CCTO Glossary

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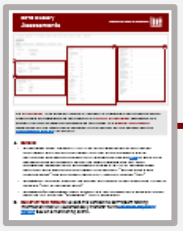

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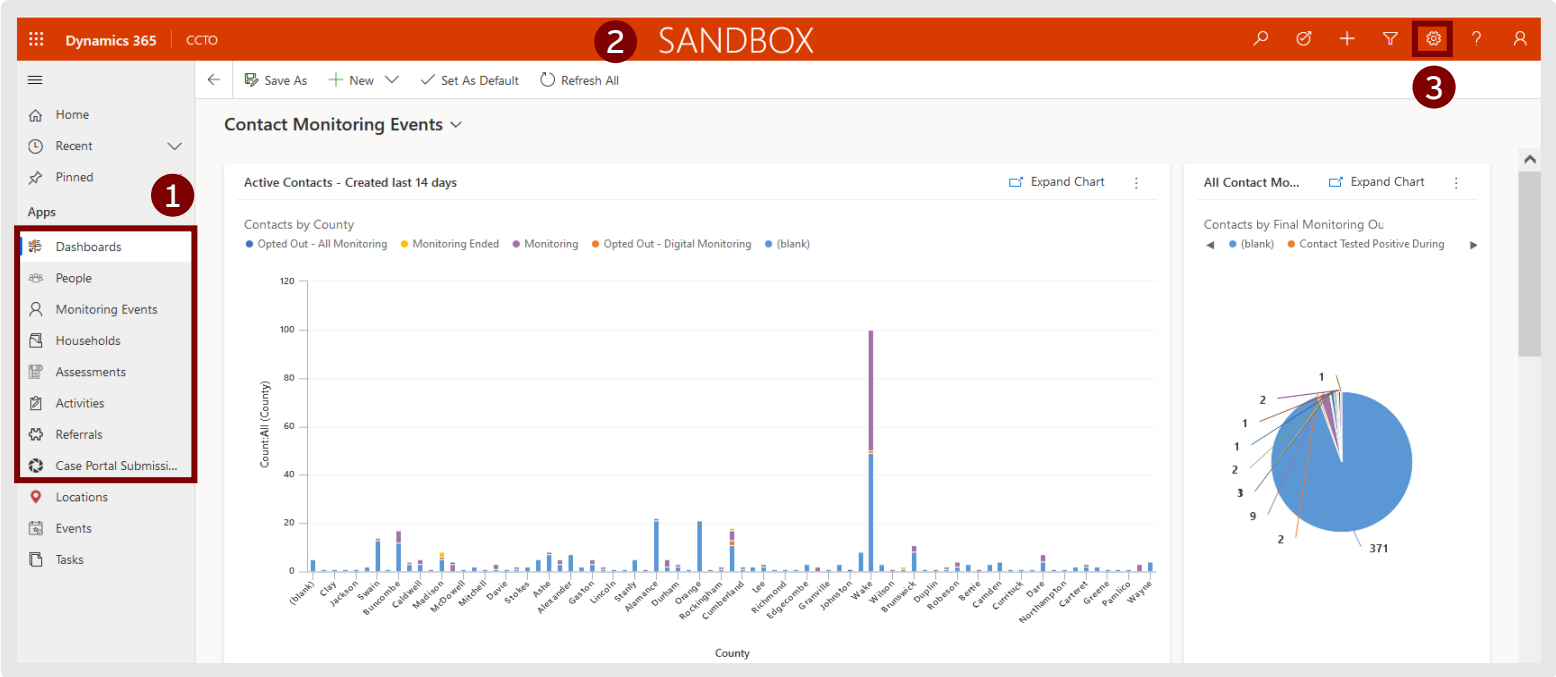

1. **Navigation Tabs:** List of tabs for each type of record within CCTO.
   - **Dashboards Tab:** Displays charts and graphs about contacts & assessments within the system.
   - **People Tab:** Displays a list of person records in the system.
   - **Monitoring Events Tab:** Displays a list of monitoring events (MEs) in the system and allows users to enter new monitoring events.
   - **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 individuals in the system.
   - **Activities Tab:** Displays a list of activities (which could include phone calls, tasks, text messages, or emails) for individuals in the system.
   - **Referrals Tab:** Displays a list of referrals for individuals in the system.
   - **Case Portal Submissions Tab:** Displays a list of contact submissions made by case patients via the portal per the job aid.
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 and case patient 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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Monitoring Events Tab

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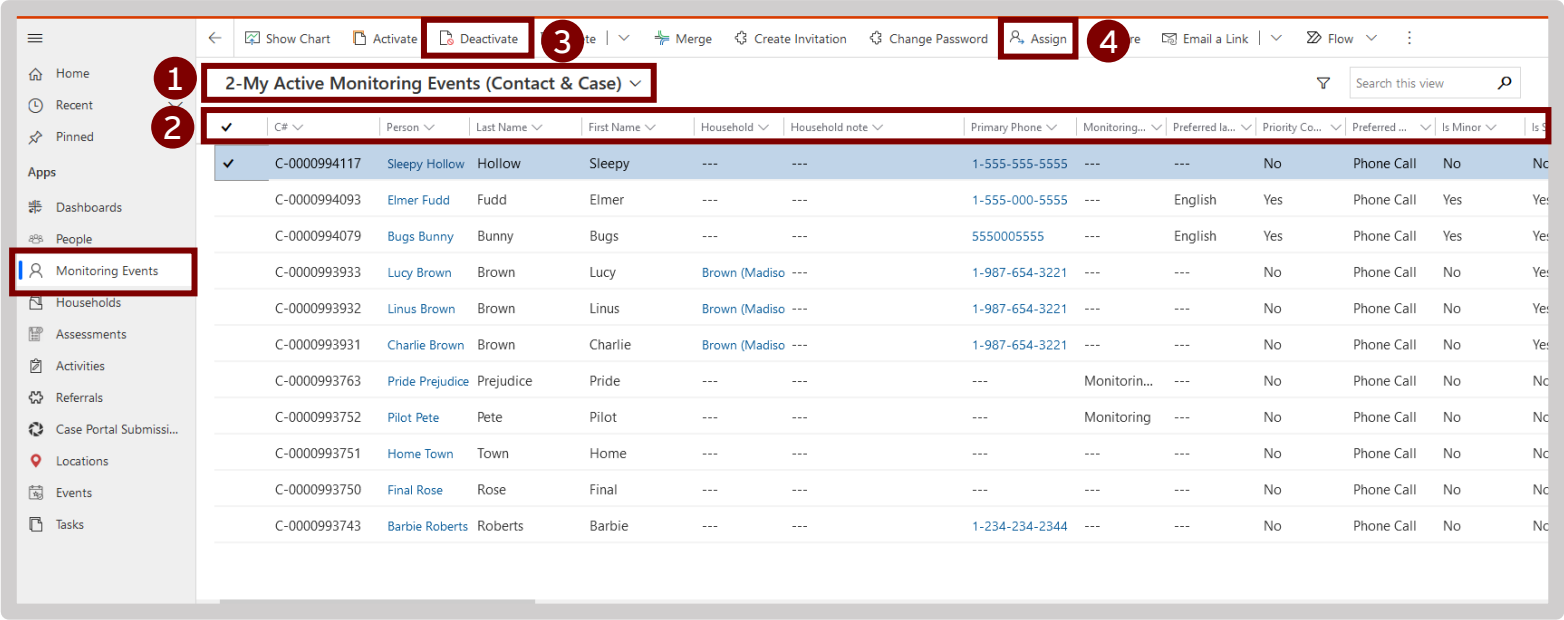

The Monitoring Events Tab holds all the monitoring events (records on which contact or case monitoring takes place) within CCTO, and it should be your center of operations for reviewing any individuals you are monitoring.

1. **My Active Monitoring Events (Contact & Case) View:** System view that displays all of the active contact and case monitoring events (MEs) assigned to the current user. Can be changed to show various other lists of MEs.

2. **Columns:** Categories of information about each monitoring event 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.

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

4. **Assign Button:** Appears upon selecting monitoring event(s). Changes the owner of an ME to a different user or team. This will remove the ME from the first user's "My Active Monitoring Events" view and place it in a different user's "My Active Monitoring Events" view.

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Views

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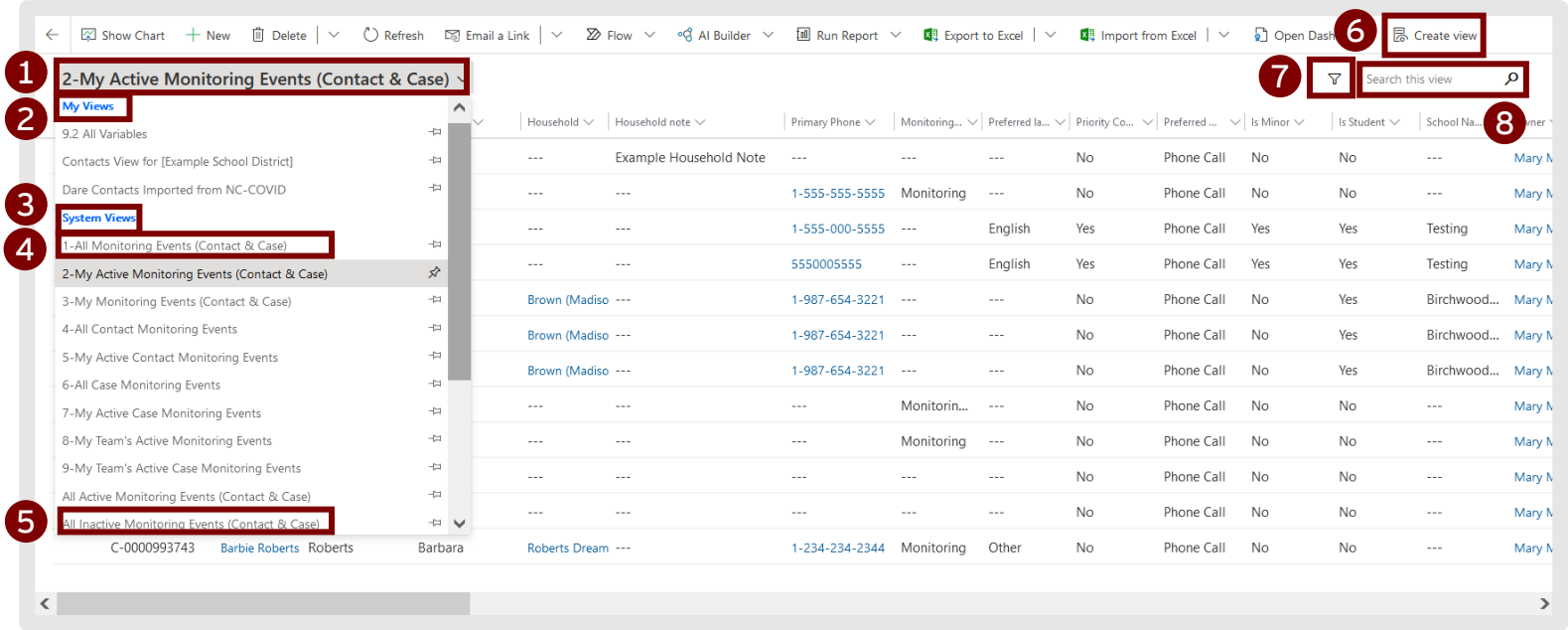

A view, such as the "My Active Monitoring Events" view, is a way of looking at the set of data displayed within each tab. Views use filters to limit the entries displayed and columns to change the information displayed about those entries. Views can be developed or shared by others, and you can also 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 a record's 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") or 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 Monitoring Events (Contact & Case):** A system view that displays a list of all active/inactive monitoring events for all contacts and cases.

