CCTO Micro-Training

Creating A Contact Monitoring Event (ME)

BEFORE YOU BEGIN, COMPLETE THE FOLLOWING:

1. Check for duplicates (active MEs for the same individual). Search the **Monitoring Events Tab** and determine if there is already an active monitoring event (ME) for this individual. If there is, update this active ME appropriately and do not create a new one. **If you have not found an active duplicate, continue to the next step.**

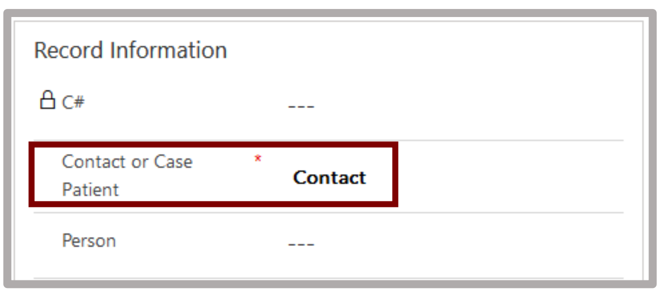
2. Check for past MEs (inactive MEs for the same individual). If an inactive ME for this individual already exists, you can visit their person record and click **+New Monitoring Event** (from within the person record's *Monitoring Events* page) to create a pre-populated event in line with the section-by-section guidance below. **If you do not identify an inactive ME, continue to the next step.**

3. If there is not any ME that matches this person, click **+New** at the top of the **Monitoring Events Tab.**

Review these key fields when creating a new contact monitoring event:

Fields with * are required to create your contact monitoring event (ME).
Fields with + are required by the state to track data.

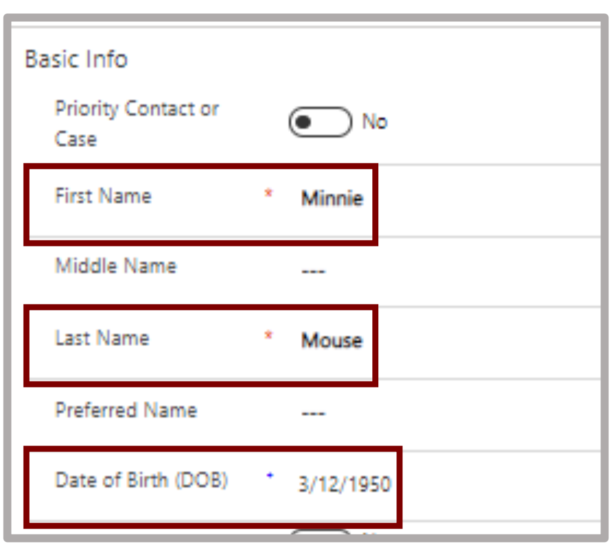
#1: Record Information



- Contact or Case Patient*

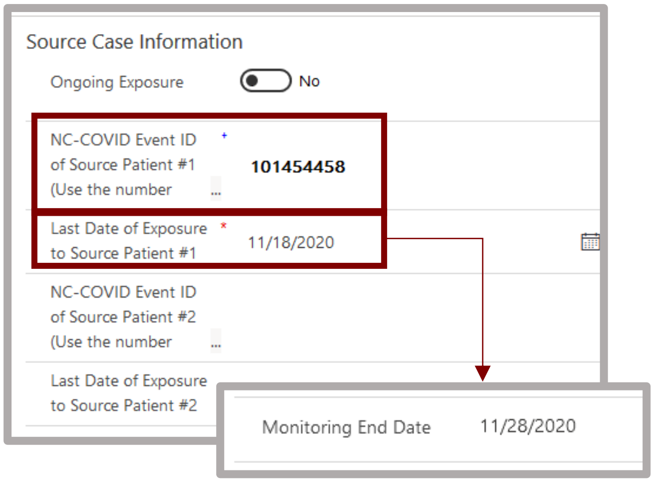
Associating Your ME With a Person Record
If you have not found another ME that matches this individual, leave the **Person** field **blank**. CCTO will automatically look for a match upon saving and **1)** associate your ME with an existing person record OR **2)** create a new person record. *If the system matches an incorrect person record upon saving,* ***see top of p.5 for next steps.***

#2: Basic Info



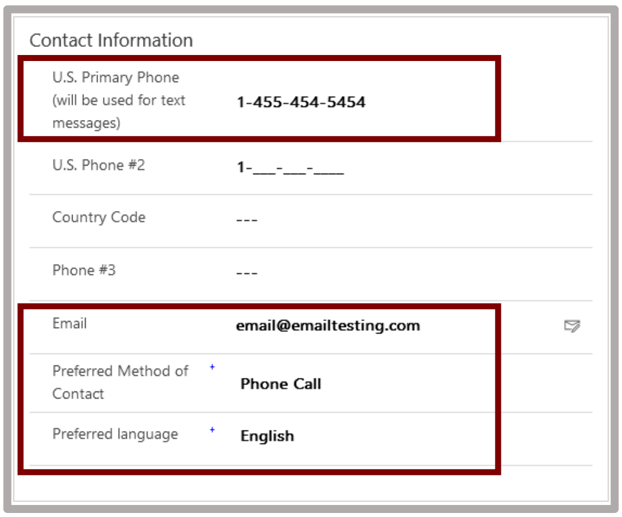
- First Name*
- Last Name*
- Date of Birth+ *(not used for notification, but used in digital monitoring)*

The **Priority Case or Contact** toggle allows you to flag a contact as being priority. **Check with your supervisor and your local policies to see if you should be using this toggle**



