12/13 CCTO Updates

Digital Exposure Notification in CCTO

LHDs can use CCTO to send digital exposure notification to contacts. This can enhance existing workflows and provide single notification to certain contacts based on priority.

Local guidance will vary. Always check with your supervisor and LHD guidance to see whether and how you should use this functionality.

Digital exposure notification is a helpful enhancement that can serve two purposes:

1. It **enhances existing workflows** by quickly helping contacts to learn of their exposure, to receive and share key info, and to begin accessing digital assessments. This expedites initial outreach but **will not prevent you from monitoring your contact normally or from contacting them by phone if needed.**
2. Depending on your local guidance, sending an exposure notification **may also take the place of an initial phone call** and/or of **normal monitoring**; this supports prioritizing contact tracer time for the contacts most likely to have and spread disease.

Using the "Needs Phone Call" Toggle

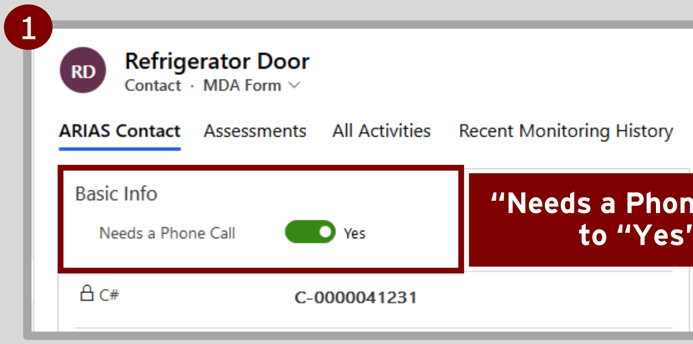
Contact tracing guidance and/or local protocol identifies which contacts are priority for a phone call. In many cases, the case investigator will have the information to determine whether a phone call is needed.

1. If your LHD workflow permits, **you can toggle "Needs a Phone Call" to "Yes"** to prioritize which contacts should receive a phone call or which should be priority for a phone call. *Local workflows on how and when to use this toggle will vary. Always be sure to check with your local protocol.*

1 **"Needs a Phone Call" to "Yes"**

A new column for "Needs a Phone Call" has been added in contact system views to allow you to sort and filter on contacts using this field.

1



"Needs a Phone Call" to "Yes"

Guidance varies by LHD. Check with your local guidance to see if "Needs Phone Call" is being used, and if so:

- **Who** is responsible for updating this toggle
- **When** it should be updated
- **How** it should be used

Digital Exposure Notification in CCTO

Sending a Digital Exposure Notification

1. If a contact is eligible for a digital exposure notification per your local guidance, **confirm that you have completed** these fields:
   - **First Name, Last Name, State,** and **County** (required CCTO fields)
   - **Last Date of Exposure to Source Patient #1**
   - **Email** AND/OR **Primary Phone** (one is required in order to send a notification)

The notification will include an end-of-quarantine date (based on the date listed in the "Monitoring End Date" field) and a test date (5 days since the most recent last date of exposure). ***If no "Monitoring End Date" is listed, the system will auto-populate it to be 14 days since the most recent last date of exposure. Please ensure that these dates are correct before sending a notification.***

2. **To initiate a digital notification, set "Send Notification" to "Yes."**
3. **Save your work.** This will send a digital exposure notification to your contact via both text (if phone number is available) and/or email (if email is available). The notification will send based on whatever methods of contact are available regardless of "Preferred Method of Contact."
4. You can confirm that a text and/or email has been created by visiting their **All Activities Page** and confirming that an email and/or text is visible. Additionally, the notification will be displayed in the **Assessments Page** as an entry marked "Notification."