5. **All Inactive Monitoring Events (Contact & Case):** A system view that displays a list of only inactive monitoring events for all contacts and cases.

6. **Create View Button:** Opens a system dialogue that allows the user to create and share personal views per the job aid.

7. **Filter Icon:** Opens a panel that displays all filters applied to the current view and allows users to add or remove filters.
8. **Search:** Used to search within the current view by contact name, C#, address, etc.

Contact Monitoring Events

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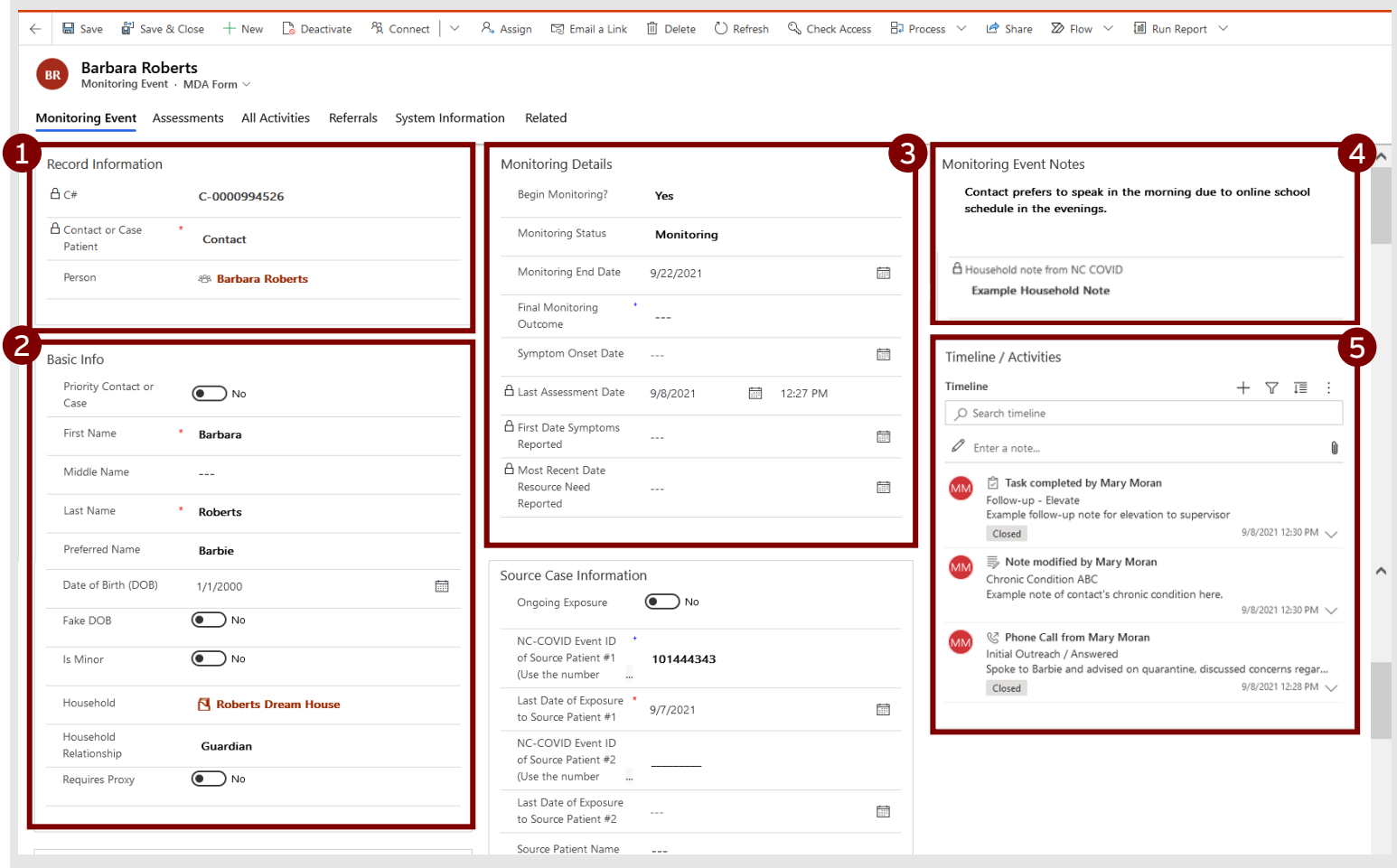


Each contact monitoring event (ME) is associated with a person record and represents a unique, continuous monitoring period following exposure to COVID-19, which may include exposure to more than one case patient and/or extend beyond the duration of an initial quarantine period. When a contact concludes a monitoring period, their ME is closed and deactivated. Review the materials for detailed instructions on creating MEs, and see the Person Functionality Job Aid for more information on how MEs are related to person records.

1. Record Information:

- **C#:** A unique identifier for this monitoring event that is automatically generated by the system.
- **Contact or Case Patient:** Indicates if the individual is *entering* the system as a contact or as a case patient. This field is mandatory and locks on the first time that a monitoring event is saved (per the Case Patients Job Aid). *This glossary section covers MEs set to "Contact." For special fields that are only visible when "Case Patient" is selected, see Case Patient MEs.*
- **Person:** Person record associated with this ME. *If you are creating a new ME, see the job aid for details on using this field and the "Create Person?" toggle.*

2. Basic Info:

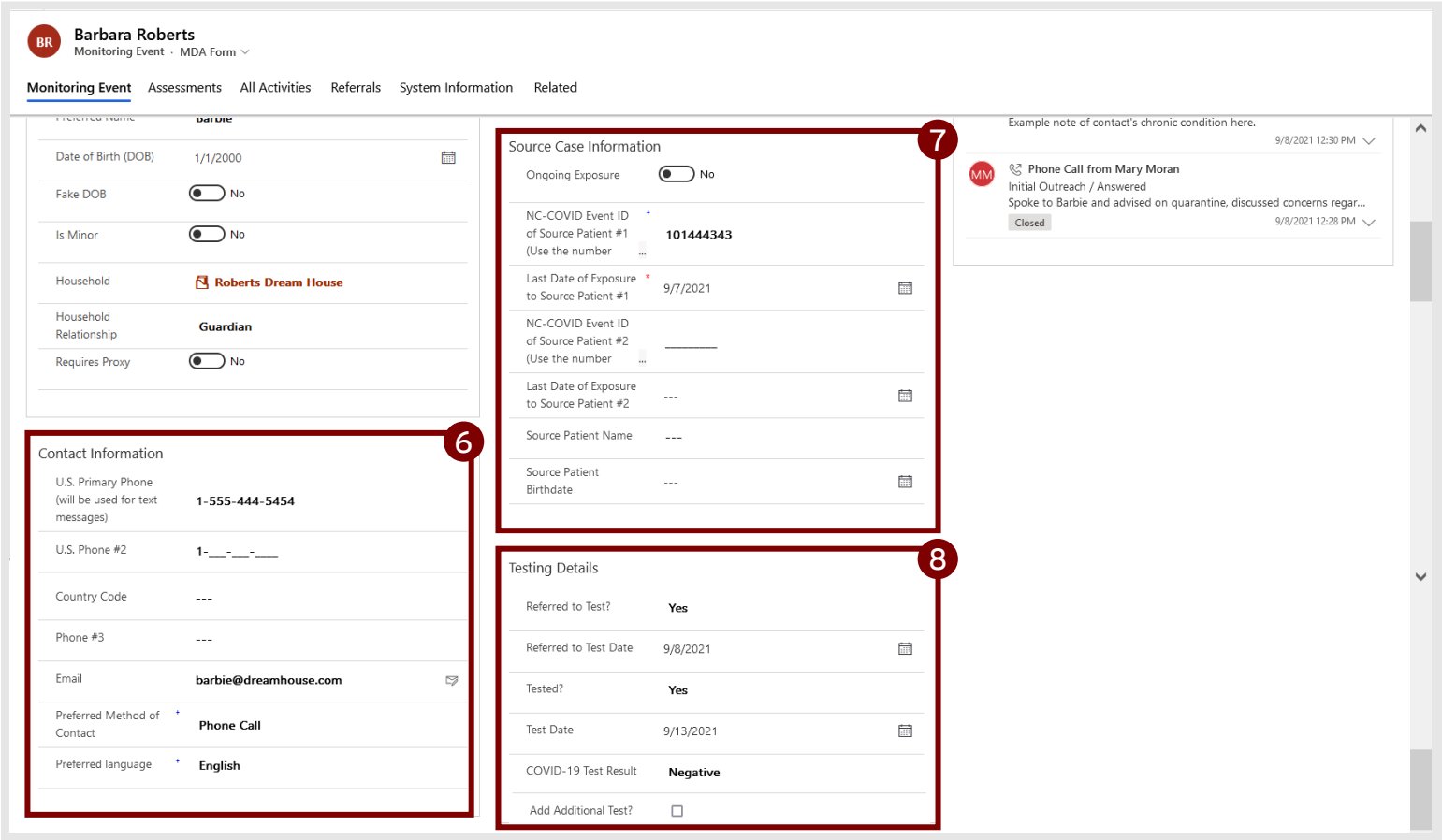
- **Priority Contact or Case:** This feature allows an individual to be tagged as a high priority for manual outreach. Check with local guidance to determine if this toggle should be used.
- **First Name:** First name of the contact. Required to create monitoring event.
- **Middle Name:** Middle name of the contact. Not required.
- **Last Name:** Last name of the contact. Required to create monitoring event.
- **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 job aid 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 but does NOT impact the date sent to contact in 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.
- **Symptom Onset Date:** Manual field to indicate first date contact experienced symptoms.
- **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 monitoring event.
   - **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.
   - **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.
   - **Phone Call:** Item that logs or schedules attempted or completed phone calls.



6. **Contact Information:**
   - **U.S. 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.
   - **Country Code:** Indicates if contact has a non-US country code to be applied to Phone #3. Not usually needed.
   - **Email:** Contact's email address.

