

# Handing Off Activities & Monitoring Events

## COVID-19 Community Team Outreach

Follow the process below to create and assign follow-up activities to other CTO users:

### Scheduling and Reassigning Tasks & Phone Calls

Any phone call or task that you create within a contact or case monitoring event can be reassigned without reassigning the associated monitoring event. **Always check with your supervisor to determine your local processes and when this may be necessary for you.**

1. Follow the [Timeline/Activities Job Aid](#) to create phone calls or tasks within monitoring events. Be sure to use the **Due** field to schedule any items that require follow-up. *Tip: You can use the **Owner** field to assign tasks or phone calls to someone else upon saving, or you can use the process below to reassign later.*
2. Navigate to the Activities Tab. The default view, *My Activities*, shows all the phone calls and tasks assigned to you that have not been marked closed, including any that you have just created and left open. **You can use this view as your to-do list of all the open items that have been assigned to you across all monitoring events.**
3. If needed, you can narrow your items with the "Due" or "Activity Type" filters, or you can use another [view](#) to display the activities you would like to reassign.
4. To reassign any of the items, select them using the checkmarks.
5. Click the "Assign" box.
6. Single click "Me" to produce the "User or Team" selection, and type the name of the assignee.
7. Click "Assign." When you reassign a task or phone call to someone else, it will appear in the assignee's *My Activities* view, even if they do not own the associated monitoring event.

**1**

Additional Outreach /  
Phone Call  
Normal Priority 10/28/2021 8:00 AM Open Status Mary Moran Owner

Priority Normal

Due 10/28/2021 8:00 AM

Status Open

Owner Mary Moran

Quick Create: Task

Owner Jahnavi Parikh  
jahnavi.p.parikh-ey@dhhs.nc.gov

Subject

Description ---

Due ---

Regarding Home Town

Duration 30 minutes

Priority Normal

**2**

My Activities

Due All Activity Type All

Date Created	Activity Type	Subject	Regarding	Priority
10/27/2021 10...	Phone Call	Additional Outreach /	Home Town	Normal
10/27/2021 10...	Task	Elevating to Supervisor	Home Town	Normal
10/27/2021 10...	Phone Call	Additional Outreach /	Adele 30	Normal
10/7/2021 11...	Task	Review digital assessment	Elmer2 Fudd2	Normal
9/28/2021 5:0...	Task	Review digital Assessment	Elmer2 Fudd2	Normal

**4**

My Activities

Due All Activity Type All

10/27/2021 10:09 AM	Phone Call	Additional Outreach /	
<input checked="" type="checkbox"/>	10/27/2021 10:05 AM	Task	Elevating to Supervisor
	10/27/2021 10:02 AM	Phone Call	Additional Outreach /
	10/7/2021 11:43 AM	Task	

Assign to Team or User

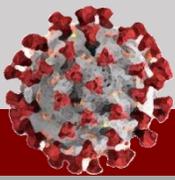
You have selected 1 item. To whom would you like to assign it?

Assign To User or team

User or team Julia Covid-T...

Assign Cancel

- 1 Create Tasks/Calls
- 2 Activities Tab
- 3 Filter/Adjust as Needed
- 4 Select items
- 5 "Assign" Box
- 6 "User or Team"
- 7 "Assign"



# Handing Off Activities & Monitoring Events

## COVID-19 Community Team Outreach

Follow the process below to assign a monitoring event to another CCTO user:

### Reassigning Monitoring Events

Reassignment of monitoring events may be required for a variety of reasons. Reassigning a monitoring event does NOT automatically reassign any associated activities. **Always check with your supervisor to determine your local processes and when this may be necessary.**

- If necessary, complete all steps (#1-7) in Option 1 to reassign any upcoming tasks and phone calls for the monitoring events in question.** These will not reassign automatically when you reassign a monitoring event, so you must complete these steps to transfer outstanding items to the assignee's Activities Tab.
- Navigate to the Monitoring Events Tab and select a [view](#) that allows you to see the monitoring events you would like to reassign.
- Select the contacts to be reassigned using the checkmarks.
- Click the "Assign" box.
- Single click "Me" to produce the "User or Team" selection, and type the name of the assignee.
- Click "Assign." These contacts will now be re-assigned to the other user and will appear in their "My Active Monitoring Events" view. They will no longer appear in your "My Active Monitoring Events" view.

Please note that if monitoring events or activities need to be reassigned to you after being assigned to someone else, the processes in this job aid should simply be repeated.

The screenshot shows a web application interface for monitoring events. On the left is a navigation menu with 'Monitoring Events' selected. The main area displays a table of active monitoring events. A modal window titled 'Assign Monitoring Event' is open, showing options to assign to a user or team, with 'User or team' selected and 'Julia Covid-T...' entered in the search field. Red callout boxes with numbers 2 through 6 highlight the 'Monitoring Events' tab, the checkmarks in the table, the 'Assign' button, the 'User or team' selection, the search input, and the 'Assign' button in the modal respectively.

✓	C#	Person	Last Name	First Name	Household
✓	C-0000998281	Adele 30	30	Adele	---
✓	C-0000994503	Home Town	Town	Home	---
✓	C-0000994093	Elmer Fudd	Fudd2	Elmer2	---
✓	C-0000994079	Bugs Bunny	Bunny	Bugs	---
✓	C-000099...				
✓	C-000099...				

- 1 Complete all steps in Option 1 if needed
- 2 Monitoring Events Tab
- 3 Checkmarks
- 4 "Assign" Box
- 5 "User or Team"
- 6 "Assign"