1 **Complete key fields**

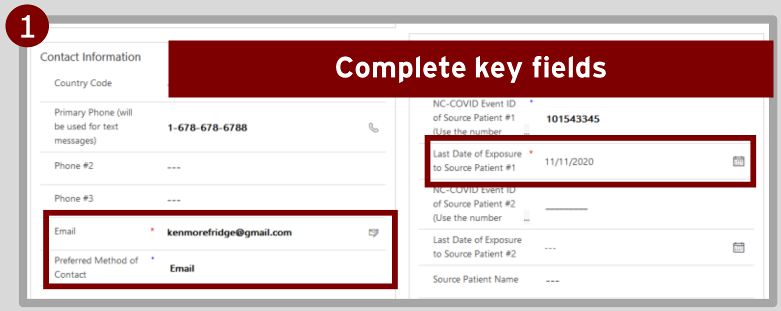
2 **Set "Send Notification" to "Yes"**

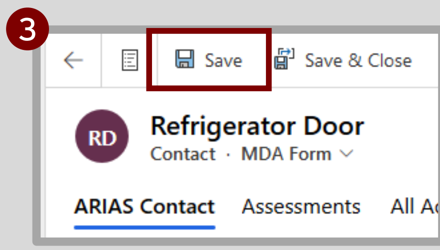
3 **Save your work**

4 **Confirm outreach/notification creation**

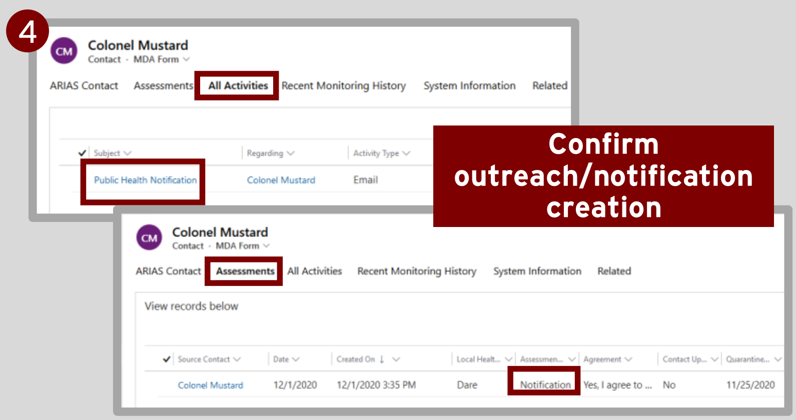
Continued onto next page...

NOTE ABOUT MINORS:
Digital exposure notification should not be used for minors, as contacts must be 18 or older to provide information through the digital portal.





Save your work

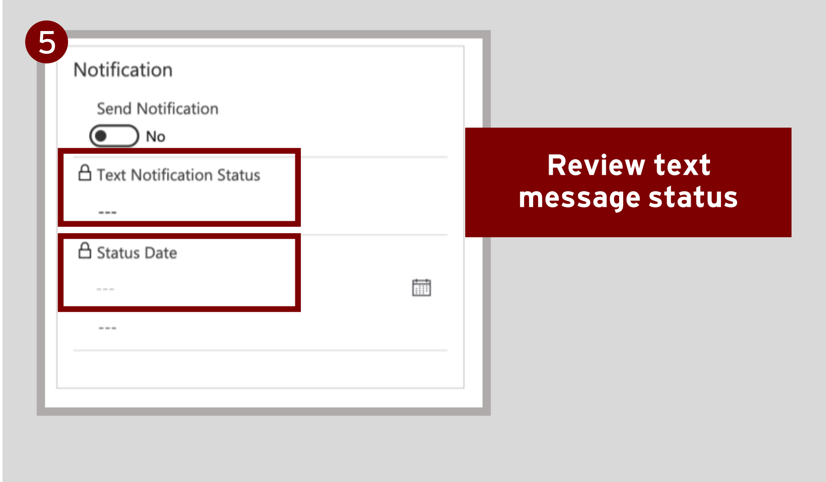


TIP: RESENDING A NOTIFICATION
If you need to send another notification after one has already been created:
1. Set "Send Notification" to "No" and **save.**
2. Set "Send Notification" to "Yes" and **save again.** The Tool will send another notification.

Digital Exposure Notification in CCTO

5. You can also review **when and if** a **text message** notification created was **sent, delivered, or undelivered** to a mobile phone number by reviewing the fields for **"Text Notification Status"** and **"Status Date."** If more than one notification was sent, the most recent will be documented. *This status is available for text message notifications only.*

