COVID-19 Community Team Outreach Tool
9/3 System Updates

This document has been simplified to provide ONLY the basic information required for your day-to-day work. **When possible, we encourage you to review the full Person Functionality job aid for more detailed information.**

Here are the main changes to CCTO*:

1. Contact or case profiles/records are now called "monitoring events" (MEs).

- A monitoring event <u>is the same</u> as a contact or case profile and will look and behave in exactly the same way that you are used to seeing.
- Similarly, the Contacts Tab is now the **Monitoring Events Tab**. It will continue to look and behave in exactly the same way.

2. Each monitoring event is now linked to a person record, which has a unique P# identifier and helps you reference all of an individual's monitoring events.

- Person records will be kept in a new tab called **People**. You can search for an individual's person record within the People Tab to see their basic information and all of their MEs in one place.
- Because person records now help us track and link an individual's monitoring events, **the cloning and connecting processes are no longer necessary and have been removed from the system.** *(As a result, the Event # is also no longer present and any records previously created through cloning have been assigned a unique C#.*)* See reverse for information about what to do instead.
- MEs flowing from NC COVID and the case portal will be matched automatically. Over the next month, person records will be automatically assigned to MEs that do not currently have them.

See below and reverse for minor impact to your workflow.

*Other minor changes with this update included at the end of this document.

🧩 — What This Means For You

In your normal day-to-day work…

1. Anything previously labeled "contact" is now labeled "monitoring event." For example, the **Contacts Tab** is now the **Monitoring Events Tab**. It will continue to look and behave in exactly the same way as the Contacts Tab did.

2. When you create a new monitoring event (ME), there will be a **Person** field and a **Create Person?** toggle. **You do not need to take any action on these.** If these are left untouched upon saving, the system will automatically look for a matching person record and 1) assign this ME to an existing person record OR 2) create a new person record for this ME as appropriate.* ***A duplicate warning will appear if a person match is found – this is okay! Proceed with saving as long as you are not duplicating an active ME.***

*The system uses these sets of criteria to look for a matching person record:

- First Name, Email
- First Name, Last Name, DOB
- First Name, Phone
- Phone, DOB

Note that the system will also search for matching person records for events from NC COVID and the case patient portal.

— What This Means For You (cont'd.)

3. This process may take a few minutes, and you should refresh your screen to verify the associated person record. (*If it was assigned incorrectly, you may clear out the **Person** field and then search and select the correct person **OR** turn on the **Create Person?** toggle* to create a new person.* **You can then proceed as normal with your assignment and monitoring procedures.**

4. Each person record has a unique P# identifier to mark this individual within CCTO. **Due to these updates, the previous Event # field is no longer necessary, and any records previously created through cloning have been assigned a unique C#.** *The legacy Event # and C# fields can be found on System Information page.*

> ***If you need to create a new person record and you do not turn Create Person? to "Yes" immediately, the system will auto-save and rematch the ME with the person record that was deleted.** Update the toggle quickly to avoid this issue.
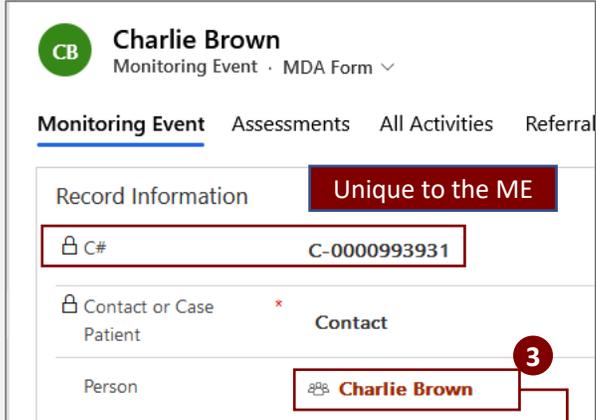
Charlie Brown
Monitoring Event · MDA Form ⌄

Monitoring Event   Assessments   All Activities   Referral

Record Information | **Unique to the ME**

🔒 C#   C-0000993931

🔒 Contact or Case Patient   * **Contact**

Person   👥 **Charlie Brown**   ③

Charlie Brown
Person · MDA Form ⌄

General   Monitoring Events   System Information   Related

General | **Unique to Person**

④ 🔒 P#   P-0000001556

🔒 Latest Monitoring Event   🅡 Charlie Brown

If you need to create a new monitoring event for an individual who has an existing inactive monitoring event (previously done by cloning)…

1. Search for this inactive monitoring event within the Monitoring Events Tab and select on it. Then, click on the associated person record.

2. Within the person's Monitoring Events page, confirm that they do not already have an active ME in the "Active MEs" box.

