Overview of Case Patient Digital Notification

Last Update: 1/11/2023

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

This document focuses on automatic case flow and notification, which was introduced to address rising case loads and to improve outreach time. For details on the case portal itself and how to handle data submitted by cases, please review the job aids for **Understanding the Case Portal**, **Case Portal – CI Guidance**, **Case Portal CT Guidance**, and **Digital Outreach Samples**.

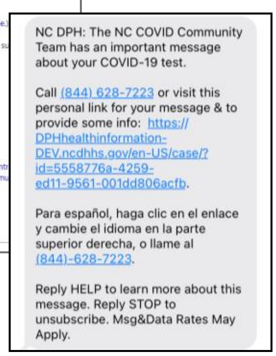
CASE NOTIFICATION: All case patients who test positive for COVID-19 and have required fields complete in NC COVID will flow into CCTO in order to be sent an automatic text and/or email notification informing them of their positive result via a unique link to the case portal landing page. **This portal is unique to the case patient and allows them to provide a symptom onset date, to calculate personal isolation dates, and to enter contacts.** *See below for an overview of case notification and its impact to your workflow.*

LEARN MORE ABOUT CASE PRIORITIZATION

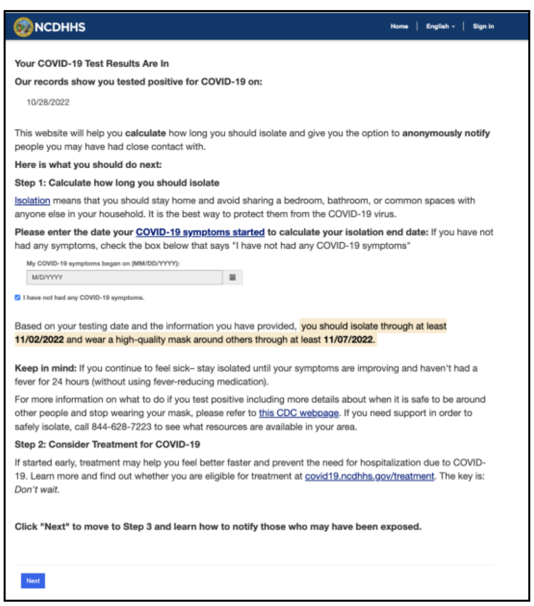
Please see this link for NC DHHS case prioritization guidance and recommended actions to prioritize case investigation efforts for individuals and populations at the highest risk of transmission for COVID-19. As recommended by this guidance, digital case notification can enable single notification of cases via email or text that also provides a link to isolation guidance and support.

Notifications Sent To Case Patients

Email



Text



Landing Page

Please see Digital Outreach Samples for full screenshots of these items.

Case patients entered into NC COVID with a positive lab within 10 days of their diagnosis date and required fields complete will have their records brought from NC COVID into CCTO so that **an automated text and/or email notification** with a unique link to the case patient portal can be sent to them.

This portal informs case patients of the result of their COVID-19 test and asks them to **provide a symptom onset date**, to **calculate their personal isolation dates**, and to **enter close contacts**. Case patients are also offered guidance on isolating and resources for more support.

For a walkthrough of the case portal itself, please refer to the ***Understanding the Case Portal*** *job aid and the* ***Digital Outreach Samples*** *document.*

See next for what you need to know based on your role in the COVID-19 Community Team.

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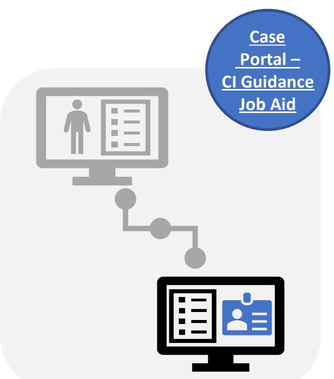
See below for what you need to know about case notification…

…as LHD leadership:

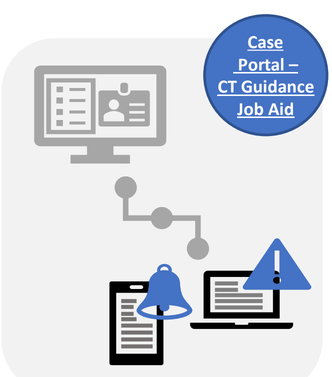
- **All cases with a positive event (PCR or antigen) in NC COVID within 10 days of their diagnosis date** (specimen collection date of first positive lab) are sent a text and/or email notification informing them of their positive result as long as required fields are complete. These cases may use this notification to calculate isolation dates and enter contacts directly through a portal. *See the **Verifying Case Flow** and **Case Portal** job aids.*
- **Contact submissions made by cases will flow directly into CCTO and should be regularly reviewed by staff. See the Case Portal – CI Guidance Job Aid.**
- For some LHDs, digital notification may represent a duplication of notification for cases who also receive phone calls. Please **work with your teams** to ensure all staff are aware and can adjust their workflows to optimize staff time.
- Case patients can reach out to the CCTC call center to ask basic questions or to confirm the validity of the text or email. Staff will let callers know that they may also receive a follow-up call. Cases who reach the portal will also see a link to contact their LHD.

