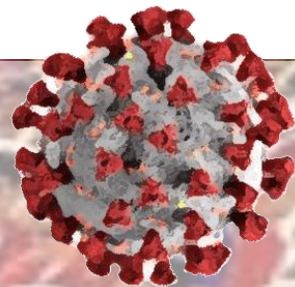


COVID-19 Community Team Outreach (CCTO) Tool

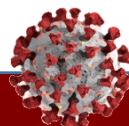
REPORTING TRAINING FOR CCTO ADMINISTRATORS



Learning Objectives

At the end of this module, learners will be able to:

- Understand the production dashboard and how to manipulate it
- Understand, create, and export “Views”
 - Create new personal views from scratch
 - Use the “Saved View” functionality to create personal views
 - Use the “Show Chart” functionality
 - Export views to Excel



Modules Covered in this Training

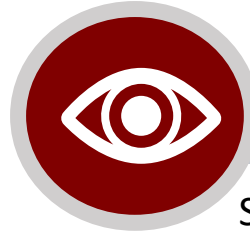


Production Dashboard

Basic overview of the production dashboard.

Key Learning:

- ✓ Understanding the production dashboard



Creating a View

Steps to create, save, and access a new personal view.

Key Learning:

- ✓ Understanding views
- ✓ Creating a new personal view
- ✓ Understanding inaccessible options
- ✓ Adding and editing columns
- ✓ Saving a new personal view
- ✓ Accessing a saved personal view
- ✓ Sharing a saved personal view



Building on a Saved View

Building on a saved view to develop a new personal view.

Key Learning:

- ✓ Using a saved view
- ✓ Adding filters
- ✓ Adding and editing columns
- ✓ Saving a new personal view
- ✓ Accessing a new personal view
- ✓ Using “Show Chart”

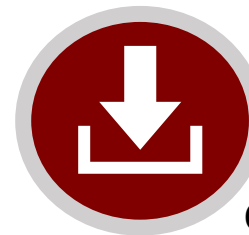


Exporting a Contacts View

Exporting a Contacts-based view to Excel.

Key Learning:

- ✓ Exporting a view to Excel from the Contacts Tab
- ✓ Exporting filtered data to Excel from the Contacts Tab
- ✓ Reviewing for data quality by exporting to Excel

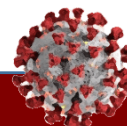


Exporting an Activities View

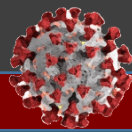
Creating a new view for “Activities” and exporting from “Create View.”

Key Learning:

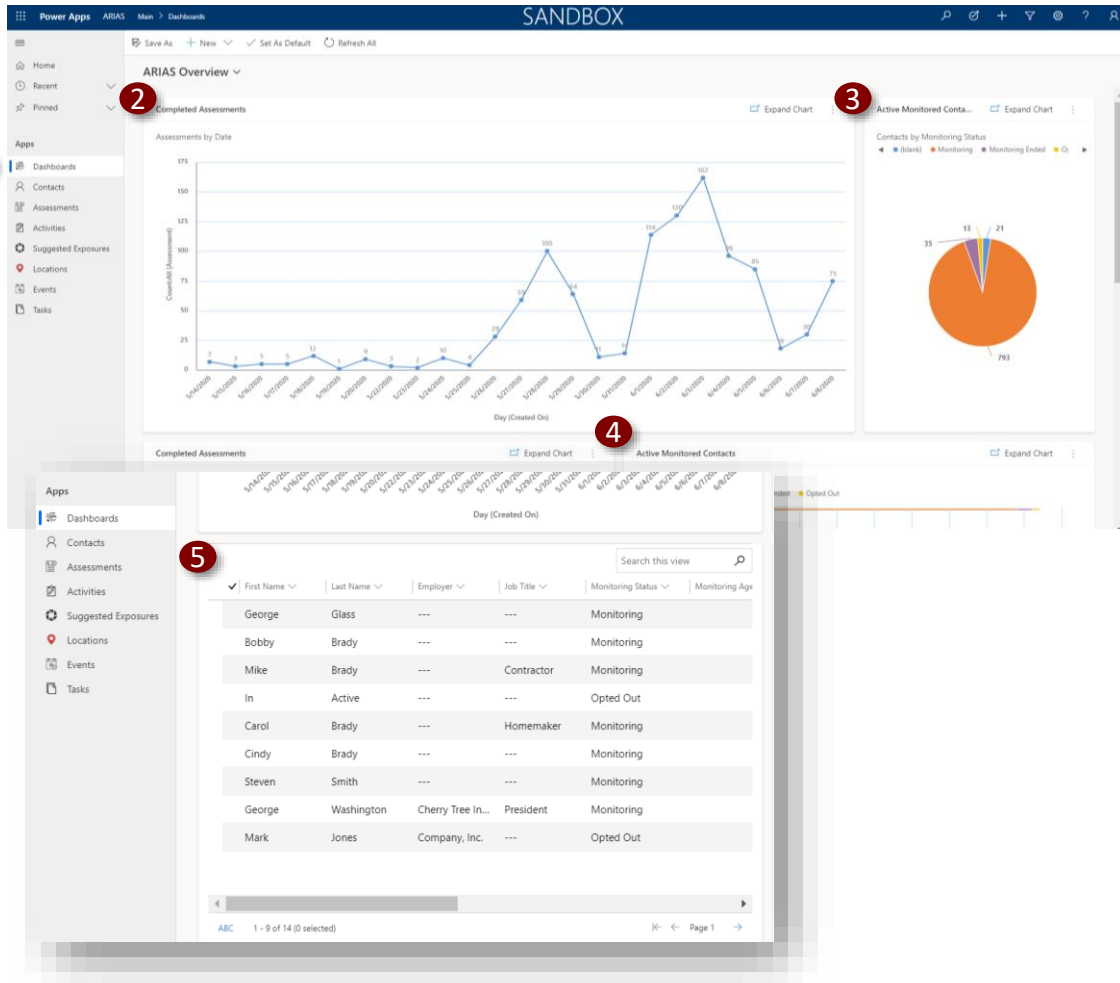
- ✓ Creating a view using “Activities”
- ✓ Adding columns from other record types
- ✓ Exporting a view from the “Create View” screen



Production Dashboard Walkthrough



Understanding the Production Dashboard



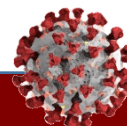
1. When you log into the CCTO Tool, you will land on the Dashboard Page.
2. This page generates visuals for created contacts and completed assessments.
3. This can help you to keep track of statewide trends, for example, a change in active monitored contacts compared with a change in completed assessments for the state.
4. Currently, the dashboard shows all assessments in the system across all counties. In a future release, we are hoping to filter by LHD.
5. At the bottom of the dashboard, you will always see a condensed pull of your “My Active Contacts” view.

