CCTO Glossary

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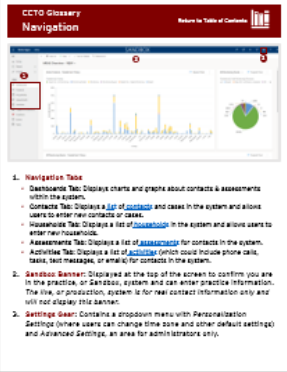

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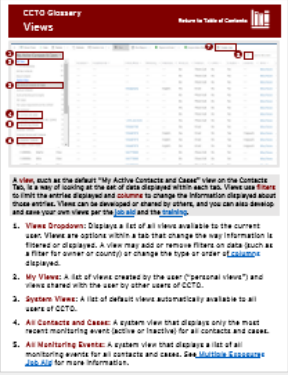

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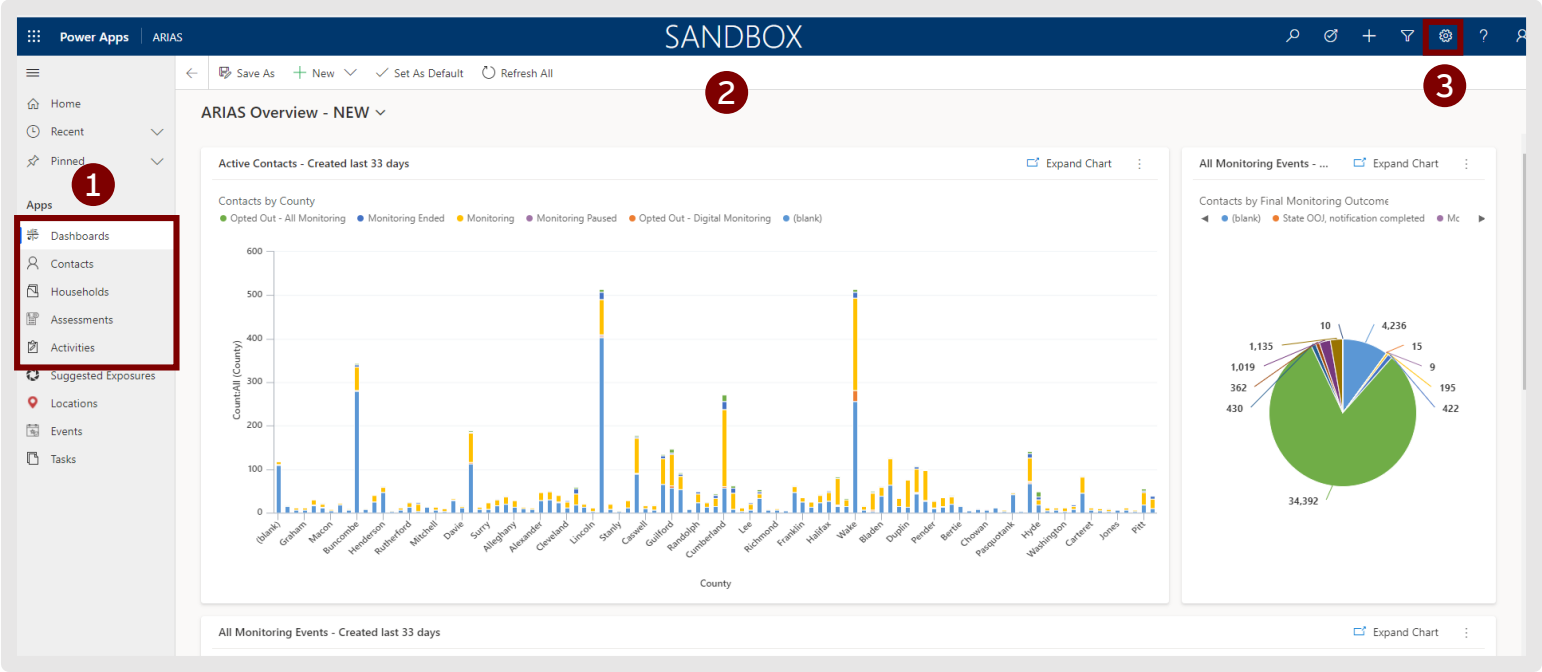

1. **Navigation Tabs**
   - **Dashboards Tab:** Displays charts and graphs about contacts & assessments within the system.
   - **Contacts Tab:** Displays a list of contacts and cases in the system and allows users to enter new contacts or cases.
   - **Households Tab:** Displays a list of households in the system and allows users to enter new households.
   - **Assessments Tab:** Displays a list of assessments for contacts in the system.
   - **Activities Tab:** Displays a list of activities (which could include phone calls, tasks, text messages, or emails) for contacts in the system.
2. **Sandbox Banner:** Displayed at the top of the screen to confirm you are in the practice, or Sandbox, system and can enter practice information. *The live, or production, system is for real contact information only and will not display this banner.*
3. **Settings Gear:** Contains a dropdown menu with *Personalization Settings* (where users can change time zone and other default settings) and *Advanced Settings*, an area for administrators only.

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Contacts Tab

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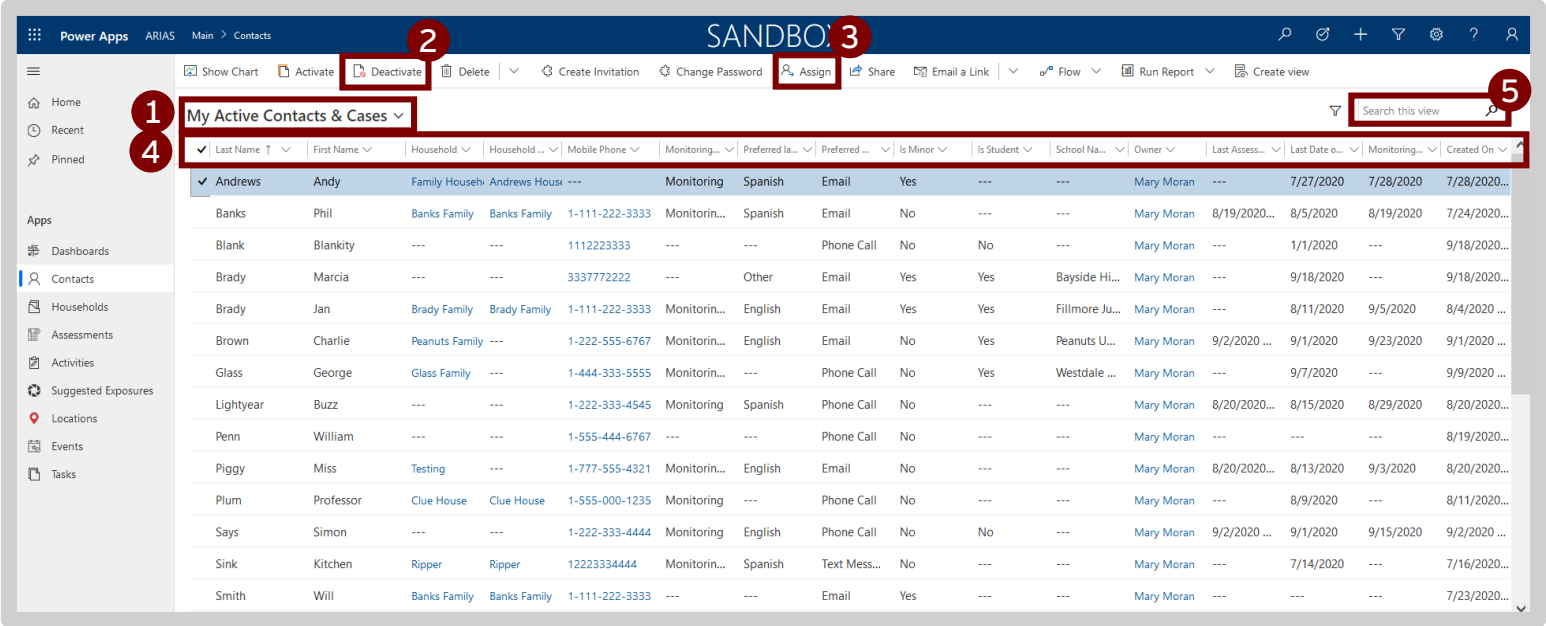

1. **My Active Contacts and Cases View:** Default view that displays all of the active contacts and cases assigned to the current user. Can be changed to show various other sets of information.

2. **Deactivate Button:** Appears upon selecting profile(s). Deactivates (but does *not* delete) the selected profile. This will put this profile into an inactive status, removing them from the user's "My Active Contacts and Cases" view. A contact should be deactivated after their monitoring period has ended.

3. **Assign Button:** Appears upon selecting profile(s). Changes the owner of a contact to a different user or team. This will remove the contact from the first user's "My Active Contacts and Cases" view and place it in a different user's "My Active Contacts and Cases" view.

