

WELCOME! We will start in just a moment.

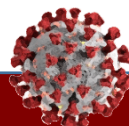
Today's training will cover the recent updates to the CCTO Tool, and it is aimed at **experienced users.**

If you are new to CCTO – welcome! You are welcome to remain for today's session and/or to review the recording later when you are more familiar with CCTO.

Sign in to the Sandbox while you wait! We will use it later.

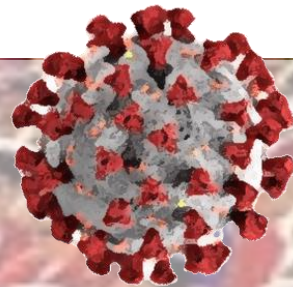
Resources for New Users (LINKED ON FIRST SLIDE OF THE PRE-READ ON YOUR INVITE)

- [Troubleshooting CCTO Access Errors Job Aid](#)
- [CD Manual Main Page](#) (general CI/CT resources)
- [Scripts Page](#) (contains links to sample scripts for CI/CT and vaccine outreach)
- [CCTO Training Resources Page](#) (contains job aids, micro-training links, system updates, etc.)
- [AHEC Training Page](#) (contains the recorded CCTO onboarding training, links to previous recorded live sessions – including today's)




Live Training on Contact Tracing Updates

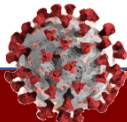
November 16th, 2021



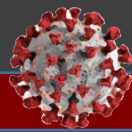
Agenda for Today's Training

Q&A will be monitored throughout each module and reviewed at the end of the presentation.

Topics	Presenters
<ul style="list-style-type: none">• Announcements<ul style="list-style-type: none">• Guidance Updates• Script Updates• Poll Results	 Laura Farrell <i>Contact Tracing Program Manager & CCTO Software Lead</i>
<ul style="list-style-type: none">• CCTO Updates<ul style="list-style-type: none">• Person functionality update• Updates to vaccine & testing fields• Updates to logging vaccine referrals	
<ul style="list-style-type: none">• Requested Topics: Selecting an FMO	
<p>User Feedback and Q&A - Please use the Q&A Box and NOT the chat!</p>	



Important Announcements



Kids HAVE A
SPOT
TO TAKE THEIR
SHOT.

The Food and Drug Administration has recently provided an emergency use authorization (EUA) for **a lower dose of the Pfizer COVID-19 vaccine for children ages 5-11.**

- Through clinical trials with about 3,000 children, the FDA has determined that the Pfizer COVID-19 Vaccine has met the safety and efficacy standards for authorization in children ages 5 through 11 years. **The vaccine was found to be 90.7% effective in preventing COVID-19 in children 5 through 11.**
- Children ages 5 through 11 years receive **one-third of the adult and adolescent dose of Pfizer COVID-19 Vaccine.** Temporary side effects for kids are similar to those experienced by adults and may include a sore arm, headache, and being tired or achy.

Can you get a **COVID-19 BOOSTER SHOT?**

If you received a Moderna or Pfizer vaccine:

You are eligible for a booster if you received your second dose more than 6 months ago and if at least ONE of the following is true:

- You are 65 or older,
- You live or work in a nursing home or long-term care facility,
- You are 18 or older with underlying medical conditions; or,
- You are 18 or older and work in high-risk settings.

If you received a Johnson & Johnson vaccine:

If you are 18 or older and vaccinated more than 2 months ago, you should get a booster.

You can receive any brand of COVID-19 vaccine for your booster shot.

Speak with a doctor, nurse or your local pharmacy if you have any questions about what booster is right for you.

Go to [MySpot.nc.gov](https://www.myspot.nc.gov) to get information and find a location or call 1-888-675-4567.

YOU HAVE A **SPOT.** | TAKE YOUR **SHOT.**



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



REMEMBER: This information is for your reference only – you should never provide medical advice!

Updated Guidance

Updated Scripts

Riddle Response

Reminder on CDC Testing Guidance for Contacts

Most up-to-date guidance on testing from CDC:

- **Vaccinated Contacts:** Vaccinated contacts should be tested 5-7 days following LDOE.
- **Contacts Who Are Not Fully Vaccinated:** Contacts who are not fully vaccinated should get tested immediately and **again** 5-7 days after LDOE if first test is negative.

What are the public health recommendations for close contacts who have ongoing exposure to COVID-19?

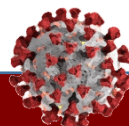
Close contacts with ongoing exposure who are unvaccinated or not fully vaccinated

People who are unvaccinated or not [fully vaccinated](#) and have ongoing exposure to COVID-19 should

- Get tested immediately when they are identified as a [close contact](#).
- Begin [quarantine](#) immediately and continue to quarantine throughout the isolation period of the person with COVID-19.
- Continue to quarantine for an additional 14 days starting the day *after* the end of isolation for the person with COVID-19.
- Get tested again 5-7 days after the end of isolation of the infected household member.
- Wear a mask when in contact with the person with COVID-19 throughout the person's isolation period.
- Wear a mask when in contact with other people in the home until quarantine ends.

The updated CDC guidance can be found in detail on the CDC [website](#).

(See “What are the public health recommendations for close contacts who have ongoing exposure to COVID-19?”)



Updated Guidance

Updated Scripts

Riddle Response

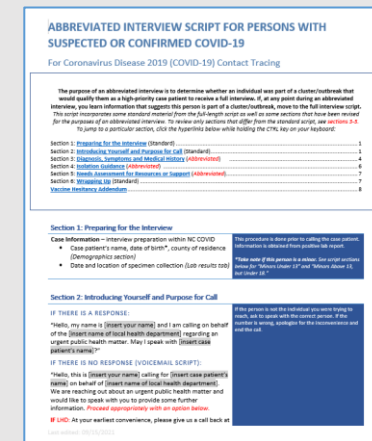
Revised Outreach Scripts Are Now Available as of 11/12:

• CT/CI/Abbreviated CI Scripts (as applicable):

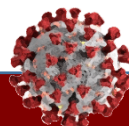
- Updated booster shot/pediatric vaccine information
- Revised testing guidance
- Additional language for handling contacts who are upset about delayed notification

• Vaccine Outreach Script

- Updated information about Pfizer EUA for children 5-11



These scripts can be found on a separate page of the CD Manual called [Sample Interview Scripts](#).