Tasks

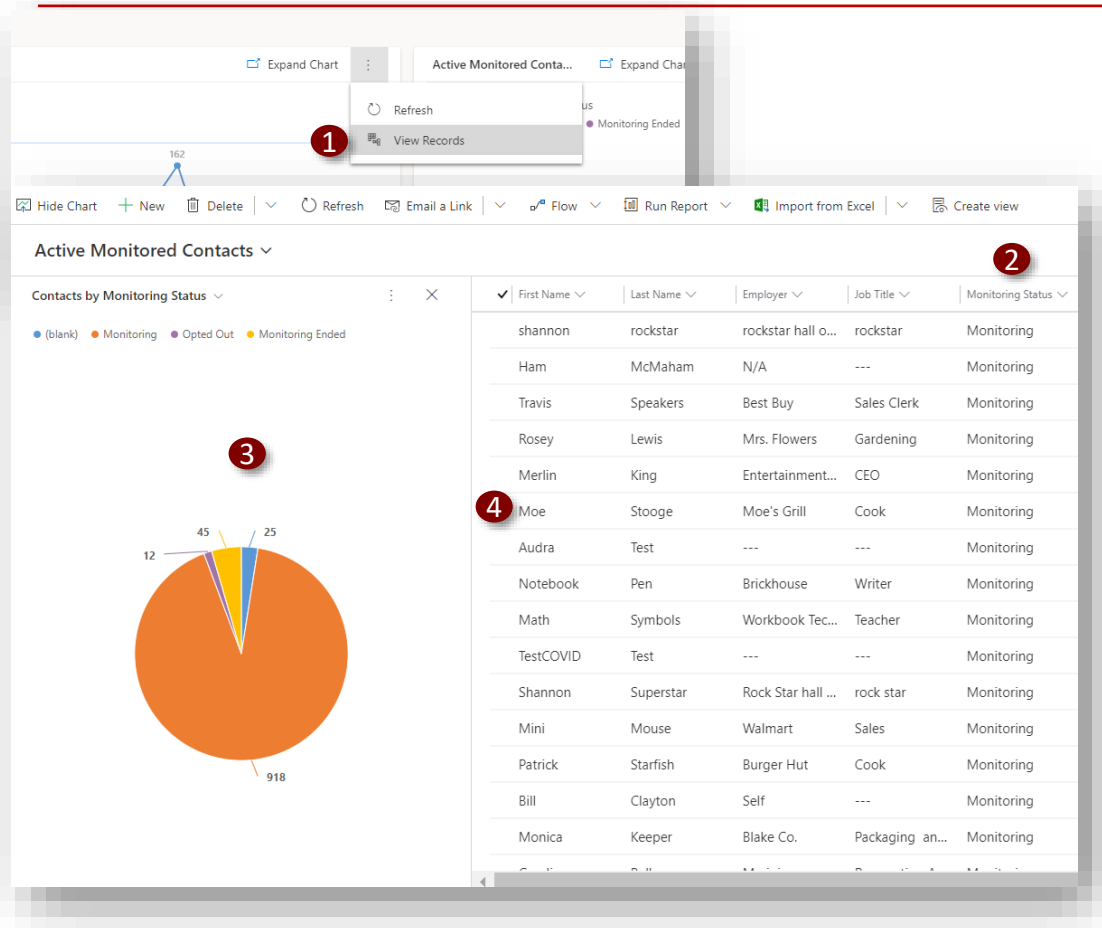
Overview of the production dashboard.

Key Learnings

- ▶ Understanding the production dashboard



Understanding the Production Dashboard



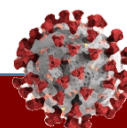
1. To drill into any of this data, you can press the ellipsis/three dots and then click “View Records” to see what parameters are being pulled in.
2. In this instance, for the chart titled “Active Monitored Contacts,” we can see that all contacts with any option toggled in “Monitoring Status” have been included.
3. We will also see a condensed version of the chart we originally clicked on.
4. As always, we can drill into any of these contacts by clicking on their name.

Tasks

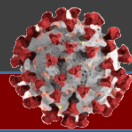
Overview of the production dashboard.

Key Learnings

- ▶ Understanding the production dashboard



Creating a View Walkthrough



Understanding views

Creating a new personal view

Understanding inaccessible options


Adding and editing columns

Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view

The screenshot shows the Contact Tracer interface. On the left sidebar, the 'Contacts' tab is selected, indicated by a red circle with the number 1. The main content area displays the 'Active Contacts' view, with a dropdown menu open. The dropdown menu lists various views, including 'My Views' (circled in red with a red circle containing the number 2) and 'System Views' (circled in red with a red circle containing the number 3). The 'Create view' button is visible in the bottom right corner, indicated by a red circle with the number 4.

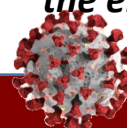
1. Visit the contacts tab at the left-hand side of the screen.
2. We can see that the “Active Contacts” view is displayed, and if we click the dropdown, we see all the other views available to us. Each view changes the columns displayed or filters the data to show information customized to that view.
3. Note that “System Views” are automatically available to all users, and “My Views” are personal views created by you. **Please note that currently, you should not attempt to create or save a system view.** Until an update is released, please only use personal views and filters to restrict contacts to your LHD.
4. Let’s create a new personal view that uses columns we choose to display some demographic information about all the contacts in the system. Click “Create View” in the upper-right corner of the screen. **Note: depending on the size of your monitor, you may need to click the ellipsis () to see this button.**

Tasks

Create a new personal view.

Key Learnings

- ▶ Understanding views



Understanding views

Creating a new personal view

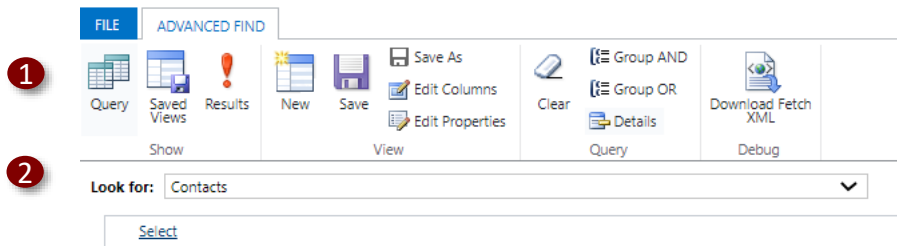
Understanding inaccessible options

Adding and editing columns

Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view



1. This produces a new screen where you are able to enter the filters and columns that you would like to utilize in your new view.
2. “Look for” will automatically populate with the name of the tab that you were on when you clicked “Create A View,” so it may say Contacts, Activities, or Assessments. In this case, it says “Contacts.”

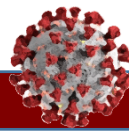
Note: there are other options in the “Look For” dropdown, as well as in other dropdowns throughout Create A View, that are not supported by the system. These include, for example, “Business Units” or “Currencies.” If you select one of these options, your report will not generate correctly. Always double-check your selections. We are planning to clean these in future so useable choices are listed first.

Tasks

Create a new personal view.

Key Learnings

- ▶ Creating a new personal view
- ▶ Understanding inaccessible options



Understanding views

Creating a new personal view

Understanding inaccessible options

Adding and editing columns

Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view

1 Look for: Contacts

2 Edit Columns

3 Remove

4 Business Phone

Edit Columns
Edit columns for the saved view. These columns represent the data that will be displayed in the view.

Full Name ▲ Business Phone

Common Tasks

- Custom Controls
- Configure Sorting
- Add Columns
- Change Properties
- Remove

View results are displayed here.

Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.

OK Cancel

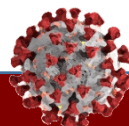
1. In this case, we want to create a view that will show us information about all Contacts, so we will leave the “Look For” dropdown as is.
2. To customize what column headers we would like to pull into the view, we can click the “Edit Columns” button.
3. This produces the Edit Columns screen. In this case, we see “Business Phone” has automatically populated. Because this isn’t a column we need to pull in for this desired view, we can remove this column by clicking the column to highlight it and clicking “Remove.”
4. To add different columns, click “Add Columns.”

Tasks

Create a new personal view.