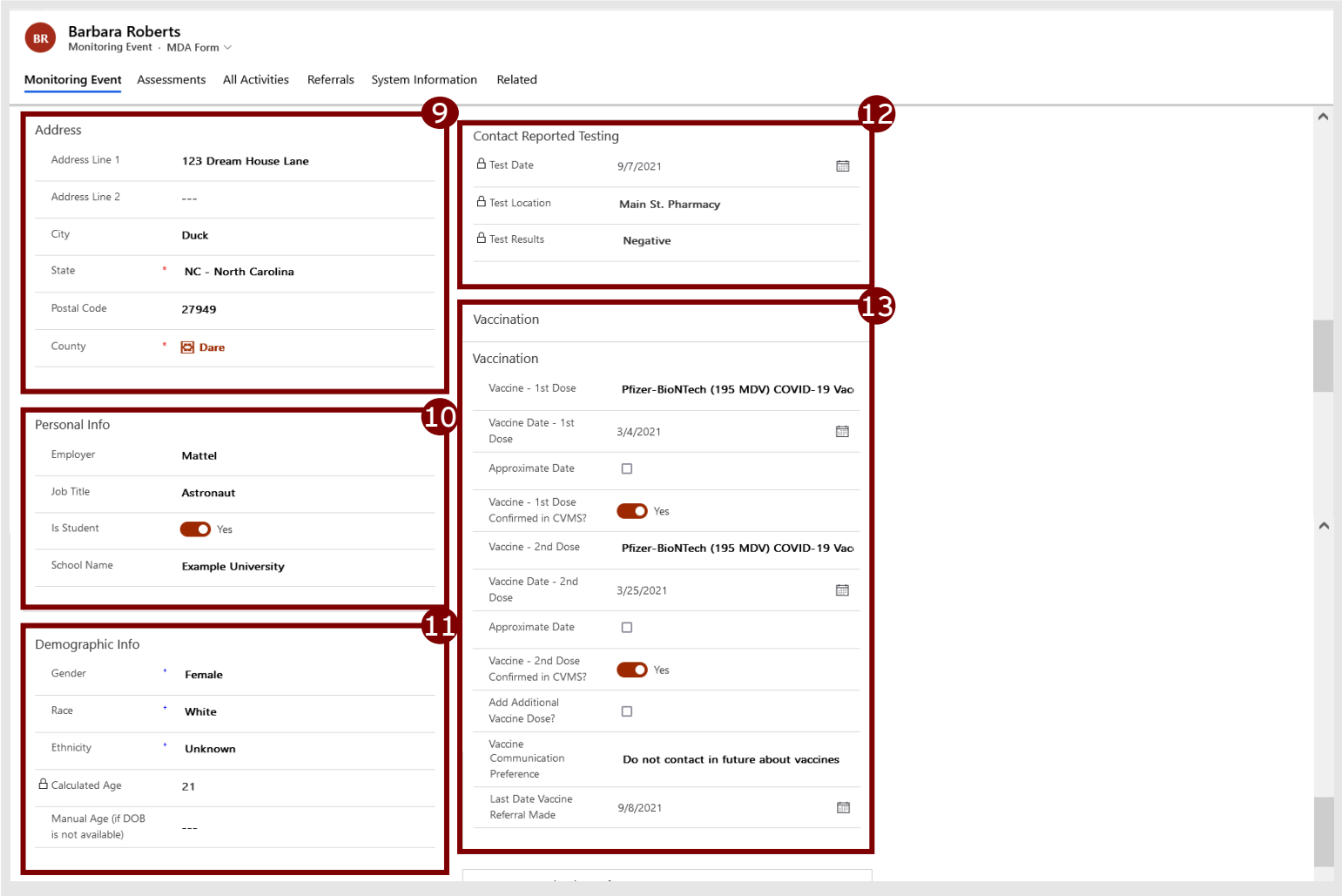
- **Email:** Contact's email address.
- **Preferred Method of Contact:** Determines how contact will be reached or how automatic digital outreach will be sent. This will be set to "Phone Call" by default until manually changed, and must read "Text Message" or "Email" in order to send a digital assessment.
- **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.

7. **Source Case Info:** Section appears only if "Contact" is selected in "Contact or Case Patient."

- **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 and quarantine dates 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.
- **Last Date of Exposure to Source Patient #2:** Used if contact has a new exposure while being monitored.
- **Source Patient Name:** Used only if NC-COVID Event ID is unavailable.
- **Source Patient Birthdate:** Used only if NC-COVID Event ID is unavailable.

7. **Testing Details:** Section appears only if "Contact" is selected in "Contact or Case Patient." Filled out manually by the contact tracer (see *Contact Reported Testing Details* for contact-submitted info).

- **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.
- **Add Additional Test?**: Manual field that, if checked, produces another box called *Testing Details (Additional Test)* that contains fields for information about a second COVID-19 test for this individual.



9. Address:

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

10. Personal Info:

- **Employer:** Contact's employer. Do not use for school information.
- **Job Title:** Contact's job title.
- **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.

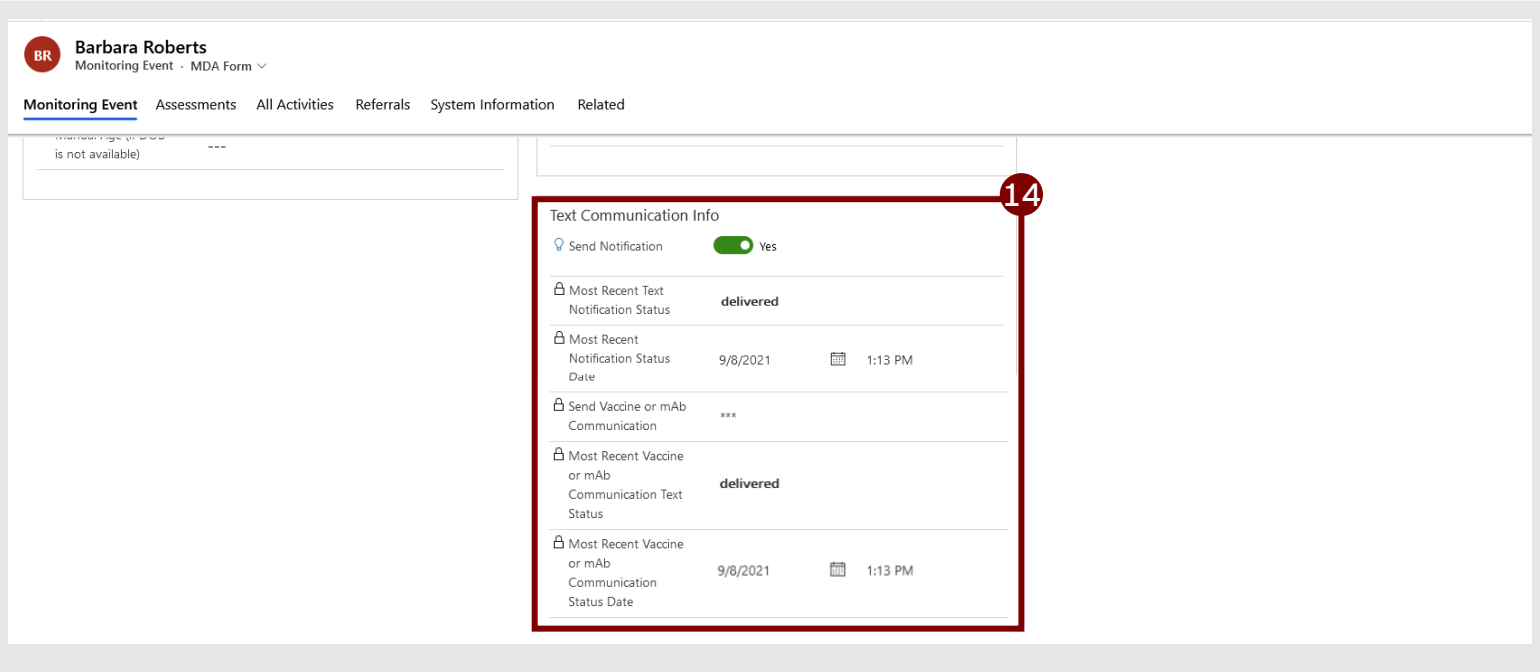
11. Demographic Info:

- **Gender:** Contact's gender.
- **Race:** Contact's race.
- **Ethnicity:** Contact's ethnicity.

- **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.

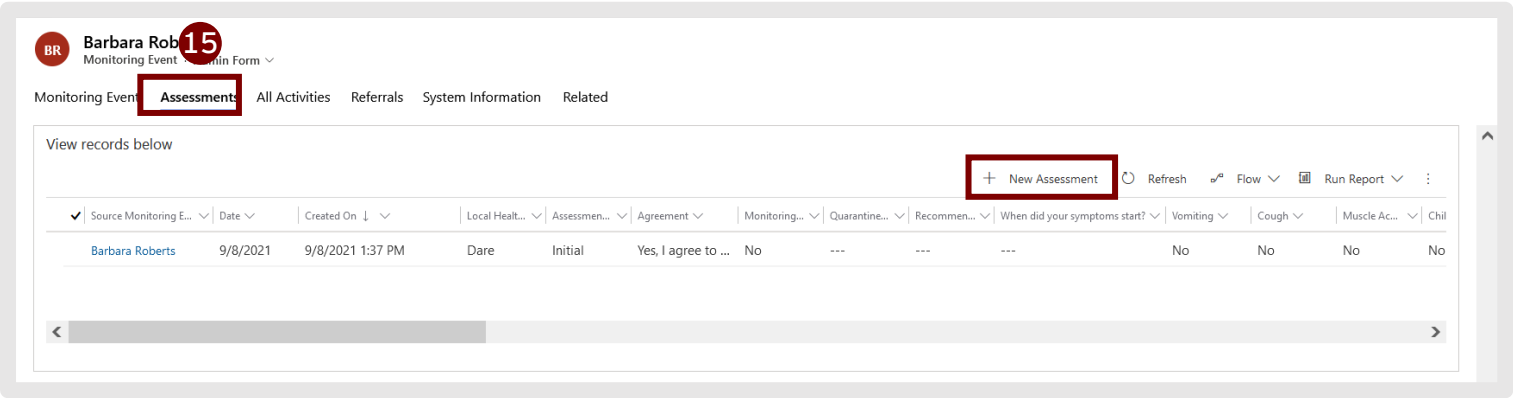
12. **Contact Reported Testing:** Section appears only if the contact completes this information in an assessment. Contains locked fields that automatically populate with information provided by the contact.
    - **Test Date:** Contact-reported date of testing.
    - **Test Location**: Contact-reported location of testing.
    - **Test Results**: Contact-reported results of the test.

