

#### Understanding the "Contact or Case Patient" Field

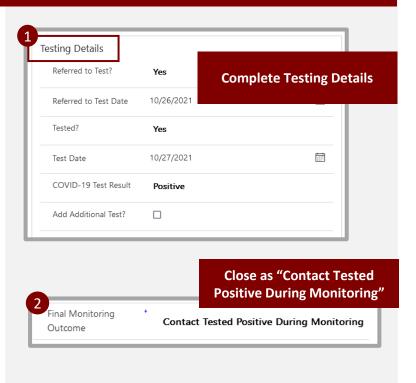
The **Contact or Case Patient** field locks the first time a monitoring event (ME) is saved, and it documents whether this ME was <u>entered</u> into the system as describing a contact or a case patient. This field will always remain locked on either "Contact" (even for contacts who test positive during their monitoring period) or "Case" (for cases who are entered manually into CCTO or who flow in from NC COVID) for this ME. **All of this is correct, and no further action on this field is required.** If you are required to continue monitoring on a contact who tests positive, you will close out the "Contact" ME and use a new "Case" ME to record their isolation monitoring. **Read on for details.** 



#### **Documenting Monitored Contacts Who Test Positive**

When an existing contact tests positive for COVID-19, complete the following actions:

- Complete all fields under the contact monitoring event (ME) Testing Details section.
- Defer to your local guidance on any other actions required before closing this ME. When you close this ME, select the FMO of "Contact Tested Positive During Monitoring." Close and deactivate this ME per the job aid.



#### **CONTINUED MONITORING:**

If your local guidance requires that this person continue monitoring in CCTO after their contact ME has been closed and deactivated, **they should continue to be monitored within a new ME labeled as a case.** See the following pages for guidance on:

- Option 1: Continuing monitoring via a new case ME that has flowed from NC COVID.
- **Option 2:** Continuing monitoring on a new ME labeled as a case that was created from their person record (*if an NC COVID record is not available*).

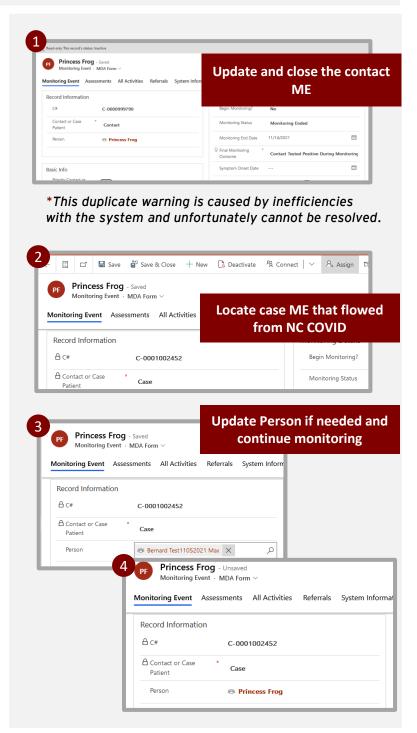


#### Option 1: Continue Monitoring on a Flowed Monitoring Event

- Most cases entered into NC COVID will flow automatically into CCTO to be sent automatic digital
  notification (see job aid), including case patients who were already being monitored as contacts in
  CCTO per the last section. Currently, there is no state-level requirement to review, monitor, or
  close out these cases in CCTO. There is also no requirement to enter cases manually.
- If your local protocol requires monitoring within CCTO on a contact who tests positive and becomes a case, you should do this on a new monitoring event (ME) labeled "Case." Ideally, this will be the ME that has flowed from NC COVID. See the process below.

If an individual who is currently being monitored in CCTO has tested positive for COVID-19, they will be entered into NC COVID as a case patient. This NC COVID record will then flow into CCTO and be notified automatically if key requirements are met. This creates a new CCTO monitoring event (ME) labeled as a case on which you can continue monitoring if required:

- 1. When an NC COVID case patient record arrives in CCTO under this individual's name, there may be a duplicate warning\* on the individual's existing contact ME. Ensure this contact ME is updated and closed as "Contact Tested Positive During Monitoring" per the previous section.
- 2. Locate the individual's new case ME that has flowed from NC COVID and reassign it if needed. (You may wish to search the "All Case MEs Imported from NC COVID" view. If the ME is not yet available, check again in 12-24 hours or see Option 2 on the next page.)
- 3. Review the Person field within the case ME. If this ME is not assigned to the correct person record, update this field to the person record associated with the contact ME you have just closed.
- Transfer over any missing information, and continue monitoring on the case ME as normal.



