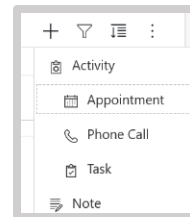




Timeline/Activities helps you document and track your outreach and monitoring. See below for a broad explanation of when and how to use each type of item:

NOTE:
For household activities, see [job aid](#).

In Timeline/Activities, click +, then select...



Phone Call...

... to document or schedule all phone outreach, whether successful or not.

- ✓ Use **“Type” & “Call Status”** to provide information about reason for the call and whether it was answered or not
- ✓ Use **“Description”** to share relevant details about the call
- ✓ **Must close when complete** by clicking the check in *Mark Complete* or Timeline/Activities (*see footnote*)
- ! **DOES NOT replace a referral.** To document a referral, log both a phone call and a referral ([job aid](#))

Task...

... to document or schedule as a work letter request or a follow-up phone call.

- ✓ Follow local protocol on **“Subject”** and **“Description”**
- ✓ Use **“Due”** to schedule in advance
- ✓ Use **“Owner”** to assign
- ✓ **Must close when complete** by clicking the check in Timeline/Activities (*see footnote*)

Note...

... to record additional reference information, such as resource needs or chronic conditions.

- ✓ Record **reference information** only
- ✗ Do **NOT** use to record tasks, phone calls or referrals

Always remember to **close out your completed phone calls and tasks** by hovering over the item, clicking the checkmark, followed by “Close Phone Call”.