Key Learnings

- ▶ Creating a new personal view
- ▶ Adding and editing columns



Understanding views

Creating a new personal view

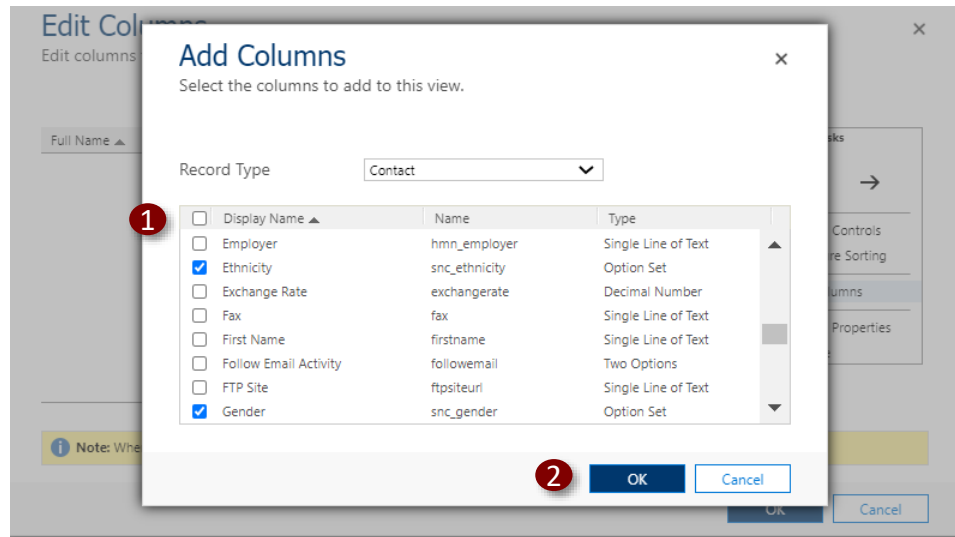
Understanding inaccessible options

Adding and editing columns

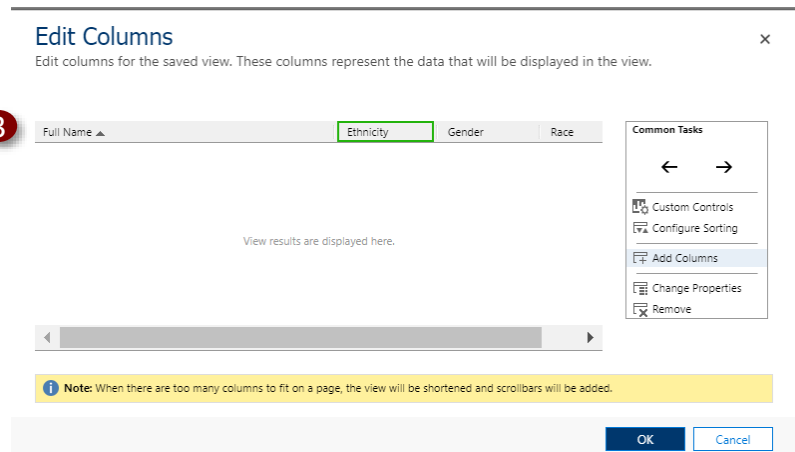
Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view



1. For this example, we will use the checkmarks to select the headers for ethnicity, gender, and race. You may use Control + F or Command + F to search, and you may select as many or as few column headers as you like. **Note: In this case, there are two options for gender. Select the first one. As we noted previously, there are many other options in this list that are also not supported by the system. In this case, you may still click them, but the values will not populate.**
2. Click “OK” when you are finished.
3. Here, we can see that the new column headers have appeared. Scroll through to double-check that you did not miss anything.
4. Click “OK” again to save your work and exit the screen.

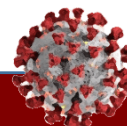


Tasks

Create a new personal view.

Key Learnings

- ▶ Creating a new personal view
- ▶ Adding and editing columns



Contact Tracer | Create a View Walkthrough

Understanding views

Creating a new personal view

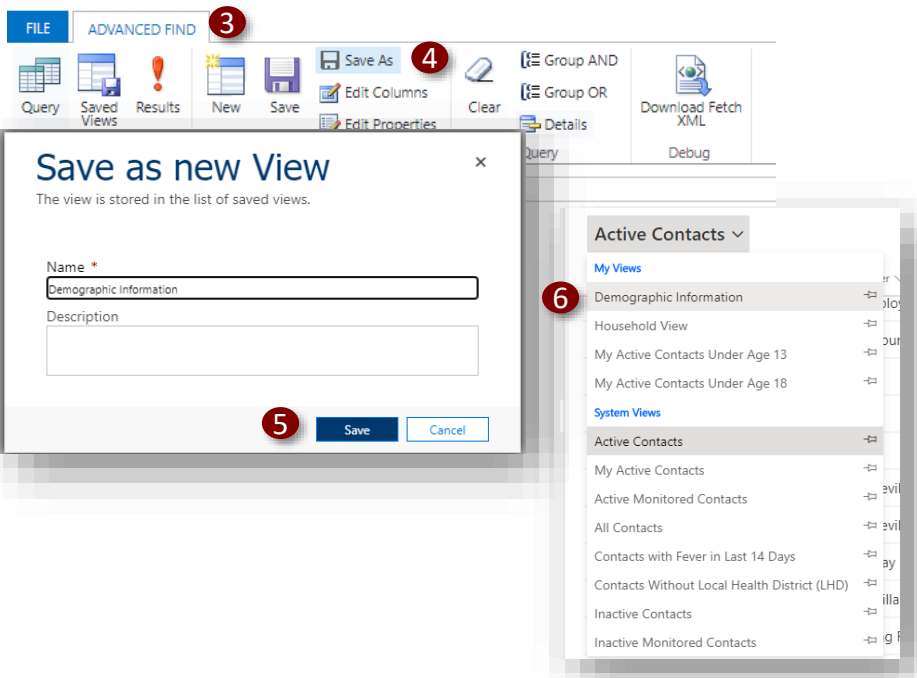
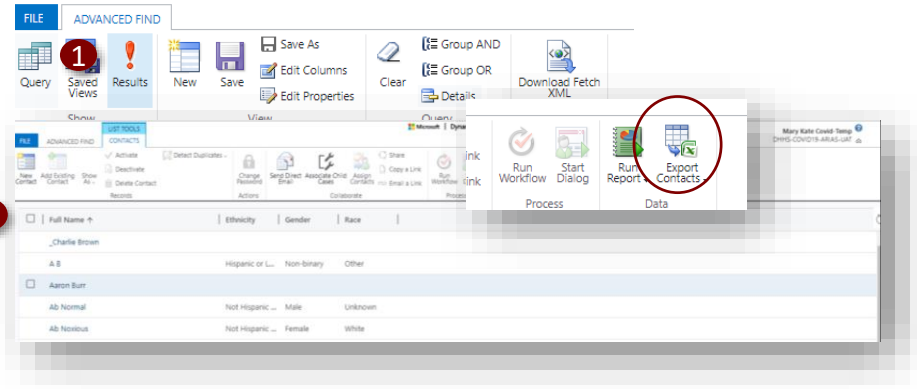
Understanding inaccessible options

Adding and editing columns

Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view



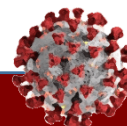
1. Click “Results” to preview the results of your view.
2. A full list of all contacts (that have been entered into the system) populate with information for ethnicity, gender, and race.
3. If this is a view we would like to access in the future, we can save it by clicking back to the “Advanced Find” tab. **Note also that there is an “Export” button to export to Excel directly from the “Results” screen without saving your view. We will review this option later.**
4. Click “Save As.”
5. Name your view, click “Save,” and close the window.
6. This view will now appear in the “Contacts” tab under “My Views” when you click “Active Contacts.” You can select this view by clicking on it.

