

CCTO Micro-Training: Beginning Monitoring & Assessments

Documenting Monitoring in CCTO & Preparing for an Initial Assessment



- **Monitoring** refers to reaching out to your contact to assess their symptoms and resource needs. These assessments are collected **manually** (over the phone). CCTO is used to document your monitoring work and to store assessments.
- An initial assessment should be done manually by the tracer ([see page 2](#)) during the outreach phone call.

If your local protocol indicates you should begin monitoring a contact beyond the outreach phone call, start with the steps below:

The screenshot shows the CCTO interface for a contact named "Driving McCrazy". The interface is divided into several sections:

- Record Information:** C# C-0001043362, Contact or Case Patient: Contact, Look for Match: Yes, Create New Person?: No, Person: Driving McCrazy.
- Monitoring Details:** Monitoring Status: ---, Monitoring End Date: 8/31/2022, Final Monitoring Outcome: ---, Symptom Onset Date: ---, Case Patient Reported No Symptoms: No, Last Assessment Date: ---, First Date Symptoms Reported: ---, Most Recent Date Resource Need Reported: ---.
- Monitoring Event Notes:** ---, Household note from NC COVID: ---, Notes provided from Case Patient on Online Case Portal: ---.
- Basic Info:** Priority Contact or Case: No, First Name: Driving, Middle Name: ---, Last Name: McCrazy.
- Timeline / Activities:** Timeline section with a search bar and a note from "Email from Public Health Notification" dated 8/23/2022 5:19 PM.

Red boxes and numbers 1-4 highlight key steps:

1. Contact name "Driving McCrazy"
2. "Monitoring Status" dropdown menu
3. "Timeline / Activities" section
4. "Assessments" tab in the top navigation bar

#1: Review your contact's event to prepare for monitoring:

- Use the [CCTO Glossary](#) to help you understand the contact monitoring event fields and determine what additional information you would like to collect.
- The fields described in page 2 of the [Digital Exposure Notification](#) micro-training can help you determine whether your contact may have already received a successful text or email notification, which will guide your conversation.
- Keep in mind that **Monitoring End Date** is automatically calculated for 10 days after the most recent **Last Date of Exposure**; however, you can update it at any time if the monitoring period needs to be adjusted. This field is used both for your reference and as the date used by the system to determine if it should send a notification.

#2: Then, document that you are initiating monitoring within CCTO: Set Monitoring Status to "Monitoring" to document that you are actively monitoring this contact.

#3: Per your local protocol and the guidance outlined on the [CD Manual Scripts](#) page, call your contact and log this phone call (per the [job aid](#)).

- See the [CD Manual Scripts Page](#) for language to use in your contact conversation.

#4: When you are ready to collect or review information about symptoms and resource needs, open an assessment: Visit the "Assessments" page at the top of your contact's monitoring event. See next page for instructions on completing fields.

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Understanding Assessment Fields & Completing a Manual Assessment



Assessment fields are completed manually by the tracer (as shown below). To start an assessment, begin on the **Assessments** page as shown in #4 of the [previous page](#).

Before you create a new manual assessment, **check if a blank assessment is already available**:

- If this is your contact's first assessment and an assessment marked "Initial" already exists, click into that assessment.
- If there is not an assessment marked "Initial," or if this is not your contact's first assessment, click **"New Assessment"** in the **top right corner** of the screen.

4 Save & Close + New Flow

New Assessment

Assessment Suggested Exposures System Information

Basic Info

Source Contact * Miss Piggy

C# C-0000035457

Details

1 Assessment Type Initial

2 Agreement * Yes, I agree to participate.

Agreement/Disagreement Date

3 Covid-19 Test Results

Have you received a Covid-19 test result? Yes

Test Date 11/5/2020

Test Location Main St Walgreens

Test Results Negative

Symptoms

Fever	Yes
Highest temperature in the past 24 hours	100.1
Sweats	No
Chills	No
Headache	No
Muscle Aches	No
Sore Throat	No
Cough	No
Loss of Smell or Taste	No
Shortness of Breath/Difficulty Breathing	No
Stomach Pain or Cramps	No
Vomiting	No

Additional Questions

Access to Phone or Computer?	Yes
Do you have a face covering at home with you?	Yes
Able to remain in your home without guests during quarantine?	Yes
Do you have the ability to isolate yourself within your ...	Yes
Do you have any household members that are high risk for ...	No
Do you have someone that could run errands and get ...	Yes
Do you have a primary care provider?	Yes
Other Resource Needs	May require assistance with getting child ...
If you identified a resource need, is it okay for someone ...	Yes

#1: Assessment Type: This should read "Initial" if this is your contact's first assessment and "Monitoring" if it is not.

- Both types collect the same symptom and test result information.
- **Initial** assessments display a full list of resource need questions. **Monitoring** assessments ask contacts: "Do you have a new resource need?" and only request details if contacts respond "Yes."

#2: Agreement: Select "Yes, I agree to participate" if your contact agrees.

- Completing this field and saving will update the **Last Assessment Date** field on contact monitoring events (MEs).

#3: Remaining Fields: Collect per your contact's responses [per the script](#).

- Each time **COVID-19 Test Results** is completed, a contact ME section for **Contact Reported Test Results** will appear and update. The contact ME section for **Testing Details** will not update automatically. Defer to your local guidance on how you should use this section.
- The first time any symptom (except "Highest Temperature in the Past 24 Hours" or "Other Symptoms") is indicated, the contact ME field for **First Date Symptoms Reported** will update.
- Each time any resource need (except "Is there any other information you would like to provide?") is indicated, the contact ME field for **Most Recent Date Resource Need Reported** will update.

#4: Save & Close: Click to save your work and record the assessment. Review this assessment at any time by returning to the "Assessments" page.