COVID-19 Community Team Outreach Tool
12/8/21 System Updates

Updates to Monitoring Event Fields

Last Date of Exposure Now Required for All Contact Monitoring Events

Last Date of Exposure to Source Patient #1 is now a required field to save any monitoring event (ME) in which **Contact or Case Patient** is set to "Contact." This will help to provide tracers with the most accurate information when reaching out to contacts and to ensure all contacts receive a notification text or email prior to any daily assessment outreach.

- *If LDE is unknown, it is the responsibility of the case investigator to include the best approximate date when creating the contact.*
- If LDE is missing on an ME that was previously created or that was created via an import or a flow, you will not be able to save the ME until a date is added. **While you work to obtain the true LDE, you can use the date the ME was created as LDE in order to save the record.**

Last Date of Exposure to Source Patient #1	*	11/22/2021		📅

New Fields for Students and Staff of Educational Institutions

1. A new field for **School Student or Staff?** has been added to indicate if an individual is associated with a K-12 school or other educational institution. If this field is set to either "Student" or "Staff," new fields for **County of Institution, Institution Name**, and **Institution Search Instructions** will appear to help you provide more information.

2. **County of Institution** should be used to indicate the NC county in which the institution is located. Choosing a county within this field will limit the options in the **Institution Name** field to display only institutions within the county in question. *If you do not know the county of the institution, you can leave this blank; however, please take notice of the county of the institution you select in* **Institution Name,** *as there are many institutions with the same name.*

Personal Info

Job Title — ---

Employer — ---

① School Student or Staff? — **Student**

② County of Institution — 🔲 **Swain**

Institution Name — *West* 🔍

Schools

🔲 **Swain County West Elementary**
Swain

Advanced lookup

🔒 Institution Search Instructions

Other Institution — ☐

3. **Institution Name** is a searchable field that allows you to search and select from a preset list of institutions. If you have selected a county within **County of Institution**, this field will only search on institutions within that county.

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School Student or Staff?	**Student**
County of Institution	Swain
Institution Name	Swain County West Elementary
Institution Search Instructions	Search by typing the first letters of the name, or by searching any word in the name using a * before and/or after as a wildcard. Example: Type "*West* to search for "Swain County West Elementary"

4. The **Institution Search Instructions** field provides you guidance on the two ways in which you can search:

- Type the first letters of the institution's name followed by a wildcard (*) to search on the beginning of the name. For example, **Sw*** for "Swain County West Elementary." This can be helpful if you are unsure of spelling.

- Type any word(s) from the institution surrounded by wildcards to search on any part of the name. For example, ***West*** for "Swain County West Elementary." ***Searching for words in the middle of an institution name WITHOUT wildcards will not work. Incomplete parts of a name must always be searched with wildcards on either side.***

4

School Student or Staff?	**Student**
County of Institution	Swain
Institution Name	Sw*
Institution Search Instructions	Schools
	Swain County East Elementary Swain
	Swain County High School Swain
	Swain County Middle School Swain
Other Institution	Swain County West Elementary Swain
Institution Name (Other)	

School Student or Staff?	**Student**
County of Institution	Swain
Institution Name	*West*
Institution Search Instructions	Schools
	Swain County West Elementary Swain

5. If an individual's institution is not available in the **Institution Name** dropdown, you can select the checkmark in the **Other Institution** field and then provide the institution name manually in **Institution Name (Other).** Otherwise, you should leave these fields blank. *****As shown in this screenshot, please avoid using these fields unless you have completed a thorough search using the techniques above and cannot find the institution listed.*****

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School Student or Staff?	**Student**
County of Institution	Alamance
Institution Name	*Example*
Institution Search Instructions	No records found.
	Advanced lookup
	Example: Type "*West* to search for "Swain County West Elementary"
Other Institution	☐