Updated Guidance

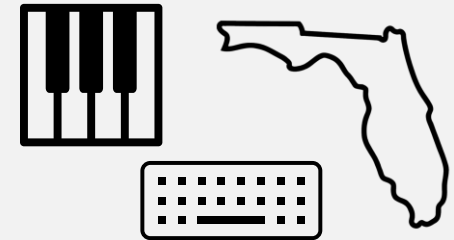
Updated Scripts

Riddle Response

You were asked this riddle in last training's feedback survey...

**What has many keys but
cannot open a door?**

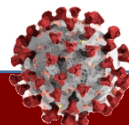
The answer is....



Number of people who got the answer to this
riddle right:

92

(65% of attendees!)



Scenario 1

Scenario 2

Scenario 3

All of the outreach scripts have recently moved to a new location on the CD Manual. What is the title of the page on which they can now be found?

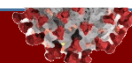
- 1. CCTO Training Resources**
- 2. Interview Scripts**
- 3. Sample Interview Scripts**
- 4. Scripts**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- ▶ Understanding the system updates



Scenario 1

Scenario 2

Scenario 3

All of the outreach scripts have recently moved to a new location on the CD Manual. What is the title of the page on which they can now be found?

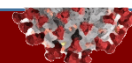
1. CCTO Training Resources
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- 3. Sample Interview Scripts**
4. Scripts

Tasks

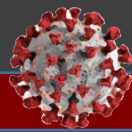
Correctly identify the action required in each scenario.

Key Learnings

- ▶ Understanding the system updates



11/8 System Updates



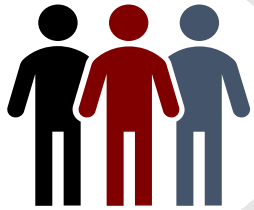
Person Functionality
Update

Update to Case Portal
Submission Box

Updates to Vaccines and
Testing Fields

Updates to Vaccine
Referrals

Example Scenario
Walkthrough



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!

Updates to Matching Functionality



The **matching functionality** has been updated so that monitoring events will now correctly match to person records based on:

- First Name/Email
- First Name/Phone Number
- First Name/Last Name/Date of Birth
- Phone Number/Date of Birth

Reminder about Upcoming Deletion



Starting on 12/1, **all person records created prior to 11/9 will be deleted and rematched** based on the automatic matching logic.

*All person records created on 11/9 or later will remain as they are. **Monitoring events will continue to work normally throughout this update.***

We are still in the process of finalizing this functionality in the live system, and the People Tab contains incomplete data. You should still be relying on the Monitoring Events Tab for searching and data needs.

Person Functionality Update

Update to Case Portal Submission Box

Updates to Vaccines and Testing Fields

Updates to Vaccine Referrals

Example Scenario Walkthrough

1

Vaccine - 1st Dose	Janssen (Johnson & Johr
Vaccine Date - 1st Dose	11/1/2021
Approximate Date - 1st Dose	<input type="checkbox"/>

2

Vaccination	
Vaccine - 1st Dose	Janssen (Johnson & Johnson) COVID-19 Vaccine
Vaccine Date - 1st Dose	11/5/2021
Approximate Date - 1st Dose	<input type="checkbox"/>
Vaccine - 1st Dose Confirmed in CVMS?	<input type="checkbox"/> No
Vaccine - 2nd Dose	---
Vaccine Date - 2nd Dose	---
Approximate Date - 2nd Dose	<input type="checkbox"/>
Vaccine - 2nd Dose Confirmed in CVMS?	<input type="checkbox"/> No

3

Test Date	10/27/2021
COVID-19 Test Result	Negative
Add Additional Test?	<input checked="" type="checkbox"/>

Testing Details (Additional Test)	
Referred to Test?	Yes
Referred to Test Date	11/1/2021
Tested?	Yes
Test Date	11/2/2021
COVID-19 Test Result	Awaiting Results

Today's software demo will cover the most important updates from the November 8th release. As always, you can defer to the November 8th [system updates job aid](#) for written support on the full list of updates.

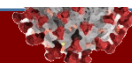
1. First, let's take a look at the **Approximate Date** checkboxes that can be used to indicate approximate vaccine dates. As of this update, any information within these boxes will now carry down from person records onto new monitoring events that are created from them.
2. Next, also in the *Vaccination* box, information about a second dose can now be added for individuals who first received J&J vaccines. When you select "Janssen (Johnson & Johnson) COVID vaccine" in **Vaccine – 1st Dose**, you will now also see a set of fields for **Vaccine – 2nd Dose**. You may use this field in the event that an individual has received an additional shot of any type after an initial J&J vaccine.
3. Finally, within the **Testing Details** section of a monitoring event, you can now select the checkbox next to **Add Additional Test?** to produce a new box for **Testing Details (Additional Test)**, which will allow you to provide details on a second test if necessary.

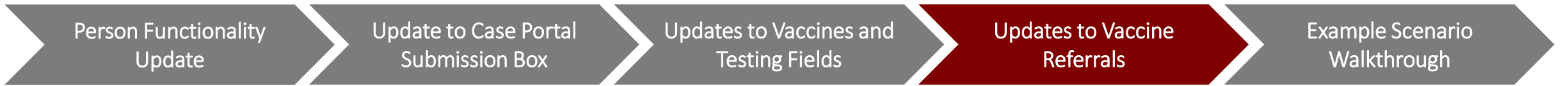
Tasks

Understand the changes to the CCTO Tool as of 11/8.