5 **Review text message status**



Sending a Mass Digital Exposure Notification

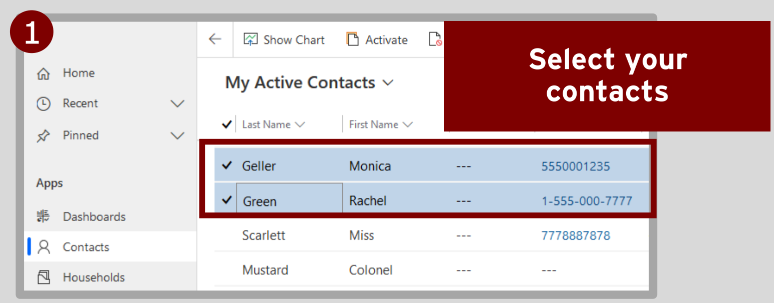
1. To send a mass digital exposure notification to several contacts at once, begin by **selecting your contacts using checkmarks** on the Contacts Tab.
2. From the top of the screen, select **"Flow" → "NC - Send Notification."**
3. Select **"OK"** to confirm, and notifications will be sent to contacts who have information in the fields for "Last Date of Exposure" as well as "Email" and/or "Primary Phone." You will **not** receive an error message for notifications that did not send due to all requirements not being met.

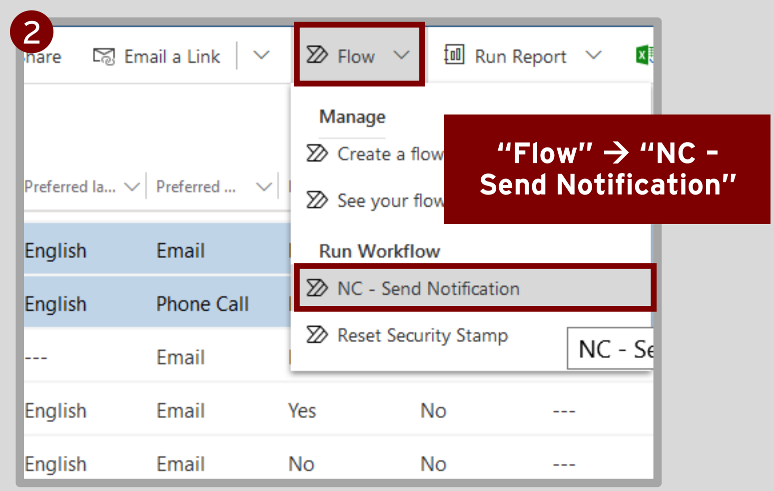
1 **Select your contacts**

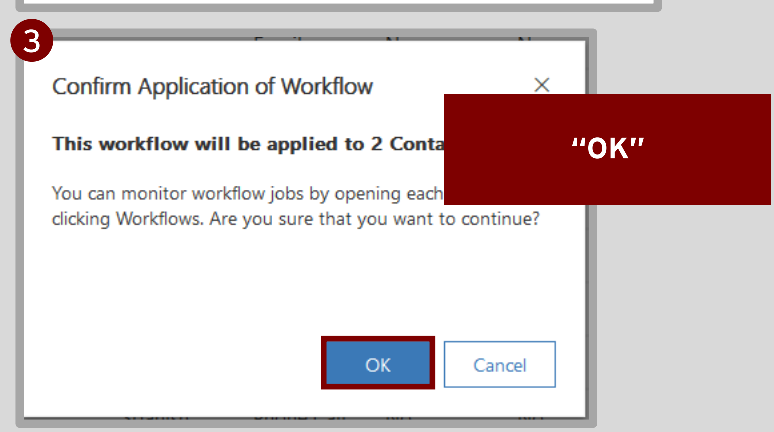
2 **"Flow" → "NC - Send Notification"**

3 **"OK"**

A new column for "Send Notification" has been added in contact system views to allow you to sort and filter on contacts using this field.







12/13 CCTO Updates

Digital Exposure Notification in CCTO

Understanding the Contact Perspective

1. Contacts will receive a text or email message **that informs them of their exposure and their personal quarantine dates.** It will also provide them with a **link to a digital portal landing page** with more details and testing info. This page asks them to **provide more information** by completing a CAPTCHA to proceed to the next page.
2. Contacts who complete the CAPTCHA will be asked to agree to participate in digital monitoring.
3. Contacts who opt in will then be asked **to provide the same personal, contact, and demographic info that they would provide on a normal initial outreach call.** *First Name, Last Name, DOB, State, County, and Email/Mobile Number (depending on Preferred Method of Contact) will be required*.
4. When contacts submit this form successfully, they will start to receive daily digital assessments via their preferred method of contact **until the end of their monitoring period as determined by the date in "Monitoring End Date".**