3. Click **+New Monitoring Event** to create a new monitoring event for this individual. The individual's basic information will be pre-populated on the new ME, and it will automatically be linked to their person record. This replaces the previous cloning functionality. ***Proceed with assignment and monitoring as normal; no further action is required.***
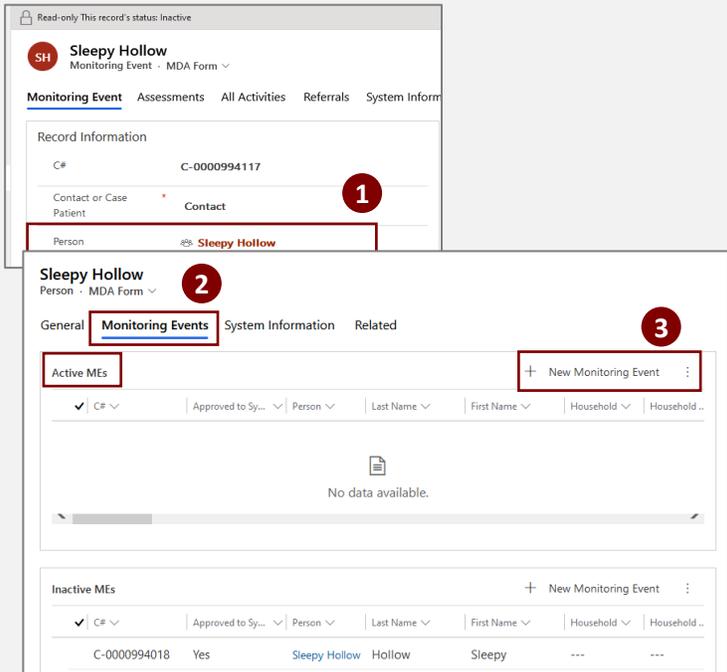
🔒 Read-only This record's status: Inactive

Sleepy Hollow
Monitoring Event · MDA Form ⌄

Monitoring Event   Assessments   All Activities   Referrals   System Inform

Record Information

C#   C-0000994117

Contact or Case Patient   * **Contact**

Person   👥 **Sleepy Hollow**   ①

Sleepy Hollow
Person · MDA Form ⌄

General   Monitoring Events   System Information   Related   ②   ③

Active MEs | + New Monitoring Event

✓ C# ⌄ | Approved to Sy... ⌄ | Person ⌄ | Last Name ⌄ | First Name ⌄ | Household ⌄ | Household ...

📄
No data available.

Inactive MEs | + New Monitoring Event

✓ C# ⌄ | Approved to Sy... ⌄ | Person ⌄ | Last Name ⌄ | First Name ⌄ | Household ⌄ | Household ...

C-0000994018 | Yes | Sleepy Hollow | Hollow | Sleepy | --- | ---

— What This Means For You (cont'd.)

If you would like to associate monitoring events for the same individual that are not currently linked (previously done via connecting*)…

1. Visit the **Person** field within an active or inactive ME that is not associated with the correct person record. Click "x" to remove the incorrect person record.

2. Search and select the appropriate person record to which this ME should be linked.

3. When you are finished, save your work. The ME is now linked to the correct person record.

As with connecting, this process only applies to non-concurrent MEs. If a contact is being actively monitored in more than one place, you should follow deduplication processes.

Please review the Person Functionality Job Aid for a full description of these changes.

Other Updates

Household Updates

1. The household record field previously labeled "Primary Contact" is now named **Primary Contact Person** and returns a person record. When records with previously assigned primary contact MEs are opened, they will update with a new primary contact person automatically. *If needed, the legacy primary contact can be found on the System Information page of the household record.*

2. The Household Members page within household records has been renamed **Monitoring Events.** The page will show two areas – one for active MEs and one for inactive MEs – to allow you to track the monitoring history of household members more efficiently.

Misc. Updates

1. To support new guidance for additional vaccine doses, new fields have been added to the vaccination section. Clicking the new checkbox for **Add Additional Vaccine Dose** will now show fields for **Vaccine 3rd Dose**, **Vaccine Date – 3rd Dose**, and **Vaccine – 3rd Dose Confirmed in CVMS?**

2. The *Source Case Information* and *Testing* boxes now only display if "Contact" is selected in the **Contact or Case Patient** field. If "Case Patient" is selected in this field, an **NC COVID Case Patient Info** box will appear to allow documentation of the case patient's **Event ID** and **Diagnosis Date**.

3. Because the Event # field has been discontinued and C#s will be new for records that were previously cloned, fields for **Legacy Event #** and **Legacy C#** are now displayed in the *System Information* page. Additionally, there is now an **Outbreak #** field (to be used if you have access to a contact's NC COVID outbreak #) and a **CORT Use Only** field. The **CORT Use Only** field should be ignored.

4. The order of fields in the *Demographic Info* box has been restructured to show **Gender, Race,** and **Ethnicity** to appear first. The **Is Student** toggle has been moved to the *Personal Info* section. The **Preferred Language** field has been moved from *Personal Info* to the *Contact Info* box.

5. System views have now been numbered to assist with clarity and organization. They will function as normal.

Finally, please note the fields for **Monitoring Date** and **Monitoring Age** will no longer be displayed on the monitoring event. *These fields can still be viewed as columns if added to a custom view.*