13. **Vaccination:**
    - **Vaccine – 1st Dose, 2nd Dose:** Manual field that indicates which classification of vaccine was administered to the contact for their first and second dose.
    - **Vaccine Date – 1st Dose, 2nd Dose:** Manual field for the date when the first dose of the vaccine was administered to the contact.
    - **Approximate Date:** Indicates if the date provided for a first, second, or third vaccine dose is approximate.
    - **Vaccine – 1st Dose, 2nd 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.
    - **Add Additional Vaccine Dose:** Manual field that produces four fields (per the above) for a 3rd vaccine dose if checked.
    - **Vaccine Communication Preference**: Automatically updates each time a vaccine referral with a new preference is logged and can also be updated manually.
    - **Last Date Vaccine Referral Made:** Locked field indicating the last time a referral with "Vaccine" type selected was logged on this ME.



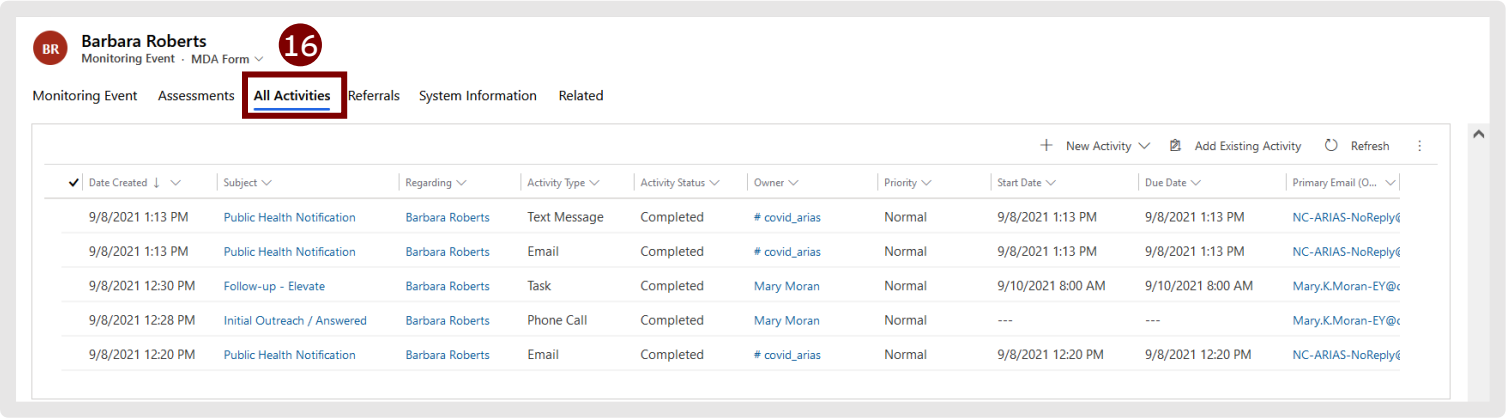
14. Text Communication Info:

- **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.
- **Most Recent 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.
- **Most Recent Notification Status Date:** Locked field for the timestamp of "Text Notification Status." Only updates one time.
- **Send Vaccine or mAb 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.
- **Most Recent Vaccine or mAb Communication Text Status:** Locked field that shows a snapshot of text blast status as of the time shown in "Vaccine or mAb Communication Status Date." Updates each time a new text blast is sent.
- **Most Recent Vaccine or mAb Communication Status Date:** Locked field for the timestamp of "Vaccine or mAb Communication Text Status." Updates each time a new text blast is sent.

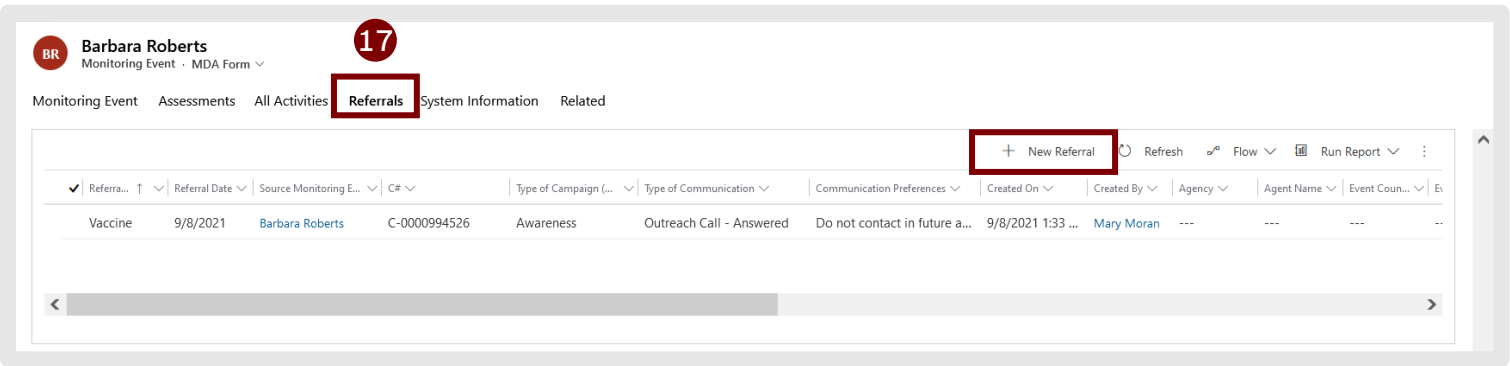


15. Assessments Page: Displays all assessments (ongoing surveys of changes in symptoms and resource needs) for this contact.

- **+New Assessment Button:** Creates a new manual assessment for the contact in which results are recorded by the tracer over the phone.

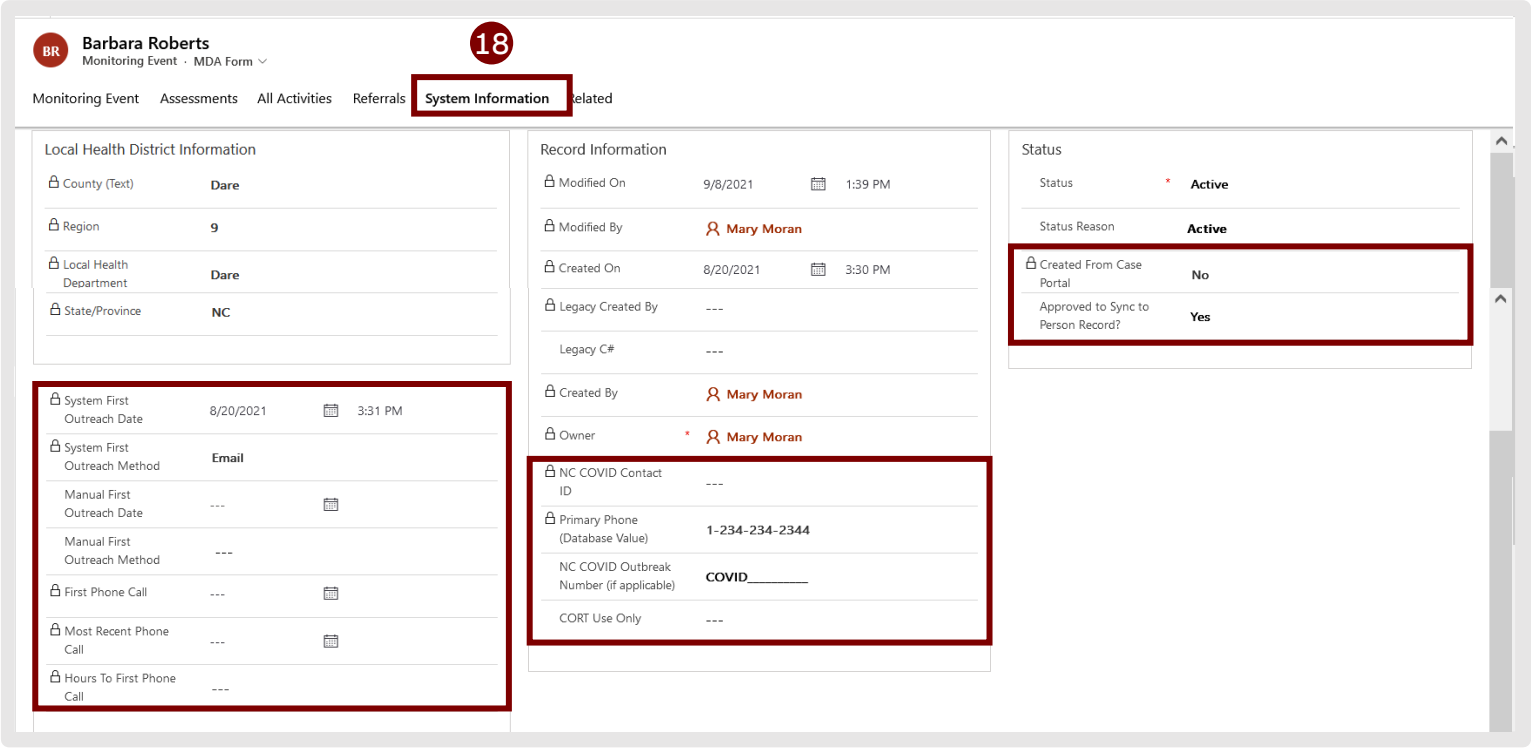


16. All Activities Page: Displays copies of all automated outreach (emails, texts) that has been sent to a contact, including items from automatic digital notifications and ongoing digital monitoring.



19. Referrals Page: Displays all referrals created for this individual.

- **+New Referral Button:** Creates a new referral within the monitoring event using pre-populated information from the individual's monitoring event.



18. **System Information Page:** Displays information about the monitoring event 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 monitoring event creation to the time when the first phone call logged on the contact record was closed.
    - **NC COVID Contact ID:** Locked field that displays the unique NC COVID ID for contacts who have flowed into CCTO from NC COVID (per job aid).
    - **Outbreak Number (if applicable):** Manual field that may be populated with a contact's NC COVID Outbreak #.
    - **CORT Use Only:** Only for use by the COVID-19 Outbreak Response Team.
    - **Created From Case Portal:** Locked field that indicates if this contact was created by a case patient through the case patient portal.
    - **Approved to Sync to Person Record?:** Manual field that can be used to sync a snapshot of an ME's basic info to a person record if set to "Yes" (per job aid).