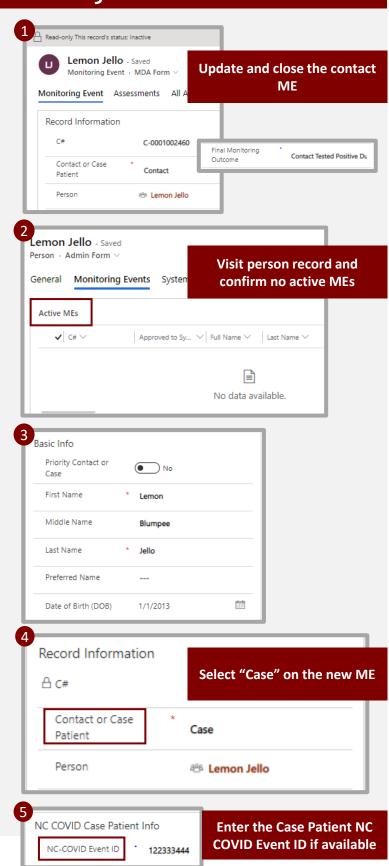


### Option 2: Continue Monitoring on a New ME

If directed by your local protocol, you can also continue monitoring a contact who has tested positive by deactivating their contact monitoring event (ME) and using the associated person record to create a new ME labeled "Case."

This method does not require the use of an NC COVID ME and may be done to ensure that documented outreach to the case is not delayed.

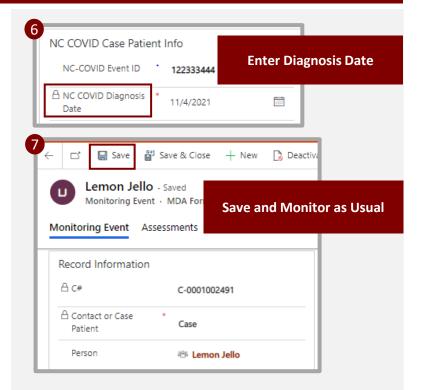
- Ensure the ME of the contact who has tested positive has been updated, closed as "Contact Tested Positive During Monitoring," and deactivated per the previous section.
- 2. Visit this individual's person record (via the Person field on their ME).
  Within their Monitoring Events page, confirm that they do not already have an active ME.
- 3. Click **+New Monitoring Event** on the right of the page. A new ME will appear with the individual's basic information from their contact ME pre-populated.
- 4. In the new ME, toggle the "Contact or Case Patient" field in the **Record**Information section to "Case." Be sure to select the correct value as this field will lock upon saving and cannot be changed.
- 5. If it is available, enter the Event ID of the case in the NC COVID Event ID field. This field only displays the Event ID of the individual to whom this ME belongs, not of the source patient. (In situations when a contact is being entered instead of a case patient, this field is not shown.)





### Option 2: Continue Monitoring on a New ME

- 6. Within NC COVID Diagnosis Date, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.
- 7. Save your work and proceed with monitoring as normal.





#### Only if required: Manual Case Patient Entry

Manual entry and monitoring of cases into CCTO is not required; however, if it is recommended by your local guidance, you may enter a new case patient who is not a current contact into CCTO:

- 1. Generally, you can use the <a href="CCTO">CCTO</a>
  <a href="Glossary">Glossary</a>
  and the guidance outlined in the <a href="Entering a Contract micro-training">Entering a Contract micro-training</a>
  to help you complete as much information as possible; however, you should pay careful attention to the extra steps below. You will not fill in the "NC COVID Source Patient Event ID" or "Last Date of Exposure" fields.
- 2. Toggle the "Contact or Case Patient" field in the **Record Information** section to "Case." Be sure to select the correct value, as this field will lock upon saving and cannot be changed.
- Enter the case's Date of Birth. This is a required field for all case patients and helps them utilize the portal for notified cases.
- 4. Enter the Event ID of the case in the "NC COVID Event ID" field. This field only displays the Event ID of the individual to whom this ME belongs, not of the source patient. (If a contact is being entered instead of a case patient, this field is not shown.)
- 5. Finally, within NC COVID Diagnosis
  Date, enter the case's diagnosis date
  (date of the case's positive lab), which
  should be confirmed in NC COVID if
  available. This will lock immediately
  upon entry.