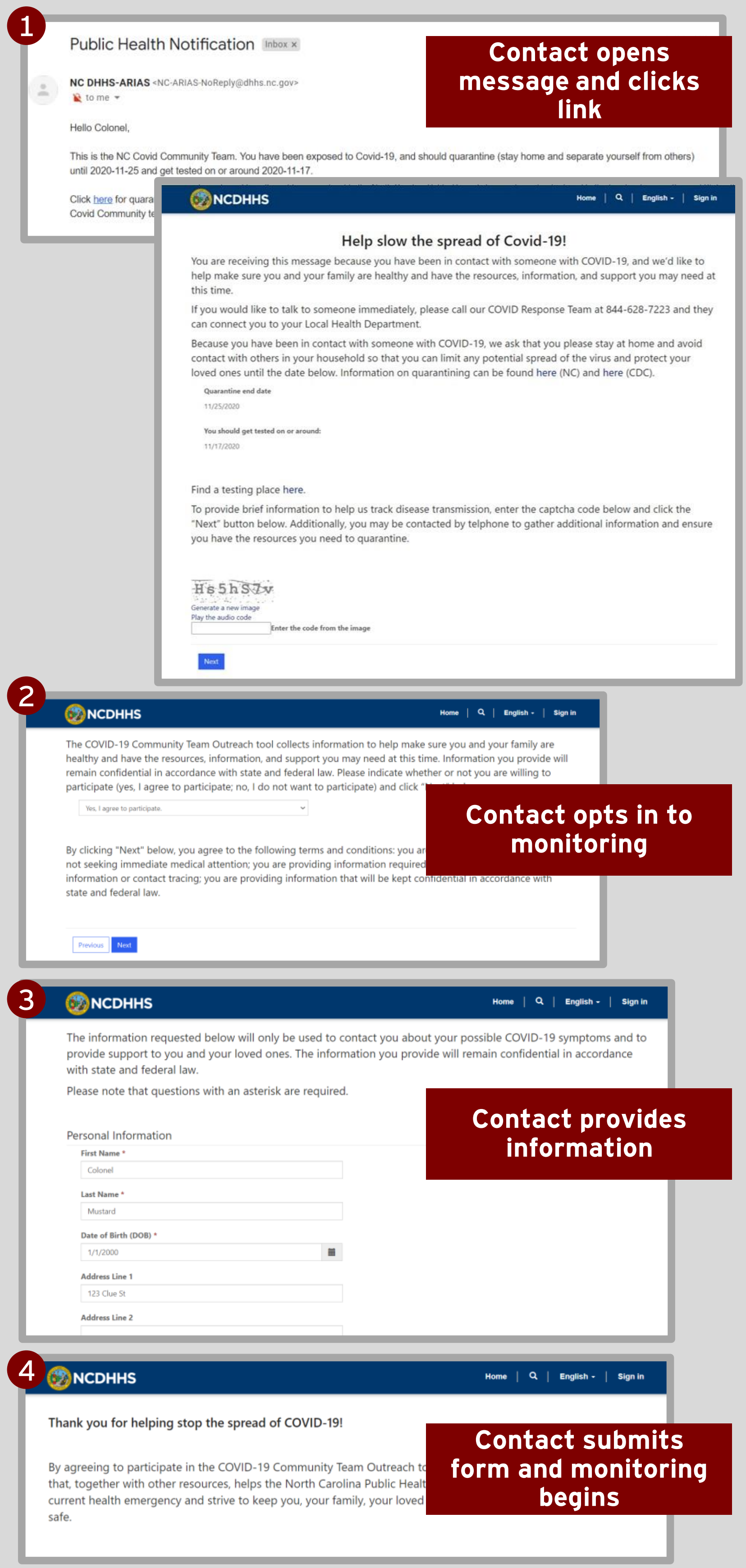
1 **Contact opens message and clicks link**

2 **Contact opts in to monitoring**

3 **Contact provides information**

4 **Contact submits form and monitoring begins**

Depending on your LHD's workflow, **contacts who complete these steps may or may not proceed to additional monitoring via phone.**

