

# COVID-19 Community Team Outreach Tool

## Documenting Referrals in CCTO



CCTO supports the functionality to document referrals that you have made for connecting individuals to **Resources, Treatments, Vaccines, and Other** types of support. When you log a referral to document your work, **keep the following in mind:**



• A referral is **not a replacement for a phone call** being logged in **Timeline/Activities** within an individual's monitoring event in CCTO. If a referral is made for an individual in CCTO, it should be logged in addition to the phone call that took place.

• A referral can be made by either **providing information to the individual** or **sharing the individual's information to a supporting organization**.



• Referrals should **only be logged by the person who made the referral(s)** and **should not be logged simply due to asking** if the individual is interested in resources, treatments, vaccines, or other types of support.

• A **unique referral should be logged for each type of support that the individual was referred for**. For example, if someone requests support for treatment, food, and transportation, then three referrals will be logged.

## Referral Types

There are four types of referrals that can be logged: **Resource, Treatment, Vaccine, or Other**. Selecting any of these referral types will produce additional fields appropriate for that referral type. Recommended documentation is as follows:



• **RESOURCE:** All individuals who are reached by phone should be asked if they have a resource need. **If they respond yes and are referred, a resource referral should be logged. If they respond no, you do not need to log a resource referral.**



• **TREATMENT:** All case patients who are reached by phone should be asked if they are interested in receiving COVID-19 treatment information. **If they respond yes and are referred, a treatment referral should be logged. If they respond no, you do not need to log a treatment referral.**



• **VACCINE:** All individuals who are reached by phone and not up to date on recommended COVID-19 vaccines should be asked if they are interested in getting up to date. **If they respond yes and are referred, a vaccine referral should be logged. If they respond no, you do not need to log a vaccine referral.**



• **OTHER:** This referral type should be used when a referral is made that **does not meet the criteria for Resource, Treatment, and Vaccine referral types**.

## Required Fields for All Referral Types

*For detailed information about referral fields, see [final pages of this document](#).*

1. You can see all referrals in CCTO through the **Referrals application on the left side of the page**.-This includes a view for **My Referrals** and a column for the referral subject's county in all views.
2. Within a **Monitoring Event**, click on the **Referrals** tab and select **+ New Referral** to create a new referral record for this monitoring event.
  - a) If a referral is made for an individual without a monitoring event, you can click on the **Referrals** application. Click **+ New Referral** to create a new referral record, then check the box **Person not in CCTO**.

The screenshot illustrates the CCTO interface. On the left, a sidebar menu (labeled '1') lists various applications: Dashboards, People, Monitoring Events, Households, Assessments, Activities, and Referrals. The 'Referrals' application is highlighted with a red box. On the right, the 'Referrals' application is open within a 'Monitoring Event' for 'Shrek'd It - Saved'. The 'Referrals' tab is selected (labeled '2'), and the '+ New Referral' button is visible. Below this, the 'New Referral' form is shown, with the 'Person not in CCTO' checkbox checked (labeled '2a'). The form includes fields for 'Owner' (Sonja Escamilla), 'Created By', 'R#', and 'Source Monitoring Event'.

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### Required Fields for All Referral Types *Continued*

- Owner** and **Referral Date** automatically populate when a referral is created. **R#** is a unique identifier that populates upon saving. **Created By** is a locked field that will also populate upon saving with the name of the user.
- Select **Referral Type** as either "Resource", "Treatment", "Vaccine", or "Other." Selecting any of these options will produce additional fields appropriate for that referral type.
- Use **Outcome of Referral** to indicate the final status of this referral, if known. The options for this field will vary depending on type of referral.
- Use **Notes from Referral** to input any additional comments regarding the referral. This is a required field when "Other" is selected as Referral Type.

The screenshot displays the CCTO referral form with several fields highlighted by red boxes and numbered callouts:

- 3**: Points to the **Owner** field, which is populated with "Jahnvi Parikh".
- 4**: Points to the **Referral Type** dropdown menu, which is currently set to "Vaccine". A secondary dropdown menu is shown to the right, listing the options: "Vaccine", "Treatment", "Resource", and "Other".
- 5**: Points to the **Outcome of Referral (if known)** field, which is currently empty.
- 6**: Points to the **Notes from Referral** text area, which is currently empty.

A callout box next to the **Notes from Referral** field states: "This field is required in an 'Other' referral, but none of the other types."

### *Not Required - Deactivating a Referral (Optional)*

After saving and completing all fields, you have the option to deactivate this referral. This option is similar to the deactivation option for assessments and is **not required**. *If you are directed to deactivate completed referrals, please note that these will appear in the **Inactive Referrals** view.*

The screenshot shows the CCTO interface with a toolbar at the top containing buttons for "Save", "Save & Close", "New", and "Deactivate". Below the toolbar, a referral ID "C-0000990898" is displayed, followed by the word "Referral".

