

Last Updated: 10/02/2020

Go Live Action Guide

Contact Tracer



Missouri's Advanced Contact Tracing System

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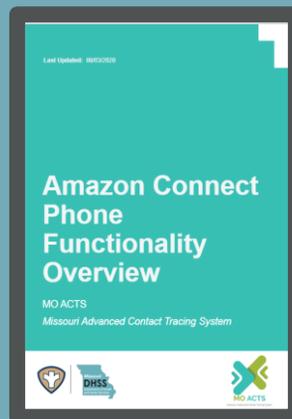
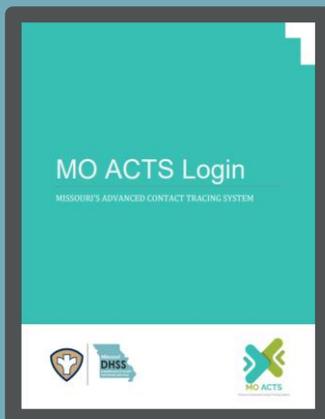
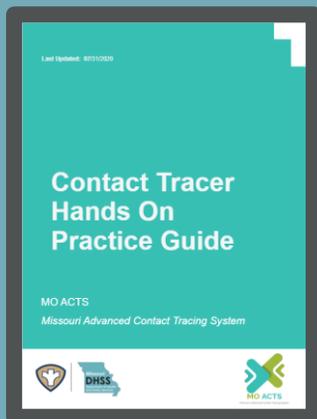
ADDITIONAL TIPS

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HELP & RESOURCES

Remember that the following resources are also available to you on the **MO ACTS webpage**:

<https://clphs.health.mo.gov/lphs/diseaseprevention/moacts>



Contact the MO ACTS Helpdesk with questions:

Telephone: (573) 526-9533

Email: MOACTS@health.mo.gov

Hours: 8:00 am – 8:00 pm, Monday - Friday



Missouri's Advanced Contact Tracing System

Welcome

Welcome to the Missouri's Advanced Contact Tracing System (MO ACTS) powered by MO ACTS! This new platform will help you in your role as a **Contact Tracer** to gather information about the transmission of COVID-19, help the people that have been exposed, and ultimately contain this deadly disease. This platform will help to organize the efforts of hundreds of folks who are working hard to trace and contain, just like you!

To help you make the most of the new platform, we built this guide to show you how to complete many common tasks in MO ACTS. You can reference the table of contents to find the different topics in this guide. **Please keep this guide close to you and reference it when you run into a question.**

Thank you again for stepping up to be part of the solution.

We couldn't do this without you!

Missouri Department of Health and Senior Services

Checklist for initial actions users complete before logging in:

- ✓ Ensure you are using Chrome as your browser
- ✓ Confirm you have Chrome set to allow pop ups
- ✓ Bookmark the link to access the system:
<https://mact.my.salesforce.com/>
- ✓ Open job aids for reference if needed. Training materials are located on the **MO ACTS webpage**
- ✓ Organize your workspace to allow you a quiet and uninterrupted place to train and work
- ✓ Contact the MO ACTS Helpdesk with questions:
Telephone: (573) 526-9533
Email: MOACTS@health.mo.gov
Hours: 8:00 am – 8:00 pm, Monday - Friday



Job Aid

How to Log In to MO ACTS and Amazon Connect



Missouri's Advanced Contact Tracing System

How to Log In to MO ACTS and Amazon Connect

MO ACTS REQUIREMENTS

Make sure the below system requirements are met by your computer:

- **Operating System**
 - Windows 7 or MacOS El Capitan or newer
- **Strong Internet Connection**
- **Google Chrome or Mozilla Firefox as your web browser**

LOG IN

Follow the steps in the MO ACTS Log In guide to access your account.