4. **Columns:** Categories of information about each profile that can be sorted or filtered by clicking each caret (down arrow). These columns can be changed and customized by creating a custom view per the job aid.

5. **Search:** Used to search within the current view by contact name, C#, address, etc.

Contact Profiles

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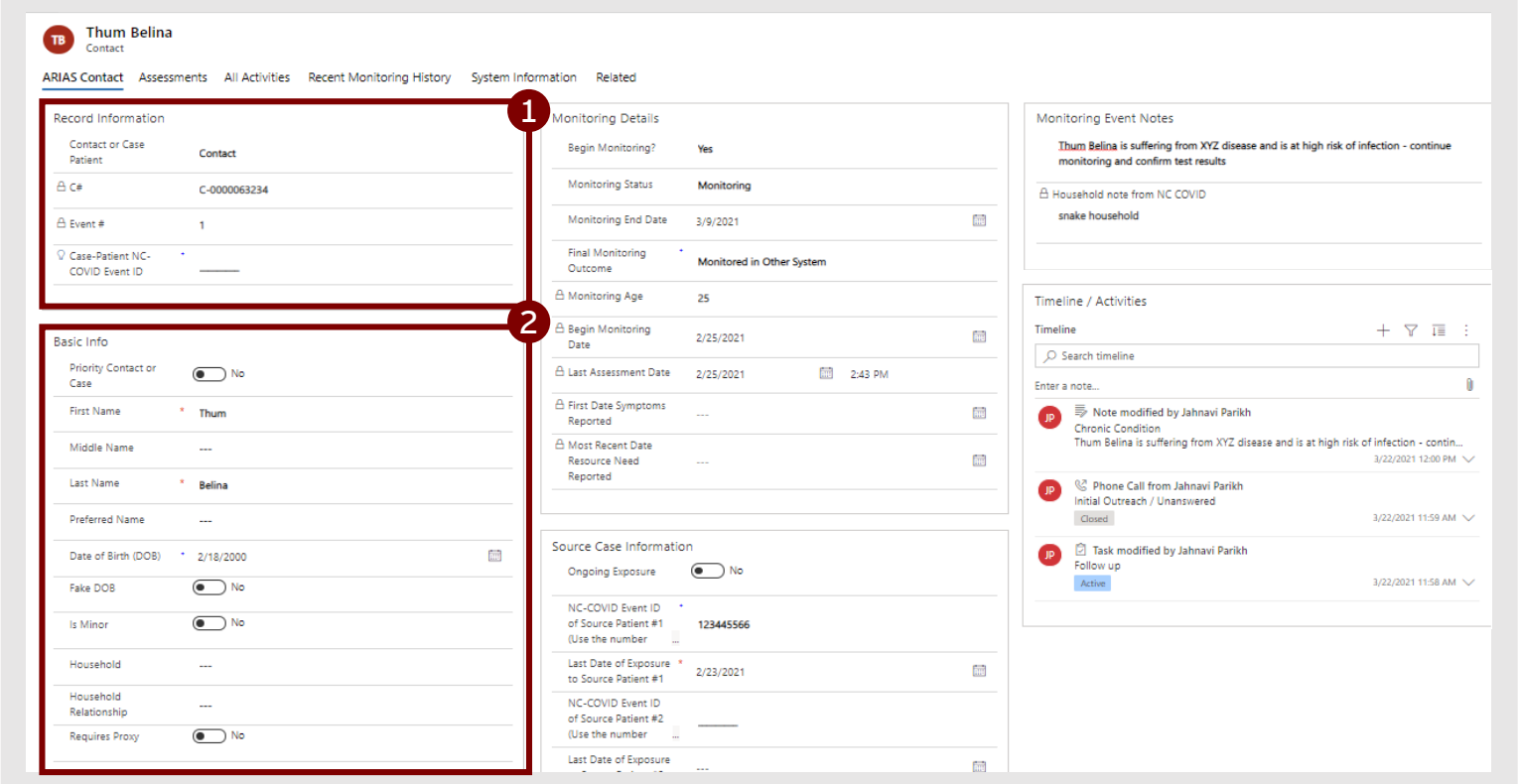


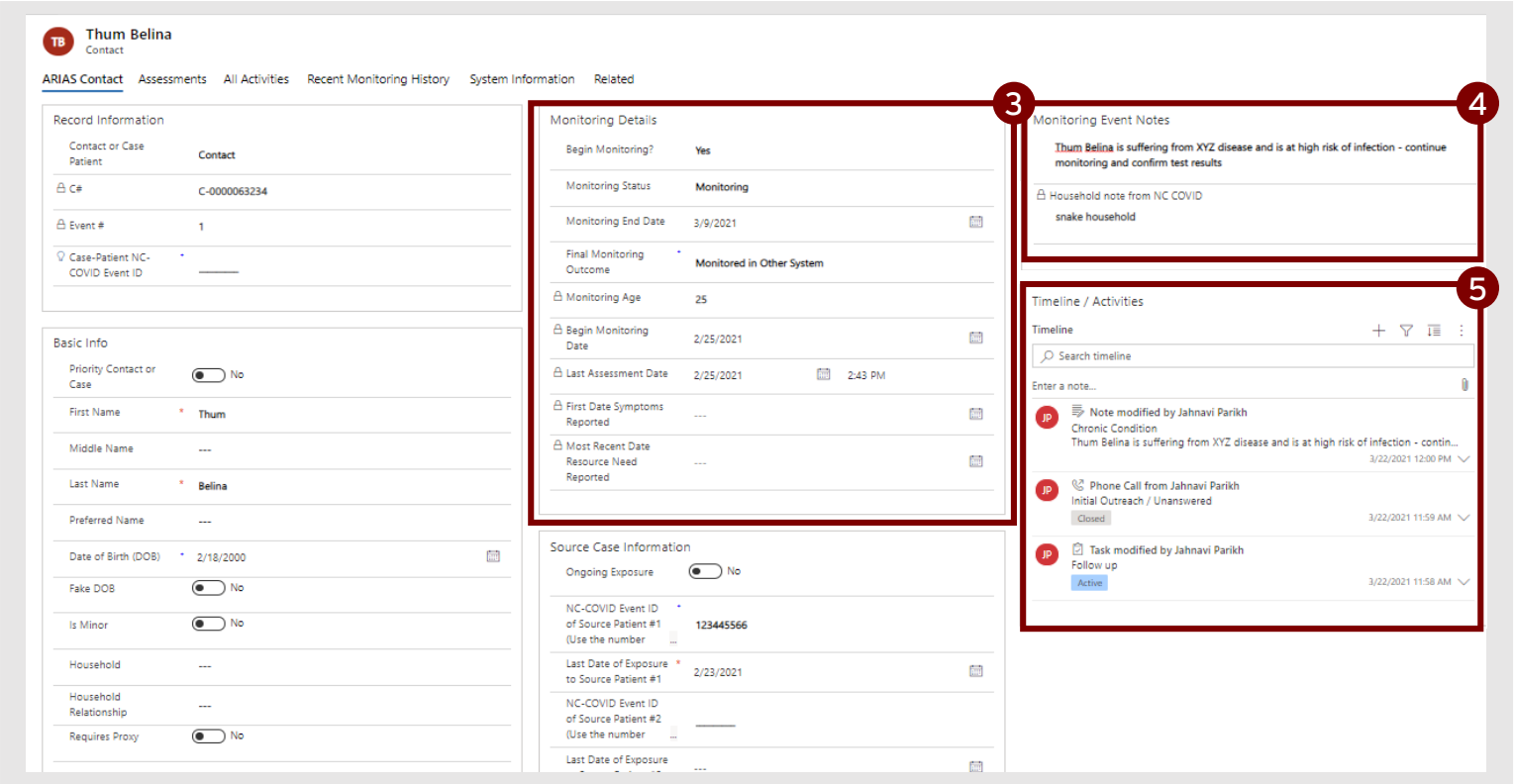
Each contact profile, or monitoring event, represents a single, continuous monitoring period following exposure to COVID-19. This may include exposure to more than one case patient and/or extend beyond the duration of an initial quarantine period. When a contact concludes a monitoring period, their profile is closed and deactivated. Review the Entering a Contact Micro-Training and materials for detailed instructions on entering contacts, and see the Handling Multiple Exposures Job Aid for more information on creating a new monitoring event if a contact is re-exposed after concluding monitoring.

1. Record Information:

- **Contact or Case Patient:** Indicates if the individual is a contact, if the individual is a case patient, or if the individual was entered as a contact but became a case patient.
- **C#:** Contact Number, a unique identifier automatically generated by the system.
- **Event #:** Monitoring event # that increases by 1 each time a contact is cloned (per the Handling Multiple Exposures Job Aid).
- **Case-Patient NC COVID Event ID:** Indicates the NC COVID Event ID of the individual to whom the profile belongs if they have tested positive and are a case. If "Contact" is selected in the "Contact or Case Patient" field, this field displays a clickable lightbulb that will remind users to leave this field blank, as it displays the Event ID of the individual to whom this profile belongs, *not* of their source patient.