Key Learnings

- Updates to fields in CCTO





1

Details	
Type of Communication	--Select--
Type of Campaign	--Select--
Referral Need	Resource Specific Outreach Call (answered)
Outcome of Referral (if known)	Resource Specific Outreach Call (left voicemail)
	Incoming Call

Type of Campaign	--Select--
Referral Need	--Select--
Outcome of Referral (if known)	Awareness
	Specific Event
	Specific Need

2

Type of Communication	Part of Standard Initial or Monitoring Call
Person Current Vaccination Status	Person Not Vaccinated and Not Scheduled for Vaccine
Reason Why Not Vaccinated	--Select--
Outcome of Referral (if known)	Person Already Partially or Fully Vaccinated
	Person has Vaccine Scheduled
	Person Not Vaccinated and Not Scheduled for Vaccine

Now, we will look at the biggest updates to CCTO from this release, which all have to do with improving the data we record in referral fields.

- As an overall update across all referral types, the options shown in **Type of Communication** have been updated for clarification on what type of call is being made or received – whether you are making a normal initial or monitoring call, whether this is a specific call to make this referral, or whether the individual is calling you. And, to further help your selections, the field for **Type of Campaign** will only appear if you select an outreach call option, as this is the only time it is relevant.

The rest of the updates to referral fields have all been made to vaccine referrals specifically, and all data from previous vaccine referrals is being updated into the new referral format this week. After we look at these fields in the system here, we will review the job aid for closer explanations.

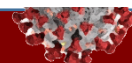
- First, notice that a new field for **Person Current Vaccination Status** has been created to indicate the vaccination status of the person being referred. Because of this, all the items related to vaccination status have also been removed from the options for the **Outcome of Referral** field.

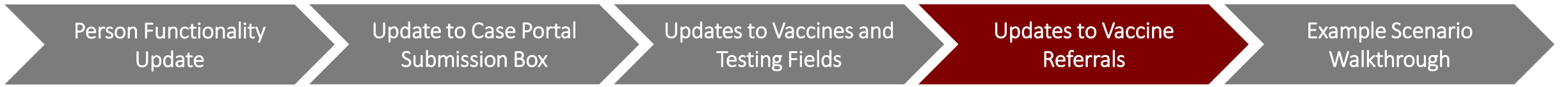
Tasks

Understand the changes to the CCTO Tool as of 11/8.

Key Learnings

- ▶ Updates to fields in CCTO





1

Person Current Vaccination Status	Person Not Vaccinated and Not Scheduled for Vaccine
Reason Why Not Vaccinated	--Select--
Outcome of Referral (if known)	--Select--
Communication Preferences	Person has resource issues with obtaining vaccine Person opposed to Covid vaccine
Notes from Referral	Other

2

Reason Why Not Vaccinated	Person opposed to Covid vaccine
Hesitancy Reason	--Select--
Outcome of Referral (if known)	--Select--
Communication Preferences	Health Concerns (Belief that) they don't need the vaccine Still Researching/ Deciding
Notes from Referral	Lack of Trust Religious Beliefs Other

1. Then, notice that if you select "Person Not Vaccinated and Not Scheduled for Vaccine" in this field, a new field for **Reason Why Not Vaccinated** will appear with options to provide more information about why the individual is not vaccinated. We will review these options in detail in a moment so that you can feel confident selecting the best one for each situation.
2. Finally, if you pick "Person Opposed to COVID Vaccine" in this field, there is now one more new field for **Hesitancy Reason** to allow you to provide more detail.

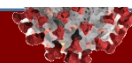
Now that we've seen these updates within the software, we are going to review them within the Quick Reference Referrals job aid, which has been linked for you in the chat. Please feel free to pull this up and follow along. When we're finished reviewing the changes, we will practice hearing a referral conversation and logging a referral together.

Tasks

Understand the changes to the CCTO Tool as of 11/8.

Key Learnings

- Updates to fields in CCTO



Fields in All Referral Types

What type of referral is being made?		
REFERRAL TYPE	<ul style="list-style-type: none"> Vaccine if the referral is for vaccination support. <i>This referral should be logged for all contacts and case patients who have not already been referred – see below for specific fields.</i> Resource if the referral is for a non-vaccine resource need, such as food assistance, legal help, or transportation. <i>This type of referral should only be logged if the contact responds "Yes" to resource need inquiries – see page 2 for specific fields.</i> Other if the referral cannot be captured by "Vaccine" or any of the categories listed in "Resource" – <i>see page 2 for specific fields.</i> 	
What type of phone call is being made or received?		
TYPE OF COMMUNICATION	Part of Standard Initial or Monitoring Call if this is a referral made as part of a standard initial or daily monitoring call (inbound or outbound).	<i>EXAMPLE</i> During an initial call to a contact, you provide them with information about where to get vaccinated or you offer support for a resource need identified during initial assessment.
	Outreach Call if this is an outbound call being made for the purpose of a referral. <i>These options are titled with "Vaccine," "Resource," or "Other" as appropriate.</i> <ul style="list-style-type: none"> Outreach Call (answered) should be used if a referral call is answered. Outreach Call (left voicemail) should be used if a referral call is made but not answered, and a voicemail has been left. 	<i>EXAMPLE</i> You call a contact to let them know about an upcoming vaccine event or other wellness event at a local community center.
	Incoming Call if this is an inbound call from a contact or case being made for the purpose of receiving a referral.	<i>EXAMPLE</i> Contact calls you seeking information about vaccines or food assistance.
What was the context of the referral? (Outreach Calls only)		
TYPE OF CAMPAIGN <i>(for Outreach Calls only)</i>	Awareness if you are providing general information that is not connected to a specific event.	<i>EXAMPLE</i> You provide education to a contact about vaccine availability in their area.
	Specific Event if you are providing this individual with information about an upcoming event.	<i>EXAMPLE</i> You let a contact know about an upcoming vaccination event in their area.
	Specific Need (resource referrals only) or Specific Need or Request (other referrals only) if this individual asks you to provide information about a specific need or request.	<i>EXAMPLE</i> You call a contact to provide more information on rent assistance after they note this need on a digital assessment.