Job Aid

The Basics of Contact Tracing in MO ACTS



Missouri's Advanced Contact Tracing System

The Basics of Contact Tracing in MO ACTS

UNDERSTANDING COVID-19 AND THE SYMPTOMS

Coronaviruses are a large family of viruses that are known to cause illness ranging from the common cold to more severe diseases such as Middle East Respiratory Syndrome (MERS) and Severe Acute Respiratory Syndrome (SARS).

The infection we now face is a viral respiratory illness caused by SARS-CoV-2.

COVID-19 Characteristics:

- It causes mild to severe symptoms
- Older adults and persons with underlying medical conditions may be at higher risk for severe disease
- There is no widely available treatment to date
- Although vaccine development is underway, there is no approved vaccine to prevent transmission

The Basics of Contact Tracing in MO ACTS

The typical symptoms associated with COVID-19 are fever, cough, shortness of breath, and difficulty breathing. Additional symptoms that COVID-19 patients sometimes experience are fatigue, muscle or body aches, headache, new loss of taste or smell, sore throat, congestion or runny nose, nausea, vomiting, and diarrhea have all been reported. Some complications that can arise from COVID-19 are pneumonia, multi-organ failure, and death.

In the absence of a more likely diagnosis, the clinical criteria you can use to assess whether someone is suspected to be a Contact to COVID-19 case includes:

- | | | | | |
|---|------------------|---|------------------|---|
| One of the Following: | <u>OR</u> | Two or more: | <u>OR</u> | Severe respiratory illness with at least one of the following: |
| <ul style="list-style-type: none">• Cough• Shortness of Breath• Difficulty breathing• New olfactory disorder• New taster disorder | | <ul style="list-style-type: none">• Fever• Chills• Rigors• Myalgia• Headache• Sore throat• Nausea or vomiting• Diarrhea• Fatigue• Congestion or runny nose | | <ul style="list-style-type: none">• Clinical or radiographic evidence of pneumonia• Acute respiratory distress syndrome (ARDS) |

If a Contact to a COVID-19 Case that you are speaking with meets the clinical criteria, we consider them as having a suspected case of COVID-19. Their information should be documented in MO ACTS so a Case Investigator can reach out to them for further assessment.

The Basics of Contact Tracing in MO ACTS

UNDERSTANDING THE MO ACTS LIST VIEWS AND QUEUES

As a Contact Tracer, a set of pre-set list views and queues exist for your use. Included below is a table with the existing views available to you and their corresponding description based on jurisdictions you have access to:

- Top Views for Contact Tracers
- Additional Views Displayed for Contact Tracers



Note: Contact Tracers will be able to view their primary jurisdiction as well as additional jurisdictions they're assigned to (data sharing agreement) in separate list views pre-pended with 'Cross Jurisdiction'.

Top Views for Contact Tracers

Queue / List view	Description
Contacts Awaiting Outreach	Displays all contact cases in MO ACTS, owned by the Contacts Awaiting Outreach queue (not yet owned by a Contact Tracer), and that are set to <u>Awaiting Outreach</u> status.
Contacts Monitoring & Support	Displays <u>all</u> contact cases in MO ACTS that are set to <u>Monitoring & Support</u> status.
My Contacts	Displays all contact cases <u>owned by you</u> , which require monitoring outreach. Contact Outreach Cases will appear in this view if the status is set to <u>Monitoring & Outreach</u> .

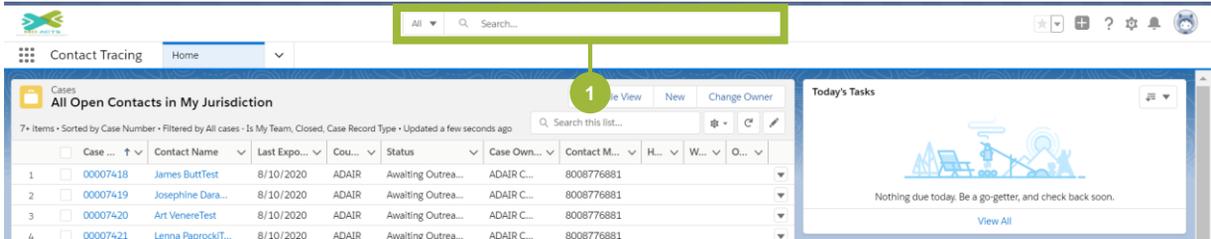
Additional Views Displayed for Contact Tracers

