- **Monitoring** refers to reaching out to your contact to assess their symptoms and resource needs. These assessments are collected **manually** (over the phone). CCTO is used to document your monitoring work and to store assessments.
- An initial assessment should be done manually by the tracer (see page 2) during the outreach phone call.

If your local protocol indicates you should begin monitoring a contact beyond the outreach phone call, start with the steps below:

#1: Review your contact's event to prepare for monitoring:

- Use the **CCTO Glossary** to help you understand the contact monitoring event fields and determine what additional information you would like to collect.
- The fields described in page 2 of the **Digital Exposure Notification** micro-training can help you determine whether your contact may have already received a successful text or email notification, which will guide your conversation.
- Keep in mind that **Monitoring End Date** is automatically calculated for 10 days after the most recent **Last Date of Exposure**; however, you can update it at any time if the monitoring period needs to be adjusted. This field is used both for your reference and as the date used by the system to determine if it should send a notification.

#2: Then, document that you are initiating monitoring within CCTO: Set **Monitoring Status** to "Monitoring" to document that you are actively monitoring this contact.

#3: Per your local protocol and the guidance outlined on the CD Manual Scripts page, call your contact and log this phone call (per the job aid).

- See the **CD Manual Scripts Page** for language to use in your contact conversation.

#4: When you are ready to collect or review information about symptoms and resource needs, open an assessment: Visit the "Assessments" page at the top of your contact's monitoring event. See next page for instructions on completing fields.
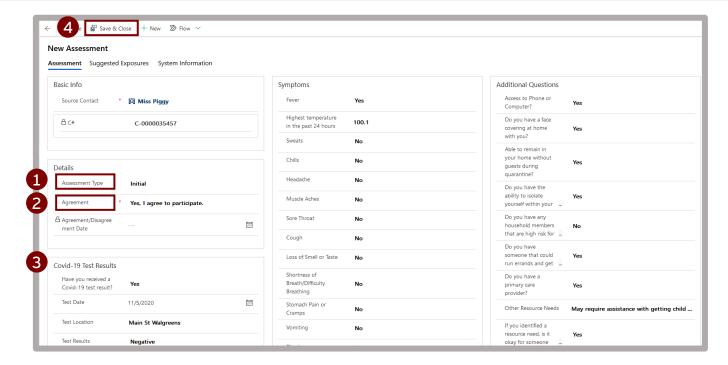
Assessment fields are completed manually by the tracer (as shown below). To start an assessment, begin on the **Assessments** page as shown in #4 of the previous page.
Before you create a new manual assessment, check if a blank assessment is already available:
- If this is your contact's first assessment and an assessment marked "Initial" already exists, click into that assessment.
- If there is not an assessment marked "Initial," or if this is not your contact's first assessment, click **"+New Assessment"** in the **top right corner** of the screen.

#1: Assessment Type: This should read "Initial" if this is your contact's first assessment and "Monitoring" if it is not.
- Both types collect the same symptom and test result information.
- **Initial** assessments display a full list of resource need questions. **Monitoring** assessments ask contacts: "Do you have a new resource need?" and only request details if contacts respond "Yes."

#2: Agreement: Select "Yes, I agree to participate" if your contact agrees.
- Completing this field and saving will update the **Last Assessment Date** field on contact monitoring events (MEs).

#3: Remaining Fields: Collect per your contact's responses per the script.
- Each time *COVID-19 Test Results* is completed, a contact ME section for *Contact Reported Test Results* will appear and update. The contact ME section for *Testing Details* will <u>not</u> update automatically. Defer to your local guidance on how you should use this section.
- The first time any symptom (except "Highest Temperature in the Past 24 Hours" or "Other Symptoms") is indicated, the contact ME field for **First Date Symptoms Reported** will update.
- Each time any resource need (except "Is there any other information you would like to provide?") is indicated, the contact ME field for **Most Recent Date Resource Need Reported** will update.

#4: Save & Close: Click to save your work and record the assessment. Review this assessment at any time by returning to the "Assessments" page.