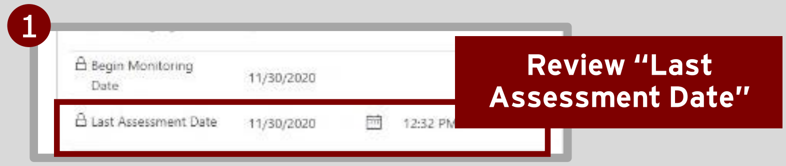


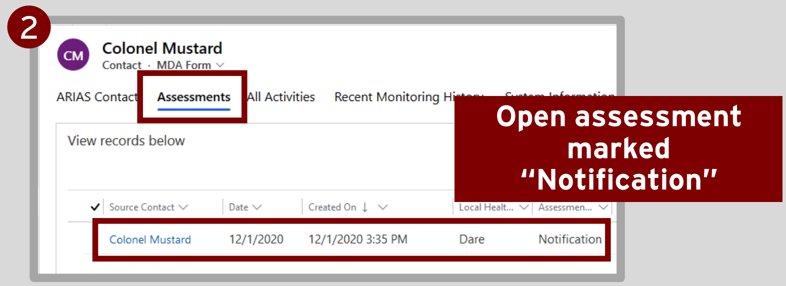
12/13 CCTO Updates

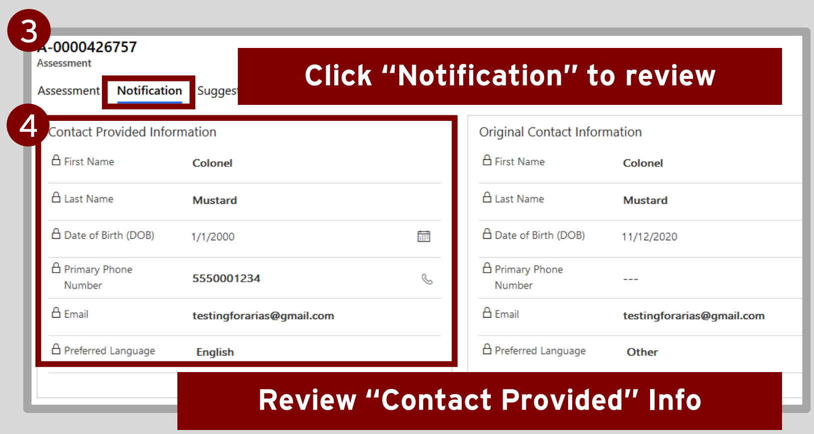
Digital Exposure Notification in CCTO

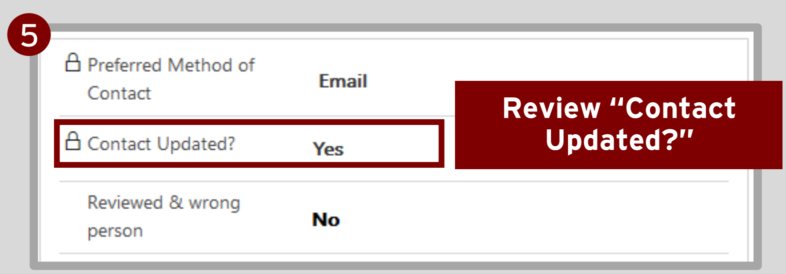
Reviewing Information Gathered from an Exposure Notification

1. If your contact has provided information in the portal, you will see that **"Last Assessment Date"** has been updated on their profile.
2. To see the information that your contact has provided in detail, **click into their Assessments Page and review the assessment marked "Notification."**
3. You can review information that your contact has provided against the information that was originally in their profile by **selecting the "Notification" page at the top of the assessment.**
4. The boxes marked **"Contact Provided"** show your contact's responses, and the boxes marked **"Original Contact"** show what was originally in their profile.
5. **If your contact entered a last name that matched their last name in CCTO exactly, "Contact Updated?" will be set to "Yes,"** and all new or changed information that they have provided has been updated automatically on their profile. **If your contact's last name did not match exactly but you believe the information should still transfer to the contact record, please proceed to the next page.**









NOTE: DEMOGRAPHIC INFO WILL NOT TRANSFER

Due to inefficiencies with the system, **contact-provided demographic info will not automatically transfer onto their profile;** however, you can still review this information and update these fields manually.

1. Review "Last Assessment Date"
2. Open assessment marked "Notification"
3. Click "Notification" to review
4. Review "Contact Provided" Info
5. Review "Contact Updated?"

12/13 CCTO Updates

Digital Exposure Notification in CCTO

Handling Incorrect Mismatches on Notifications

You should only complete this process if explicitly instructed to do so. Check with your supervisor on local protocol.

A **mismatch** occurs when **the last name that a contact submits in the digital portal does not match their original last name in CCTO** (either in spelling or in upper/lowercase), and this stops their profile from updating automatically. If you believe the submitted info should **still be paired** with the contact, however, you can correct this.