Case Monitoring Events (MEs)

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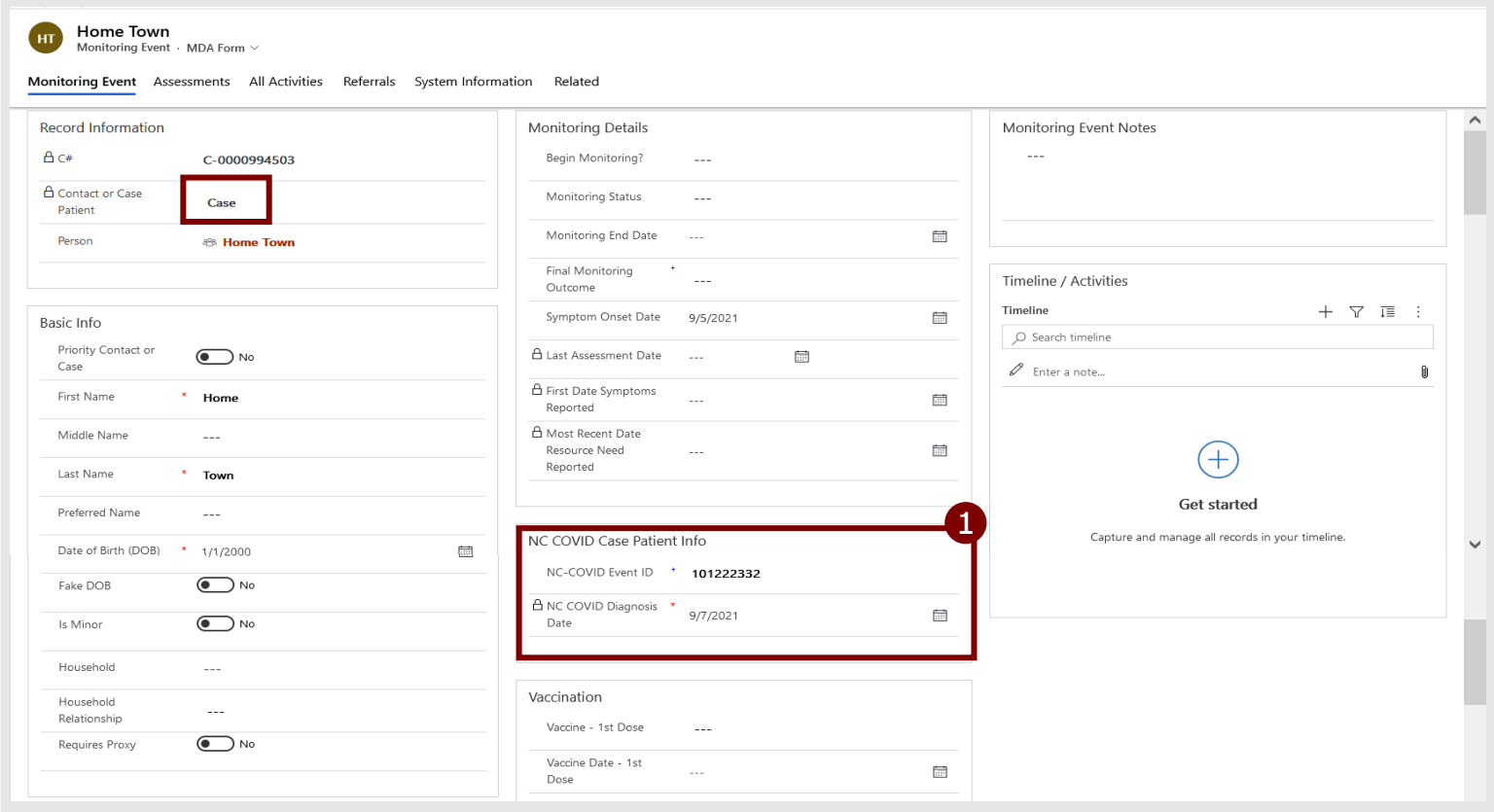

Case patients are not required to be monitored within CCTO; however, case patient monitoring events (MEs) are used to create digital notifications (per job aid) and may be used for monitoring if required by local protocol. Almost all fields are shared between case patient MEs and contact MEs. The fields listed below are specific to cases and are only shown within monitoring events that have "Contact or Case Patient" set to "Case-Patient" (see left box above). *Note also that case patient MEs do NOT include boxes for Source Case Information or Testing*.

1. **NC COVID Case Patient Info**: Section appears only if "Case Patient" is selected in "Contact or Case Patient."
   - **NC COVID Event ID:** A field for the NC COVID Event ID of this case patient. Flows automatically for cases flowing into CCTO from NC COVID.
   - **NC COVID Diagnosis Date:** Field for case patient's NC COVID diagnosis date that locks immediately upon saving. Flows automatically for cases flowing into CCTO From NC COVID.

Person Records

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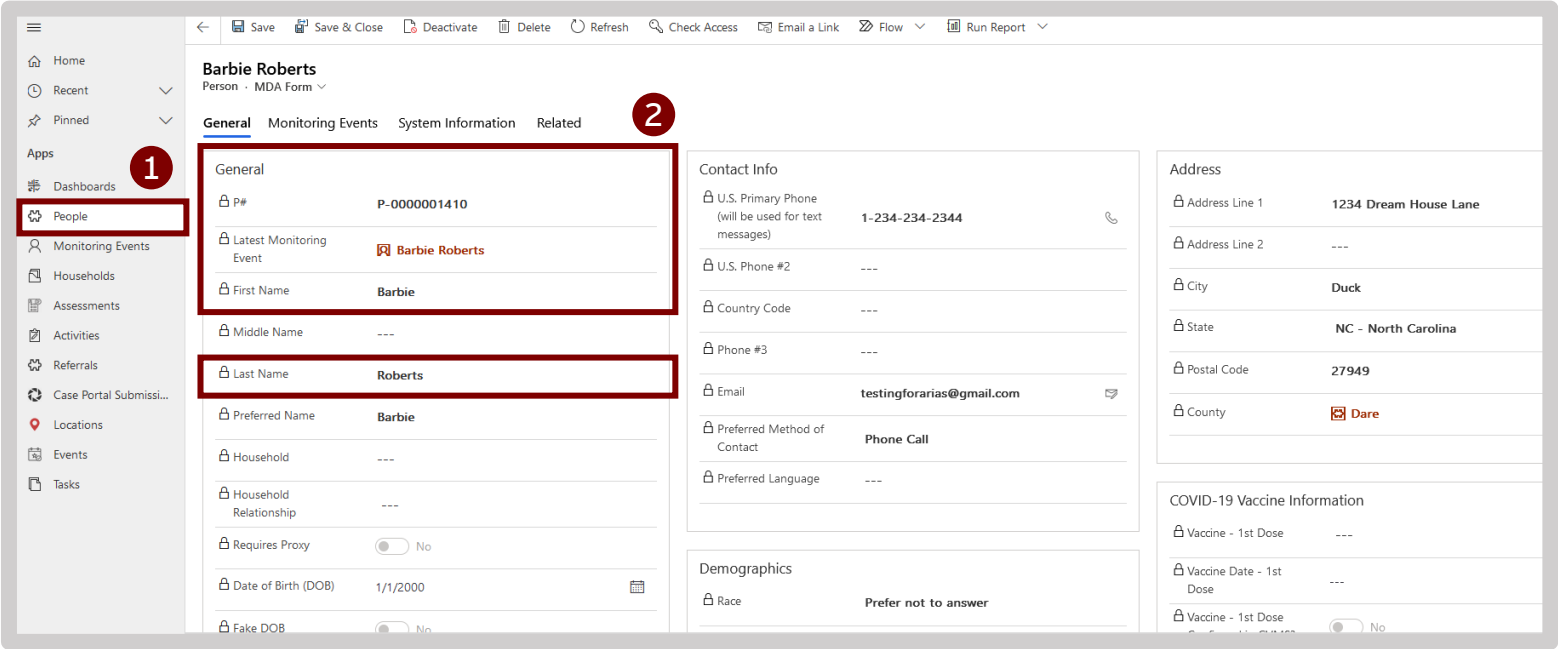
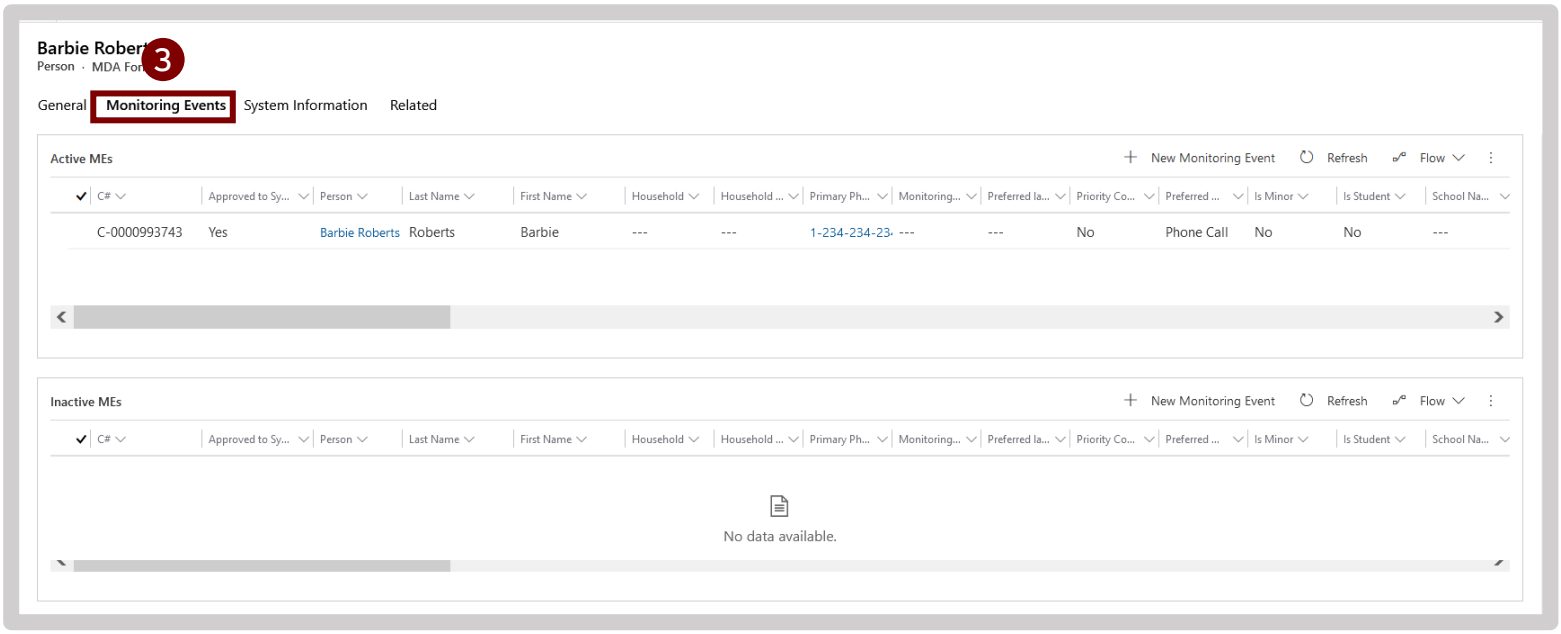


Each person record represents a unique individual who has one or more active or inactive monitoring event(s) (MEs) within CCTO. Per the Person Functionality job aid, a person record displays all of the MEs associated with a particular individual and provides a locked snapshot of their basic information.