2. Basic Info:

- **Priority Contact or Case:** This feature allows an individual to be tagged as a high priority for manual outreach. Check with local guidance to determine if this toggle should be used.
- **First Name:** First name of the contact. Required to create contact profile.
- **Middle Name:** Middle name of the contact. Not required.
- **Last Name:** Last name of the contact. Required to create contact profile.
- **Preferred Name:** Contact's preferred name. Not required.
- **Date of Birth:** Contact's exact date of birth, if known. Required in order to select "Yes" in the "Begin Monitoring?" field, which triggers digital outreach.
- **Fake DOB:** Indicates if contact's DOB is a placeholder. If this is turned on and saved, "Calculated Age" will not be populated.
- **Is Minor:** Indicates if contact is under age 18.
- **Household:** Used to link a contact with an existing household.
- **Household Relationship:** Used to indicate a contact's relationship to others in their household.
- **Requires Proxy:** Indicates whether a contact completes their own assessments or requires a proxy (e.g., parent completing assessment for minor under 13).



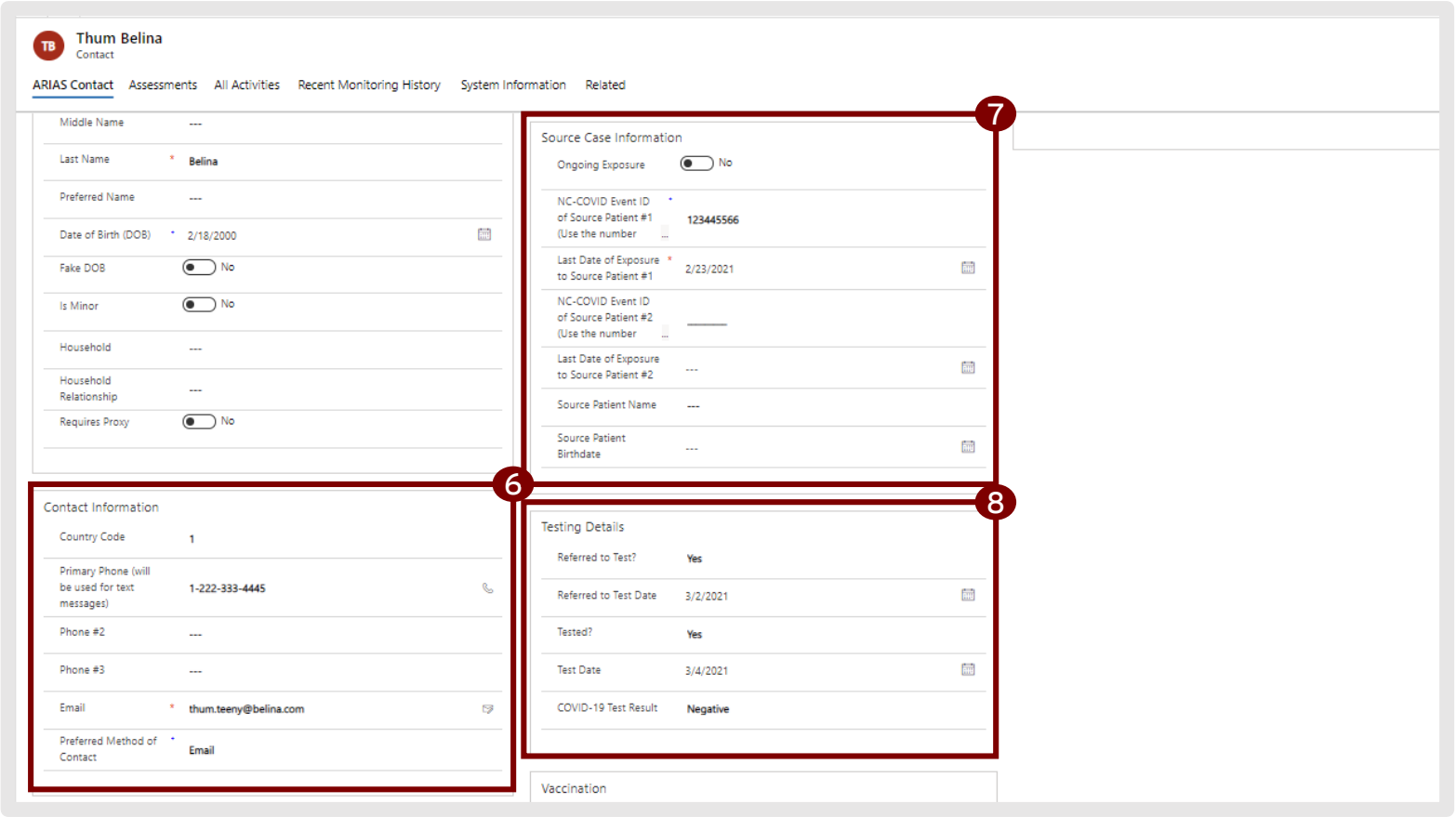
3. Monitoring Details: Used after contact entry when monitoring begins.

- **Begin Monitoring?:** Turns on automatic digital (text or email) outreach when set to "Yes" (if "Monitoring Status" is set to "Monitoring"). Review the Beginning Monitoring & Assessments Micro-training and materials for details.

- **Monitoring Status:** Indicates if contact is being monitored, has opted out, or has concluded or paused monitoring.
- **Monitoring End Date:** Automatically calculated as 14 days since a contact's last date of exposure unless manually updated by tracer. Determines end of digital monitoring as well as the end-of-quarantine date sent to contact in an automatic digital exposure notification.
- **Final Monitoring Outcome:** Indicates a contact's status at the conclusion of monitoring. See the Closing Out a Contact job aid for an explanation of outcomes and when they are used.
- **Monitoring Age:** Locked field that shows how many days a contact has been monitored, automatically calculating days since "Begin Monitoring?" was set to "Yes." For example, a "Monitoring Age" of 5 means that the contact has been monitored for 5 days.
- **Begin Monitoring Date:** Locked field that automatically calculates the date "Begin Monitoring?" was set to "Yes."
- **Last Assessment Date:** Locked field that automatically calculates the date of the last submitted assessment in which the "Agreement" field was completed.
- **First Date Symptoms Reported:** Locked field that updates to alert tracer to review assessment on the first occasion that a contact reports a symptom. Only updates one time.
- **Most Recent Date Resource Need Reported:** Locked field that updates to alert tracer to review the assessment each time a contact reports a new resource need.

4. **Monitoring Event Notes:** Free text box for any reference information that should remain easily visible at the top of a contact's profile.
   - **Household Notes:** Locked field that automatically flows into CCTO with information entered into its counterpart field in NC COVID. Used to detail a contact's household information. Only appears if populated.

5. **Timeline/Activities:** Used to schedule and record monitoring, outreach, and reference information per the job aid and micro-training.
   - **Phone Call:** Item that logs or schedules attempted or completed phone calls.
   - **Task:** Item that logs or schedules all other monitoring activities, such as the review of digital assessments or planned escalations.
   - **Note:** Item that records reference information, such as chronic conditions. Key information entered in this field can also be pasted into the *Monitoring Event Notes* box for increased visibility as needed.