1. If the last name that a contact entered in the digital portal does not match their original last name in CCTO, **"Contact Updated?"** will be set to **"No"** because the Tool considers this a mismatch. This means info that they have provided **did not** automatically transfer onto their profile.

2. Contacts labeled as a mismatch can quickly be identified and reviewed by selecting the view for **"Notification – Contact not updated"** in the Assessments Tab.

3. **If you have determined that this is not a true mismatch and that the contact's profile *should* be updated with the info submitted, you can use a *flow* (automatic workflow) to do this in one step.** After selecting your contact(s) from the "Notification – contact not updated" view, click **"Flow"** at the top of the screen.

1 **"Contact Updated?" is set to "No"**

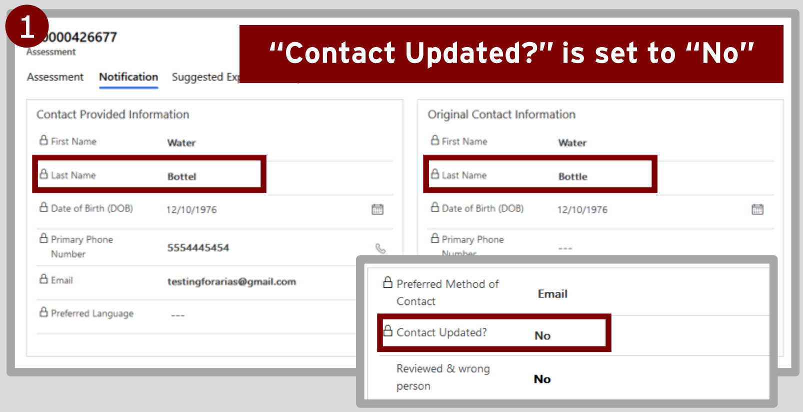
2 **"Notification – Contact not updated" view**

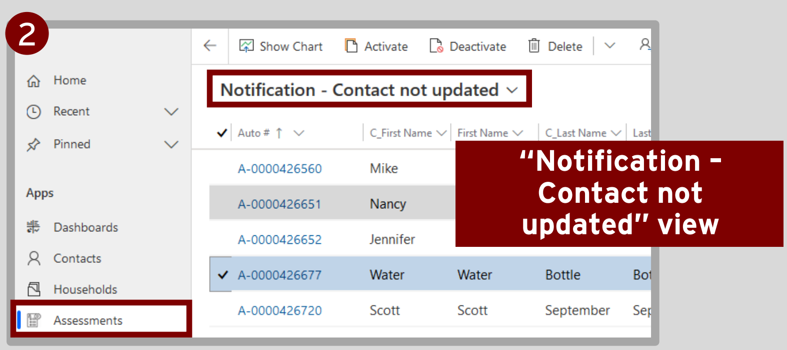
3 **Select contact(s) and click "Flow"**

Continued onto next page...

TRUE MISMATCHES: Notifications received by the wrong person

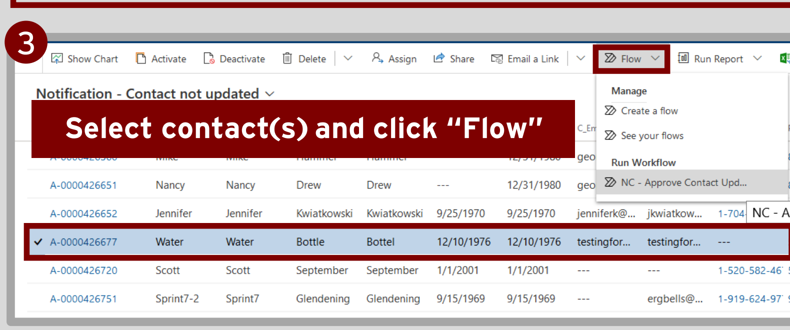
- If "Contact Updated?" reads "No" and you have determined that the notification was received by the wrong person, **consult with your supervisor.**
- A field has been provided for **"Reviewed & wrong person"** that you may use to document this, but you should always discuss documentation and next steps with your supervisor.