A new person record is generated when a new ME is created for someone who does not currently exist within CCTO. When new MEs are created for individuals who already exist within CCTO, they are attached to an existing person record. *See job aid for details.*

1. **People Tab:** Displays a person record for each individual who has one or more active or inactive monitoring event(s) within CCTO.
2. **General:** Displays locked information about this person record. *All fields except those listed below are shown as a snapshot from the most recently created ME associated with this person that has the "Approved Sync to Person Record?" field set to "Yes." This happens automatically when an ME is edited or manually created (see job aid).*
   - **P#:** A unique identifier for this person that is automatically generated by the system. This identifier attaches to each monitoring event associated with this person.
   - **Latest Monitoring Event:** Locked field with a link to the individual's most recently created monitoring event.

- **First, Last Name:** Locked field displaying the first and last name that were entered on the first ME that created this record. These fields do NOT update with the basic info snapshot and can only be edited by an administrator.



3. **Monitoring Events Page:** Page within a person record that displays a list of each active and inactive monitoring event that has been associated with this individual's person record.
   - **+New Monitoring Event Button:** Creates a new monitoring event (with pre-populated basic info) for the individual whose person record is selected.

Household Records

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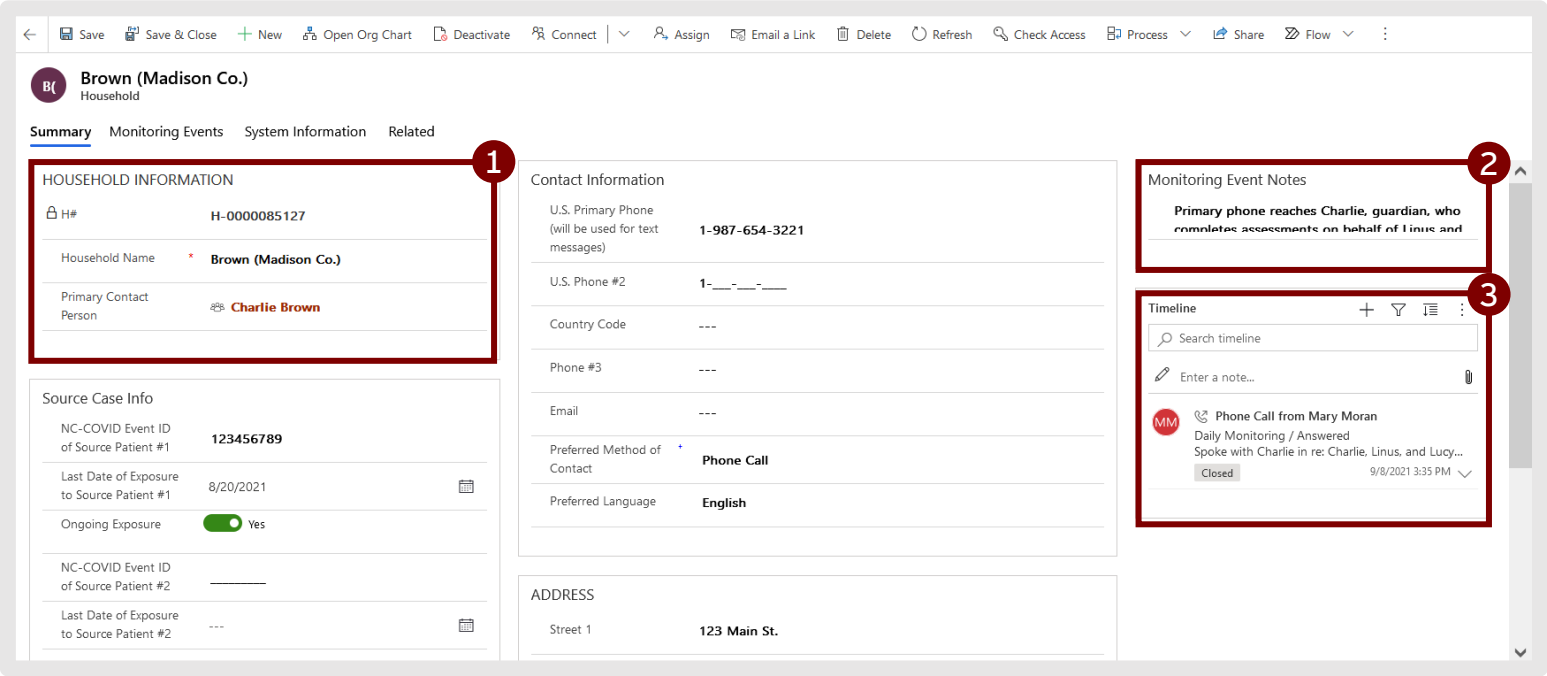
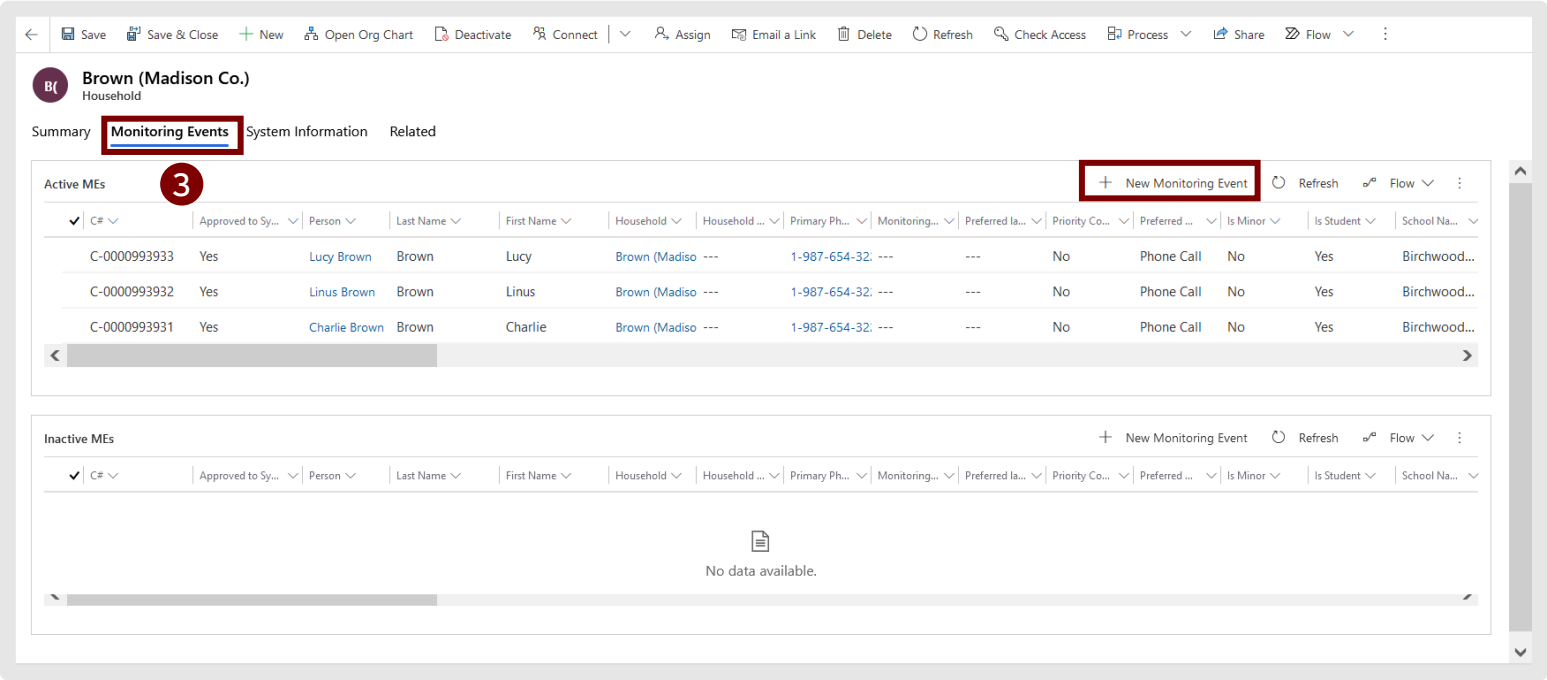


A household is a joint record that connects a group of monitoring events to help streamline data entry and outreach. Information entered in Source Case Information, Contact Information, and Address will carry over to new contacts created within this household, and this information can also always be adjusted on individual monitoring events 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 Person:** The person record associated with 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.
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 monitoring event.
3. **Household Timeline:** May be used to log shared activities for household members by following the process per the job aid.



3. **Monitoring Events Page:** Lists all active and inactive monitoring events within a household. Each individual within a household must have their own monitoring event and assessments.
   - **+New Monitoring Event Button:** Creates a new ME within the household using pre-populated information from the household record.

Assessments

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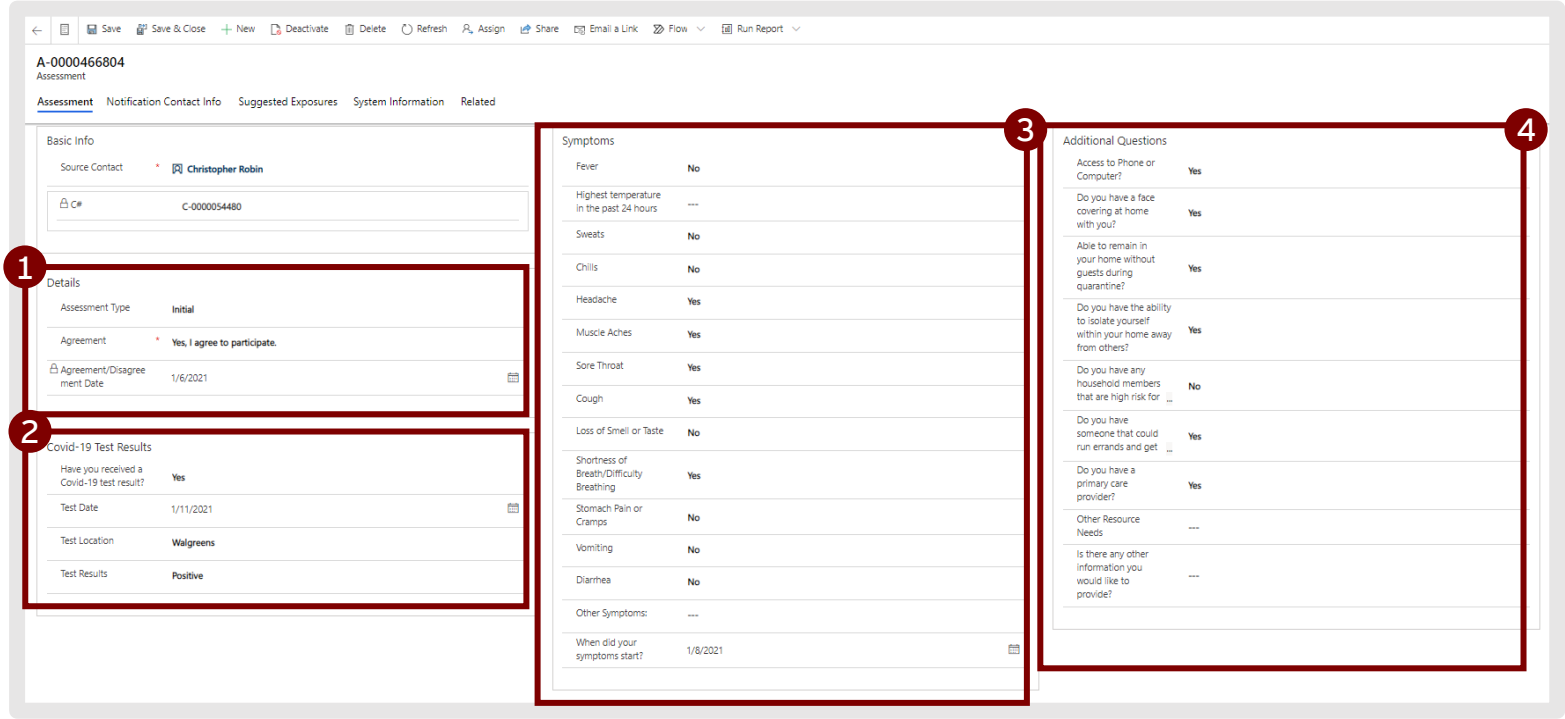