Queue / List view	Description
Recently Viewed	Displays all recently viewed (by you) contact cases.
All Open Contacts in my Jurisdiction	Displays <u>all</u> contact cases in <u>all stages</u> (Awaiting Outreach, Outreach Underway, Monitoring and Support) in <u>your Jurisdiction</u> and <u>owned by anyone</u> .
Contacts Outreach Underway	Displays <u>all</u> contact cases in MO ACTS that are set to the <u>Outreach Underway</u> status.
Contacts Closed	Displays <u>all</u> contact cases in MO ACTS that have completed quarantine or which status is closed for some other reason.

Search for a Contact to a COVID-19 Case

Getting Started

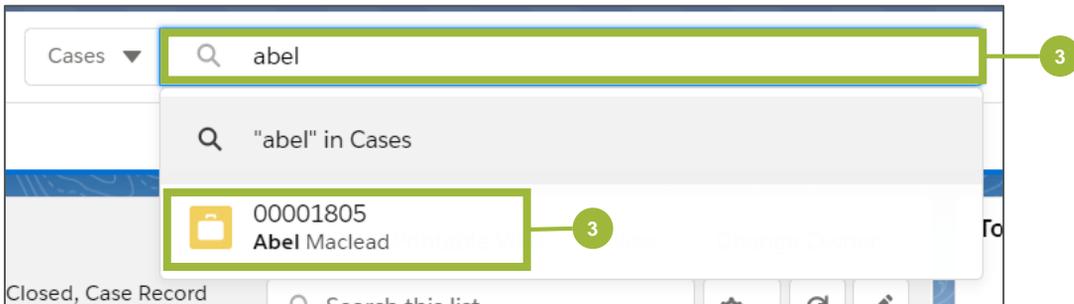
1. On the Homepage, locate the search bar at the top of the page



2. Click on the drop-down next to **All** and select **Cases** (you can also use the Contacts option).



3. Type the name of the **Contact name** or the **Case number** into the search bar, and MO ACTS will begin providing suggestions. Click on the correct **case** to open it or enter to search if no suggestions appear.



