COVID-19 Community Team Outreach Tool
May 21st CCTO Updates

Updates to Referrals

General Updates to Referrals

1. Audit history is now available for referrals by selecting **Related → Audit History.**

2. Fields for **Owner** and **Created By** are now visible on all referral records and in referral views. **Owner** can be updated to assign the referral to another user.

3. The **Outreach Call** option under **Type of Communication** has been split into two more specific choices for outreach calls. These are:

   • **Outreach Call: Answered** – This option should be used when you make a referral call and it is answered.

   • **Outreach Call: Left Voicemail** – This option should be used when you make a referral call and it is unanswered, but you have left a voicemail.

   If you are unable to leave a voicemail on an unanswered outreach call, you should log the phone call but NOT a referral.

4. When you log an **Other** type referral, **Notes from Referral** is now a required field.

5. A new contact/case profile field for **Last Date Vaccine Referral Made** will now update each time a vaccine referral is created for this individual.

1

R-0000001099
Referral

General   Related

Basic Inf   Related - Common

Owner   🕘 Audit History

🔒 Created By   ⓘ 👤 Mary Moran

Audit History

Filter on: All Fields

	Changed Date	Changed By	Event	Changed Field
	5/19/2021 8:37 ...	Mary Moran	Update	Name
☐	5/19/2021 8:36 ...	Mary Moran	Create	C# Communication Outcome of Refe Owner Referral Date Referral Type

2

R-0000001071
Referral

General   Related

Basic Info

Owner   * ⓘ 👤 Jahnavi Parikh

🔒 Created By   ⓘ 👤 Jahnavi Parikh

🔒 R#   R-0000001071

3

Details

Type of Communication   --Select--

Type of Campaign   --Select--

Outcome of Referral (if known)   Outreach Call - Answered

Communication Preferences   Outreach Call - Left Voicemail

Monitoring Call

4

Notes from Referral   * ----

Referral Type   * Other

5

Last Date Vaccine Referral Made   5/18/2021 📅

For detailed information about referral fields, see the Quick Reference: Referrals chart. For information on how to document a referral, review the Documenting a Referral job aid.
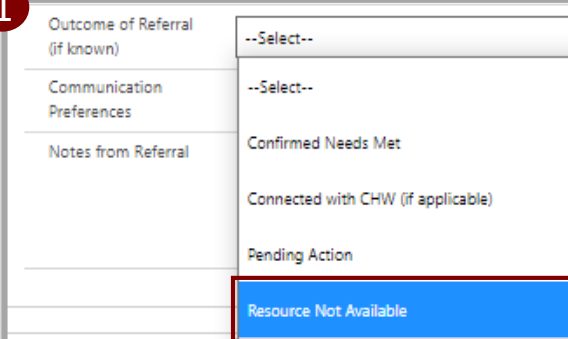
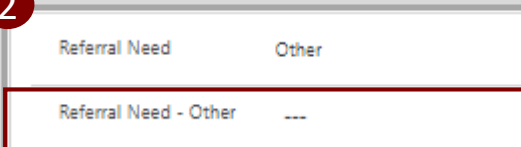## Updates to Resource Referrals

When logging a **Resource** referral:

1. A new option for **"Resource Not Available"** is available for selection in the **Outcome of Referral** field. This option should be used if the resource needs outlined in the "Referral Need" field were not able to be met.

2. If you check the box for **Other** in the **Referral Need** field, a free text field for **Referral Need – Other** will now appear to allow you to provide more information.

1

Outcome of Referral (if known)	--Select--
Communication Preferences	--Select--
Notes from Referral	Confirmed Needs Met
	Connected with CHW (if applicable)
	Pending Action
	Resource Not Available

2

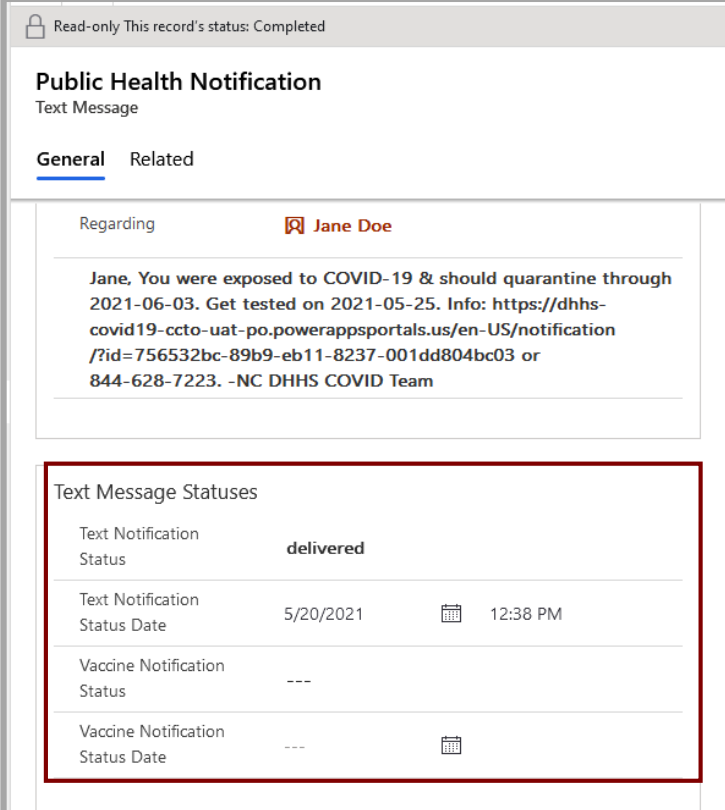| Referral Need	Other
Referral Need - Other	---

Updates to Outreach

Updates to Text Message Status

Text message records, which can be viewed in the Activities Tab or a contact's *All Activities* page, now have a **Text Message Statuses** box. This box records the status of a specific text by providing a snapshot of the **Text Notification Info** box at the time of this message. *Note that all fields in this box will be listed for all text message activities; however, vaccine communication fields will show as blank for text notifications and vice versa*.