An assessment is an ongoing survey of changes in symptoms and resource needs. These could be completed by the contact in a digital assessment *(delivered to a contact via text or email)* or recorded by the tracer in a manual assessment *(completed by the tracer while speaking to the contact on the phone)*.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

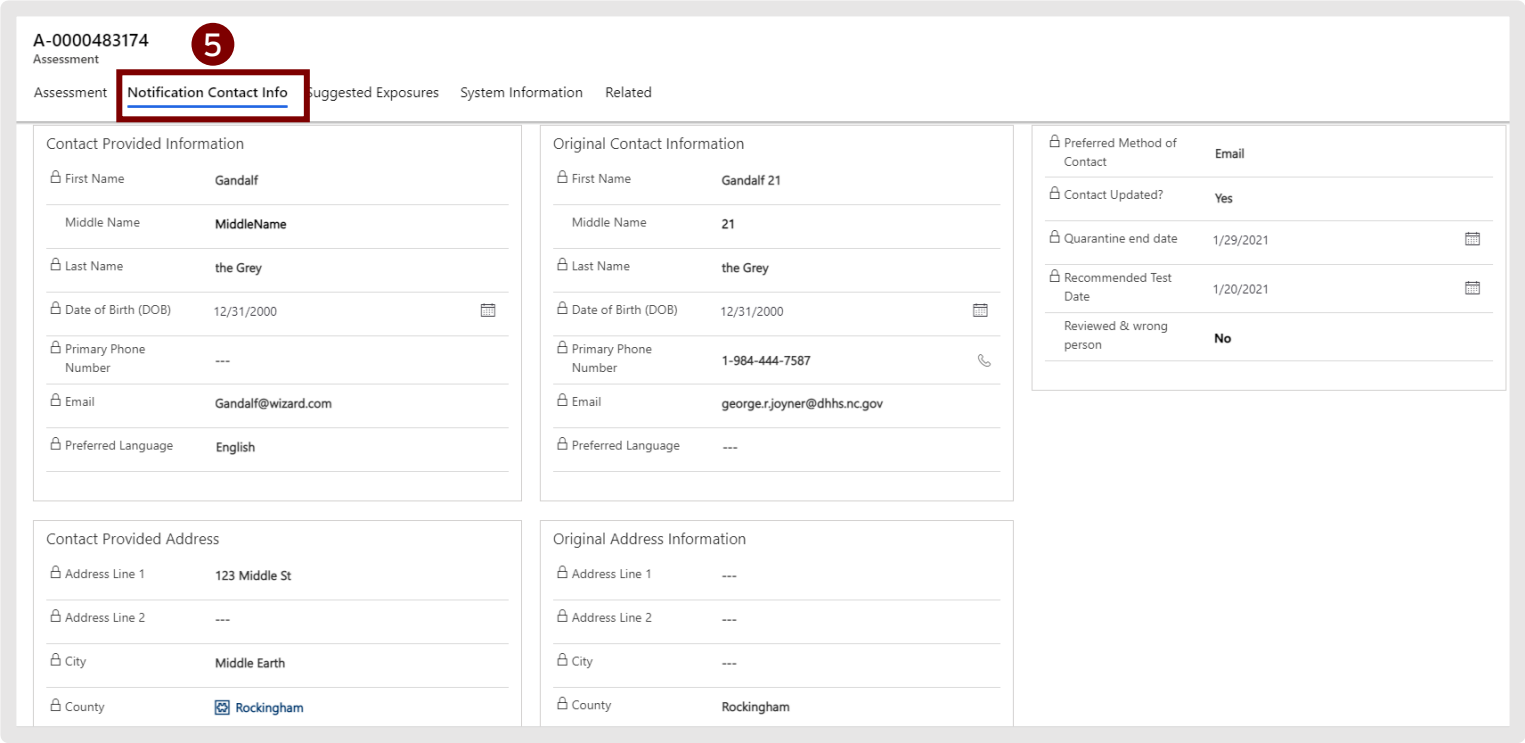
1. Details:

- **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 monitoring event.

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 monitoring event 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 monitoring event 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 monitoring event 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 monitoring event. *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 "Last Date of Exposure").
- **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.

CCTO Glossary

Referrals

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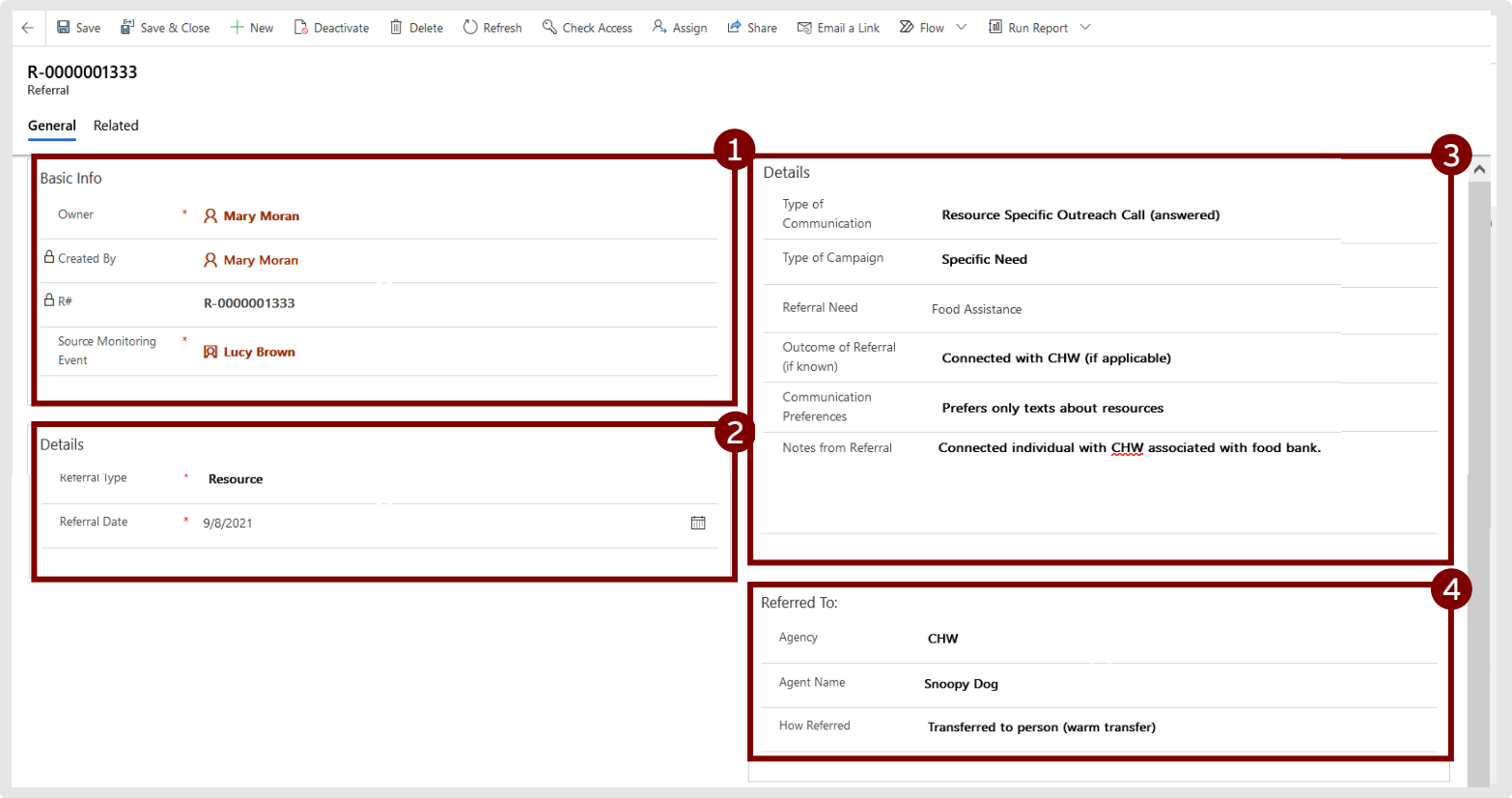
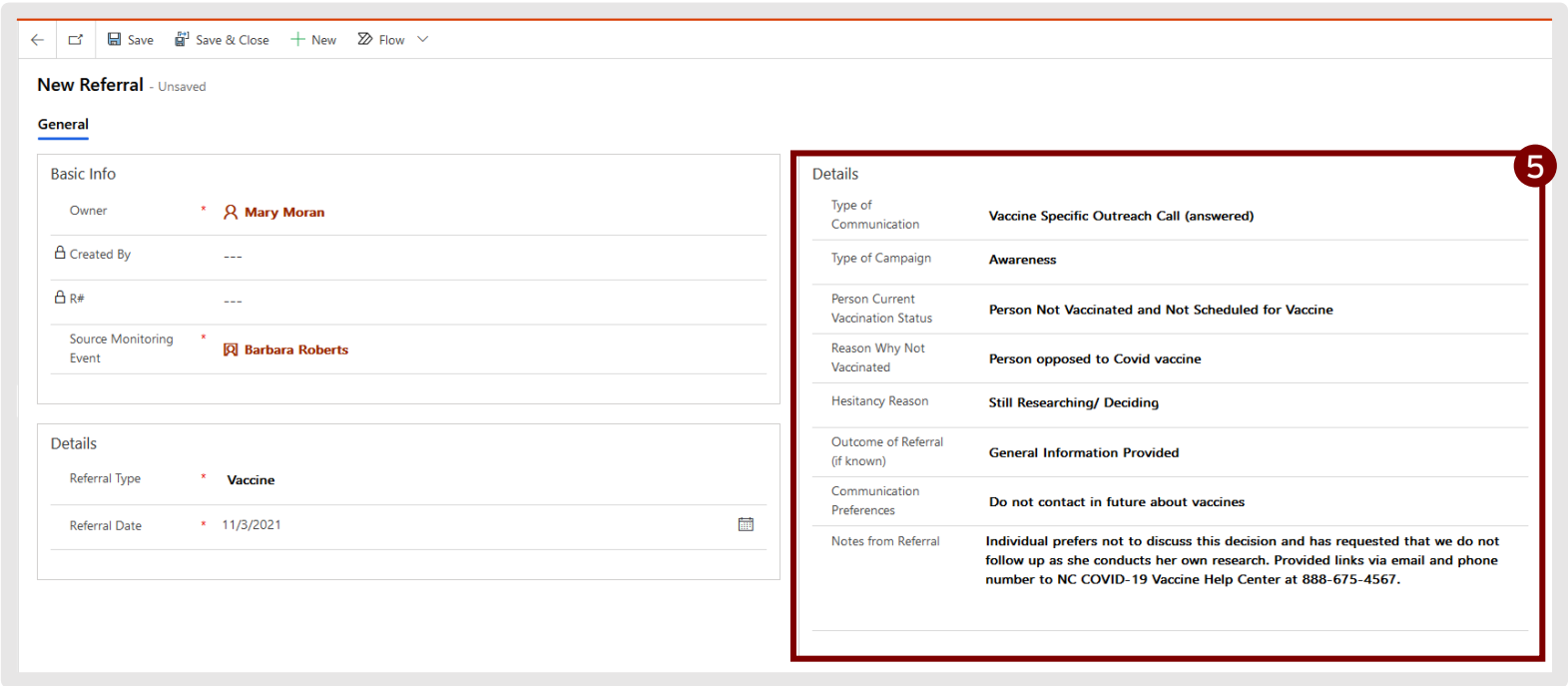


