



Case Patient Portal Workflow Guidance for CTs

The new case patient portal will allow case patients to enter contacts on their phone or computer directly from their digital notification. Read on to understand how this may impact your work.

Contact Tracing Work Alongside the Case Patient Portal

Cases may now access a digital notification that allows them to submit close contacts to CCTO directly, and these submitted contacts may have already received their own digital exposure notification before you review them. **Given this possibility, consider the following implications to your contact tracing process:**

WHEN YOU ARE WORKING AN ASSIGNED CONTACT:

- In addition to direct entry and flow from NC COVID, **contacts may now also enter CCTO directly via being submitted into the case patient portal by a case patient. These contacts will be sent an automatic digital exposure notification to the phone and/or email submitted by the case patient.** You will know that a contact has been submitted via the case patient portal if the **Created From Case Portal** field on the contact's System Information page is toggled to "Yes" or if the **Notes Provided from Case Patient on Online Case Portal** field is visible.
- **No special action is required on your part** if a contact has entered CCTO via the case patient portal; however, please keep in mind that if any information that has been provided suggests that this individual is not actually a close contact, you should reach out to the case investigator who is responsible for this case per your local protocol.
- As always, never disclose any information about the case patient who named this contact, even if it is available to you.

Reviewing a Contact Who Was Submitted Through the Case Patient Portal

1. Contacts who were submitted through the case patient portal will show **Created From Case Portal** toggled to "Yes" on their System Information page. The **Created from Case Portal** field can also be filtered as a column at the far right of the **All Monitoring Events** view to display all contacts who originated from the case patient portal.
2. You may review the **Notes Provided from Case Patient on Online Case Portal** field to see if a case has provided any particular extra details about a contact.

Remember that if any information that has been provided suggests that this individual is not actually a close contact, you should reach out to the case investigator who is responsible for this case per your local protocol.

The screenshot shows two parts of the CCTO interface. The top part, labeled '1', shows the 'System Information' page for a contact. A red box highlights the 'Created From Case Portal' field, which is set to 'Yes'. The bottom part, labeled '2', shows the 'All Monitoring Events' view. A red box highlights the 'Created From Case Portal' column header, and another red box highlights the 'Notes Provided from Case Patient on Online Case Portal' field, which contains the text 'testing'.