Tasks

Create a new personal view.

Key Learnings

- ▶ Creating a new personal view
- ▶ Saving a new personal view
- ▶ Accessing a saved personal view



Contact Tracer | Create a View Walkthrough

Understanding views

Creating a new personal view

Understanding inaccessible options

Adding and editing columns

Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view

1. Clicking 'Create view' button.

2. Clicking 'Saved Views' button.

3. Clicking 'Share' button.

4. Clicking 'Add User/Team' button.

5. Selecting 'Julia Accorsini' user.

6. Clicking 'Add' button.

Name	Owner	Last Modified...
Demographic Information	Mary Kate Co...	6/8/2020 5:1...
Household View	Mary Kate Co...	6/4/2020 12:...
My Active Contacts Under Age 13	Mary Kate Co...	6/5/2020 3:1...
My Active Contacts Under Age 18	Mary Kate Co...	6/4/2020 8:1...
<input checked="" type="checkbox"/> Testing Referrals	Mary Kate Co...	6/9/2020 1:0...

Look Up Records

Enter your search criteria.

Look for: User

Look in: User Lookup View

Search: Julia Accorsini

Full Name	Position
<input checked="" type="checkbox"/> Julia Accorsini	919-8

Selected records:

Julia Accorsini

Buttons: Add, Remove, Cancel

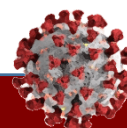
1. After you have saved a view, you are able to share it with any other user. As an example, you may wish to do this to share a view that is pre-filtered on your Local Health Department with other LHD users. **Return to the “Create View” screen by clicking the button in the top right.**
2. Review your saved views by clicking “Saved Views” at the top left.
3. Use the checkmark functionality to select the view(s) you wish to share and click “Share.”
4. Click “Add User/Team”
5. Type the name(s) of the users you wish to receive this view and select them with the checkmark functionality.
6. Click “Select” to move these users into “Selected Records.” Then, click “Add.”

Tasks

Create a new personal view.

Key Learnings

- ▶ Creating a new personal view
- ▶ Sharing a saved personal view



Understanding views

Creating a new personal view

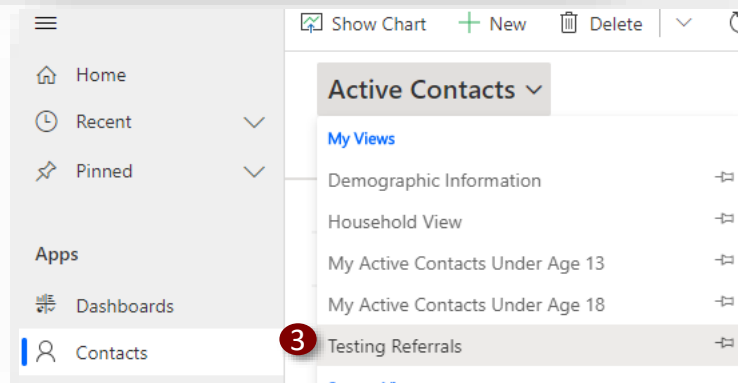
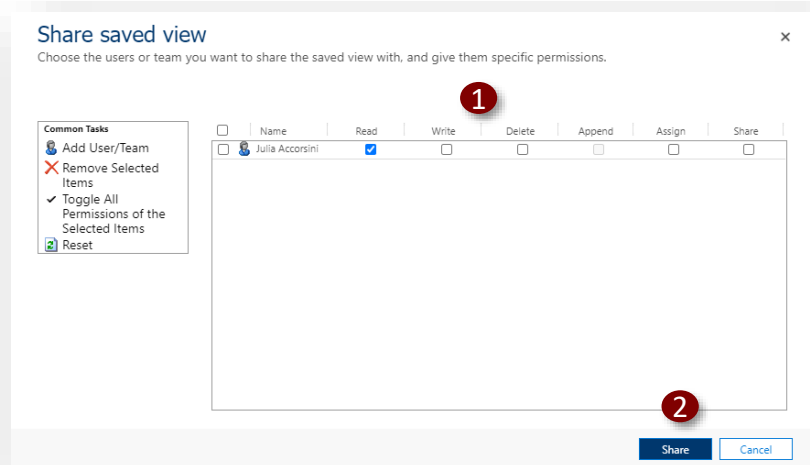
Understanding inaccessible options

Adding and editing columns

Saving a new personal view

Accessing a saved personal view

Sharing a saved personal view



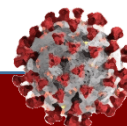
1. “Read” will automatically be selected as a permission for these users. You can choose if you would also like them to be able to write, delete, or assign or share the view to other users by clicking the boxes.
2. Click “Share” when finished.
3. The new view will now appear in the users’ “My Views” section in the appropriate tab.

Tasks

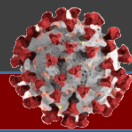
Create a new personal view.

Key Learnings

- ▶ Creating a new personal view
- ▶ Sharing a saved personal view



Building on a Saved View Walkthrough



Using a saved view

Adding filters

Adding and editing columns

Saving a new personal view

Accessing a new personal view

Using "Show Chart"

1. Active Contacts

2. Create view

3. Use Saved View: My Active Contacts

4. Owner: Equals Current User

5. Status: Equals Active

5. Select

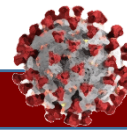
1. For this example, we will start by building on an existing view instead of working from scratch. Click on the title of the view you currently have selected. Remember that the list displays personal views that you have built/customized for yourself, as well as system views. You can use any of these as the foundation for a new personal view. In this example, we will use "My Active Contacts" as a base to create a view that shows which of our contacts are currently under monitoring.
2. Navigate to "Create View" to start the process.
3. In "Use Saved View," select "My Active Contacts." This will update the base of your view to the columns and filters used in "My Active Contacts."
4. Note that "Look For" is selected to "Contacts" and that two filters for "Owner" and "Status" have been applied. Combined, these selections tell the Tool to show only contacts who are active and assigned to you.
5. At any time when creating a new view or when building off of an existing view, you can create additional filters by clicking "Select."

Tasks

Build a new view from an existing view.

Key Learnings

- ▶ Using a saved view





Look for: Use Saved View

Owner [Equals Current User](#)

Status [Equals](#) [Active](#)

1 [Equals](#) 3 [Enter Value: Monitoring Status](#) 4

2

Monitoring Status

Nickname

No. of Children

5 **Select Values** ×

Select the values you want included.

Available Values	Selected Values
Monitoring	
Monitoring Ended	
Opted Out	

>> <<

OK Cancel

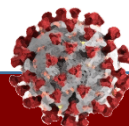
1. When we click “Select,” a dropdown appears with all available filtering options. We will apply an additional filter to narrow our view further and see which of our active contacts are currently under monitoring. **Again, note that not all of these options are supported by the system. You can always review a contact’s profile to see how supported fields are titled within the system.**
2. Scroll down and select “Monitoring Status.”
3. The middle dropdown will automatically populate to “Equals.” We will leave this field as is, as we are going to look for a single particular response.
4. Click “Enter Value: Monitoring Status?”
5. This produces the “Select Values” screen.

