

CCTO Sprint 5 Update

COVID-19 Community Team Outreach

See below for an overview of the changes being rolled out in the Tool for Sprint 5:

Updated Household Functionality

Households are now a separate entity within CCTO, and a separate tab has been created for them. To create a new household, you should now begin on the Households Tab on the left side of the screen. All existing households and household members have been preserved, but the process to add existing contacts to a household has changed, and you must visit the contact's profile to do this (see next page). Remember that it is always best to create a new household first before creating its member contacts.

Updates to Creating a New Household

1. To create a new household, begin on the Households Tab and select "New." You can then use the established processes you have already learned to populate information as usual, with a few improvements per user feedback:
2. "Last Name" is now "Household Name" to help provide clarity in naming your household.
3. A "Primary Contact" and "Primary Language" can now be identified in the household profile to help streamline your outreach.
4. All information on the household profile will now auto-populate to the profiles of new members created within a household. You should only use the household profile for information that is applicable to the whole household, but you can always edit this information for household members later.
5. Reassigning a household will now reassign all household members. Reassigning individual members will not reassign the household.

Household Name	Mobile Phone	City
Banks Family	1-111-222-3333	Duck
Brady Family	1-111-222-3333	Duck
House Trial Household	---	---
Pelekai Family	1-444-999-8888	Duck
Testing	1-555-444-3333	Duck
Weasley Family	---	Duck

1 New

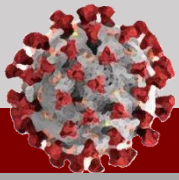
2 Household Name: Peanuts Family

3 Primary Contact: --- Preferred Language: English

4 Source Case Info: NC-COVID Event ID of Source Patient #1: 101333555

5 Assign

- 1 New Household
- 2 "Household Name"
- 3 Primary Contact & Language
- 4 "Source Case Info"
- 5 Reassign Household



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Contact Profile Updates: Basic Info/Households

- Existing contacts can now **only be added to or removed from a household by all users** from the unlocked "Household" field on contact profiles.
- "Household Relationship"** now supports several new options to help you identify specific relationships.
- A **toggle for "Requires Proxy"** has also been added for contacts who will not complete their own assessments. **This can be used for all contacts, including those who are not members of a household.**

- 1 Add/Remove Household Link
- 2 Household Relationships
- 3 "Requires Proxy"

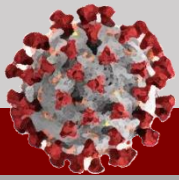
Contact Profile Updates: Source Case Information

- Details about source patient exposure have now been pulled out of "Personal Info" and into **"Source Case Information."**
- NC-EDSS Event ID is now "NC-COVID Event ID"** for consistency across the program.
- A **toggle for "Ongoing Exposure?"** has been added under "Last Date of Exposure to Source Patient #1." The primary purpose of this toggle is to allow case investigators to alert contact tracers to ongoing exposures when contacts are entered.

- 1 "Source Case Information"
- 2 "NC-COVID Event ID"
- 3 "Ongoing Exposure?"

The screenshot shows the contact profile for Charlie Brown. The 'Basic Info' section includes fields for C#, First Name (Charlie), and Last Name (Brown). A red box labeled '1' highlights the 'Household' field, which is set to 'Peanuts Family'. A dropdown menu for 'Household Relationship' is open, with 'Child under 13' selected, highlighted by a red box labeled '2'. Below this, the 'Requires Proxy' toggle is shown in the 'On' position, highlighted by a red box labeled '3'. A note on the right states: 'NOTE: You can now only add or remove an existing contact from a household from that contact's profile. The "Household Members" screen should still be used to create new contacts.'

The screenshot shows the 'Source Case Information' section. A red box labeled '1' highlights the section header. A red box labeled '2' highlights the 'NC-COVID Event ID of Source Patient #1' field, which contains the value '101333888'. A red box labeled '3' highlights the 'Ongoing Exposure' toggle, which is currently turned 'On' (Yes).



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Contact Profile Updates: *Demographic Info*

1. A toggle for **"Is Student"** has been added to contact profiles.
2. Selecting **"Yes"** on **"Is Student"** will produce a field for **"School Name"** where you can input this information. School information should no longer be entered in the **"Employer"** or **"Job Title"** fields.
3. **"Calculated Age"** (formerly **"Current Age"**) remains a calculated field based on Date of Birth, but **"Manual Age"** has become an unlocked field for your use if a contact does not disclose a full date of birth.