Fields in Vaccine Referrals

VACCINE REFERRAL DETAILS BOX	
PERSON CURRENT VACCINE STATUS	This field indicates the vaccination status of the person being referred. <ul style="list-style-type: none"> Person Already Partially or Fully Vaccinated Person Has Vaccine Scheduled Person Not Vaccinated and Not Scheduled for Vaccine <i>(will produce a field for Reason Why Not Vaccinated)</i>
REASON WHY NOT VACCINATED <i>(individuals without vaccine scheduled only)</i>	This field only appears if "Person Not Vaccinated and Not Scheduled for Vaccine" is selected in the Person Current Vaccine Status field. <ul style="list-style-type: none"> Person does not meet criteria for vaccine (e.g., one of the CDC contraindications for a specific group) Person has resource issues with obtaining vaccine (e.g. is unable to access a vaccination site or take time off work, etc.) Person opposed to COVID vaccine <i>(will produce a field for Hesitancy Reason)</i> Other <i>(will produce a free text field and should only be used rarely – please only select this option AFTER you have confirmed no other option applies)</i>
HESITANCY REASON <i>(individuals opposed to vaccine only)</i>	This field only appears if "Person opposed to COVID Vaccine" is selected in the Reason Why Not Vaccinated field. <ul style="list-style-type: none"> Health Concerns (e.g., concerned about side effects/health complications associated with the vaccine) (Belief that) they don't need the vaccine (e.g., believe it is unnecessary to get vaccinated or that the vaccine is not effective) Still Researching/Deciding (e.g., wants to wait for more information and/or hasn't decided whether they want to get vaccinated) Lack of Trust (e.g., mistrust of government/vaccines in general) Religious Beliefs Other <i>(will produce a free text field)</i>
OUTCOME OF REFERRAL	<ul style="list-style-type: none"> General Information Provided Vaccine appointment scheduled on call Transferred to LHD or vaccine hotline Other <i>(will produce a free text field)</i>
COMMUNICATION PREFERENCES	This field will update the Vaccine Communication Preference field on this individual's monitoring event unless you leave it blank. <ul style="list-style-type: none"> Would like future calls and texts about vaccines Prefers only texts about vaccines Prefers only calls about vaccines Do not contact in future about vaccines

EXTRA FIELDS FOR INDIVIDUALS WHO DO NOT HAVE A VACCINE SCHEDULED

DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and a referral record!

Person Functionality
Update

Update to Case Portal
Submission Box

Updates to Vaccines and
Testing Fields

Updates to Vaccine
Referrals

Example Scenario
Walkthrough



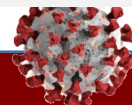
PUT IT INTO PRACTICE:

1. Log into the CCTO Sandbox (UAT).
2. Open any ME and click **+New Referral** from its Referrals Page.
3. Listen to a referral conversation and log the **vaccine referral on an initial outreach call** appropriately.

LOGGING ON...



PLEASE SIT TIGHT AS
OTHERS WORK!



Person Functionality Update

Updates to Vaccines and Testing
Fields

Updates to Vaccine Referrals

Example Scenario Walkthrough

Example Vaccine Referral on Initial Outreach Call p. 11 in CT script

Key Components:

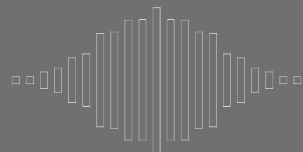
- **Asking permission to share information**
- **Responding to concerns about the vaccine**

LISTEN FOR KEY POINTS:

- The CT listens carefully and asks for permission to continue sharing
- The CT responds factually without telling the case what to do



CONVERSATION
IN PROGRESS



Person Functionality Update

Updates to Vaccines and Testing Fields

Updates to Vaccine Referrals

Example Scenario Walkthrough

Timeline / Activities

Timeline

Search timeline

Enter a note...

JP Phone Call from Jahnvi Parikh
Initial Outreach / Answered
Closed 11:46 AM

1

+ New Referral

Details

Referral Type **Vaccine**

2

Details

Type of Communication --Select--

Type of Campaign --Select--

Person Current Vaccination Status

Outcome of Referral (if known)

Communication Preferences

Part of Standard Initial or Monitoring Call

Vaccine Specific Outreach Call (answered)

Vaccine Specific Outreach Call (left voicemail)

Incoming Call

3

Details

Type of Communication Part of Standard Initial or Monitoring Call

Person Current Vaccination Status **Person Not Vaccinated and Not Scheduled for Vaccine**

First, notice that this initial outreach phone call is documented within the monitoring event's Timeline/Activities section. When you log a real referral, don't forget this important step!

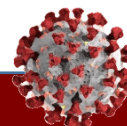
1. To document the referral for today's exercise, you should have accessed the monitoring event's referral page and clicked **+New Referral**. You should have selected "Vaccine" in **Referral Type**.
2. In **Type of Communication**, you should have selected "Part of Standard Initial or Monitoring Call," because this conversation took place on an initial outreach phone call. Notice that the **Type of Campaign** field disappears when we select this option.
3. Now, notice the new field **Person Current Vaccination Status**. Over the course of this contact tracing call, the individual has told us that they are not currently vaccinated, and we just heard that they do not have any plans to get the vaccine in the future. For this reason, you should have selected "Person Not Vaccinated and Not Scheduled for Vaccine."

Tasks

Understand the changes to the CCTO Tool as of 11/8.