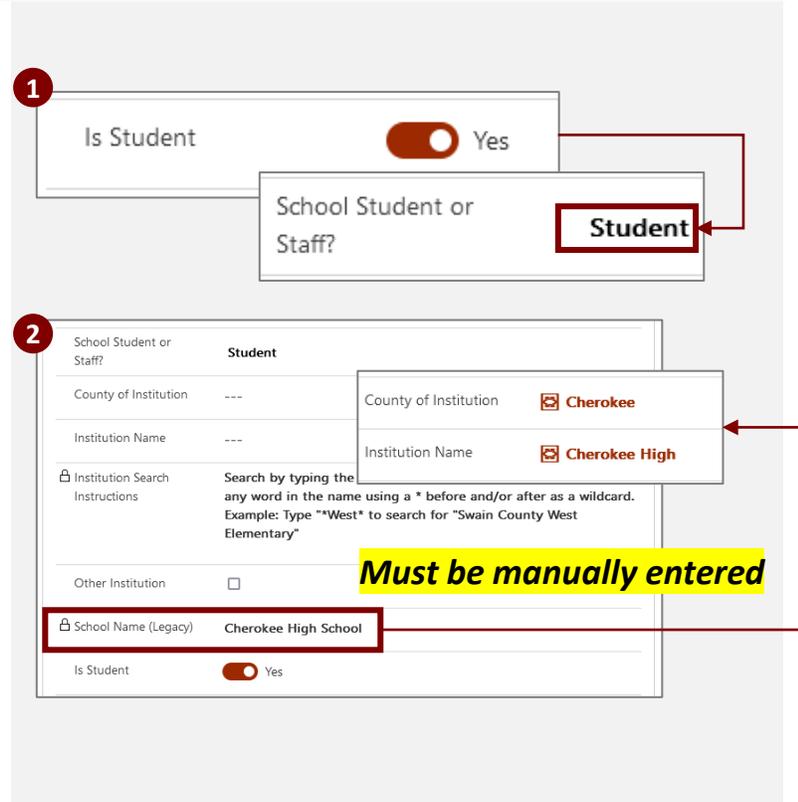| Other Institution	☑
Institution Name (Other)	Example Alamance Elementary School

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Notes on Previous Data from "Is Student" and "School Name"

1. Data from the previous **Is Student** field has not yet been transferred into the new **School Student or Staff?** field; however, when you open an ME with existing **Is Student** data, this will trigger an automatic flow that transfers this information into the new field.

2. At this time, data in the previous **School Name** field has not been integrated into the **Institution Name** field. For this reason, the **School Name (Legacy)** field will be visible for your reference if either option is selected in **School Student or Staff?**. Please transfer data from **School Name (Legacy)** manually into the new **Institution Name** field.


NOTE ON PULLING STUDENT DATA FROM LEGACY STUDENT FIELDS:

As described above, the data from the legacy **Is Student** and **School Name** fields has not been carried into the new **School Student or Staff?** and **Institution Name** fields. If you are pulling data for any records prior to December 6th, you will need to include both the legacy fields (**Is Student** and **School Name (Legacy)**) and the new fields (**School Student or Staff?** and **Institution Name**) to see full information.

Updates to Digital Outreach

Updates to Turning On Digital Monitoring (Daily Assessments)

1. The field that turns on daily text or email outreach with assessment links, which was formerly labeled **Begin Monitoring?**, is now labeled **Enable Digital Monitoring.** This change was made for clarification purposes, and the functionality of this field has not changed.
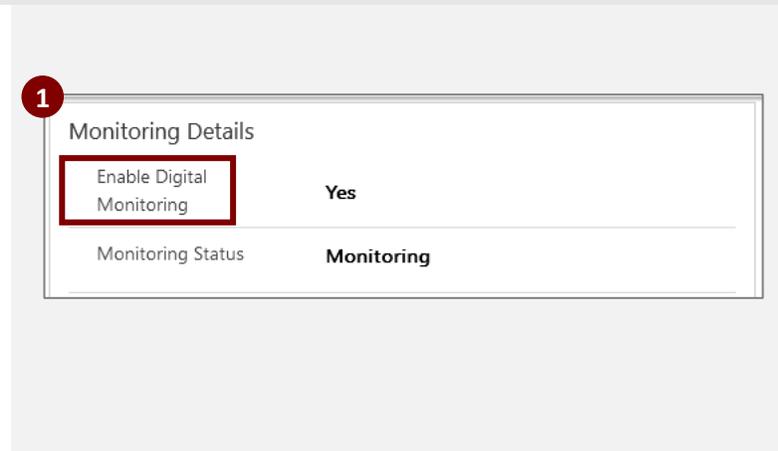
2. To send daily monitoring assessments, **Preferred Method of Contact** must be set to "Text Message" or "Email." If you attempt to set **Enable Digital Monitoring** to "Yes" while **Preferred Method of Contact** is set to "Phone Call," a lightbulb will now appear to remind you that you should update **Preferred Method of Contact.** Clicking "Apply" will update this to "Text Message."

3. If you set **Preferred Method of Contact** to "Email" or "Text Message" but do not turn on **Enable Digital Monitoring**, daily monitoring assessments will not be sent. If you attempt to set **Preferred Method of Contact** to "Text Message" or "Email" while **Enable Digital Monitoring** is set to "No," a lightbulb will now appear to suggest you turn it on. Clicking "Apply" will update **Enable Digital Monitoring** to "Yes."

②

Monitoring Details

Enable Digital Monitoring   **Yes**

Recommendation   **Enable Digital Monitoring**
Preferred method of contact must be text or email to enable digital monitoring. Press "Apply" to change the preferred method of contact to text message.