Job Aid

Completing an Initial Call to a Contact to a COVID-19 Case

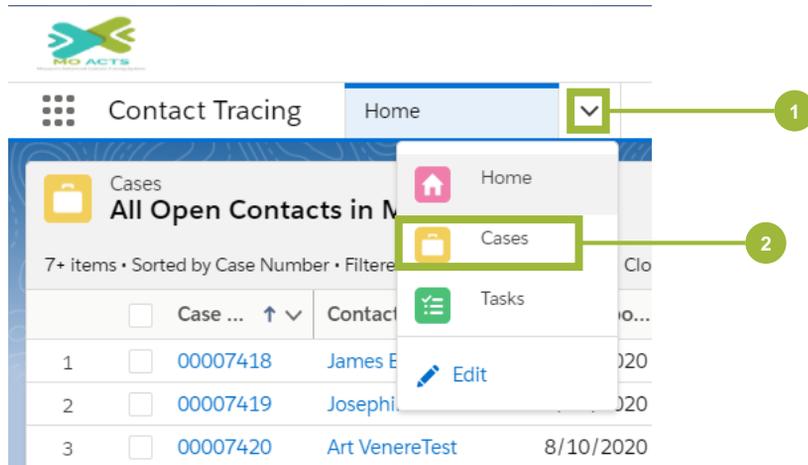


Missouri's Advanced Contact Tracing System

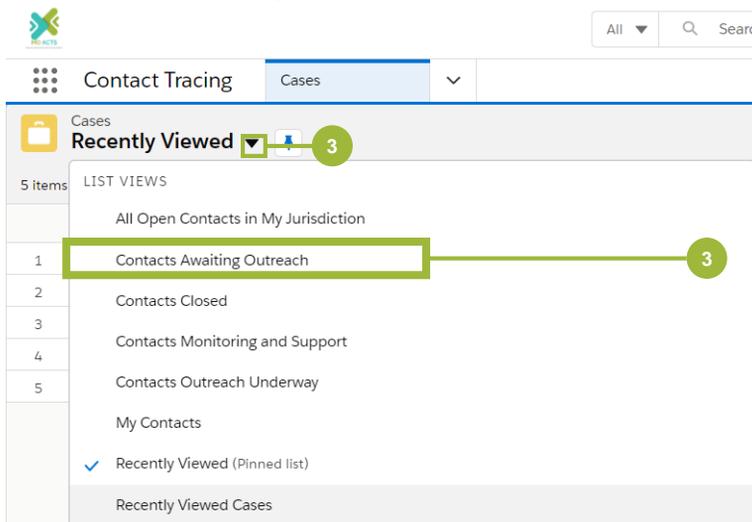
Completing an Initial Call to a Contact to a COVID-19 Case

Getting Started

1. On the Homepage, find and click on the drop-down arrow next to the **Home** tab.
2. Click on the **Cases** option.



3. Open the **Contacts Awaiting Outreach** queue to view cases that are awaiting outreach. *If not already displayed, clicking on the drop-down arrow next to the queue name option*



Completing an Initial Call to a Contact to a COVID-19 Case

Preparing to Call

1. You will now see the **Contacts Awaiting Outreach queue**; this is the list of Contacts to COVID-19 Case requiring outreach. Other Contact Tracers will also select from this list.
2. Click on any **Case Number** to open the Contact to a COVID-19 Case.

Case Num...	Contact Name	Last Ex...	Co...	Status	Case O...	Contact ...	Ho...	Wo...	Oth...
1	James ButtTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
2	the DarakjyTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			

3. Find and click on the **Accept** button in the upper right corner of the window. This will give you ownership of the Contact.

YOU MUST ACCEPT THE CASE BEFORE BEGINNING WORK ON IT.



Note: If someone else's name shows as the Case Owner, someone else has already accepted the Case and you need to pick another one.

Awaiting Outreach Outreach Underway Monitoring and Sup... Closed

Status: Awaiting Outreach [Mark Status as Complete](#)

Case Possible Contact: (Unknown Date) [+ Follow](#) [Change Owner](#) [Edit](#) [Accept](#)

Status	Case Record Type	Case Owner	Enterprise Id
Awaiting Outreach	Contact Outreach	DADE COQ	