Key Learnings

- Updates to fields in CCTO



Person Functionality Update

Updates to Vaccines and Testing Fields

Updates to Vaccine Referrals

Example Scenario Walkthrough

Details	
Type of Communication	Part of Standard Initial or Monitoring Call
Person Current Vaccination Status	Person Not Vaccinated and Not Scheduled for Vaccine
1 Reason Why Not Vaccinated	Person opposed to Covid vaccine
2 Hesitancy Reason	Health Concerns

3 Outcome of Referral (if known)	--Select--
Communication Preferences	--Select--
Notes from Referral	General Information Provided
	Vaccine appointment scheduled on call
	Transferred to LHD or Vaccine Hotline
	Other

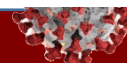
1. Once this is selected, we see a new field appear for **Reason Why Not Vaccinated**. Because the contact has expressed some hesitancies and does not want to get vaccinated, you should have selected “Person Opposed to Vaccine.”
2. Now, we need to select a **Hesitancy Reason**. You will recall that in our conversation, the contact expressed concerns about side effects and mentioned that they were worried about certain health conditions. Based on the information we reviewed in the job aid, we will select “Health Concerns.” If a contact states more than one reason for vaccine hesitancy, you should simply highlight the main reason in this field and add any additional reasons within the notes section.
3. Now, remember that **Outcome of Referral** has custom fields for vaccination. In this example, this individual has told us that they are hesitant about being vaccinated, but they were willing to listen to the information the CT offered to share. Therefore, we’ll select “General Information Provided.”

Tasks

Understand the changes to the CCTO Tool as of 11/8.

Key Learnings

- Updates to fields in CCTO



Person Functionality Update

Updates to Vaccines and Testing Fields

Updates to Vaccine Referrals

Example Scenario Walkthrough

1

Communication Preferences	Do not contact in future about vaccines
Notes from Referral	--Select--
	Would like future calls and texts about vaccines
	Prefers only texts about vaccines
	Prefers only calls about vaccines
	Do not contact in future about vaccines

1. Finally, we will indicate the individual's **Communication Preference**. In this example, it's important to respect the individual's choice not to be contacted again about vaccines by properly noting their preference and saving your work.

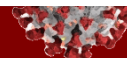
This concludes our overview of CCTO updates for today. We will now have a couple of knowledge checks.

Tasks

Understand the changes to the CCTO Tool as of 11/8.

Key Learnings

- Updates to fields in CCTO



Scenario 1

Scenario 2

Scenario 3

A contact has expressed that they are opposed to the COVID-19 vaccine because they believe that it is not important to be vaccinated, and that the vaccine does not work. What hesitancy reason should you select when logging this referral?

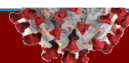
- 1. Health Concerns**
- 2. (Belief that) they don't need the vaccine**
- 3. Lack of Trust**
- 4. Still Researching/Deciding**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- ▶ Understanding the system updates



Scenario 1

Scenario 2

Scenario 3

A contact has expressed that they are opposed to the COVID-19 vaccine because they believe that it is not important to be vaccinated, and that the vaccine does not work. What hesitancy reason should you select when logging this referral?

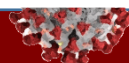
1. Health Concerns
- 2. (Belief that) they don't need the vaccine**
3. Lack of Trust
4. Still Researching/Deciding

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- ▶ Understanding the system updates



Scenario 1

Scenario 2

Scenario 3

In which of the following situations should a hesitancy reason of “Lack of Trust” be selected?

- 1. “I do not feel comfortable getting the vaccine, as my religion does not allow for it.”**
- 2. “Due to my heart condition, I do not believe the vaccine is safe for me.”**
- 3. “I don’t know if I feel comfortable with the vaccine data yet, but I plan to spend some time looking into it.”**
- 4. “I’ve heard too many bad stories... I don’t think the vaccine has been properly tested by the government, and won’t be getting it.”**

Tasks

Correctly identify the action required in each scenario.

Key Learnings

- ▶ Understanding the system updates

Scenario 1

Scenario 2

Scenario 3

In which of the following situations should a hesitancy reason of “Lack of Trust” be selected?

1. “I do not feel comfortable getting the vaccine, as my religion does not allow for it.”
2. “Due to my heart condition, I do not believe the vaccine is safe for me.”
3. “I don’t know if I feel comfortable with the vaccine data yet, but I plan to spend some time looking into it.”
4. **“I’ve heard too many bad stories... I don’t think the vaccine has been properly tested by the government, and won’t be getting it.”**

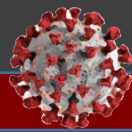
Tasks

Correctly identify the action required in each scenario.