Referrals are a type of record connected to monitoring events and used as part of the documentation process for vaccine, resource, and other referral conversations. A referral is not a replacement for a phone call being logged in Timeline/Activities, and it should be logged in addition to the phone call that took place. For more details and guidance regarding referrals, please review the Documenting a Referral job aid.

1. **Basic Info:** This box is included on all three referral types.
   - **Owner:** Field automatically populated with the user who created this referral; can be manually edited.
   - **Created By:** Locked field for the user who created this referral.
   - **R#:** A unique identifier that populates upon saving.
   - **Source Monitoring Event:** Locked field that automatically populates with the ME for which this referral is being logged.
2. **Details:** This box on the left side is included on all three referral types.
   - **Referral Type:** This field can be selected to "Vaccine," "Resource," or "Other" and indicates which category of referral is being logged. Each option will produce unique fields pertaining specifically to each individual referral type, and selecting "Other" will produce a free text field for more information about this referral type.
   - **Referral Date:** Automatically populates based upon the time the referral was created.

3. **Details (Resource Referral):** This box is specific to each referral type. See the Quick Reference: Referrals Job Aid for assistance in selecting the options in each field. For referrals in which "Referral Type" is set to "Resource":
   - **Type of Communication:** Indicates what type of call is being made or received.
   - **Type of Campaign:** Appears only if an outreach call option is selected in "Type of Communication." Indicates the context of the referral.
   - **Referral Need:** Appears only if "Resource" is selected in "Referral Type" to indicate more detail about the type of resource requested.
   - **Outcome of Referral:** Indicates the final status of the referral.
   - **Communication Preferences:** Indicates how the individual would like to be contacted regarding resources.
   - **Notes from Referral:** This section serves as a free text box for any information regarding the referral that should remain easily visible.
4. **Referred To (Resource Referral):** See the Quick Reference: Referrals Job Aid for assistance in selecting the options in each field. This box appears only if "Resource" is selected as the referral type, along with the following fields:
   - **Agency:** Indicates the type of organization to which the individual has been referred. Selecting "Local Resource" will produce a free text field for the name of the local resource.
   - **Agent Name:** A free text field that indicates the name of the individual to whom this case or contact has been referred.
   - **How Referred:** Lists the process used for the referral. Selecting "Other" will produce a free text field.



5. **Details (Vaccine Referral):** This box is specific to each referral type. See the Quick Reference: Referrals Job Aid for assistance in selecting the options in each field. For referrals in which "Referral Type" is set to "Vaccine":

- **Type of Communication**: Indicates what type of call is being made.
- **Type of Campaign**: Appears only if an outreach call option is selected in "Type of Communication." Indicates the context of the referral.
- **Person Current Vaccination Status:** Appears only if "Vaccine" is selected in "Referral Type" to indicate the vaccination status of the individual being referred.
- **Reason Why Not Vaccinated:** Appears only if "Person Not Vaccinated and Not Scheduled for Vaccine" is selected in "Person Current Vaccination Status" to indicate the reason that this individual is not vaccinated.
- **Hesitancy Reason:** Appears only if "Person opposed to COVID vaccine" is selected in "Reason Why Not Vaccinated" to provide more information about the individual's hesitancy. See the Quick Reference: Referrals Job Aid for assistance in selecting these options.
- **Outcome of Referral:** Indicates the final status of the referral.
- **Communication Preferences**: Indicates how the individual would like to be contacted. For vaccine referrals, field will also update the "Vaccine Communication Preference" field in the individual's monitoring event. The monitoring event field can also be updated manually but will automatically update each time a referral with a new preference is logged.
- **Notes from Referral**: This section serves as a free text box for any information regarding the referral that should remain easily visible.

Case Portal Submissions

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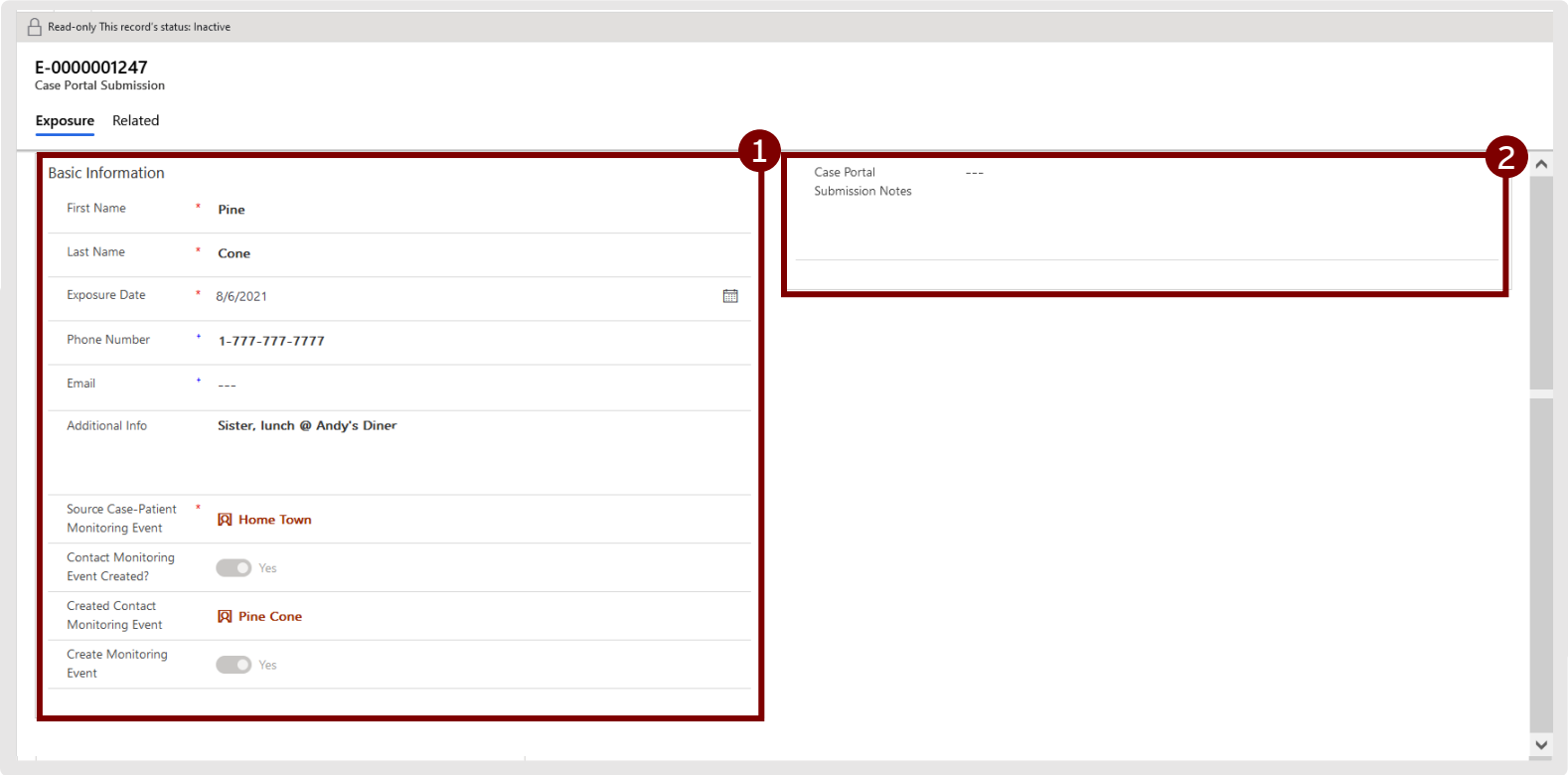

Case portal submissions are a type of record documenting the close contact submissions made by case patients using the portal. All information regarding any contacts submitted by the case patient through the portal is stored within CCTO as a submission record whether or not the submission becomes a contact monitoring event. *See the criteria for automatic contact ME creation and the steps for manual ME creation in the Understanding the Case Patient Portal job aid*.

1. **Basic Info:** Locked fields documenting information about this potential close contact as it was submitted by the case.
   - **Source Case-Patient Monitoring Event:** Monitoring event for the case patient who accessed the portal to submit this potential close contact.
   - **Contact Monitoring Event Created?:** Locked toggle indicating whether this submission has already been created as a contact monitoring event.
   - **Created Contact Monitoring Event:** Name of the contact monitoring event created by this submission if applicable.
   - **Create Monitoring Event:** Manual toggle to create a contact monitoring event from this submission. Only unlocked if a submission has *not* already been automatically created as a monitoring event. Locks upon first use so that only one monitoring event can be created per submission.
   - **Additional Info:** Locked field for any additional information submitted by a case patient about this individual.

2. **Case Portal Submission Notes:** Manual field for any notes the CI/CT would like to record about this case portal submission.