outside organizations, and all users have been assigned accordingly. A business unit is a way of grouping all the users for an LHD or organization. Users must be assigned to a business unit, and they may only be assigned to one. Business units for outside organizations (universities, military bases, etc.) will restrict these users' visibility rights, and they will only see contacts within their organizations. Business units for LHDs and CCNC will not restrict contact visibility or editing rights. **LHD and CCNC users are still able to view and edit all contacts in the system.**

Teams that mirror these business units have been automatically created. A Team is a grouping of users from the same or different business units, and a user can be a member of multiple Teams. Currently, every user has been assigned to a Team based on their business unit. Contacts and views can now be assigned to these Teams per the demonstration below. **A forthcoming update will allow administrators to create custom Teams of users and enhance workflows.**

To find a user's business unit and Teams, click on their name in the "Owner" column of any view and review the sections labeled "Teams" and "Organization Information." **Each user is required to be in a business unit and has been automatically assigned to a Team based on this unit.**

Assigning Contacts to a Team

Contacts can now be assigned to a Team rather than an individual user by typing the name of the Team in the "Assign" function. The owner will now show as the Team. Because an LHD or organization Team has already been created for you, this can be used to create a "pool" of contacts who require attention from other users at your LHD or organization. **For now, this should not be used to assign OOJ contacts to other counties. Continue to follow the existing OOJ process per the job aid.**

See below for an overview of the changes being rolled out in the Tool for August 24th:
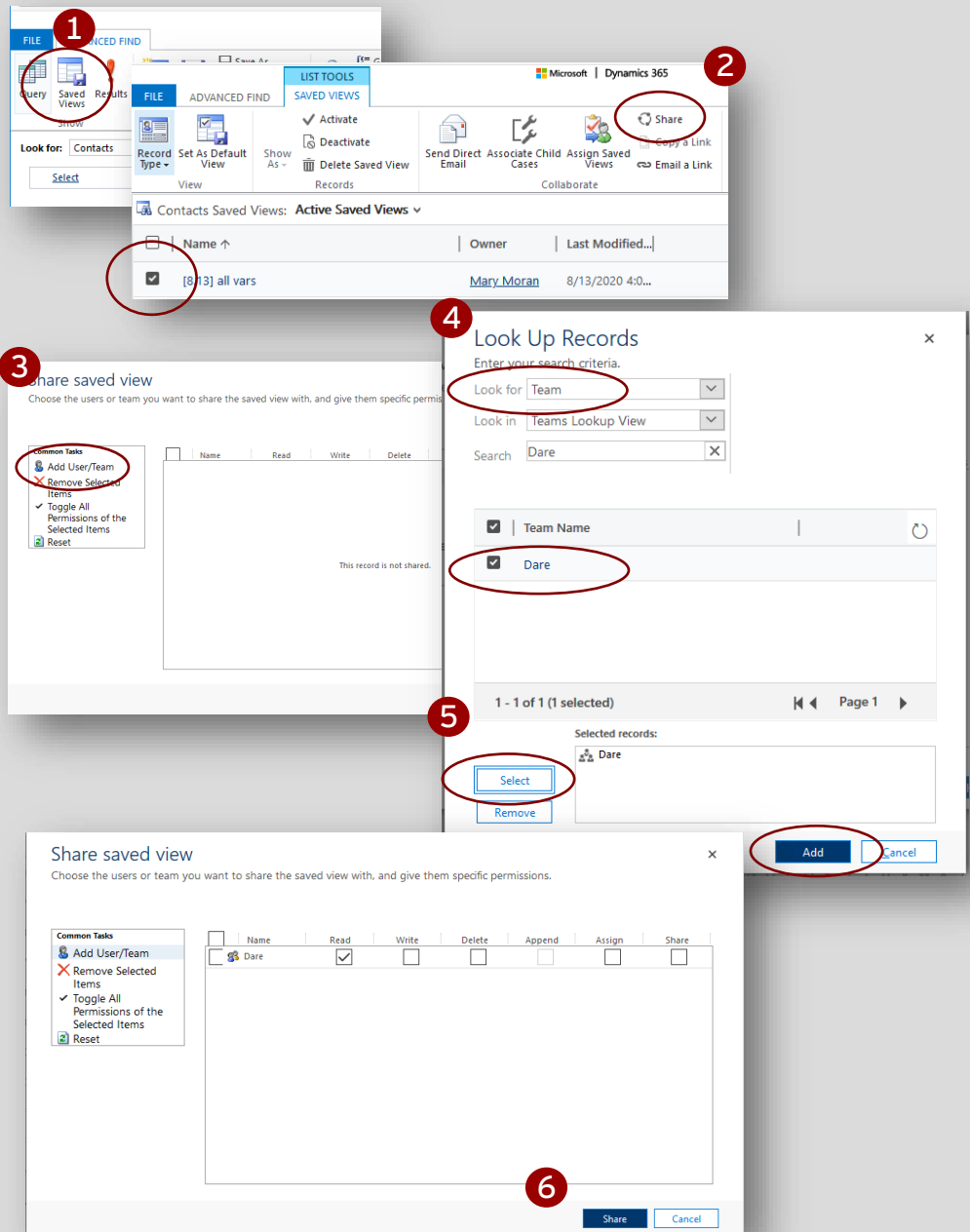
Viewing Contacts Assigned to a Team

Assigning a contact to a Team removes them from an individual user's My Active Contacts view and any views filtered by user. **To keep these Team-owned contacts visible once they are no longer assigned to a user, filter "Active Contacts" by "Owner" for the name of your Team.** You can then save this filter as a new view by clicking the down arrow next to "Create View" and selecting "Save Filters as New View."
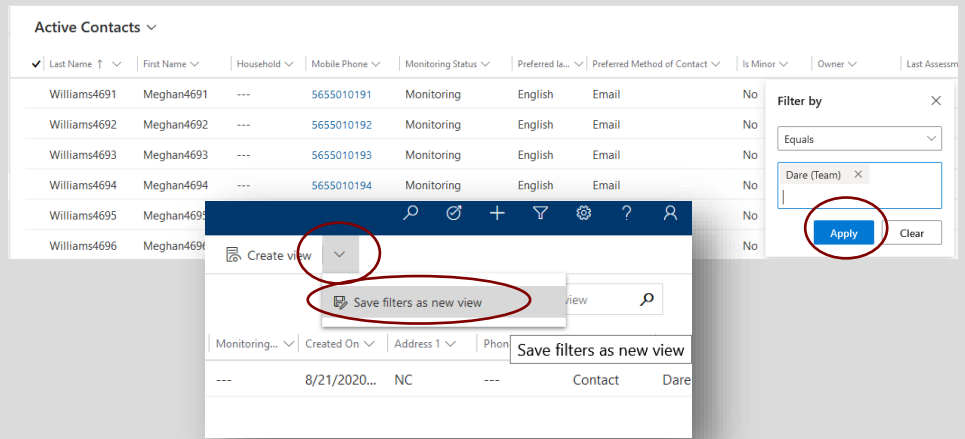
Sharing Views with a Team

Sharing a view with a Team can enable you to roll out views tailored to your LHD or organizational needs quickly and easily.

1. From the Create View screen, select "Saved Views."
2. Choose the View you wish to share and select "Share."
3. Choose "Add User/Team."
4. **Change "Look For" to "Team," type the name of your Team and select it.**
5. Click "Select" to add your Team to "Selected Records" and then choose "Add."
6. Choose the permissions you would like to share and then select "Share."

❶	"Saved Views"
❷	"Share"
❸	"Add User/Team"
❹	"Look for" "Team"
❺	"Select" "Add"
❻	"Share"