Key Learnings

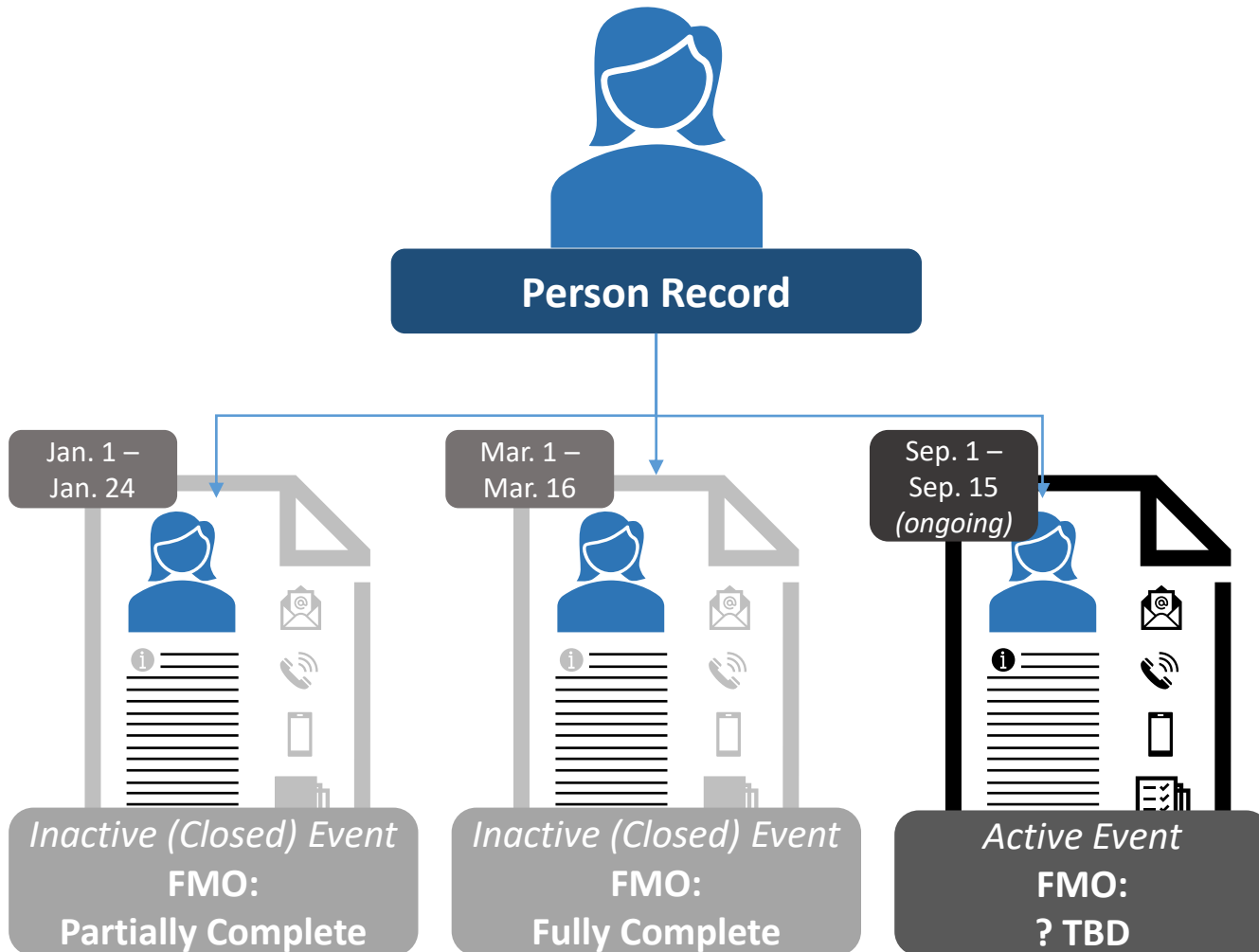
- ▶ Understanding the system updates

Requested Topics: Selecting an FMO



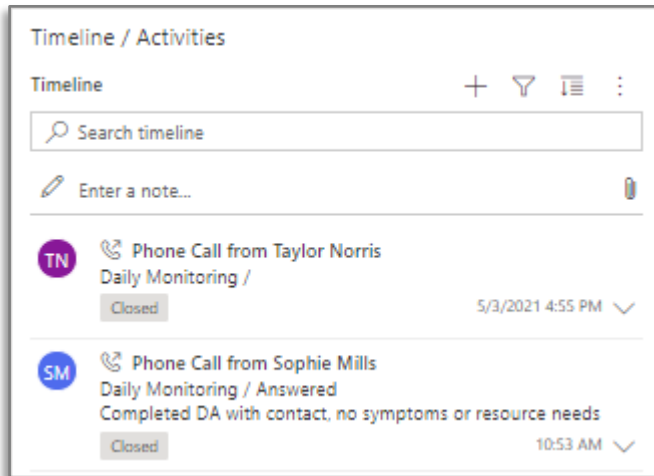
Closing Out a Contact Monitoring Event

When an individual concludes monitoring in CCTO, it is important to close their monitoring event properly to ensure you have documented your work and their outcome.



CCTO uses Final Monitoring Outcomes, or FMOs, to indicate how the monitoring period described in a particular event concluded.

Closing Out a Contact ME



Timeline / Activities

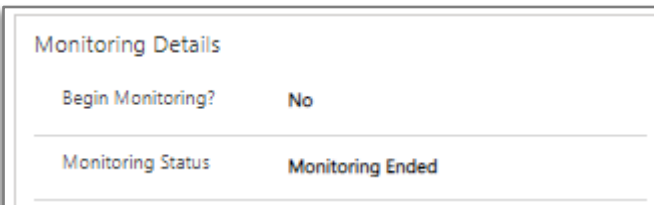
Timeline

Search timeline

Enter a note...

TN Phone Call from Taylor Norris
Daily Monitoring /
Closed 5/3/2021 4:55 PM

SM Phone Call from Sophie Mills
Daily Monitoring / Answered
Completed DA with contact, no symptoms or resource needs
Closed 10:53 AM



Monitoring Details

Begin Monitoring?	No
Monitoring Status	Monitoring Ended

When you are looking to close a monitoring event, you will use the following process.

1. You should first check that all entries in **Timeline/Activities** for this event have been completed and closed, including all active phone calls and tasks. This helps to confirm that there are no outstanding monitoring actions needed.
2. Then, you should update the **Monitoring Status** as appropriate, to either “Monitoring Ended” or “Opted Out – All Monitoring,” based on whether the contact has explicitly opted out of all monitoring for this monitoring period.

After you’ve taken these steps, you are ready to select a Final Monitoring Outcome. Just for an example, we will select “Fully Complete.”

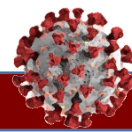
Then, the event should be deactivated. In most situations, the person selecting the FMO will be the person responsible for deactivating the event, but you should defer to your local protocol in case another process is being followed.

Tasks

Closing out a contact ME.

Key Learnings

- ▶ Key fields before selecting an FMO



Closing Out a Contact ME

Read-only This record's status: Inactive

CL Candy Land - Saved
Monitoring Event · MDA Form

Monitoring Event Assessments All Activities Referrals System Informa

Record Information

C#	C-0001002700
Contact or Case Patient	* Contact
Person	Candy Land

1. To deactivate an event, click the **Deactivate** button. You will see a grey bar appear at the top of the screen confirming that this monitoring event is now inactive.