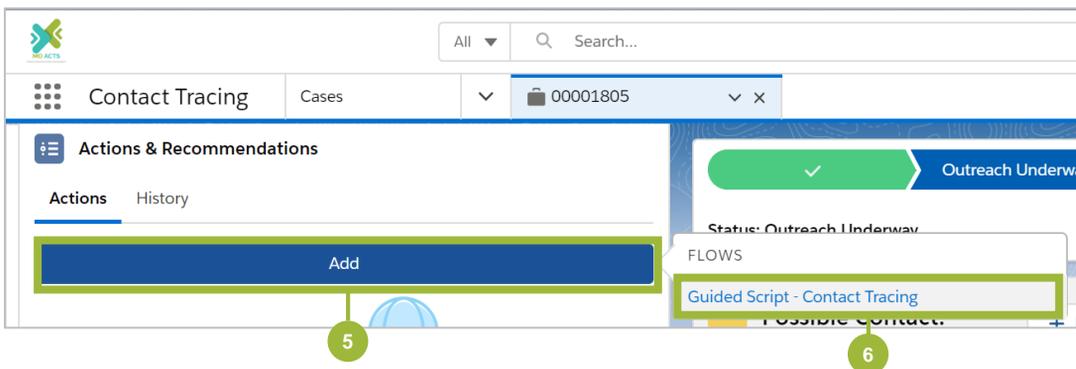


Completing an Initial Call to a Contact to a COVID-19 Case

4. Click the **Mark Status as Complete** button to move the case to the Outreach Underway status.



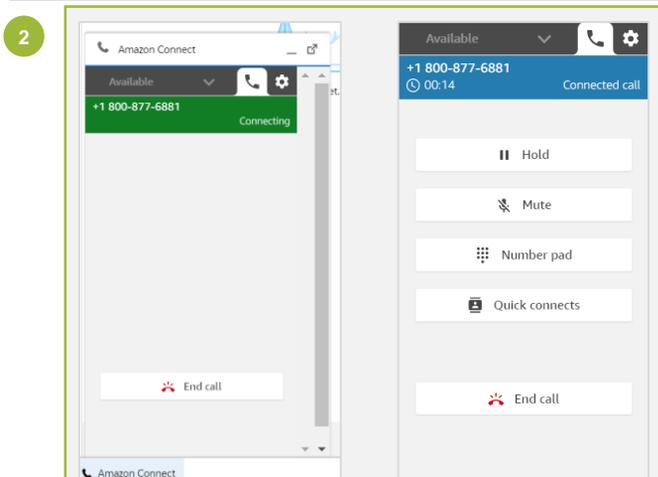
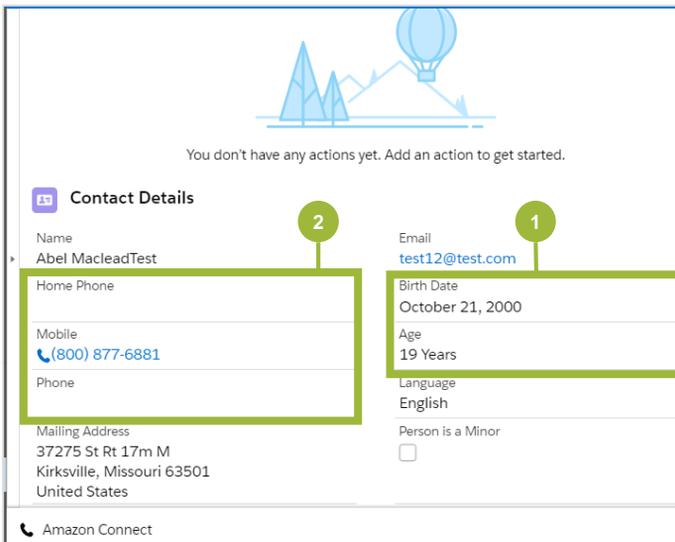
5. On the left panel of the page, click the **Add** button.
6. From the pop out, click the **Guided Script – Contact Tracing** button. This will open the call flow script that you will follow.



Completing an Initial Call to a Contact to a COVID-19 Case

Contact Tracing Guided Script

1. Scroll down on the left side of the window until you find the **Contact Details**. Look at the **Person is a Minor** checkbox. If this is checked, look at the Contact to a COVID-19 Case's age.
 - a. If the Contact to a COVID-19 Case is 12 years old or younger, ask to speak to their parent or guardian and complete the interview with them.
 - b. If the Contact to a COVID-19 Case is 13 to 17 years old, ask to speak to the parent or guardian to either complete the interview with them or gain their permission prior to completing the interview with the Contact to a COVID-19 Case.
2. You are now ready to call the Contact to a COVID-19 Case. Click the blue phone icon next to the phone number to launch the call from Amazon Connect.



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Beginning the Call

1. Read the script and click the **Yes** radio button.
2. Click the **Next** button.

Guided Script - Contact Tracing

Hello, am I speaking with Abel Maclead?

If no, ask to speak to that person.

My name is Patty Marra and I am calling from DADE .

I was calling today to let you know that you have been exposed to Coronavirus (COVID-19).

* Do you have a few minutes we could discuss what this might mean for you?