Note that the following are excluded from this view because these contacts should not be updated:

- If "Contact Updated?" reads "No" because the contact has opted in but not submitted any information.
- If "Contact Updated?" reads "No" **AND** "Reviewed & wrong person" *(see box above)* is set to **"Yes."**



12/13 CCTO Updates

Digital Exposure Notification in CCTO

Handling Incorrect Mismatches on Notifications

4. Choose **"NC – Approve Contact Update."**

5. The first time you run this flow, you will receive a dialogue that asks you to connect to the Common Data Service. You can approve any prompts you may receive, and you will see a green check mark when you have been connected.

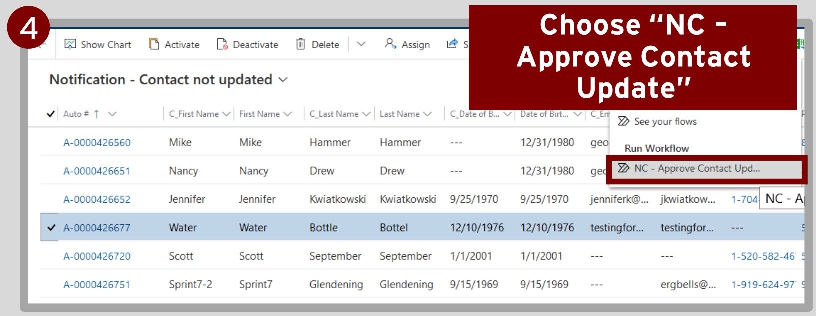
6. Click **"Run Flow,"** and you will receive a confirmation message. All submitted contact info will be transferred automatically, and you can click "Done."

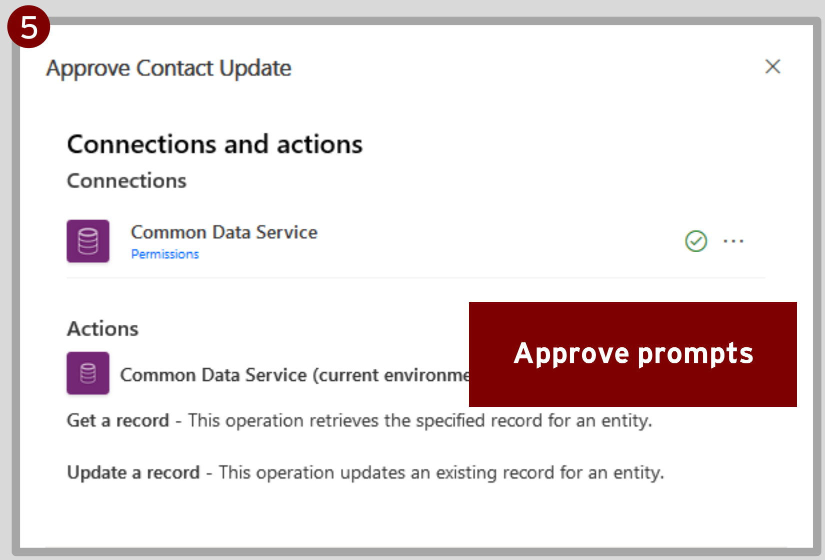
4 **Choose "NC – Approve Contact Update"**