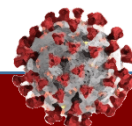
Now, let's talk about how to pick an FMO. Your best resource for this is the **"Closing Out a Contact Monitoring Event" job aid, which is posted to the CD Manual and is updated regularly.** We have placed a link to this job aid in the chat now so that you can all have it handy when we work on some examples.

Tasks

Closing out a contact ME.

Key Learnings

- ▶ Key things to know about deactivating



Quick Reference: Closing Out a Contact Monitoring Event (ME)

Scenario	Final Monitoring Outcome	Final Monitoring Outcome Definition	Begin Monitoring?	Monitoring Status
Contact does not need to quarantine or be monitored due to vaccination or previous COVID diagnosis	Fully Vaccinated – Monitoring Not Needed	<ul style="list-style-type: none"> Contact does not need to quarantine because they are fully vaccinated and meet CDC standards for not needing to quarantine as confirmed by an initial assessment 	No	Monitoring Ended
	Past COVID Diagnosis – Monitoring Not Needed	<ul style="list-style-type: none"> Contact tested positive for COVID-19 within the past three months and meets CDC standards for not needing to quarantine as confirmed by an initial assessment 	No	Monitoring Ended
Contact concludes monitoring without testing positive for COVID-19	Fully Complete	<ul style="list-style-type: none"> Contact does not test positive for COVID-19 Contact completes at least initial monitoring assessment Contact completes at least one monitoring assessment on the end of quarantine date or within the following 48 hours 	No	Monitoring Ended
	Partially Complete	<ul style="list-style-type: none"> Contact does not test positive for COVID-19 Contact completes at least initial monitoring assessment May include contacts who opt out midway 	No	Monitoring Ended
Contact becomes a case	Contact Tested Positive During Monitoring	<ul style="list-style-type: none"> Contact tests positive for COVID-19 during the monitoring period and becomes a case patient 	No	Monitoring Ended
		<p>NOTE ON CASE PATIENTS: This FMO is specifically to be used for someone labeled as a <u>contact</u> who tests positive. If you are working on an ME labeled as a case, you may use any applicable FMO to describe their monitoring outcome.</p>	<p>ACTION: Testing info and any other local requirements complete per job aid</p>	
Contact opts out of monitoring	Refused	<ul style="list-style-type: none"> Contact explicitly declines to participate in monitoring (opts out) at the beginning, which includes opting out through digital notification or acknowledging a notification but not completing any assessments No assessments completed 	No	Opted Out – All Monitoring
Contact does not respond to a digital notification	Notification – No Response	<ul style="list-style-type: none"> Contact is sent a digital exposure notification through email or text but does not acknowledge the notification or complete an assessment 	No	Monitoring Ended
Contact is unreachable	Never Reached	<ul style="list-style-type: none"> Contact has never been reached because no attempts to reach contact were made or attempts to reach contact were unsuccessful (per standards determined by LHD) and therefore was not informed of exposure 	No	Monitoring Ended
Contact will be monitored outside CCTO	Monitored in Other System	<ul style="list-style-type: none"> Contact will not be monitored within CCTO because they are being monitored within a different system (e.g., by a military organization, prison, or jail) 	No	Monitoring Ended
Contact is a duplicate	Is Duplicate	<ul style="list-style-type: none"> Contact is a duplicate of another active ME, and any relevant information from this ME has been transferred onto kept ME per job aid 	No	Monitoring Ended
			<p>ACTION: Any new information transferred onto kept monitoring event per job aid</p>	
Other FMOs do not apply	Other	<ul style="list-style-type: none"> Contact cannot be described by any other FMO (e.g., is deceased) 	No	Monitoring Ended

When you have finished selecting these options, ensure the monitoring event is saved and deactivated per your local protocol.

Closing Out a Contact Monitoring Event



FMO:
? TBD

On this ME...

- Contact has taken a COVID-10 test that has come back **positive**.
- You have updated their ME appropriately with testing details and recorded your phone call.

What will you do next?

- a. Nothing, keep monitoring on this event
- b. Close this event as “Contact Tested Positive During Monitoring” and then (if directed to do so) continue monitoring on a case event

Closing Out a Contact Monitoring Event



FMO:
Contact Tested Positive
During Monitoring

On this ME...

- Contact has taken a COVID-10 test that has come back **positive**.
- You have updated their ME appropriately with testing details and recorded your phone call.

What will you do next?

- b. Close this event as **“Contact Tested Positive During Monitoring”** and then (if directed to do so) continue monitoring on a case event

WHY?

When a contact tests positive, you should always close the contact ME as “Contact Tested Positive During Monitoring.” If your local protocol requires monitoring to continue within CCTO, you can do this on a new ME labeled “case.”

Closing Out a Contact Monitoring Event



FMO:
? TBD

On this ME...

- Contact has had a text notification marked “**delivered.**”
- Contact **did not** complete any assessments or respond to any phone calls.

Which FMO is this?

- Refused
- Notification – No Response
- Never Reached
- Partially Complete

Closing Out a Contact Monitoring Event



FMO:
**Notification – No
Response**

On this ME...

- Contact has had a text notification marked “**delivered.**”
- Contact **did not** complete any assessments or respond to any phone calls.

Which FMO is this?

- Refused
- **Notification – No Response**
- Never Reached
- Partially Complete

WHY?

Notification – No Response describes MEs in which the contact has had a digital notification delivered but has not acknowledged it or responded to any other contact attempts.

Closing Out a Contact Monitoring Event



FMO:
? TBD

On this ME...

- Contact has had a digital notification sent but does not acknowledge it.
- When you call him, he answers, you inform him of his exposure, but he declines to complete an assessment and opts out.

Which FMO is this?

- Refused
- Notification – No Response
- Never Reached
- Partially Complete

Closing Out a Contact Monitoring Event



FMO:
Refused

On this ME...

- Contact has had a digital notification sent but does not acknowledge it.
- When you call him, he answers, you inform him of his exposure, but he declines to complete an assessment and opts out.

Which FMO is this?

