



This revised job aid includes the latest iteration of the household feature as of Sept 17th, 2021.

CCTO's household feature can help to streamline your outreach and reduce data entry. This job aid will cover all necessary processes of handling household contacts in CCTO. For general information on Household records, view the dedicated households section in the [CCTO Glossary](#).

Creating a New Household

The household feature allows you to create a **grouped record for contacts and case patients whom it is advantageous to group together** to reduce data entry and streamline outreach. If you know you will be entering new MEs who are members of the same household, **create the household first**.

1. To create a new household, **begin on the Households Tab and select "New."**
2. In the "Household Name" field, type an identifying name for your household per your local guidance.
3. If known, you can then use **Primary Contact Person** to indicate a member of this household who may be speaking on behalf of others; however, it is recommended that you create the household first before creating this individual. You can return to the household record and add this primary contact person at any time.
4. Indicate the primary language of this household in **Preferred Language**. This field can be found within the "Contact Information" box.
5. Fill out the boxes for "Source Case Info," "Contact Information," and "Address" with information appropriate to the whole household. **This information will carry over to new contacts you create within this household to help reduce data entry; however, you are always able to edit and adjust information as needed for individual contacts.**
6. Click **Save** when you are finished. This record will now appear in your **Households Tab**, and you can add monitoring events to it per the next page.

NOTE: All the members of a household should have separate monitoring events within the household. **Each contact must receive individual assessments.**

1 Selecting 'New' in the Households tab.

2 Entering 'Monsters Inc' as the household name.

3 Selecting 'Sully Monster' as the primary contact person.

4 Entering 'English' as the preferred language.

5 Filling out source case info, contact information, and address.

6 The new household record appearing in the 'My Active Households' list.

COVID-19 Community Team Outreach Tool

Handling Households



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Adding New Monitoring Events to a Household

This process is for **new monitoring events that have not yet been entered in CCTO**. See below for adding existing monitoring events.

1. Always **begin this process on the household record to reduce data entry**. Select "Monitoring Events" from the top of the household record to see any existing active or inactive members.
2. Select "New Monitoring Event" on the **RIGHT** of the screen to add a new monitoring event (that does not currently exist in the system) to this household.
3. Because you started from the "Monitoring Events" page, a New Monitoring Event screen will appear **with pre-populated information from the household record**. Input the remaining information about your new monitoring event or adjust any of the pre-populated information as needed.
4. Click "Save and Close" when finished to return to the "Monitoring Events" page, and repeat the process if necessary.

NOTE: All the members of a household should have separate monitoring events within the household. **Each contact must receive individual assessments.**

1 Monsters Inc Household

Summary **Monitoring Events** System Information Related

Active MEs

✓ | C# | Approved to Sy... | Full Name | Last Name | First Name | Contact or ...

2 + New Monitoring Event

3 New Monitoring Event
Monitoring Event - MDA Form

Monitoring Event Assessments All Activities Referrals System Information

Record Information

☰ C# ---

Contact or Case Patient * Contact

Person ---

Create Person? No

Basic Info

Priority Contact or Case No

First Name * Mike

Monitoring Details

Begin Monitoring? ---

Monitoring Status ---

Monitoring End Date 10/1/2021

Final Monitoring Outcome ---

Symptom Onset Date 9/14/2021

☰ Last Assessment Date ---

☰ First Date Symptoms Reported ---

☰ Most Recent Date Resource Need ---

4 Monsters Inc Household

Summary **Monitoring Events** System Information Related

Active MEs

✓ | C# | Approved to Sy... | Full Name | Last Name | First Name | Contact or ...

C-0000995366	Yes	Mike Monster..	Monster	Mike	Contact
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Adding Existing Monitoring Events to a Household

Note that existing monitoring events do not take on household information when they become members of a household, so it is always best to create households first whenever possible.

1. Begin on the individual's monitoring event. Under "Basic Info," use the **Household** field to search and select the household you have created that applies to this contact or case.
2. Save your work.
3. This monitoring event will now appear as a member of your household.

1 Household Monsters Inc

3 Monsters Inc Household

Summary **Monitoring Events** System Information Related

Active MEs + New

✓ | C# | Approved to Sy... | Full Name | Last Name | First Name | Contact or ...