6. Contact Information:

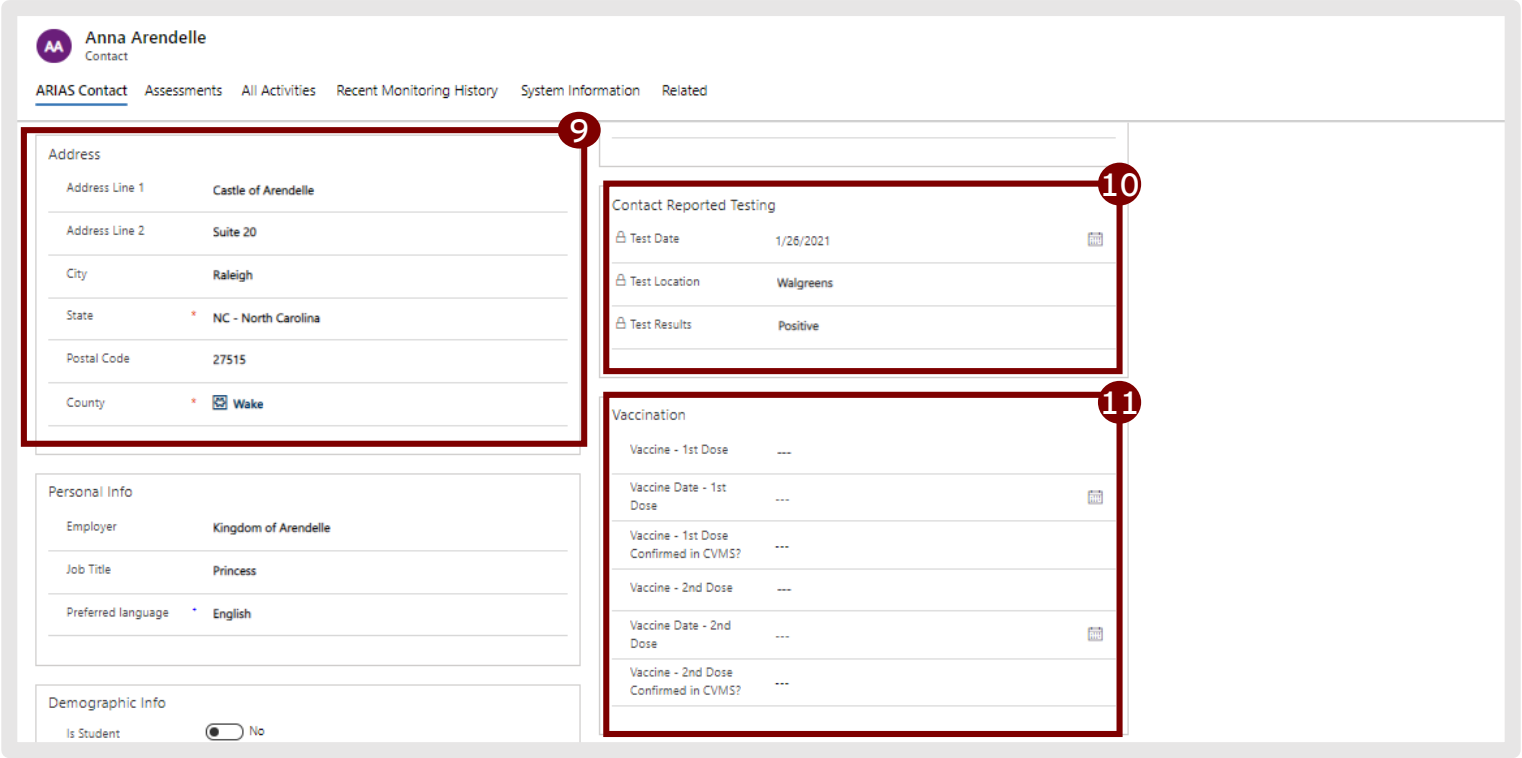
- **Country Code:** Indicates if contact has a non-US country code. Not usually needed.
- **Primary Phone:** Contact's primary phone number, which should be their mobile phone, if available. Automated texts will always be sent to this number.
- **Phone #2, #3:** Contact's secondary phone numbers, such as work or landlines.
- **Email:** Contact's email address.
- **Preferred Method of Contact:** Determines how contact will be reached or how automatic digital outreach will be sent. This will be set to "Phone Call" by default until manually changed, and must read "Text Message" or "Email" in order to send a digital assessment.

7. Source Case Info:

- **Ongoing Exposure:** Indicates if a contact's last date of exposure is ongoing (e.g., if contact lives with case patient).
- **NC-COVID Event ID of Source Patient #1:** 9-digit NC-COVID Event ID of case patient to whom contact was exposed. This number must start with a "1."
- **Last Date of Exposure to Source Patient #1:** Last date when contact was exposed to case patient. Used by the system to calculate "Monitoring End Date" and the recommended testing date sent to the contact in an automatic digital exposure notification.
- **NC-COVID Event ID of Source Patient #2:** Used if contact has a new exposure while being monitored. See Handling Multiple Exposures Job Aid.

- **Last Date of Exposure to Source Patient #2:** Used if contact has a new exposure while being monitored. See Handling Multiple Exposures Job Aid.
- **Source Patient Name:** Used only if NC-COVID Event ID is unavailable.
- **Source Patient Birthdate:** Used only if NC-COVID Event ID is unavailable.

8. **Testing Details:** Section to be filled out manually by the contact tracer.
   - **Referred to Test?:** Indicates if contact has been referred to testing.
   - **Referred to Test Date:** Manual field to indicate date of contact's test referral.
   - **Tested?:** Indicates if contact is confirmed to have been tested.
   - **Test Date:** Manual field to indicate date of contact's test.
   - **COVID-19 Test Result:** Indicates outcome of contact's test.
   - **NC COVID Diagnosis Date**: Locked field populated automatically from NC COVID that is only shown for case patients who have flowed into CCTO.



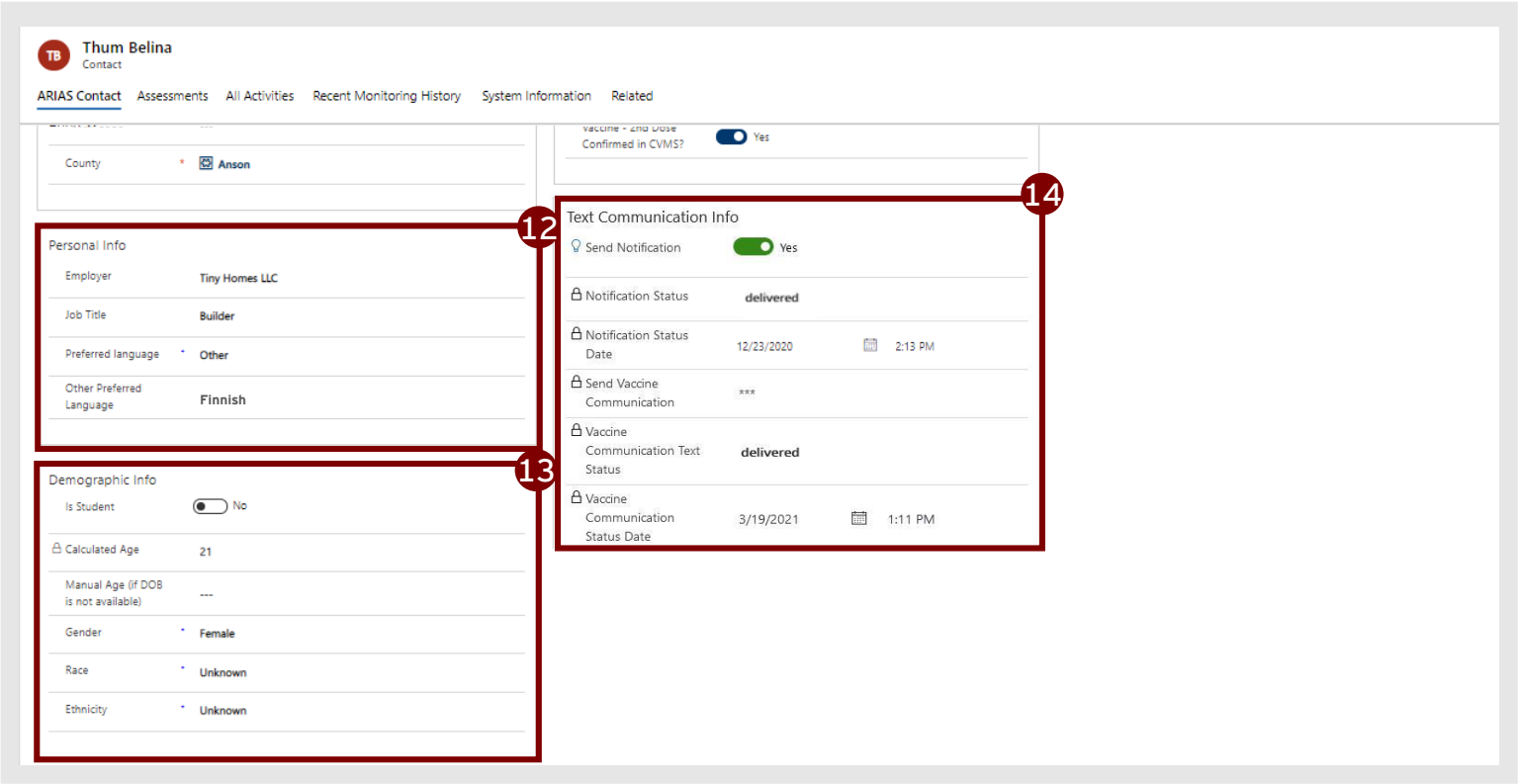
9. **Address:**
   - **Address Line 1, 2:** Contact's street address.
   - **City:** City of contact.
   - **State:** State of contact. Required to create contact profile.
   - **Postal Code:** Postal code of contact.
   - **County:** County of contact. Required to create contact profile if the contact resides in NC. *Use county of case if county of contact is not known*.

10. **Contact Reported Testing:** Section appears only if the contact completes this information in an assessment. Contains locked fields that automatically populate with information provided by the contact.