- **Refused**
- Notification – No Response
- Never Reached
- Partially Complete

WHY?

Refused describes MEs in which the contact has explicitly declined to participate in monitoring without completing an assessment. They may do this over the phone (as shown here) or digitally (through the contact portal link).

Closing Out a Contact Monitoring Event



FMO:
? TBD

On this ME...

- Text notification was **marked "undelivered."**
- No phone calls have been answered, so this contact is **not informed of exposure.**

Which FMO is this?

- Refused
- Notification – No Response
- Never Reached
- Partially Complete

Closing Out a Contact Monitoring Event



FMO:
Never Reached

On this ME...

- Text notification was **marked “undelivered.”**
- No phone calls have been answered, so this contact is **not informed of exposure.**

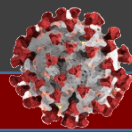
Which FMO is this?

- Refused
- Notification – No Response
- **Never Reached**
- Partially Complete

WHY?

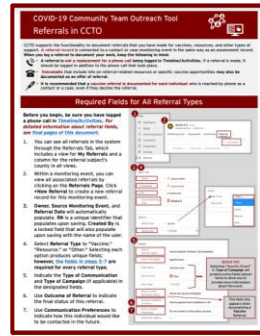
Never Reached describes MEs in which the contact has never been informed of their exposure because no attempts to reach them were successful per LHD standards. Contacts with delivered texts or sent emails are NOT “Never Reached.”

Support Resources



To review everything we covered today..

11/8 System Updates



- The [11/8 System Updates and Referrals](#) job aids cover all the basic information regarding updates to case and contact notification, and all other miscellaneous updates to monitoring events.

Selecting FMOs

Scenario	Final Monitoring Outcome	Final Monitoring Outcome Definition	Begin Monitoring?	Monitoring Status
Contact does not need to quarantine or be monitored due to vaccination of previous COVID diagnosis	Fully Vaccinated - Monitoring Not Needed	Contact does not need to quarantine because they are fully vaccinated and meet CDC standards for not needing to quarantine as confirmed by an initial assessment.	No	Monitoring Ended
Contact concludes monitoring without testing positive for COVID-19	Fast COVID Diagnosis - Monitoring Not Needed	Contact tested positive for COVID-19 within the past three months and meets CDC standards for not needing to quarantine as confirmed by an initial assessment.	No	Monitoring Ended
Contact becomes a case	Fully Complete	Contact does not test positive for COVID-19 Contact completes at least one monitoring assessment on the end of quarantine date or within the following 48 hours	No	Monitoring Ended
Contact tests out of monitoring	Partially Complete	Contact does not test positive for COVID-19 Contact completes at least one monitoring assessment	No	Monitoring Ended
Contact does not respond to a digital notification	Contact Tested Positive During Monitoring	Contact tests positive for COVID-19 during the monitoring period and becomes a case.	No	Monitoring Ended
Contact is unreachable	Refused	NOTE ON CASE MATTERS: This FMO is specifically to be used for someone identified or notified who tests positive. If you are working on an ME before an event, you may not use applicable FMO to describe their monitoring outcome.	No	Monitoring Ended
Contact will be monitored outside CCTO	Notification - No Response	Contact tests a digital notification notification throughout or has but does not acknowledge the notification or complete an assessment	No	Monitoring Ended
Contact is a duplicate	Never Reached	Contact has never been reached because no attempts to reach contact were made or attempts to reach contact were unsuccessful due to contact being unreachable (e.g., by wireless representative, phone, or email)	No	Monitoring Ended
Other	Monitored in Other System	Contact will not be monitored within CCTO because they are being monitored within a different system (e.g., by wireless representative, phone, or email)	No	Monitoring Ended
Other	Is Duplicate	Contact is a duplicate of another active ME, and any relevant information from this ME has been transferred onto that ME (see 11/13/22 update)	No	Monitoring Ended
Other	Other	Contact cannot be described by any other FMO (e.g., is deceased)	No	Monitoring Ended

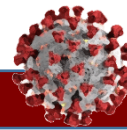
- [Closing Out a Contact Job Aid](#) contains all the FMOs and descriptions of when to use each.

Scripts

- The CT, CI, Abbreviated CI, and Vaccine Outreach scripts can all be found on the [Sample Interview Scripts Page](#) of the CD Manual.

Updated Vaccine Info

- Information on boosters: <https://covid19.ncdhhs.gov/vaccines/boosters>
- Information on pediatric vaccines: <https://covid19.ncdhhs.gov/vaccines/kids>



Where to go for training support

CT Process Questions: Contact Your Supervisor



- If you have process-based questions about contact tracing workflows, policies, and procedures beyond the CCTO software, **contact your supervisor directly**, as these may vary on local levels

Access Support: CD Manual & Knowledge Center



- [“CCTO Help Desk & IT Support”](#) on the CD Manual for NCID/ServiceNow/CCTO access support job aids
- [ServiceNow Knowledge Center](#) for job aids on tech issues (login, NCID, password reset, etc.)

CCTO Tool Help: Training Materials and Office Hours



- FAQs, [Training Resources](#), [System Updates](#), Process Documentation and Scripts (Found on the [NC DPH Communicable Disease Manual Coronavirus Page](#))
- [Patient Education Tools](#), [CCTO trainings and slides](#) and [recorded live sessions](#) posted to the [AHEC](#) Portal
- *Check your email for ongoing CCTO office hours opportunities and regular live trainings*

CCTO Tool Help & Suggestions: ServiceNow (SNOW)

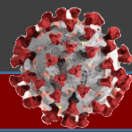


- [Register](#) for ServiceNow and then visit the [DHHS Contact Tracing ServiceNow Portal](#) to log in using your NCID and submit **CCTO questions and suggestions**

If you have a process-based question on contact tracing requiring specific guidance...

- Consult state CT guidance in the [CD Manual Contact Tracing Instructions](#)
- Consult federal CT guidance on the [CDC website](#)

Participant Feedback



Questions?