1

"Is Student"

2

"School Name"

3

Manual Age (if no DOB)

Demographic Info	
Is Student	<input checked="" type="checkbox"/> Yes
School Name	Peanuts University
Is Minor	<input type="checkbox"/> No
Calculated Age	20
Manual Age (if DOB is not available)	---
Gender	+ Male
Race	+ White
Ethnicity	+ Not Hispanic or Latino

Contact Profile Updates: *Monitoring Details & Testing Details*

1. **"Details"** has now been split into **"Monitoring Details"** and **"Testing Details"** for efficiency and clarity.
2. **"Monitoring Status"** may now be selected to **"Monitoring Paused"** for contacts whose monitoring is on hold. Selecting this option and changing **"Begin Monitoring?"** to **"No"** will stop automatic digital outreach via text or email.

1

Monitoring/Testing Details

2

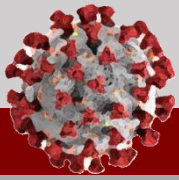
"Monitoring Paused"

Monitoring Details	
Begin Monitoring?	Yes
Monitoring Status	Monitoring Paused
Monitoring End Date	9/5/2020
Monitoring Age	15
Begin Monitoring Date	8/18/2020
Last Assessment Date	---
Final Monitoring Outcome	

1

2

Testing Details	
Referred to Test?	Yes
Referred to Test Date	7/23/2020
Tested?	Yes
Test Date	7/25/2020



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See below for an overview of the changes being rolled out in the Tool for Sprint 5:

First Outreach Date and Method

“System First Outreach Date” and “System First Outreach Method,” which record the date/time and type of your first Timeline/Activities outreach to a contact, are now automatically logged by the system in locked fields. These are visible within the System Information tab on a contact profile. **No action is required on your part.**

Fields for **“Manual First Outreach Date”** and **“Manual First Outreach Method”** are also available. If you are part of an organization that needs to manually backdate phone calls, you can use these fields to log your first outreach information; however, the **“System First Outreach”** fields will always be logged automatically. **If you are not part of one of these organizations, you should not use these manual fields.**

Local Health District Information	
County (Text)	Dare
Region	9
Local Health Department	Dare
State/Province	NC

System First Outreach Date	5/2/2020	12:00 AM
System First Outreach Method	Email	
Manual First Outreach Date	---	---
Manual First Outreach Method	---	

Updated Contacts Views

System views for contacts have been updated to include **System and Manual First Outreach Date** columns. You can filter these columns by **“Does Not Contain Data”** to see all high-priority contacts who have not yet received any outreach.

System views for contacts have also been updated to include columns for **“Is Student”** and **“School Name”** for your reference.

Name (Ow...)	C#	Full Name	NC-COVID ...	Gender	Ethnicity	System First Outreach Date	Manual ...
NC DHHS_...	C-0000035...	William Penn	---	---	---	---	---
NC DHHS_...	C-0000033...	Will Smith	---	---	---	---	---

Last Name	First Name	Household	Household ...	Mobile Phone	Monitoring...	Preferred la...	Preferred ...	Is Minor	Is Stud...	School Na...
Brady	Jan	Brady Family	Brady Family	1-111-222-3333	Monitorin...	English	Email	Yes	Yes	Fillmore Ju...
Brown	Charlie	Peanuts Family	---	1-222-555-6767	Monitorin...	English	Email	No	Yes	Peanuts U...
Glass	George	---	---	1-444-333-5555	---	---	Phone Call	Yes	Yes	Westdale ...

Functionality in Progress: Phone Call Type

Phone call **“Type”** can now be selected to **“Initial,” “Second,” “Third,”** or **“Daily Monitoring”** from the quick create screen. **This feature is still being developed, and further updates and training will be released when it is fully operational.**

Quick Create: Phone Call

Owner: Mary Moran

Subject: 9/3 Initial Outreach

Call From: Mary Moran

Call To: Andy Andrews

Direction: Outgoing

DESCRIPTION

Phone Number: 1112223333

Type: Initial

Description: ---

Duration: ---

Due: ---

Priority: Normal

Regarding: Andy Andrews

Save and Close Cancel