- **Test Date:** Contact-reported date of testing.
- **Test Location**: Contact-reported location of testing.
- **Test Results**: Contact-reported results of the test.

11. Vaccination:

- **Vaccine – 1st Dose:** Manual field that indicates which classification of vaccine was administered to the contact for their first dose.
- **Vaccine Date – 1st Dose:** Manual field for the date when the first dose of the vaccine was administered to the contact.
- **Vaccine – 1st Dose Confirmed in CVMS?:** Toggle indicating whether the information entered in "Vaccine Type" and "Vaccine Date" 1st Dose fields has been cross-checked with CVMS per local protocol.
- **Vaccine – 2nd Dose:** Manual field that indicates which classification of vaccine was administered to the contact for their second dose.
- **Vaccine Date – 2nd Dose:** Manual field for the date when the second dose of the vaccine was administered to the contact.
- **Vaccine – 2nd Dose Confirmed in CVMS?:** Toggle indicating whether the information entered in "Vaccine Type" and "Vaccine Date" 2nd Dose fields has been cross-checked with CVMS per local protocol.



12. Personal Info:

- **Employer:** Contact's employer. Do not use for school information.
- **Job Title:** Contact's job title.
- **Preferred Language:** Contact's primary language. Determines if automatic outreach is sent in English or Spanish.

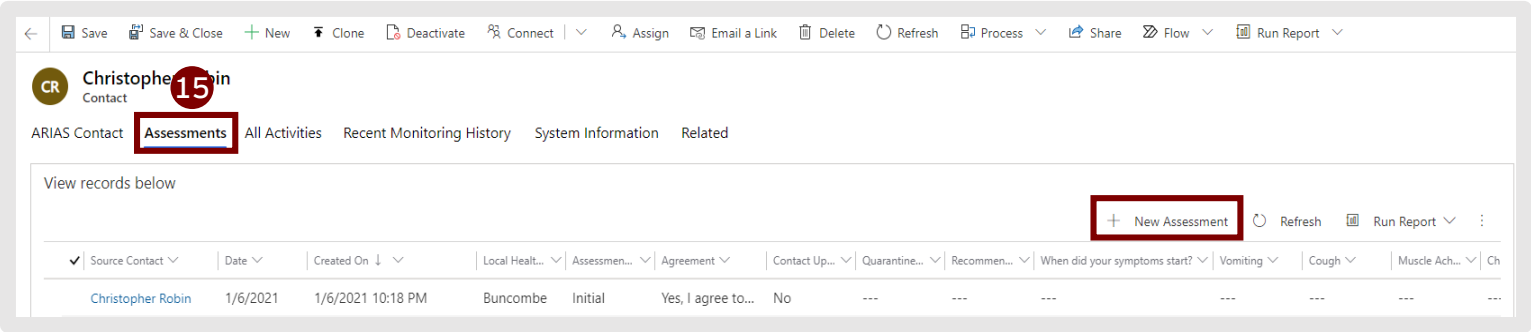
- **Other Preferred Language:** Used to type the name of contact's primary language only if "Other" is selected in "Preferred Language." Appears if "Other" is selected in Preferred Language.

13. Demographic Info:

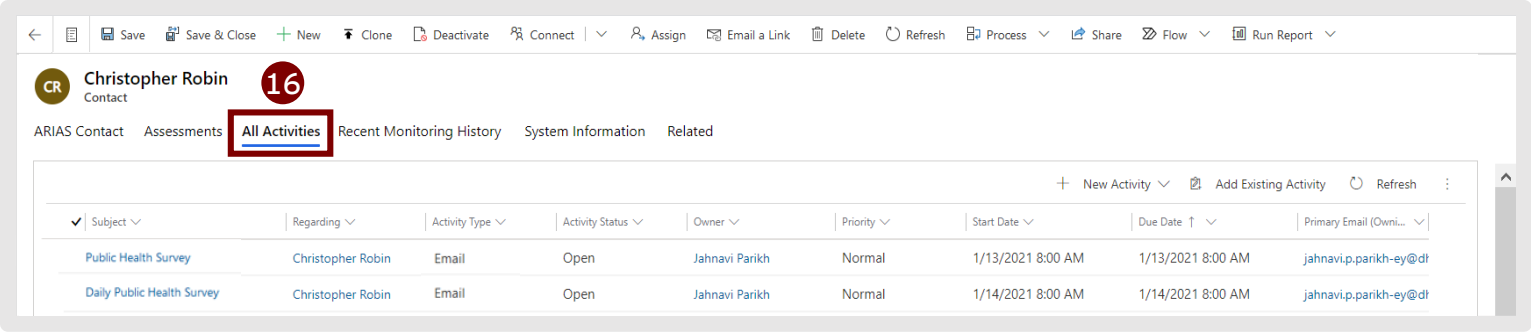
- **Is Student:** Indicates if contact is a student.
- **School Name:** Contact's school (*or pre-school, daycare, etc. if permitted by local protocol*). Appears if "Is Student" is turned on.
- **Calculated Age:** Locked field that automatically calculates contact's age based on "Date of Birth."
- **Manual Age:** Manual field to input contact's age if DOB is not available.
- **Gender:** Contact's gender.
- **Race:** Contact's race.
- **Ethnicity:** Contact's ethnicity.

14. Text Communications Info:

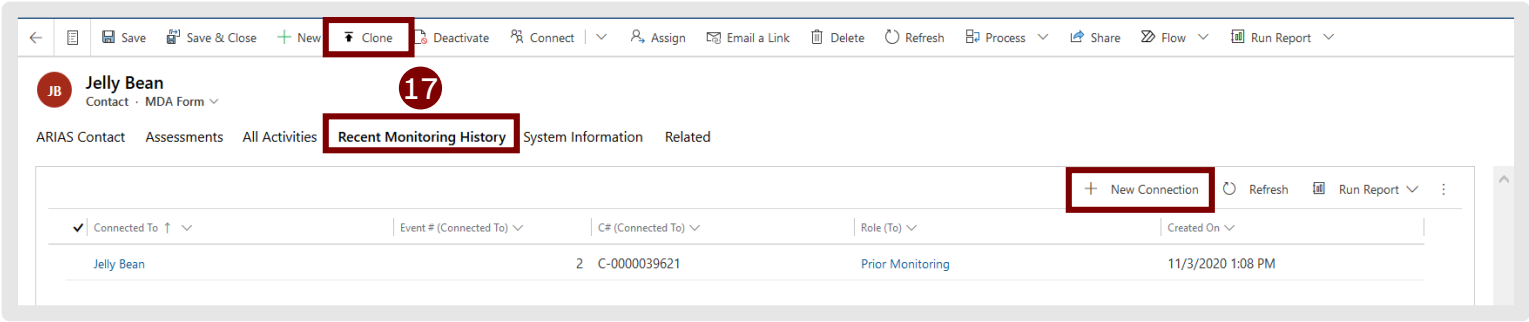
- **Send Notification?:** Automatic toggle that moves to "Yes" once the fields required for notification ("Last Date of Exposure" for contacts; "Email" or "Primary Phone" for both contacts and cases) are complete, indicating that the system will send an automatic notification upon saving. See job aids for Digital Exposure Notification for Contacts and Verifying Case Flow and Notification.
- **Text Notification Status:** Locked field that shows a snapshot of text notification status as of the time shown in "Status Date." Only updates one time. See Digital Exposure Notification for Contacts or Verifying Case Flow and Notification one-pager for descriptions of statuses.
- **Status Date:** Locked field for the timestamp of "Text Notification Status." Only updates one time.
- **Send Vaccine Communication:** Locked field used only by the NC DHHS IT Team to support the text blast functionality. CCTO users cannot use or change this field.
- **Vaccine Communication Text Status:** Locked field that shows a snapshot of text blast status as of the time shown in "Vaccine Communication Status Date." Updates each time a new text blast is sent.
- **Vaccine Communication Status Date:** Locked field for the timestamp of "Vaccine Communication Text Status." Updates each time a new text blast is sent.