C-0000995371	Yes	Boo Monster	Monster	Boo	Contact
C-0000995366	Yes	Mike Monster..	Monster	Mike	Contact

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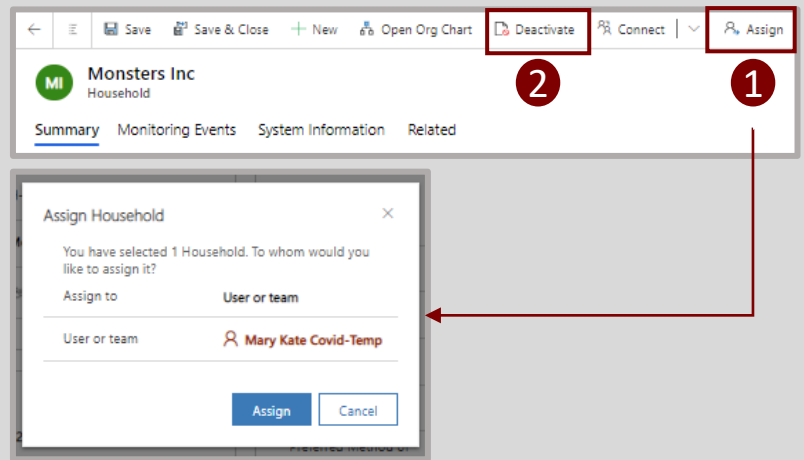
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Reassigning & Deactivating Households

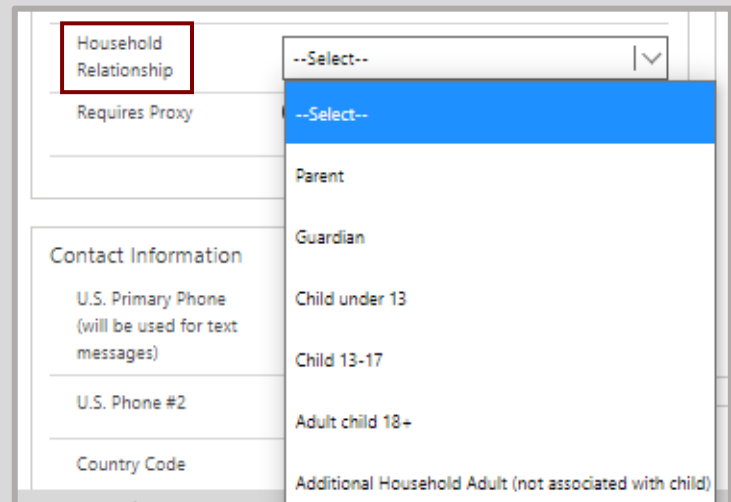
1. Reassigning a household using the "Assign" button from the household record **will reassign all its monitoring events.**
2. **Deactivating a household will not deactivate any of the monitoring events within it.** All monitoring events must be **deactivated by each event** after deactivating the household. Similarly, **deactivating all household members will not deactivate the household**, and it must be deactivated independently.



Indicating Household Relationships Between Monitoring Events

1. From the **Monitoring Events Page** on your household record, click on a monitoring event whose relationship you would like to indicate.
2. Under "Basic Info," review the options under the **Household Relationship** field and select the option that applies to your contact.
3. Click **Save & Close** when finished with your work, and repeat this process as needed.

As a note, if you select "Child under 13" or "Child 13-17," you should also ensure you have selected "Is Minor" and provided schooling information in "Demographic Info," if applicable. You may also wish to select "Requires Proxy" for children under 13 whose assessments will be completed by their parents.