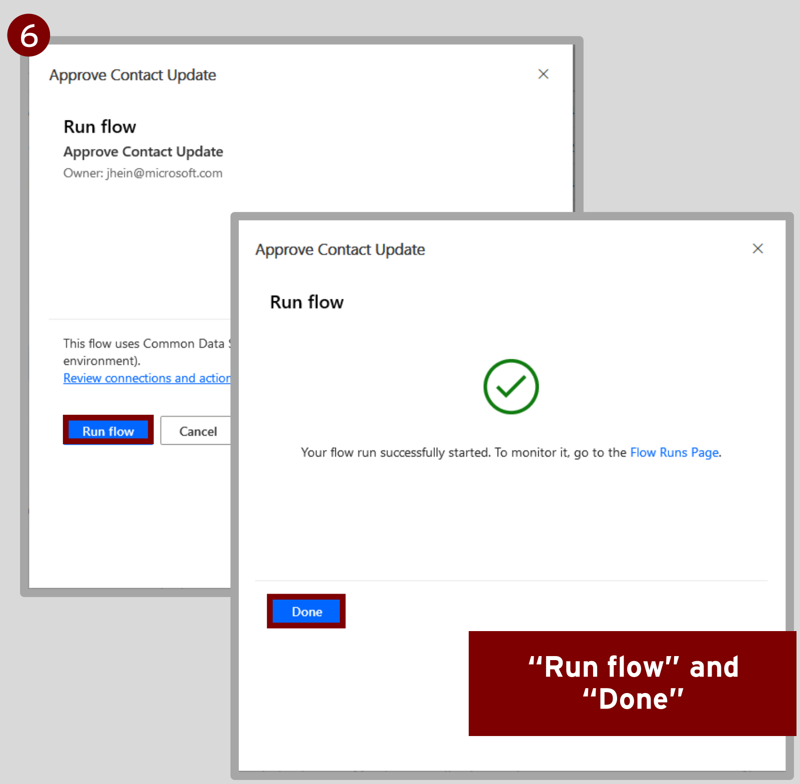
5 **Approve prompts**

6 **"Run Flow" and "Done"**

CORRECT MULTIPLE MISMATCHES:
In addition to running this flow for one contact, you can also select multiple contacts in any assessment view and run the flow for several contacts at one time.







12/13 CCTO Updates

Digital Exposure Notification in CCTO

Automatic End of Digital Monitoring

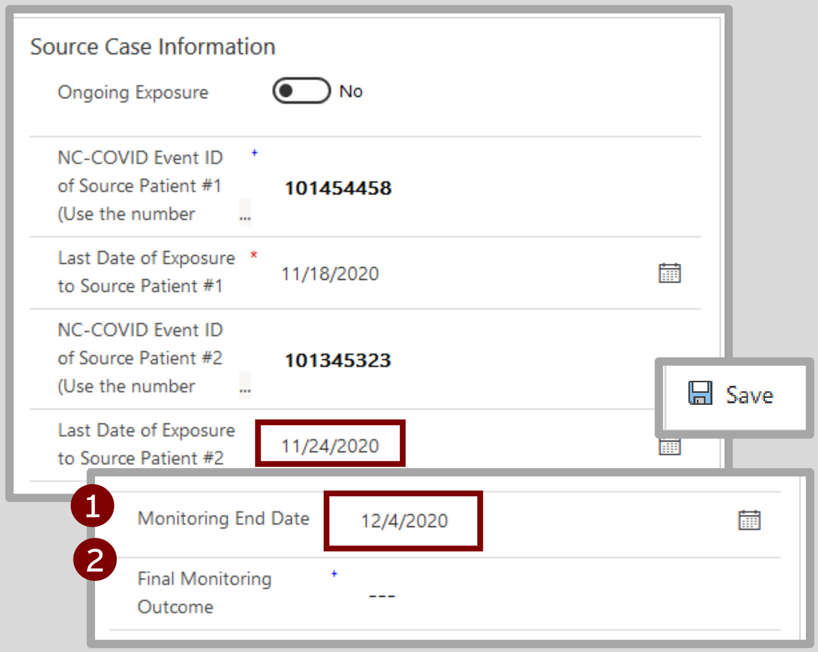
1. If **"Monitoring End Date"** is left blank, **it will now update automatically to be 14 days after your contact's most recent last date of exposure. If this contact should have a different "Monitoring End Date" per your local guidance, you may adjust this date at any time.** The automatic change will only occur if "Monitoring End Date" is blank, so you should continue to update "Monitoring End Date" manually if a contact's exposure is ongoing or if quarantine needs to be extended for any reason. (If you have already updated this manually, it will not be overwritten.)

2. When the date listed in "Monitoring End Date" is reached, **digital assessments will no longer be created automatically.** Remember that this date does not lock and can be manually adjusted at any time if digital assessments should continue. Please note that the end of digital assessments will not change the "Begin Monitoring?" or "Monitoring Status" fields, so you will need to review a contact's "Monitoring End Date" to confirm that digital assessments are still being sent.

Please note that none of these changes impact the close-out process, which must be completed on all contacts per the [Closing Out A Contact Job Aid].

1 **Blank "Monitoring End Date" updates based on Last Date of Exposure**

2 **Digital assessments no longer created after "Monitoring End Date"**



NOTE ABOUT ONGOING EXPOSURES:
If your contact's exposure is **ongoing** and their monitoring period will be extended, **remember to adjust "Monitoring End Date" manually** so that they continue to receive automatic digital notifications while they are quarantined.

NOTE ABOUT DIGITAL MONITORING:
These updates will apply to the sending of all digital assessments **regardless of whether digital monitoring was started through a digital exposure notification or through a normal initial outreach process.** You should still always select a Final Monitoring Outcome and complete the contact deactivation process [per the job aid].