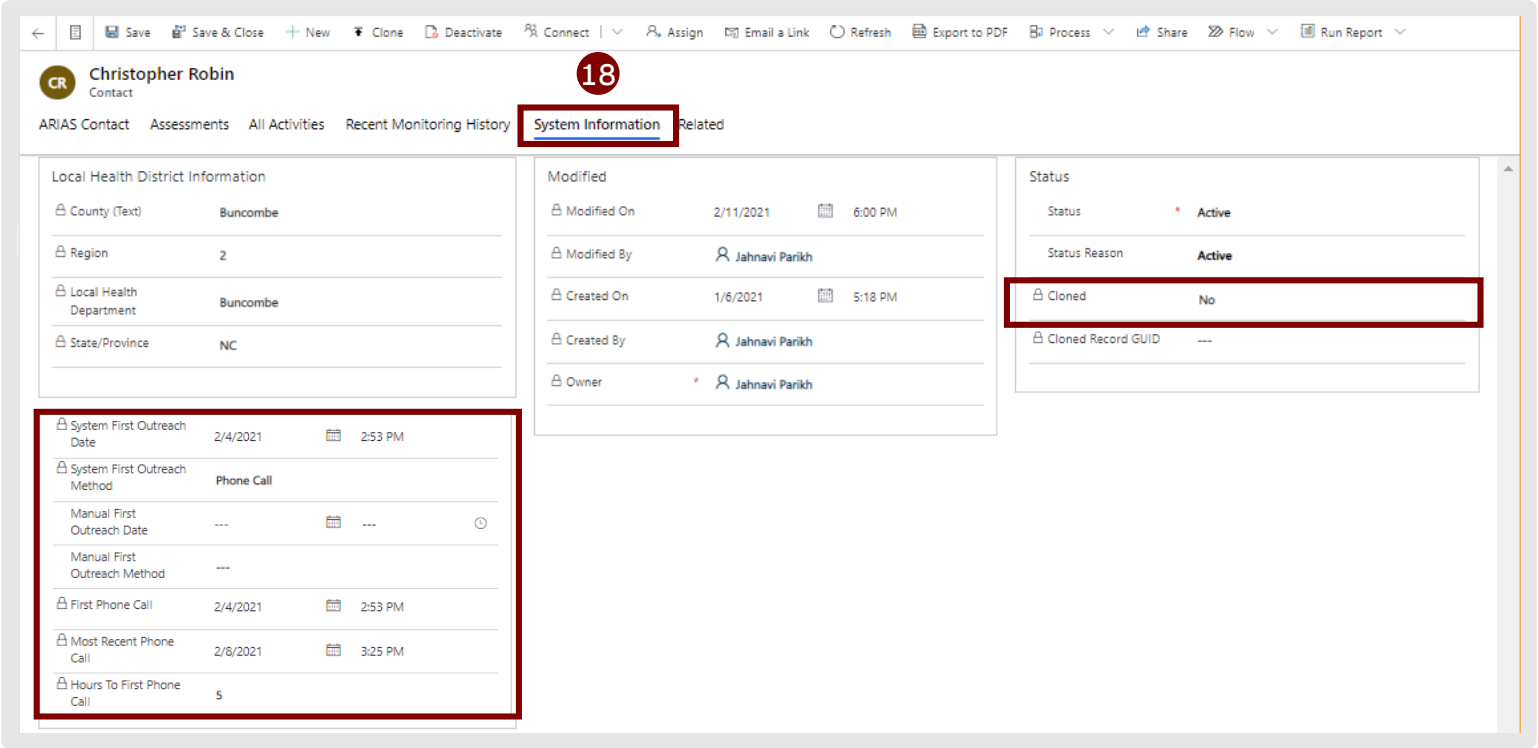
15. **Assessments Page:** Displays all assessments (ongoing surveys of changes in symptoms and resource needs) for this contact.
    - **+New Assessment Button:** Creates a new manual assessment for the contact in which results are recorded by the tracer over the phone.



16. **All Activities Page:** Displays copies of all automated outreach (emails, texts) that has been sent to a contact, including items from automatic digital notifications and ongoing digital monitoring.



17. **Recent Monitoring History Page:** Shows the monitoring events immediately before and (if applicable) immediately following this monitoring event.
    - **Clone Button:** Creates a new monitoring event under the same C# from a *deactivated profile only*. See the Handling Multiple Exposures, Quick Reference Handling and Preventing Duplicates, and the Cloning, Connecting, Deduplicating Job Aids for more information on how and when to use this feature.
    - **+ New Connection:** Links non-concurrent monitoring events for the same individual when cloning is not an option because a new monitoring event has already been created under a different C#. See the Connecting Contacts and Cloning, Connecting, Deduplicating job aids for more information on how and when to use this feature.



18. **System Information Page:** Displays information about the contact profile that has been automatically recorded by the system for your reference.

- **System First Outreach Date, Method:** Locked fields that automatically calculate based on the first completed outreach attempt (phone call, text message, or email) in Timeline/Activities.
- **Manual First Outreach Date, Method:** Manual fields that can be used to record the date and method of first outreach attempt for organizations in which this is required. Not generally used.
- **First Phone Call:** Locked field that automatically updates one time based on the first completed phone call, whether or not this is a contact's first outreach.
- **Most Recent Phone Call:** Locked field that automatically updates every time a new phone call is completed.
- **Hours to First Phone Call:** Locked field that automatically calculates the time from profile creation to the time when the first phone call logged on the contact record was closed.
- **Cloned:** Indicates if this monitoring event was created through cloning a deactivated profile for a previous monitoring event. This field will read "No" for all active profiles and "Yes" for any deactivated profiles that have been cloned to create new monitoring events. See the Cloning, Connecting, Deduplicating and Handling Multiple Exposures Job Aids.

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Views

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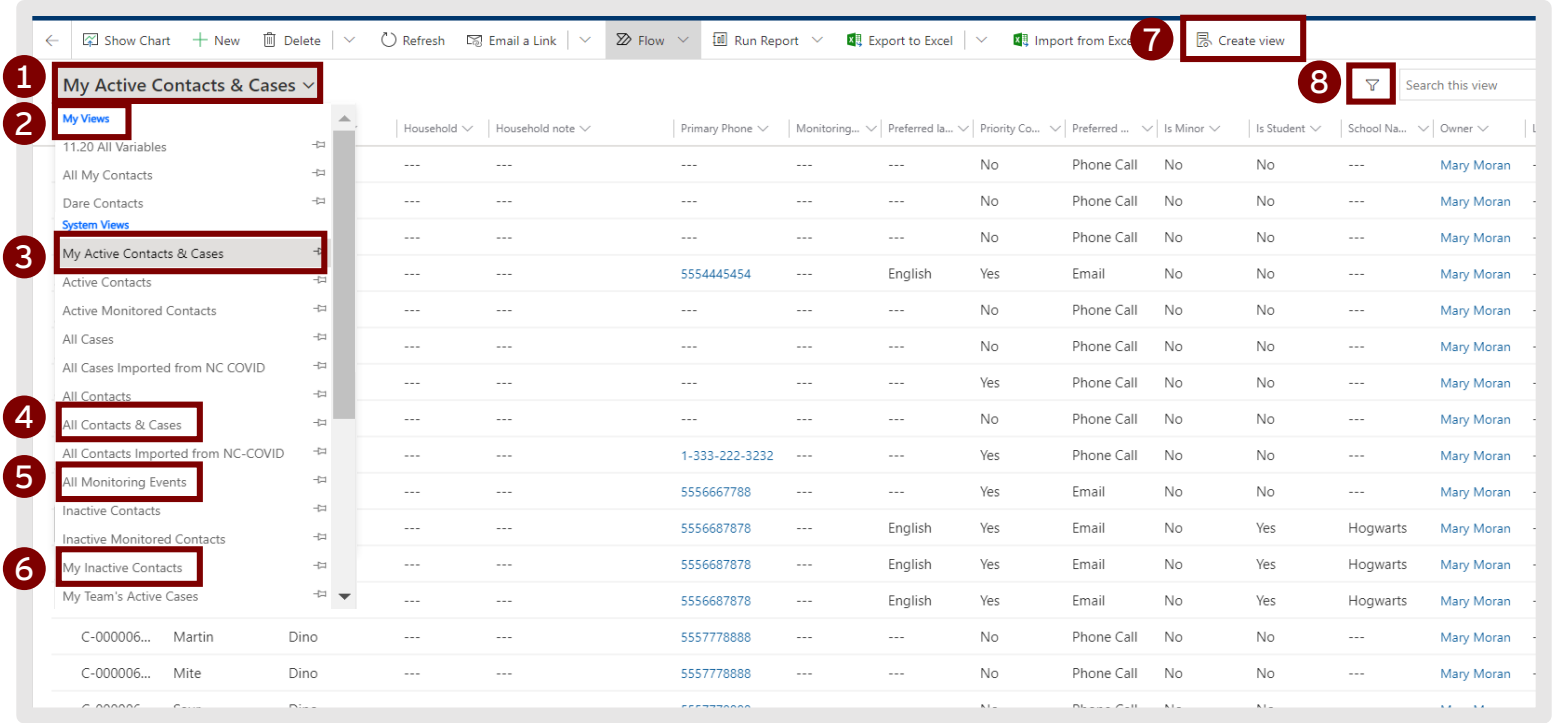

A view, such as the default "My Active Contacts and Cases" view on the Contacts Tab, is a way of looking at the set of data displayed within each tab. Views use filters to limit the entries displayed and columns to change the information displayed about those entries. Views can be developed or shared by others, and you can also develop and save your own views per the job aid and the training.

