Use the process below to identify which individuals in CCTO have indicated resource needs through their assessments and to follow up with these individuals.

#1: Within the Monitoring Events Tab, filter the "All Monitoring Events (Contact & Case)" view (or another view that displays all MEs) to display only relevant individuals.

- Scroll to the right and locate the **Most Recent Date Resource Need Reported** column. Click the column title and select **Filter by.** Change the word "On" to "Contains data (any time)." This will display all the individuals in CCTO who have noted a resource need on an assessment.

- Then, you can filter on **Owner, County**, and/or **Local Health Department** as needed to limit the contacts and case patients displayed.

#2: Select an ME from the list and review the Assessments Page within this ME.

- Visit the "Assessments" page at the top of the selected monitoring event. Review the assessment whose date matches the date shown in **Most Recent Date Resource Need Reported** and determine what information has been provided about resource needs. *If the individual has submitted other assessments, you may also wish to review these for any additional information.*

- Take careful note of the "**If you identified a resource need, is it okay for someone from the Local Health Department to follow…**" field. If this response is set to "Yes," then this indicates that this person has agreed to be contacted about this need. If it is set to "No," they have opted out of follow up, and you should not reach out to them.

#3: If the individual has agreed to be contacted and has not yet received follow-up, reach out to them by phone and make a referral.

- Log a phone call to document your outreach, and log a referral as appropriate to document connecting this individual with support.

- Talk to your LHD about local resources and see the Supplemental Guidance document (found on here under Contact Tracing and Movement & Monitoring).