## Fields in All Referral Types

What type of referral is being made?	
REFERRAL TYPE	<ul style="list-style-type: none"> <li>• <b>Vaccine</b> if the referral is for vaccination support. <i>This referral should be made and documented for any individual who is not up to date with their COVID-19 vaccination recommendations and is interested in vaccination– see below for specific fields.</i></li> <li>• <b>Resource</b> if the referral is for resources such as food, housing, or transportation. <i>If they respond yes and are referred for support, a resource referral should be recorded for each type of resource need– see page 2 for specific fields.</i></li> <li>• <b>Treatment</b> if the referral is for information on COVID-19 treatment – <i>see page 2 for specific fields.</i></li> <li>• <b>Other</b> if the referral cannot be captured by “Vaccine” or any of the categories listed in “Resource” – <i>see page 2 for specific fields.</i></li> </ul>

## Fields in Resource Referrals

### Significant Fields for Resource Referrals

#### RESOURCE REFERRAL DETAILS AND REFERRED TO BOX

REFERRAL NEED	Use the Referral Need field to select only one descriptor per referral. For information on the different options please refer to the <a href="#">Types of Resource Referral Needs</a> job aid. <i>(Selecting “Other” will produce Referral Need – Other, a free text field to provide more information.)</i>
OUTCOME OF REFERRAL	<ul style="list-style-type: none"> <li>• <b>Confirmed needs met</b></li> <li>• <b>Pending Action</b> (if the outcome of this referral is yet to be confirmed)</li> <li>• <b>Resource Not Available</b> (if the resource needs are unable to be met)</li> <li>• <b>Other</b> <i>(will produce a free text field)</i></li> </ul>
AGENCY	<p>The organization to which you have referred this individual:</p> <ul style="list-style-type: none"> <li>• <b>211</b> (if you have referred this individual to a 211 agency)</li> <li>• <b>CHW</b> (community health worker)</li> <li>• <b>Local resource</b> (e.g., local food bank or legal clinic)</li> <li>• <b>NCCARE360</b> (self assistance request form)</li> <li>• <b>Other</b> <i>(will produce a free text field)</i></li> </ul>
AGENT NAME	<b>Free text</b> field for the name of the person to whom you referred this individual.
HOW REFERRED	<p><i>The process used for this referral:</i></p> <ul style="list-style-type: none"> <li>• <b>Entered into NCCARE360</b> (via UniteUs platform)</li> <li>• <b>Transferred to person (warm transfer)</b></li> <li>• <b>Transferred to phone number (cold transfer)</b></li> <li>• <b>Provided contact information (no transfer)</b></li> <li>• <b>Other</b> <i>(will produce a free text field)</i></li> </ul>

## Fields in Treatment Referrals

### Significant Fields for Treatment Referrals

#### TREATMENT REFERRALS DETAILS BOX

OUTCOME OF REFERRAL	<ul style="list-style-type: none"> <li>• <b>General Information Provided</b></li> <li>• <b>Transferred to Treatment Call Center or Provider</b> (if you have connected this individual directly with a call center or provider)</li> <li>• <b>Other</b> <i>(will produce a free text field)</i></li> </ul>
NOTES FROM REFERRAL	<b>Recommended free text</b> field for you to provide details about the treatment information provided.

**DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and a referral record!**

## Fields in Vaccine Referrals

### Significant Fields for Vaccine Referrals

VACCINE REFERRAL DETAILS BOX	
<b>PERSON CURRENT VACCINATION STATUS</b>	<p>This field indicates the vaccination status of the person being referred.</p> <ul style="list-style-type: none"> <li>• <b>Person Already Partially or Fully Vaccinated</b></li> <li>• <b>Person Has Vaccine Scheduled</b></li> <li>• <b>Person Not Vaccinated and Not Scheduled for Vaccine</b> (will produce a field for <b>Reason Why Not Vaccinated</b>)</li> <li>• <b>Prefer not to answer</b></li> </ul>
<b>REASON WHY NOT VACCINATED</b> <i>(individuals without vaccine scheduled only)</i>	<p>This field only appears if “Person Not Vaccinated and Not Scheduled for Vaccine” is selected in the <i>Person Current Vaccine Status</i> field.</p> <ul style="list-style-type: none"> <li>• <b>Person does not meet criteria for vaccine</b> (e.g., one of the CDC contraindications <a href="#">for a specific group</a>)</li> <li>• <b>Person has resource issues with obtaining vaccine</b> (e.g. is unable to access a vaccination site or take time off work, etc.)</li> <li>• <b>Person opposed to COVID vaccine</b> (will produce a field for <b>Hesitancy Reason</b>)</li> <li>• <b>Other</b> (will produce a free text field and should only be used rarely – please only select this option AFTER you have confirmed no other option applies)</li> </ul>
<b>HESITANCY REASON</b> <i>(individuals opposed to vaccine only)</i>	<p>This field only appears if “Person opposed to COVID Vaccine” is selected in the <i>Reason Why Not Vaccinated</i> field.</p> <ul style="list-style-type: none"> <li>• <b>Health Concerns</b> (e.g., concerned about side effects/health complications associated with the vaccine)</li> <li>• <b>(Belief that) they don’t need the vaccine</b> (e.g., believe it is unnecessary to get vaccinated or that the vaccine is not effective)</li> <li>• <b>Still Researching/Deciding</b> (e.g., wants to wait for more information and/or hasn’t decided whether they want to get vaccinated)</li> <li>• <b>Lack of Trust</b> (e.g., mistrust of government/vaccines in general)</li> <li>• <b>Religious Beliefs</b></li> <li>• <b>Other</b> (will produce a free text field)</li> </ul>
<b>OUTCOME OF REFERRAL</b>	<ul style="list-style-type: none"> <li>• <b>General Information Provided</b></li> <li>• <b>Vaccine appointment scheduled on call</b></li> <li>• <b>Transferred to LHD or vaccine hotline</b></li> <li>• <b>Other</b> (will produce a free text field)</li> </ul>

(EXTRA FIELDS FOR INDIVIDUALS WHO DO NOT HAVE A VACCINE SCHEDULED)

## Fields in Other Referrals

### Significant Fields for Other Referrals

OTHER REFERRALS DETAILS BOX	
<b>REFERRAL TYPE DESCRIPTION</b>	Use the free-text field to add more information about this referral.
<b>OUTCOME OF REFERRAL</b>	Free text field for you to provide information.
<b>NOTES FROM REFERRAL</b>	Required free text field for you to provide information.

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