1. **Views Dropdown:** Displays a list of all views available to the current user. **Views** are options within a tab that change the way information is filtered or displayed. A view may add or remove filters on data (such as a filter for owner or county) or change the type or order of columns displayed.

2. **My Views:** A list of views created by the user ("personal views") and views shared with the user by other users of CCTO.

3. **System Views:** A list of default views automatically available to all users of CCTO.

4. **All Contacts and Cases:** A system view that displays only the most recent monitoring event (active or inactive) for all contacts and cases.

5. **All Monitoring Events:** A system view that displays a list of all monitoring events for all contacts and cases. See Multiple Exposures Job Aid for more information.

6. **My Inactive Contacts:** A system view that displays a list of all contact profiles owned by the user that have been deactivated.
7. **Create View Button:** Opens a system dialogue that allows the user to create and share personal views per the job aid.
8. **Filter Icon:** Opens a panel that displays all filters applied to the current view and allows users to add or remove filters.

Household Profiles

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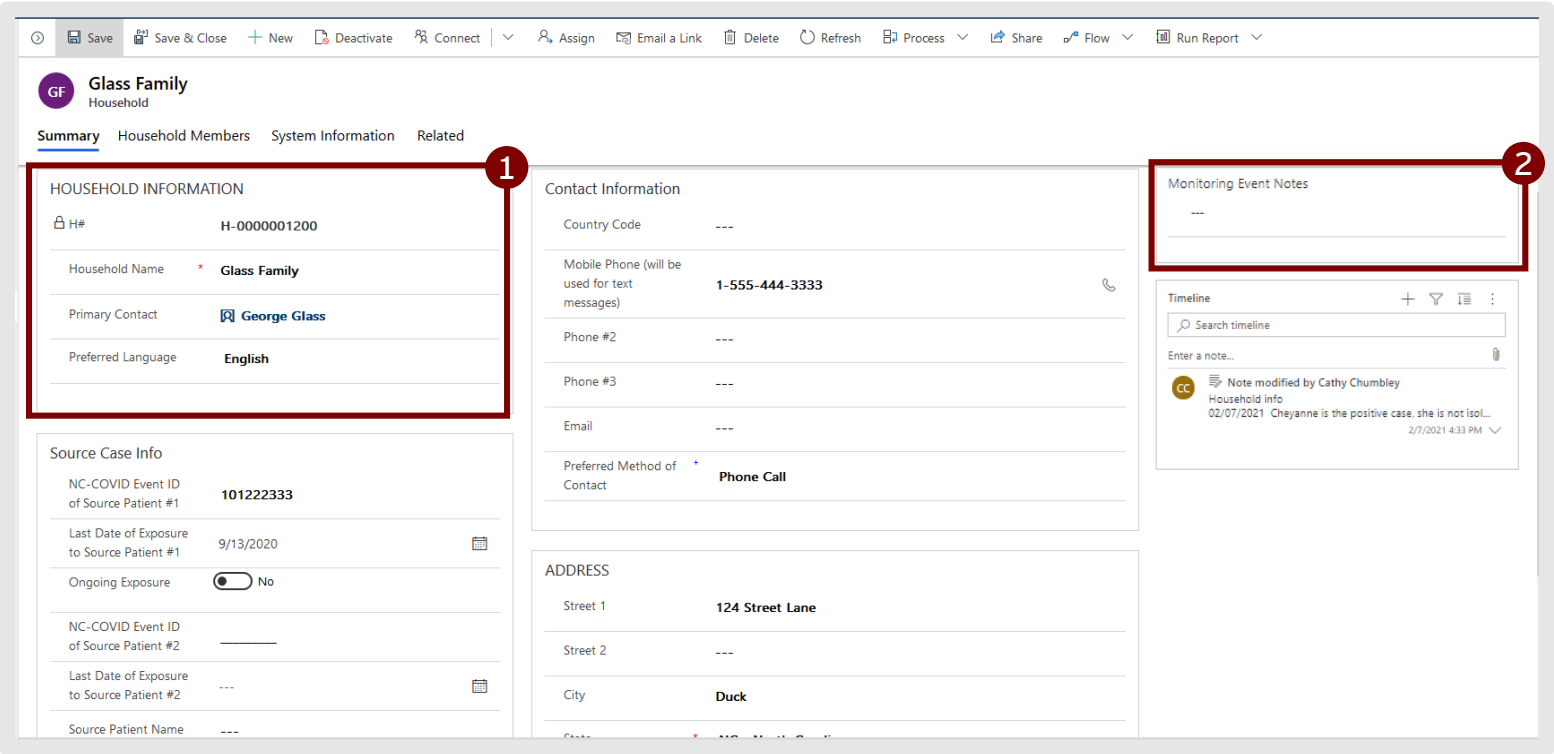
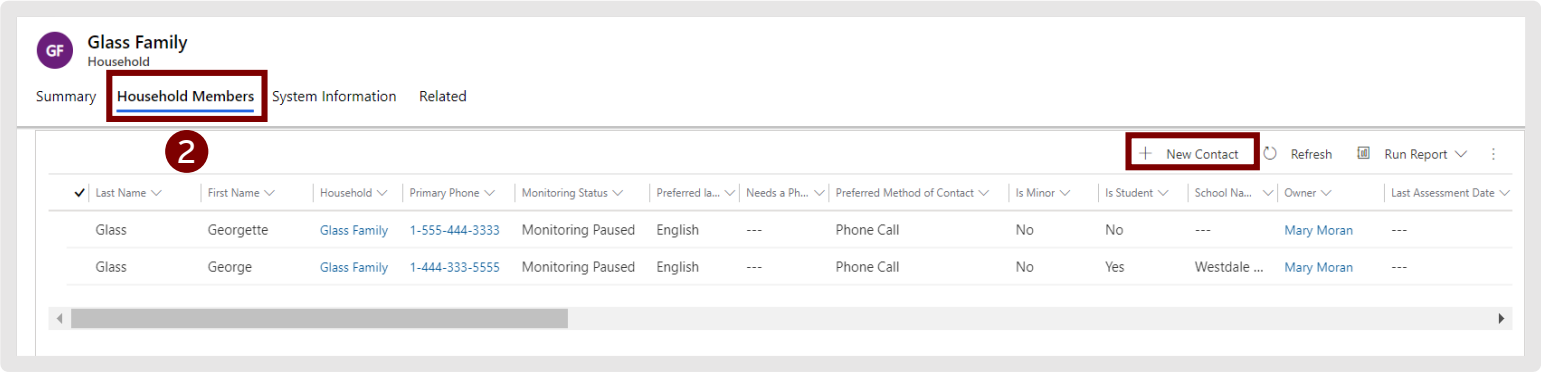


A household is a joint profile that links a group of contacts to help streamline data entry and outreach. Information entered in Source Case Information, Contact Information, and Address will carry over to new contacts created within this household; however, this information can always be adjusted on individual contact profiles later. For more information on navigating households, see this job aid.

1. **Household Information:**
   - **H#:** Household number, a unique identifier automatically generated by the system.
   - **Household Name:** An identifying group name used for the entire household.
   - **Primary Contact:** The main individual to whom the contact tracer should speak when contacting this group. This individual may have been designated to complete assessments on behalf of others.
   - **Preferred Language:** The primary language spoken by members of this household.
2. **Monitoring Event Notes:** This section serves as a free text box for any reference information that should remain easily visible at the top of the household profile.



2. **Household Members Page:** Lists all contacts within a household. Each contact within a household must have their contact profile and receive their own assessments.
   - **+New Contact Button:** Creates a new contact within the household using pre-populated information from the household profile.