Tasks

Build a new view from an existing view.

Key Learnings

- ▶ Using a saved view
- ▶ Adding filters



Contact Tracer | Building on a Saved View Walkthrough

Using a saved view

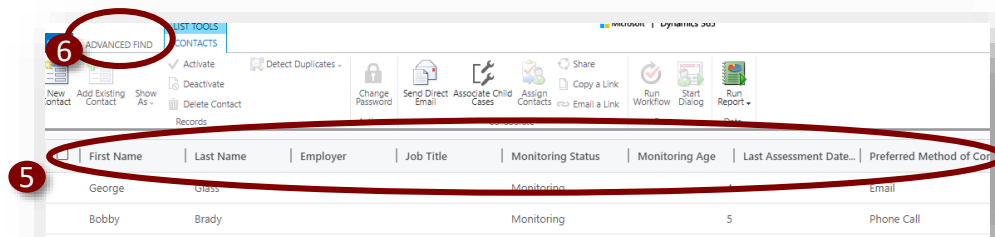
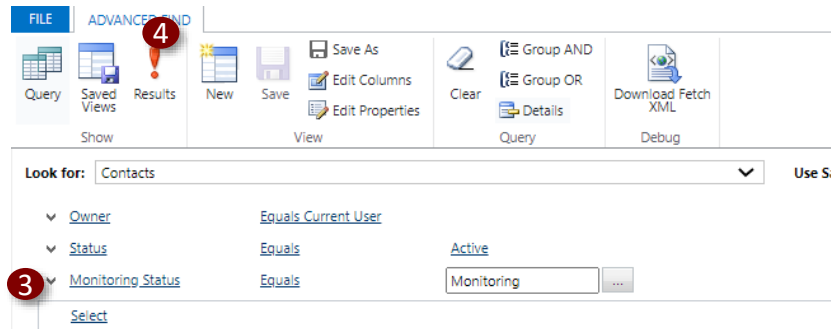
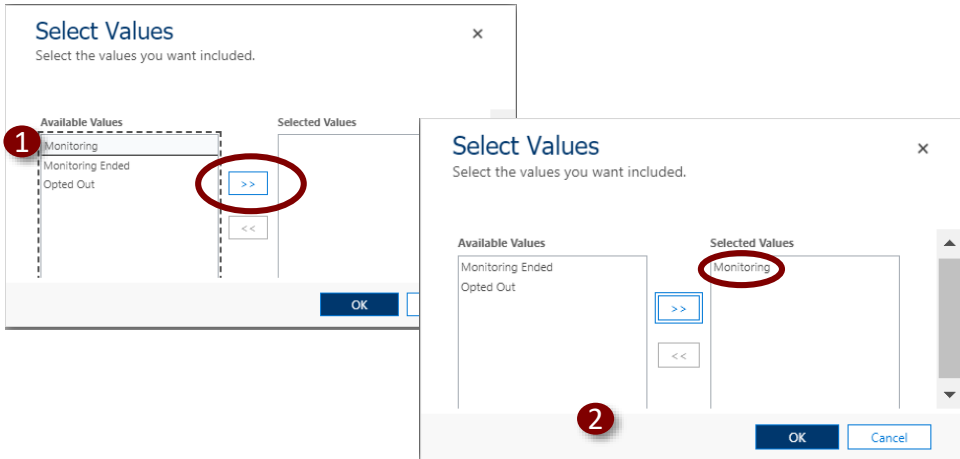
Adding filters

Adding and editing columns

Saving a new personal view

Accessing a new personal view

Using "Show Chart"



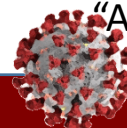
1. Because we are looking for contacts who are under monitoring, select "Monitoring" and use the arrow button to move it from "Available Values" into "Selected Values."
2. Click "OK."
3. Our new filter is now displayed under the existing filters that were already applied from the "My Active Contacts" view.
4. To check the results, click "Results."
5. All the active contacts assigned to the user and under monitoring are now displayed. Note that since we built off of the "My Active Contacts" view, the column headers from the "My Active Contacts" view are displayed.
6. To make our view more useful, we can add new columns that show the date a contact was referred to testing, the date a contact was tested, a contact's test result, and Final Monitoring Outcome. Return to the "Advanced Find" tab.

Tasks

Build a new view from an existing view.

Key Learnings

- ▶ Using a saved view
- ▶ Adding filters



Using a saved view

Adding filters

Adding and editing columns

Saving a new personal view

Accessing a new personal view

Using "Show Chart"

The screenshot shows the 'Edit Columns' dialog box in a software application. The dialog has a title bar 'Edit Columns' and a subtitle 'Edit columns for the saved view. These columns represent the data that will be displayed in the view.' Below the subtitle, there is a table with columns 'First Name', 'Last Name', 'Employer', 'Job Title', and 'Monitorin'. To the right of the table is a 'Common Tasks' panel with a list of actions: 'Custom Controls', 'Configure', 'Add Columns', 'Change Properties', and 'Remove'. The 'Add Columns' option is selected and highlighted with a red circle '2'. Below the table, there is a 'Record Type' dropdown menu set to 'Contact'. A list of columns is shown with checkboxes. The 'Test Date' column is checked and highlighted with a red circle '3'. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red circle '4'.

Display Name	Name	Type
Status Reason	statuscode	Status Reason
Suffix	suffix	Single Line of Text
Telephone 3	telephone3	Single Line of Text
Territory	territorycode	Option Set
<input checked="" type="checkbox"/> Test Date	snc_testdate	Date and Time
Tested?	snc_tested	Option Set
Time Spent by me	timespentbymeonemail...	Single Line of Text
Time Zone	adx_timezone	Whole Number
Two Factor Enabled	adx_identity_twofactor...	Two Options

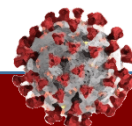
1. We will repeat the same process we used before to edit columns. Select "Edit Columns."
2. Click "Add Columns."
3. Check "COVID-19 PCR Test Result," "Final Monitoring Outcome," "Referred to Test Date," and "Test Date."
Note that Final Monitoring Outcome is a new field that can be updated to specify the circumstances under which a contact concludes monitoring. It allows contact tracers to record the full picture of how a contact's monitoring concluded, for example: partially completed, fully completed, refused, or never reached.
4. Select "OK."

Tasks

Build a new view from an existing view.

Key Learnings

- ▶ Using a saved view
- ▶ Adding and editing columns



Contact Tracer | Building on a Saved View Walkthrough

Using a saved view

Adding filters

Adding and editing columns

Saving a new personal view

Accessing a new personal view

Using "Show Chart"

1. New columns will appear last. Scroll to the right and review that the first new column appears highlighted in green.

2. To move the column to the left of the screen, we can click the left arrow button as many times as needed. Then, you can repeat the process by highlighting the other columns and clicking the left arrow.

3. Click "OK" when finished.

4. To check your work, click "Results" again.

5. Our new columns for test information and monitoring outcome are now visible on the left of our filtered data.

6. Return to the "Advanced Find" tab to save your new view.

7. Click "Save As."

8. Type a new name for your view. **Note that this will not erase or overwrite your My Active Contacts view.**

9. Click "Save" and close the window.

10. As with your previous view, this view is now available by clicking on the bold text in the Contacts Tab and then selecting your view.

First Name	Last Name	Referred to	COVID-19 PC...	Test Date	Final Monitor...	employer
James	Bond		6/12/2020	Negative	6/12/2020	Partially Com... Spy Inc.
George	Glass		6/9/2020			
Bobby	Brady		6/7/2020			

Save as new View
The view is stored in the list of saved views.