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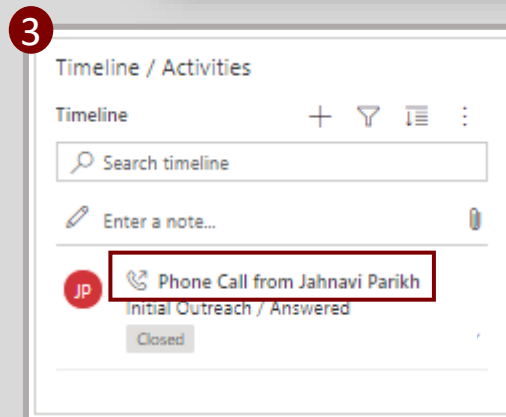
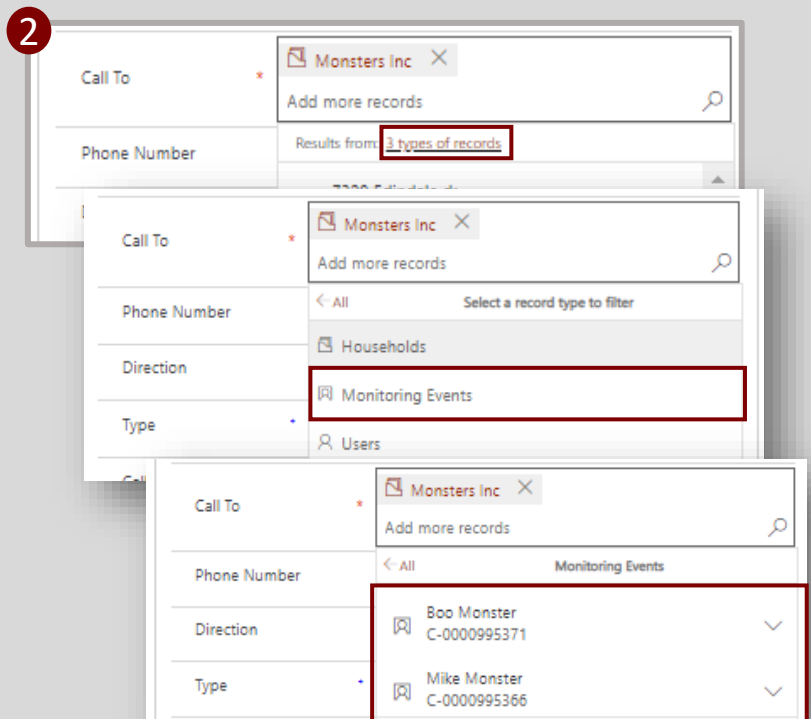
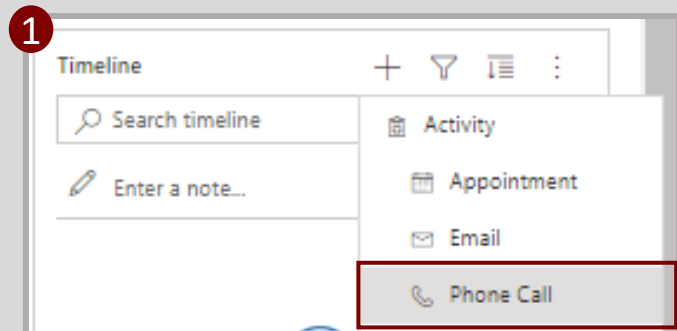
Creating Phone Calls from a Household Record

Users can create a phone call from within a household record and have it transfer onto members' individual monitoring events, meaning that phone calls do not need to be logged manually for each household member while making a household call.

1. In Timeline/Activities on a household record, click + → "Phone Call."
2. In **Call To**, add the individual names of the household members who are included in the phone call. Click on the magnifying glass and then select "3 types of records." Selecting the option "Monitoring Events" will limit the names displayed to only those in the household.

Any names you add in "Call To" will have this phone call **transfer onto the Timeline/Activities section of their individual monitoring event** (even if they are not part of the household); however, this phone call **will not appear on the All Activities page** within any household member monitoring events.

3. Continue filling out the remaining phone call fields as normal. When you save, each member you listed in the **Call To** section of the household phone call will display this phone call in the **Timeline/Activities section of their monitoring event**. Any updates you make to this call (including closure or deletion) will transfer automatically to the Timeline/Activities section of all individuals listed in the **Call To** field.
4. When you have completed the phone call, close it by clicking **Mark Complete** or by using the checkmark in Timeline/Activities, and each instance of this phone call will also close.



COVID-19 Community Team Outreach Tool

Handling Households



5. After closing this call, you may notice an extra phone call appearing on household member monitoring events marked "SYSTEM GENERATED - FOR TIMESTAMP." This is created by the system in order to update the timestamps for each monitoring event's **Most Recent Phone Call, First Phone Call (if applicable), and System First Outreach Date/Method (if applicable) fields. No action is required on this phone call record, and it will disappear automatically within 2 minutes.**
6. Once the call has been closed, the **Most Recent Phone Call, First Phone Call (if applicable), and System First Outreach Date/Method (if applicable)** fields for each individual will all reflect this household phone call. Timestamps may vary by 1-2 mins. You may need to refresh to see these changes.

5

Timeline / Activities

Timeline + ∩ ☰ :

🔍 Search timeline

📝 Enter a note... 📎

MM 📞 Phone Call from Mary Moran
Second Outreach / Answered
Closed 5/7/2021 3:06 PM ∨

● 📞 Phone Call from
SYSTEM GENERATED - FOR TIMESTAMP
Closed 5/7/2021 3:06 PM ∨

6

🔒 System First Outreach Date	5/4/2021	📅	3:09 PM
🔒 System First Outreach Method	Phone Call		
Manual First Outreach Date	---	📅	
Manual First Outreach Method	---		
🔒 First Phone Call	5/4/2021	📅	3:09 PM
🔒 Most Recent Phone Call	5/7/2021	📅	3:06 PM