Assessments

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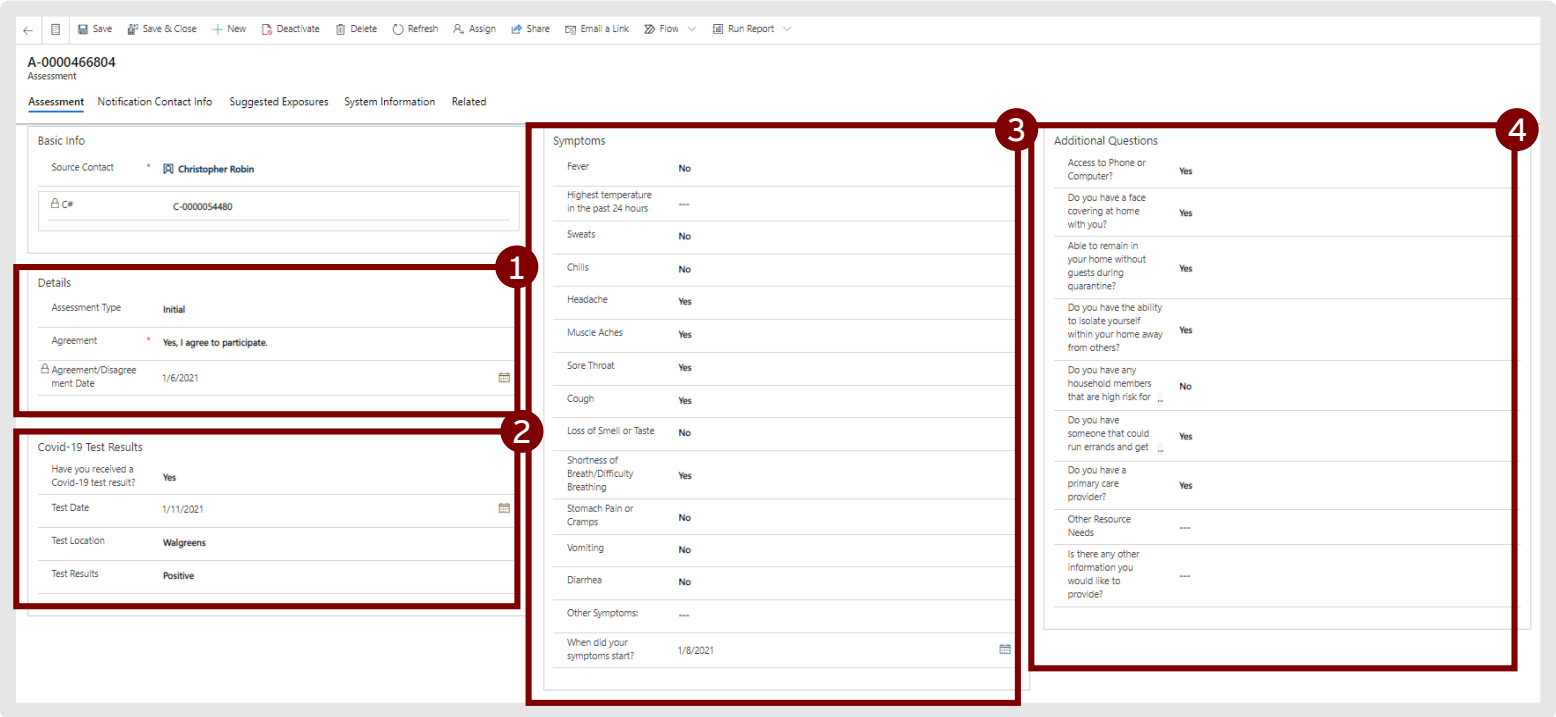


An assessment is an ongoing survey of changes in symptoms and resource needs. These could be completed by the contact in a digital assessment *(delivered to a contact via text or email)* or recorded by the tracer in a manual assessment *(completed by the tracer while speaking to the contact on the phone)*. See the Assessments Job Aid or micro-training video for details.

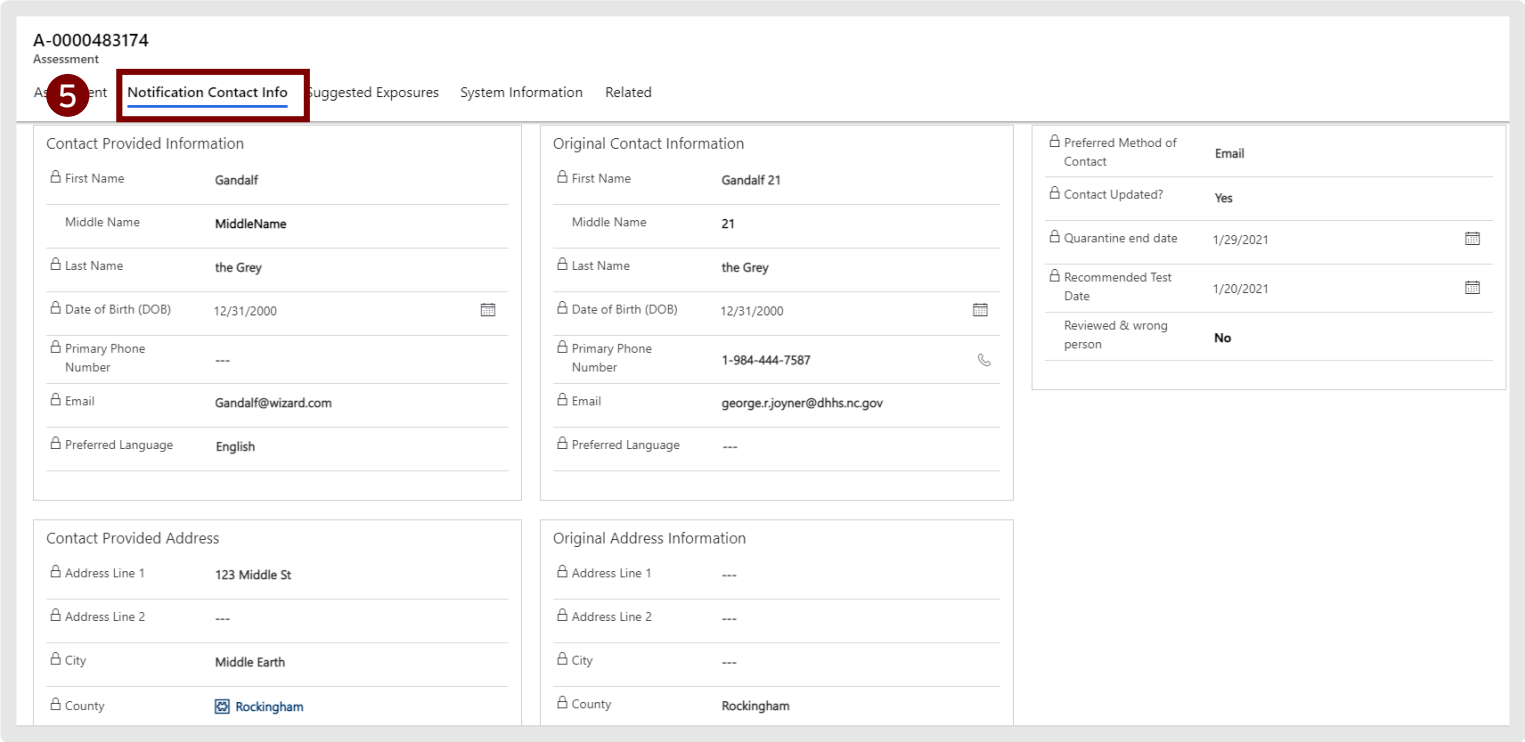
1. Details:

- **Assessment Type:** Indicates if this is an initial, monitoring, or notification assessment. Notification assessments are sent within automatic digital notifications and contain a unique set of information (*see next page*). Both initial and monitoring assessments collect the same symptom and test result information; however, initial assessments display a full list of resource need questions, while monitoring assessments ask contacts: "Do you have a new resource need?" and only request more info if contacts respond "Yes."
- **Agreement:** Indicates whether the contact has agreed to participate and is used to calculate "Last Assessment Date."
- **Agreement/Disagreement Date:** Locked field that automatically populates based upon the first date that "Agreement" field is populated.

2. Covid-19 Test Results: Allows the contact to self-report testing information that will automatically transfer to the *Contact Reported Testing* box on a contact profile.

3. **Symptoms:** Corresponds with the symptom questions presented to contacts in digital assessments. The first time any field in this section except "Other Symptoms" or "Highest temperature in the past 24 hours" is completed, the contact profile field for "First Date Symptoms Reported" will update.

4. **Additional Questions:** Corresponds with the resource need questions presented to contacts in digital assessments and will present a shortened list of questions if "Assessment Type" is "Monitoring." Each time any field in this section except "Is there any other information you would like to provide?" is updated, the contact profile field for "Most Recent Date Resource Need Reported" will update.



5. **Notification Contact Info**: For notification assessments only, shows the information submitted by a contact through the notification portal. Will be blank on monitoring and initial assessments. See the Digital Exposure Notification job aid for more information.
   - **Contact Provided Info, Address, Demographics**: Locked fields that show contact's submitted responses within the digital exposure notification portal.
   - **Original Contact Info, Address, Demographics:** Locked fields that show the original data in contact's profile prior to contact's submitted responses in the portal.
   - **Contact Updated?:** Locked field that reads "Yes" if contact-provided last name and original last name are an exact match, indicating that all contact-provided responses have transferred automatically onto profile. *In the event of a mismatch, see page 5 of the job aid*.

- **Quarantine End Date:** Locked field that displays the quarantine end date sent to the contact in their automatic notification (based on "Monitoring End Date").
- **Recommended Test Date**: Locked field that displays the recommended test date sent to the contact in their automatic notification (based on "Last Date of Exposure").
- **Reviewed & Wrong Person:** Manual field that can be updated to "Yes" per local process if it is determined a notification was received by someone other than the intended contact.