Name *
Monitoring/Testing View

Description

Active Contacts

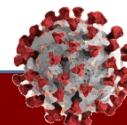
- My Views
- Demographic Information
- Household View
- Monitoring/Testing View
- My Active Contacts Under Age 13
- My Active Contacts Under Age 18
- Testing Referrals
- System Views
- Active Contacts
- My Active Contacts

Tasks

Build a new view from an existing view.

Key Learnings

- ▶ Using a saved view
- ▶ Adding and editing columns
- ▶ Saving a new personal view
- ▶ Accessing a new personal view



Contact Tracer | Building on a Saved View Walkthrough

Using a saved view

Adding filters

Adding and editing columns

Saving a new personal view

Accessing a new personal view

Using “Show Chart”

1 Show Chart + New Delete

Monitoring/Testing View

Monitoring/Testing

Monitoring/Testing View

My Views

- Demographic Information
- Household View
- Monitoring/Testing View
- My Active Contacts Under Age 13
- My Active Contacts Under Age 18
- Testing Referrals
- System Views
- Active Contacts
- My Active Contacts
- Active Monitored Contacts

Active Contacts

County	Count
(Blank)	1
Dare	7
Wake	1

First Name	Last Name	Employer
Wweee	Wuuut	---
Groot	Quill	Marvel Cine
John	Smith	ABC Home
Mickey	Mouse	Walt Disney
Jallyn	Morales	---
James	Wilson	---
Nash	hero	---
Apple	Green	---
Feet	Sang	---
Love	Test	Home make
james a	dean	---
sarah	Dean	---
Super	Mario	---
Ana	Lawrence	Lowes
Timmy	Nook	Animal Cro

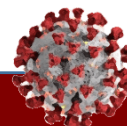
1. As a note, with any view toggled, you can click “Show Chart” in the upper left-hand corner to see a few quick dashboards of the information you have displayed.
2. In this case, we can see which counties are linked to the contacts in this view.
3. Clicking on the title of the chart allows you to select a different chart if you wish.
4. You can also keep the chart open and click on the title of your view at the top of the screen to change the information displayed. Select the “Active Contacts” view.
5. In this case, we can see that these contacts within the test system are split across several counties. **Currently, this functionality is basic, but expect improvements to come with further updates.**

Tasks

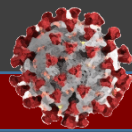
Build a new view from an existing view.

Key Learnings

- ▶ Using a saved view



Exporting a Contacts View Walkthrough



Contact Tracer | Exporting a Contacts View Walkthrough

Exporting a view to Excel from the Contacts Tab

Exporting filtered data to Excel from the Contacts Tab

Reviewing for data quality by exporting to Excel

Power Apps ARIAS Main > Contacts

3 Export to Excel

2 My Active Contacts

First Name	Last Name	Employer	Job Title	Monitoring Status	Monitoring Age	Last Assessment Date	Preferred Method of Contact	Email
Jay	Blue	Green Tree	Flyer	---	---	---	Phone Call	---
Janey	Rabbit	---	---	Monitoring Ended	---	---	Email	janey.rabbit@juno.com
Peter	Rabbit	---	---	---	---	---	Email	---
Happy	Turtle	---	---	Monitoring	---	6/2/2020 2:49 PM	Email	erika.samoff@dhhs.nc.gov
Mike	Jones	---	---	---	---	---	Email	mike@mikejones.com

4 5 My Active Contact...xlsx

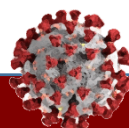
1. When you have selected a view on any tab, you are always able to export it to Excel for analysis and data quality reviews. We will begin on the Contacts Tab.
2. Select the view that you would like to export to Excel. For this example, we will use “My Active Contacts.”
3. Click “Export to Excel.”
4. The file will automatically be downloaded to your computer and will display at the bottom of your screen for most browsers. *If it does not, check your downloads folder.*
5. Double-click the file to open it.

Tasks

Export a created view to Excel.

Key Learnings

- ▶ Export a view to excel from the Contacts Tab



Contact Tracer | Exporting a Contacts View Walkthrough

Exporting a view to Excel from the Contacts Tab

Exporting filtered data to Excel from the Contacts Tab

Reviewing for data quality by exporting to Excel

1

1	First Name	Last Name	Employer	Job Title	Monitoring Status	Monitoring Age	Last Assessment Date	Preferred Method of Contact	Email	
2	Jay	Rabbit	Green Tree	Plyer	Monitoring Ended			Phone Call	janey.rabbit@...	
3	Janey	Rabbit			Monitoring Ended					
4	Peter	Rabbit			Monitoring		6/2/2020 14:40	Email	erika.samo@...	
5	Henry	Turtle			Monitoring				mike@...	
6	Mike	James			Monitoring Ended					
7	Trina	Rabbit			Monitoring			Text Message		
8	Purple	Monkey			Monitoring				erika.samo@...	
9	DONOTEDIT	Charlie	Brown	Peanuts R Us	Good Man	Monitoring	16			
10	Nity	Caribid			Monitoring	20	5/20/2020 17:38	Email	hity@...	
11	DONOTEDIT	Jack	NoResponse	Beantank Climber	Opted Out		6/5/2020 13:21	Email	testing@...	
12	Test	Test			Monitoring Ended		5/29/2020 11:28	Email	test@...	
13	Sally	Testing			Monitoring Ended	20		Phone Call	sally@testing.c...	
14	Ron	Wesley			Monitoring	14	5/28/2020 9:36	Phone Call		
15	DONOTEDIT	Marty	Mindy	Delorian Industries	Time Traveler	Monitoring	20	5/26/2020 11:57	Email	marty@mcty.c...
16	Harry	Potter	The Ministry of Magic	Auror	Monitoring Ended		6/2/2020 8:58	Text Message	harry@ministry...	
17	Hermione	Granger	Ministry of Magic	Witch	Monitoring Ended		5/18/2020 10:58	Email	hermione@...	
18	DONOTEDIT	Spider	Man	The Daily Bugle	Photographer	Monitoring Ended	5/28/2020 7:52	Email	spider@...	

2

Filter by

Equals

Rabbit

Apply

Clear

3

1	First Name	Last Name	Employer	Job Title	Monitoring Status	Monitoring Age	Last Assessment Date	Preferred Method of Contact
2	Janey	Rabbit	---	---	Monitoring Ended	---	---	Email
3	Peter	Rabbit	---	---	---	---	---	Email
4	Erika	Rabbit	---	---	Monitoring Ended	---	---	Text Message

5

1	First Name	Last Name	Employer	Job Title	Monitoring Status	Monitoring Age
2	Janey	Rabbit			Monitoring Ended	
3	Peter	Rabbit				
4	Erika	Rabbit			Monitoring Ended	
5						

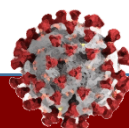
1. Once the downloaded Excel file is open, you are able to sort and filter on the same columns that you used in your view.
2. If you return to your browser, you can also refine what is exported by filtering your data on any of the columns, such as “Last Name.” *In this example, we select the dropdown arrow next to last name, click “Filter by,” and type “Rabbit.”*
3. *This narrows our data to only those with this last name.*
4. Click “Export to Excel” again.
5. The new file downloaded to your computer will only contain the filtered data. **Please note: this method is *not* recommended for checking the quality of data, as it will not permit you to catch misspellings. In our next example, we will review how to check for typos.**

Tasks

Export a created view to Excel.