[Apply]

③

Email   *   testingforarias@gmail.com
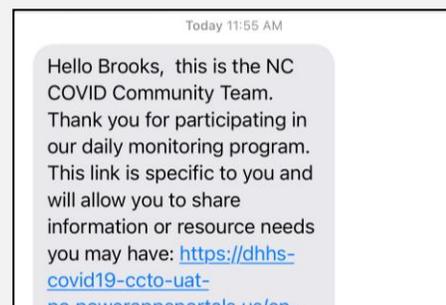
Preferred Method of Contact   *   **Email**

Recommendation   **Send assessment**
Change "Enable Digital Monitoring" to Yes in order to send assessment by text or email

[Apply]

Updates to Daily Assessment Outreach from CCTO

Text and email outreach for daily assessment links has been revised to include a sentence thanking individuals for participating in our daily monitoring program. See the [Digital Outreach Samples](#) job aid for full details.

Today 11:55 AM

Hello Brooks, this is the NC COVID Community Team. Thank you for participating in our daily monitoring program. This link is specific to you and will allow you to share information or resource needs you may have: https://dhhs-covid19-ccto-uat-no.powerappsportals.us/en-

Updates to Contact and Case Portal Time Zones

The dates for testing, quarantine, isolation, and contagious periods that are displayed on the contact and case portals (as applicable) will now always be based on Eastern Standard Time rather than the time zone of the individual accessing the portal.

You should get tested on or after:

11/27/2021

Misc. Updates & Bug Fixes

1. Contact MEs that have a notification marked "delivered" but are incorrectly closed with the "Never Reached" FMO will now automatically be corrected to an FMO of "Notification - No Response" via a system flow that will run nightly. This change is also being applied to previously closed MEs.

2. A bug that prevented the **Vaccine Communication Preference** field from flowing properly up to person records has been resolved.

3. **Calculated Age** (the age of an individual as of their last ME) has been removed from person records. The calculated age field within MEs has also been renamed to **Calculated Age at Time of Event.**

1

Most Recent Text Notification Status | delivered

Most Recent Notification Status Date | 11/23/2021 | 8:22 AM

Final Monitoring Outcome | Notification - No Response

2

Vaccine Communication Preference | Would like future calls and texts about vac

3

Calculated Age at time of event | 20

Continued Data Cleaning with Person Functionality

Thank you for your continued patience and cooperation as we work to integrate all the records in the production system into the new person functionality! The following updates have been made as of this sprint:

- The person record field for **Count of Monitoring Events** should now properly calculate the number of MEs associated with a particular person.

- A bug that prevented members of outside organizations from being able to create new monitoring events from within person records has been resolved.

- *Starting in mid-December, all person records created prior to 11/9 will be deleted and rematched based on the automatic matching logic. All records created on 11/9 or later will remain.*

- **We are still in the process of ensuring that each monitoring event has a person record associated with it;** therefore, please continue to rely on the Monitoring Events Tab (and not the People Tab) for searching needs.

Updates to Case Portal Submissions

Case portal submission records, which document close contact submissions made by case patients through the portal, have been revised to provide greater detail and to assist manual review processes. **Generally, no action is required on the Case Portal Submissions Tab, and you should only complete the manual approval process described below if instructed to do so.**
The information below is most relevant to CCTO Administrators, Data Managers, and anyone who has been instructed to evaluate case portal submissions. See [the job aid](#) for more information.

Updates to Fields for Contact Information

1. Locked fields for contact information as it was submitted by the case patient are now shown in the box labeled *Original Information from Case Portal.*

2. The left side of all case portal submission records now displays a box titled *Updated Info for Monitoring Event Creation*. This box displays the information that has been or will be pulled onto a contact monitoring event (ME) created from this submission. By default, each field will be a copy of the information in the *Original Information* box. *If a case portal submission has already been converted into a contact ME, these fields will all be locked.*

3. If an active submission record has not automatically been turned into a contact ME and requires manual review, you will be able to edit the fields in *Updated Info for Monitoring Event Creation*. (For example, if a case patient has accidentally submitted a future last date of exposure, this can be corrected here before the ME is created.)

4. If **Create Monitoring Event** is turned on to create a contact ME from this submission manually, the fields within *Updated Info* will override the fields in *Original Information* to appear on the new contact ME*.*

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Updates to Fields for Source Case Information

1. Information about the case patient who submitted this contact has now been pulled into a separate box called **Source Case**, which now includes fields for **NC COVID Diagnosis Date, Reported No Symptoms,** and **Symptom Onset Date.**

2. **Symptom Onset Date** will indicate the date of symptom onset reported by the case patient who submitted this contact. **Reported No Symptoms** will read "Yes" if the case patient did not provide a symptom onset date and instead selected "I have not had any COVID-19 symptoms" in the portal. *These fields are also visible and automatically updated within the **Monitoring Details** box of case patient monitoring events.*