The contact profile fields within **Text Notification Info** will continue to behave in the same way, only updating once per message sent and overwriting each time a new text is sent to an individual.

🔒 Read-only This record's status: Completed

Public Health Notification
Text Message

General   Related

Regarding   🔲 Jane Doe

Jane, You were exposed to COVID-19 & should quarantine through 2021-06-03. Get tested on 2021-05-25. Info: https://dhhs-covid19-ccto-uat-po.powerappsportals.us/en-US/notification/?id=756532bc-89b9-eb11-8237-001dd804bc03 or 844-628-7223. -NC DHHS COVID Team

Text Message Statuses		
Text Notification Status	**delivered**	
Text Notification Status Date	5/20/2021	🗓 12:38 PM
Vaccine Notification Status	---	
Vaccine Notification Status Date	---	🗓

Updates to Phone Numbers

1. The **Primary Phone** and **Phone #2** fields have been updated to only accept 11-digit US phone numbers. The "1" prefix is included and the other 10 digits must be entered manually. Letters can no longer be entered in these fields. **If these fields appear as expected, no action is needed.**

2. To allow for international numbers, **Phone #3** still supports a country code, which can be entered in the **Country Code** field. *(This code will not carry over to Primary Phone or Phone #2.)*

QUICK RECAP:
If primary phone appears as expected, no action is needed. Skip the section below.

Contact Information

Primary Phone (will be used for text messages) **①** 1-333-434-3434

Phone #2

Country Code **②** 44

Phone #3 44-423-232-3232

If Primary Phone Does Not Appear as Expected

The new, locked *System Information* page field for **Primary Phone (Database Value)** displays the **true** primary phone value from the database, which is the number that the system will use to send text message outreach. **If this number appears as expected, no action is required; however, if it is not a valid format as described above, see below.**

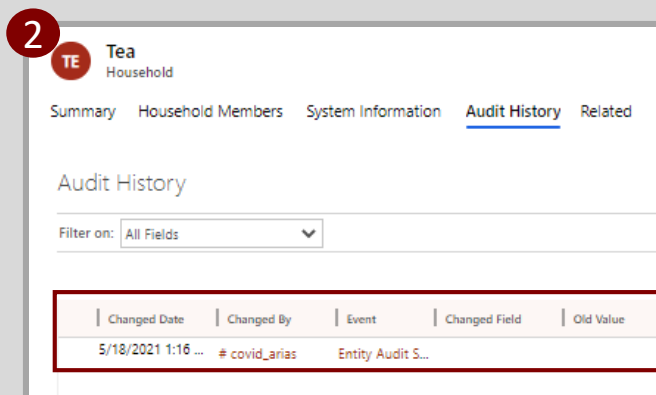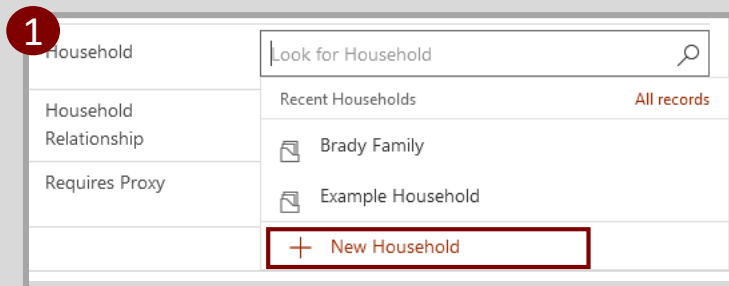**ACTION REQUIRED ONLY IF PRIMARY PHONE (DATABASE VALUE) DOES NOT APPEAR AS EXPECTED:**

- **If the number previously entered in Primary Phone was an incorrectly formatted US number** (more than 11 digits or with text), you must update **Primary Phone** with a correctly formatted US number and save.

- **If the number previously entered in Primary Phone was an international number,** you must move this number to **Phone #3** and confirm or add the country code. Save your work.

QUICK RECAP:
If you notice that Primary Phone and Primary Phone (Database Value) do not match, then you should update the value in Primary Phone and save to ensure text messages can send correctly.

CCTO Contact   **System Information**   ···

🔒 Legacy Created By   ---

🔒 Owner   * ○ 👤 Mary Moran

🔒 NC COVID Contact ID   ---

🔒 Primary Phone (Database Value)   1-123-456-7890 123456

CCTO Contact   Assessments   All Activities

Contact Information

Primary Phone (will be used for text messages)   1-123-456-7890

🔒 Primary Phone (Database Value)   1-123-456-7890

*The **Phone #2** field functions in the same way as **Primary Phone**, and the **Phone #2 (Database Value)** field can be reviewed if the **Phone #2** field does not appear as expected.*

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Miscellaneous

Updates to Households

1. When you create a household from the **Household** field on a contact profile, you will now proceed directly to the normal household creation screen. The household quick create functionality has been removed.

2. On a household profile, you can now click **Related → Audit History** to pull up the audit history for a household profile.

Dashboard Changes

All the charts within the **Dashboards Tab** have now been updated to show a timeframe of 14 days rather than 33 days.