Key Learnings

- ▶ Export filtered data from the Contacts Tab



Exporting a view to Excel from the Contacts Tab

Exporting filtered data to Excel from the Contacts Tab

Reviewing for data quality by exporting to Excel

1. Create view

2. Look for: Contacts

3. Select

4. Edit Columns

5. Remove

6. Add Columns

Business Phone

Full Name

Common Tasks

Custom Controls

Configure Sorting

Add Columns

Change Properties

Remove

View results are displayed here.

Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.

OK Cancel

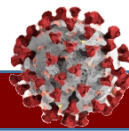
1. Next, let's run a check on monitoring data quality for our Local Health Department by exporting to Excel. Return to your Contacts Tab in your browser and click "Create View."
2. Verify that "Contacts" is populated in "Look For."
3. To do a data quality check, you should export as many records as possible so that you do not exclude any records based on fields that are missing or that have been entered incorrectly. Therefore, we don't want to add any additional filters on this data. We will filter it later in Excel.
4. To add columns for the information we want to see, click "Edit Columns."
5. Highlight "Business Phone" and click "Remove."
6. Click "Add Columns."

Tasks

Export a created view to Excel.

Key Learnings

- ▶ Review for data quality by exporting to Excel



Exporting a view to Excel from the
Contacts Tab

Exporting filtered data to Excel from
the Contacts Tab

Reviewing for data quality by
exporting to Excel

The screenshot shows the Dynamics 365 interface. At the top, a search bar contains 'last assessment date' with a '2/2' indicator. Below it, the 'Add Columns' dialog box is open, showing a list of columns for the 'Contact' record type. The 'Last Assessment Date' column is selected with a checkmark. Below the dialog, the 'Edit Columns' view is shown, with the 'Last Date of Ex...' column highlighted in green. A red circle with the number '3' is placed over the highlighted column. At the bottom of the 'Edit Columns' view, there is a yellow note: 'Note: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.' A red circle with the number '4' is placed over the 'OK' button at the bottom right of the 'Edit Columns' view.

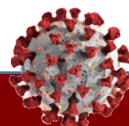
1. As a reminder, you can use CTRL+F or COMMAND+F on your keyboard to search within this list. After your search appears, you can type the name of the value you're looking for to find it.
2. Click the checkmarks to add:
 - **Both** "NC EDSS Event ID" values
 - **Both** "Last Date of Exposure" values
 - "Owner"
 - "Monitoring Status"
 - "Last Assessment Date"
 - "County"
 - "Local Health Department"**and click "OK."**
3. Use the highlight and arrows functions to move your columns. In this case, we can move "Last Date of Exposure to Source Patient #1" so that it appears first, next to the "Last Date of Exposure to Source Patient #2" value.
4. Click "OK" to finish.

Tasks

Export a created view to Excel.

Key Learnings

- ▶ Review for data quality by exporting to Excel



Contact Tracer | Exporting a Contacts View Walkthrough

Exporting a view to Excel from the Contacts Tab

Exporting filtered data to Excel from the Contacts Tab

Reviewing for data quality by exporting to Excel

Full Name	Last Date of E...	Last Date of E...	NC EDSS Eve...	NC EDSS Eve...	Last Assessm...	Monitoring ST...	Owner	County	Local Health ...
_Charlie Brown	5/16/2020		12345678		5/24/2020 10...	Monitoring	Christopher K...	NC Default L...	
A B						Monitoring	Meg Sullivan	NC Default L...	
Aaron Burr							ruth berry	NC Default L...	
Ab Normal	5/31/2020		45855896589			Monitoring	Tammy Dellin	NC Default L...	
Ab Noxious	5/27/2020		43585489			Monitoring	MamieElean...	Mecklenburg	Mecklenburg
Abby Smith	5/31/2020					Monitoring	Addison Martin	NC Default L...	
Abed Nadir						Monitoring	ruth berry	NC Default L...	
			78458745			Monitoring	GENEVA WILL...	Mecklenburg	Mecklenburg
			64757464				Arlene Pietrzyk	NC Default L...	
			2345						

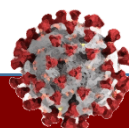
1. Click the “Results” button.
2. All the columns we have indicated are now populated for every contact in the system. Notice that “Local Health Department” populates based on “County,” a free text field, so if someone types a county incorrectly or leaves it blank, their LHD will not populate. **We understand that all of us are working as quickly as we can, and small errors like this may happen – that’s okay!** In the future, we will make “County” a drop-down field.
3. For a closer look, let’s pull this into Excel by clicking “Export Contacts” and selecting “Static Worksheet.”
4. Open the new worksheet.
5. Click the “County” dropdown arrow and start typing to filter by your county. In this example, we can use Durham. Notice that Durham has been input two different ways, as “Durham” and “Durham County.”

Tasks

Export a created view to Excel.

Key Learnings

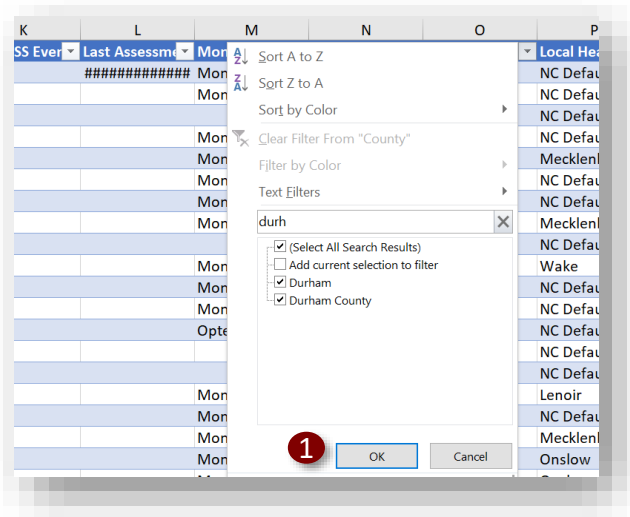
- ▶ Review for data quality by exporting to Excel
- ▶ Exporting a view from the “Create View” screen



Exporting a view to Excel from the Contacts Tab

Exporting filtered data to Excel from the Contacts Tab

Reviewing for data quality by exporting to Excel



1. If we filter on all of these spellings by clicking “OK,” we will see that “Local Health Department” is only populated for the entries that don’t include the word “County.”
2. In this case, even though the system doesn’t recognize the “Durham County” entries as attached to Durham LHD, we would want to include them in our review. **This is an example of a data quality concern that is easiest to check with Excel, as filtering by column allows you to see quickly if similar but non-equivalent values have been used.**

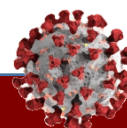
Tasks

Export a created view to Excel.

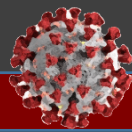
Key Learnings

- ▶ Review for data quality by exporting to Excel

County	Local Health Department
Durham County	NC Default LHD
Durham	Durham
Durham	Durham
Durham	Durham
Durham	Durham
Durham	Durham
Durham	Durham



Exporting an Activities View Walkthrough



Creating a view using “Activities”

Adding columns from other record types

Exporting a view from the “Create View” screen

1. Activities

2. Create View

3. Select

4. Owner

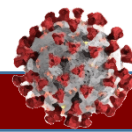
1. We will start by creating a view that will show us the contact and county attached to every activity created by two tracers we choose. When we finish, we'll export directly to Excel from the Results screen. Navigate to the “Activities” tab on the left-hand side of the screen. **As a reminder, you can create a view from any of these tabs, including Assessments and Tasks.**
2. Select “Create View.” Remember that you may have to click the ellipsis depending on the size of your monitor.
3. Notice that “Look For” has now automatically populated to “Activities.” Click “Select” to add a filter for yourself as the first contact tracer.
4. Choose “Owner,” and “Equals Current User” automatically populates.

