Daily Roadmap – Contact Tracer Working in CCTO

If you are a contact tracer who is using CCTO for the first time, the roadmap below can serve as a supplement to your local guidance while you work through basic tasks in the software.

Starting Out

1. Log into CCTO

You should log into CCTO using an incognito window or a web browser that you don't use for any other applications. **These documents can help you avoid roadblocks:**

- **CCTO Access & Navigation***
- **Logging into the CCTO Tool** & **Troubleshooting CCTO Access Issues**
- **Using the CCTO Tool for the First Time**

ASK YOUR SUPERVISOR: "What is our assignment process for the monitoring events and activities that will be my follow-up responsibility?" *This varies by local process!*

2. Identify Today's Outstanding Items

Your local guidance will help you know which monitoring events and activities are your responsibility. *(Monitoring events, or MEs, are the records on which contact monitoring takes place in CCTO.)* Once you know this, **you can use *views* to review existing monitoring events and activities and determine follow-up needs for the day:**

- **Reviewing Contacts & Using Views*** will help you understand how you can search for and find monitoring events and activities.
- **Handing Off Activities & Monitoring Events** will help you understand **1)** how to create and locate follow-up items (such as phone calls) for yourself or others and **2)** how to (re)assign monitoring events.

ASK YOUR SUPERVISOR: "How often should I plan to follow up with a contact by phone?" *This varies by local process!*

Reaching Out

3. Conduct Outreach

Once you have determined the monitoring events and activities that require your attention, you will need to **conduct initial or follow-up calls** to contacts to initiate monitoring, conduct assessments, and/or make referrals *(see 4-5).*

- **Sample Outreach Scripts** provide examples of the language you will use to conduct outreach conversations.
- **How to Use Timeline/Activities*** shows you how to document your call.

CHECKPOINT: If you learn new information about a contact and need to update their monitoring event, the **CCTO Glossary** can help you understand each field.

4. Begin Monitoring (as applicable) and Conduct Assessments

Monitoring a contact means you are assessing their symptoms and resource needs over the length their monitoring period. You will update some key monitoring event fields to show that monitoring has begun. Throughout monitoring, a contact's symptoms and resource needs will be documented in *assessments.*

- **How to Begin Monitoring & Initial Assessment*** will show you how to indicate that you have started monitoring and how assessments can be completed manually (over the phone) or digitally (online by the contact).

5. Document Referrals

You should make and document a vaccine referral for all contacts whom you reach by phone. You may also need to document referrals for other resource needs that your contact identifies.

- **Sample Outreach Scripts** help you have vaccine referral conversations.
- **Documenting Referrals*** shows the full software process for recording your referral.

6. Set Follow-Up Activities

For any contact whose monitoring is not yet finished, **set follow-up tasks or phone calls** for yourself or others so that they will continue to be monitored:

- **How to Use Timeline/Activities***
- **Handing Off Activities & Monitoring Events**

U-TURN: After you finish these actions for one contact, repeat them for the next!

Closing Out

7. Close Out Monitoring (as needed)

When a contact finishes their monitoring period within CCTO, you will need to ensure their event is properly closed and assigned a Final Monitoring Outcome (FMO).

- **Closing Out Contact Monitoring Events***

***LOOK OUT FOR VIDEOS!**
Every item in **purple** is also available as a micro-training video through the CCTO Onboarding Course on AHEC! Make a free account and sign in to watch these videos any time **here**.