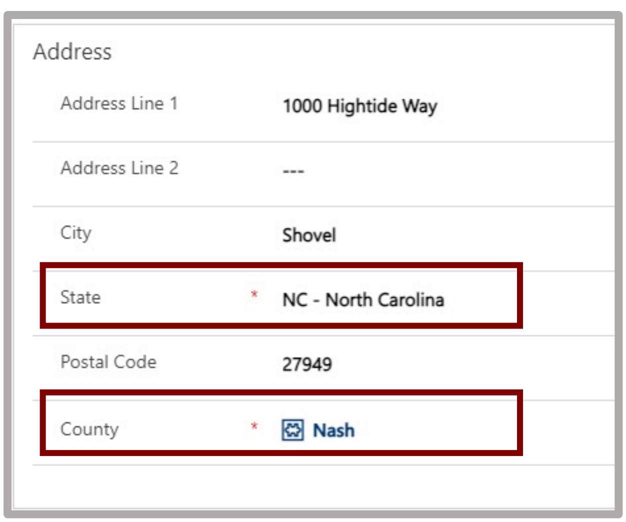
#3: Source Case Information

- Ongoing Exposure *(if, for example, your contact lives with a case patient)*
- NC-COVID Event ID+*(for the case patient who named this contact)*
- Last Date of Exposure*
  *(If the **Monitoring End Date** field is blank, it will auto-calculate for 10 days after the date in this field. **ACTION:** Update **Monitoring End Date** manually if it needs to be another date.)*



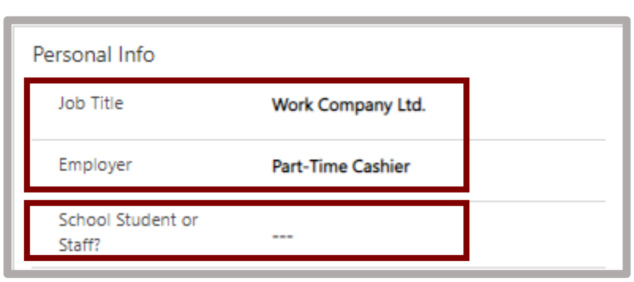
#4: Contact Information

- U.S. Primary Phone *(this number will be used for [automated text outreach]() if applicable)*
- Email
- Preferred Method of Contact+
- Preferred Language+ *(when set to "Text Message" or "Email," a Primary Phone number or Email will become required)*



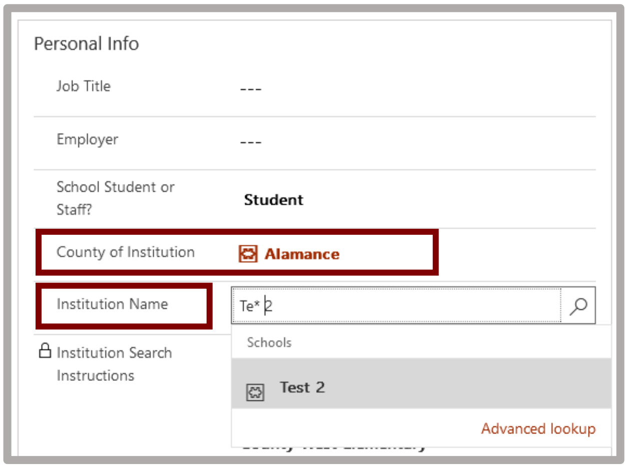
#5: Address

- Address Line 1 *(street address)*
- City
- State*
- Postal Code
- County* *(use county of case if not known)*



#6: Personal Info

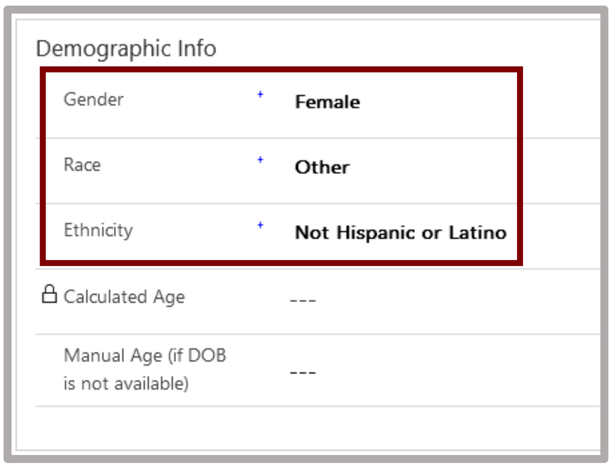
- Job Title *(if known)*
- Employer *(if known)*
- School Student or Staff? *(if known; see next page for additional fields)*



If "Student" or "Staff" is selected within the ***School Student or Staff?*** *field:*

- County of Institution *(choosing a county will narrow the institutions shown)*
- Institution *(if known)*

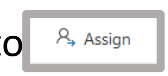
Search the **Institution** field using a wildcard (*) as a substitute for any unknown text (see p.2). If the institution is not available in the **Institution Name** dropdown, check the **Other Institution** field and then enter its name manually in **Institution Name (Other).** Otherwise, you should leave these fields blank.



#7: Demographic Information

- Gender+
- Race+
- Ethnicity+
- Manual Age *(if no DOB)*

Save your work 

ish. If needed, you can then **use Assign** at the to 

of the screen to assign this ME to someone else. Single-click "Me" to input a "User or Team" and assign this contact to them.

You're all done!

What's Next?

- Your contact will be sent an [automated digital exposure notification] upon saving as long as you have completed the required fields plus **Email and/or US Primary Phone** *(and "Monitoring End Date" is not set to a date before today)***.**
- **If you are a contact tracer,** **check the roadmap**! The **CCTO job aids** can also help with what you need to know about **beginning monitoring** and **documenting your outreach**.