Tasks

Export a view that shows all activities on each contact from the “Create View” screen.

Key Learnings

- ▶ Creating a view using “Activities”



Creating a view using “Activities”

Adding columns from other record types

Exporting a view from the “Create View” screen

The screenshots illustrate the following steps:

- Step 5: The 'Look for' field is set to 'Activities' and the 'Owner' filter is set to 'Equals Current User'.
- Step 6: A search icon is clicked next to the 'Owner' filter.
- Step 7: The 'Select Row' option is chosen from the dropdown menu.
- Step 8: The 'Group OR' option is selected from the grouping options.
- Step 9: The final view shows the 'Owner' filter set to 'OR'.

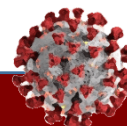
5. Click “Select,” and choose “Owner” again.
6. This time, select “Equals” and type the name of another tracer. If you are unsure, you can click the search icon to search users.
7. Click the arrow next to each row and toggle “Select Row.” They will highlight in blue.
8. Right now, these filters tell the system to look for records jointly owned by these tracers, but we want records owned by the first OR second tracer. To tell the system that results do not have to meet both filters, we can review our grouping options. “AND” will tell the system that records must meet both criteria, and “OR” will tell the system that records can meet any of the criteria. Click “Group OR.”
9. An “OR” appears next to your grouped filters to show that the filter will find records that fit either of the grouped conditions.

Tasks

Export a view that shows all activities on each contact from the “Create View” screen.

Key Learnings

- ▶ Creating a view using “Activities”



Contact Tracer | Exporting an Activities View Walkthrough

Creating a view using “Activities”

Adding columns from other record types

Exporting a view from the “Create View” screen

1. Click “Edit Columns.”

2. Click “Add Columns.”

3. Notice that the dropdown options reflect all the **information that is tagged directly to activities**. For example, a field for “Actual Duration” is included; however, we don’t see a field for “County,” since this is directly tied to a contact and not an activity.

4. For now, we can select “Owner” to add a column that shows us which of the two tracers owns the activity.

5. To add columns that will show information about the **contacts linked to the activities**, we can toggle the “Record Type” dropdown to “Regarding (Contact).”

6. Select “County” and “Full Name” to return columns about the county and full name of the contact related to each activity.

7. Click “OK.”

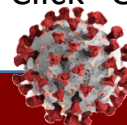
8. Click “OK” again to finish your edits.

Tasks

Export a view that shows all activities on each contact from the “Create View” screen.

Key Learnings

- ▶ Adding columns from other record types



Contact Tracer | Exporting an Activities View Walkthrough

Creating a view using “Activities”

Adding columns from other record types

Exporting a view from the “Create View” screen

The screenshot shows the Dynamics 365 interface. At the top, the 'ADVANCED FIND' ribbon is visible with the 'Results' tab selected. A red circle with the number '1' highlights the 'Results' button. Below the ribbon, a list of activities is displayed. A red circle with the number '2' highlights the 'Export' button in the ribbon. A red circle with the number '3' highlights the 'Export to Excel' button in the ribbon. The list of activities includes columns for Subject, Activity Type, Activity Status, Priority, Last Updated, Owner, County (Rega...), and Full Name (R...).

Subject	Activity Type	Activity Status	Priority	Last Updated	Owner	County (Rega...)	Full Name (R...)
TEST	Task	Open	Normal	5/14/2020 6:31 PM	Andrew Cov...		Andrew Zirk
TEST	Phone Call	Open	Normal	5/14/2020 6:32 PM	Andrew Cov...		Andrew Zirk
Figure out views	Task	Open	Normal	5/17/2020 1:44 PM	Christy Crowley	Wake	Wonder Wo...
Initial Phone Outreach	Phone Call	Open	Normal	5/18/2020 11:29 ...	Bryan Covid-...	Dare	Minnie Mouse
Initial Phone Outreach	Phone Call	Completed	Normal	5/18/2020 1:25 PM	Erika Samoff	Cherokee	Harry Potter
Follow-up on resource needs	Phone Call	Completed	Normal	5/18/2020 1:25 PM	Erika Samoff	Cherokee	Harry Potter
Follow-up Field Visit	Appointment	Completed	Normal	5/18/2020 1:25 PM	Erika Samoff	Cherokee	Harry Potter
Initial Outreach Phone call	Phone Call	Completed	Normal	5/18/2020 1:25 PM	Erika Samoff	Mecklenburg	Hermione Gr...
Resource need phone call	Phone Call	Open	Normal	5/18/2020 1:25 PM	Erika Samoff	Mecklenburg	Hermione Gr...
Initial Outreach	Phone Call	Completed	Normal	5/18/2020 10:39 ...	Erika Samoff		Test Tester
Monitoring Outreach	Phone Call	Open	Normal	5/19/2020 5:26 PM	Erika Samoff		Jane Doe
Initial Outreach	Phone Call	Completed	Normal	5/20/2020 8:49 AM	Erika Samoff		Sally Testing
Initial Outreach	Phone Call	Completed	Normal	5/20/2020 11:06 ...	Erika Samoff		DONOTEDIT...
Initial Outreach	Phone Call	Completed	Normal	5/20/2020 11:06 ...	Erika Samoff		DONOTEDIT...
5/18 Monitoring Needed	Task	Completed	Normal	5/20/2020 4:36 PM	Erika Samoff	Durham	DONOTEDIT...
5/19 Monitoring Needed	Task	Completed	Normal	5/20/2020 4:57 PM	Erika Samoff	Durham	DONOTEDIT...
5/20 Monitoring Needed	Task	Completed	Normal	5/20/2020 4:57 PM	Erika Samoff	Durham	DONOTEDIT...
Initial Phone Outreach	Phone Call	Completed	Normal	5/20/2020 5:22 PM	Erika Samoff		DONOTEDIT...

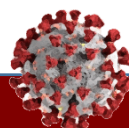
1. Click “Results.”
2. Notice that, in this instance, the system has returned results from records owned by either of the two contact tracers we indicated because of our “OR” grouping.
3. To export this information to Excel and run any needed analysis, click “Export Activities.” This will download the entire data set to your computer with the columns provided.
4. *If you wish, you may also save this view for later use by clicking “Save As” and following the same process we utilized before.*

Tasks

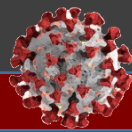
Export a view that shows all activities on each contact from the “Create View” screen.

Key Learnings

- ▶ Exporting a view from the “Create View” screen



Support Resources



Where to go for support

Refer to support materials



FAQs

Job Aids (Found in the [CDM](#))

Process Documentation and Scripts

[Patient Education Tools](#)

Check your email for ongoing CCTO office hours opportunities

Contact your supervisor



Contact your supervisor directly with any additional questions about the **Contact Tracing process**

Call the IT Helpdesk for access support



Talk to your NCID administrator for any questions regarding **NCID and gaining access to your account**

Email for process support



Email Covid19CTSoftwareQuestion@dhhs.nc.gov with **questions about the CCTO Tool**