…as a Case Investigator:



- Cases entered in NC COVID with a phone number or email **flow automatically into CCTO if their diagnosis date is within 10 days *(see above)*.** These cases will be notified of their positive result via a unique link that allows each case to provide a symptom onset date, to calculate personal isolation dates, and to enter contacts. *See the **Verifying Case Flow** and **Case Portal** job aids.*
- When you reach a case by phone, **they may have received this notification and completed the items listed in the bullet above.** **Before calling a case,** review any submitted information per the **Case Portal – CI Guidance** job aid and proceed appropriately.
- Your LHD may rely on case notification to **enhance existing workflows OR** to **ensure notification of lower-priority cases** per the case prioritization guidance.
- The NC COVID *All Models Event Line List* reports can be used to identify any cases not sent to CCTO for notification. If you would like to send a notification for a case outside the automatic flow, the case record can be entered in CCTO by hand or spreadsheet and the toggle set to "Yes."

…as a Contact Tracer:



- Cases flow automatically from NC COVID into CCTO so that they can be sent a notification from CCTO. **This notification links to a portal that allows cases to submit contacts directly into CCTO.** When these cases and their contacts arrive in CCTO, they will automatically be assigned to an **owner team by the case patient's county.** *See the **Verifying Cases** and **Case Portal** job aids.*
- **Any contact records** resulting from case portal submissions should be **handled as normal** per your local guidance. *See the **Case Portal – CT Guidance** job aid.*
- Case records that have flowed into CCTO can be used to track case communication and monitoring if desired; however, **there are no requirements for further action on case records within CCTO**, including cleaning or deduplication. *(Note: If you have any personal views for contacts owned by your county's Owner Team, you can add a filter in the "Contact or Case Patient" column that unchecks "Case Patient" to remove cases).*

See previous for examples of texts and emails that positive case patients may receive.

Frequently Asked Questions on Automatic Case Flow

1. Which cases flow into CCTO?

- All cases with a positive lab (PCR or antigen) in NC COVID within 10 days of their diagnosis date (which is also the specimen collection date of first positive lab) *and* required fields completed will flow into CCTO.
- Required fields are: **First Name**, **Last Name**, **State**, **County** (*NC residents only – county is not required if State is not NC*), **Date of Birth, Phone** or **Email** *(home phone will be used if no mobile phone is listed),* and **Diagnosis Date.** These fields are used to confirm a case's identity within the portal and to help the case calculate isolation dates.
- The flow into CCTO is triggered by a positive lab, and prior negative labs will not impact the flow; however, if a subsequent positive lab is added to the same event, the person will **not** be exported again.

2. When do cases flow?

- Any records that enter NC COVID between…
  - 6-10 am will start importing into CCTO around 11am
  - 10am – 2pm will start importing into CCTO around 3pm
  - 2pm – 6am will start importing into CCTO around 7am
- If file sizes are large, the import time may be delayed. File size determines the time it takes for an import cycle to complete.
- Each record will be extracted once from NC COVID, so new info entered into NC COVID after an extract has been made will not flow over.
- *See the Verifying Cases Job Aid for more information.*

3. What do I need to do with the Send Notification toggle?

- Nothing. Cases who flow from NC COVID will enter CCTO with this toggle already turned on so that notifications will be sent as soon as a record is created.
- This toggle is locked and cannot be adjusted by non-admin users. Please work with an admin user (who will have access to the form required to move this toggle manually) if you must re-send a notification or send a notification to a case patient who was entered manually into CCTO.

FAQs continued onto next page.

Frequently Asked Questions on Automatic Case Flow

4. How do I check to see if a case was sent a notification?

- In the administrative package in NC COVID, you will see a value in "Date Reported to CCTO" if the event has flowed to CCTO. You can also review which cases did and did not flow by using the NC COVID All Models Identified and Deidentified Line List Reports, which contain this variable.
- In CCTO, you may check to see if notifications were sent by using the "All Case Monitoring Events Imported From NC COVID" view and looking at the **Most Recent Text Notification Status** column. *See the **Verifying Case Flow & Notification Job Aid** for details.*

5. What do I need to do with these cases in CCTO?

- Mostly, nothing. Based on local guidance, you may or may not wish to monitor cases using CCTO. You do not need to close or deactivate these cases. You should, however, review the **Case Portal** and the ***Case Portal – CI Guidance*** job aids for more on handling information that has flowed into CCTO from the case portal.
- Contact system views have been updated to filter out case patients, and new system views have been created for cases. Activity and Assessment System Views will show contacts and cases.
- If you do wish to see these cases, you can find them by using the **All Case Monitoring Events Imported from NC COVID** view and filtering by the case's LHD. *See the **Verifying Cases Job Aid** for details.*
- The most important thing is to know is that you should remove case patients from any personal views you have created in CCTO. To do this, you can add a filter for: **Contact or Case Patient** "Does not equal" "Case Patient" to any custom view.

6. I have identified a case record that should have flowed from NC COVID into CCTO but did not. What should I do?

- Please reach out to the help desk so that the issue can be investigated.