

Using CCTO for the First Time

COVID-19 Community Team Outreach

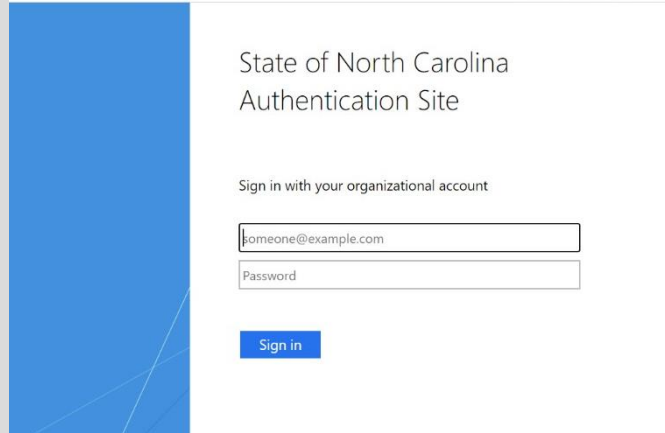
As you begin using the CCTO Tool for the first time, keep the following in mind:

Logging In

Navigate to the CCTO Tool to log in with your NCID per the process [in this job aid](#).

- Use the [CCTO Sandbox System](#) for practice and the [CCTO Live System](#) for real contact info.
- If you have an email ending in **nc.gov**, log in using your current credentials.
- If you do not have an NC email, the format of your username will be YOURNCIDUSERNAME@nc.gov.

If you experience issues logging in, click "Sign Out" and open the Tool in an incognito window or a new browser (e.g., Chrome, Firefox) where you are not signed into other Microsoft applications. Check the [Logging In Job Aid](#) if you continue to experience issues.



If you experience issues, log in from another browser per the [Troubleshooting CCTO Access](#) job aid.

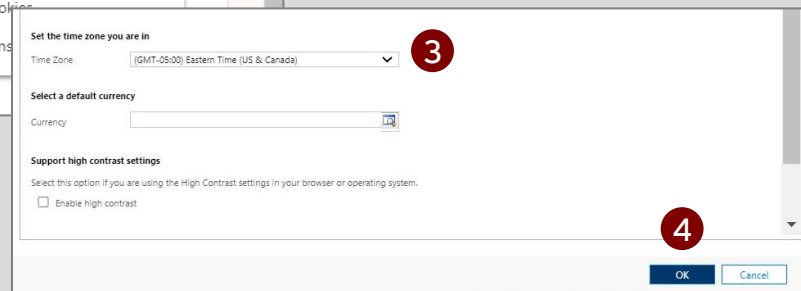
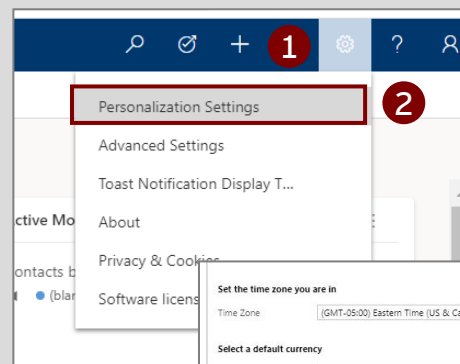


Setting Your Time Zone (optional)

It is important to set your time zone accurately to manage and record your work effectively.

1. Click the **gear icon** in the top right corner.
2. Select **"Personalization Settings."**
3. Under "Time Zone," select **(GMT -05:00) Eastern Time.**
4. Click **"OK"** to save.

- 1 **Gear Icon**
- 2 **Personalization**
- 3 **Time Zone**
- 4 **OK**



Viewing Your Monitoring Events

Click the Monitoring Events Tab, and you will automatically see "All Monitoring Events," which shows all the contact and case monitoring events (MEs) in the system.

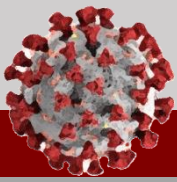
Monitoring Events Tab →

To see only your MEs, click the arrow next to "All Monitoring Events" and select "My Active Monitoring Events" or "My Monitoring Events," which filters all the MEs in the system to show only MEs assigned to you. See [this job aid](#) for more detail on filtering.

✓	C#	Person	Last Name	First Name	Household	House
	C-0000999908	janet smith	smith	janet	---	---
	C-0000999907	Minnie White	White	Minnie	---	---
	C-0000999906	Test Au				
	C-0000999905	Betty W				
	C-0000999904	Wonde				

For more info on MEs, see:

- [CCTO Glossary](#) on all ME fields
- [Micro-training](#) on creating MEs
- [Definition of an ME \(p.1\)](#)



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As you begin using the CCTO Tool for the first time, keep the following in mind:

Viewing Your Outstanding Tasks and Phone Calls

To review all tasks and phone calls that have been created and assigned to you, visit the **Activities Tab**.

The tab defaults to a list of your open items (your to-do list!), and you can view each item in detail by clicking on it. **These items must be created manually by you or another user before they appear here.** For more info on how to create and assign these items, see the job aids on [Timeline/Activities](#) and [reassigning job aids](#).

Activities Tab

Due	Activity Type	Subject	Regarding	Priority
10/27/2021 10...	Phone Call	Additional Outreach /	Home Town	Normal
10/27/2021 10...	Task	Elevating to Supervisor	Home Town	Normal
10/27/2021 10...	Phone Call	Additional Outreach /	Adele 30	Normal
10/7/2021 11:...	Task	Review digital assessment	Elmer2 Fudd2	Normal
9/28/2021 5:0...	Task	Review digital Assessment	Elmer2 Fudd2	Normal

Viewing Your Contacts' Assessments

Assessments are ongoing contact surveys of symptom changes and resource needs. The **Assessments Tab** pulls all assessments from individual contact monitoring events. Contacts may respond to assessments over the phone or digitally via links sent in automated emails or texts (see p. 2 of [this job aid](#) for more info).

1. Click the Assessments Tab.
2. Click the arrow ▼ next to "Active Assessments."
3. Select "Assessments from Contacts & Cases I Own" to view only assessment responses from your contacts and cases.
4. Each line is a record of one assessment completed by an individual. Contacts should complete multiple assessments during monitoring. You can view an assessment by clicking on it. Note that the column headers reflect details about each assessment and individuals' responses, and you can sort and filter on these headers by clicking on them.

Active Assessments ▼

- System Views
- Active Assessments
- All Resource View
- All Symptom View
- Assessment Details
- Assessments from Contacts & Cases I Own**
- Completed Assessments
- Contact Event Notification Assessments (from Text/Email)
- Inactive Assessments

Assessments from Contacts & Cases I Own ▼

Source Contact	Date	Created On	Local Health...	Assessment ...	Agreement	When did y...	Vomiting	Cough
Teddy Bear	9/1/2020	9/1/2020 ...	Dare	Initial	Yes, I agree t...	---	No	No
Snow White	9/1/2020	9/1/2020 ...	Dare	Initial	Yes, I agree t...	---	No	No
Simon Says	9/2/2020	9/2/2020 ...	Dare	Initial	Yes, I agree t...	---	No	No
Charlie Brown	9/2/2020	9/2/2020 ...	Dare	Initial	Yes, I agree t...	---	No	No

- Assessments Tab**
- Active Assessments**
- Assessments from Contacts & Cases I Own**
- Assessment Responses**

PLEASE review the [CCTO Training Resources subpage](#) and reference the [CCTO Glossary](#) (plus other resources linked [here](#)) as needed while you become familiar with the system.

WELCOME TO THE TEAM!