Yes **1**

No

2 [Next](#)

3. Read the script – if **yes**, enter who notified them of their exposure, if **no**, skip to the second script.
4. Click the **Next** button.

Coronavirus Information

Were you aware that you were exposed to Coronavirus?

If yes:

Who notified you of your exposure?

3

If no:

When people test positive for Coronavirus in Missouri, they are interviewed to determine who may have been exposed to the infection. Through this process, you were identified as someone who may have been exposed to Coronavirus and needed to be notified so that you can take steps to prevent transmitting the infection to others. The information about who tested positive is confidential according to law just like anything we discuss today on the call.

4

[Previous](#) [Next](#)



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Personal Details

1. Read the **Call Objectives** script and click the **Next** button.

Call Objectives

There are 2 key things I'd like to discuss with you today:

First, I would like to ask you about any symptoms of coronavirus you have.

Second, we will make a plan together to help you make sure that in case you did get the coronavirus, that your family and friends will not be put at risk.

Previous Next

2. Confirm the **personal details** of the Contact to a COVID-19 Case. Any pre-populated information has been provided by the positive case through EpiTrax.

Confirm Personal Details

Before we start, let's make sure we have your correct contact information.

This information will be kept confidential according to the law and will not be made available to the public.

Address
Address
37275 St Rt 17m M

City
De Soto

State/Province
Missouri

Zip/Postal Code
63020

Country

Previous Next



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Personal Details



NOTE: When confirming these details, If you want to change the county but **NOT** the jurisdiction select the **Do Not Change Jurisdiction** checkbox. If you **do not** use this checkbox, the jurisdiction will change and therefore:

- **Permissions** for this case will change as well, preventing you from accessing this record after saving. The case will also disappear from the current queue once it is closed (e.g. once the call ends).
- If the jurisdiction that the case is assigned to does not have any users in the MO ACTS platform, the case will be directed to the **Administration queue**.
- If a contact tracer learns that the contact **is not** in their designated jurisdiction, follow the below guidance on the effect this has on the outreach call:
 - If a contact tracer learns that the Contact to a COVID-19 case is outside their jurisdiction, they should change the county and end the call, explaining that a contact tracer from the contact's jurisdiction or surge support will reach out from their respective jurisdiction
 - If the contact tracer is DHSS staff/surge support, they may be serving multiple jurisdictions and would not need to end the call. However, if only supporting a particular region and the Contact to a COVID-19 case is outside of their purview, then they should end the call.

3. Be sure to scroll down to the bottom of the page to confirm all details and click Next.

* County
ADAIR

WARNING!Permissions for this case will change after you finish the call and you will no longer be able to access this record!

Do Not Change Jurisdiction ⓘ

WARNING:
Changing jurisdiction will change after you finish the call and you will no longer be able to access this record! Check the above box if you do not want to change the jurisdiction.

Mobile Phone Number

Work Phone

Previous **Next**



Completing an Initial Call to a Contact to a COVID-19 Case

4. Fill in the appropriate **Personal Details** with as much detail as possible.

Confirm Personal Details Continued

Race
White

Are you of Hispanic Ethnicity
 Hispanic or Latino
 Not Hispanic or Latino
 Refused to Answer

* Gender
Female

Are you a healthcare worker
 Is this a household member of the original contact?

Occupation
[Text Input Field]

Other Occupation
[Text Input Field]

Employer Name
[Text Input Field]

Employer Address
[Text Input Field]

Employer City
[Text Input Field]

Employer State
[Text Input Field]

Employer Phone
[Text Input Field]

5. Click **Next**.

Employer Phone
[Text Input Field]

Previous Next



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Symptom Check

1. You will now be on the **Symptom Check** page where you will read the script and confirm any symptoms that the Contact to a COVID-19 Case is experiencing.

Symptom Check

Now let's talk about the symptoms you may be experiencing. Since COVID-19 is a new coronavirus, medical experts are still learning more about the symptoms it can cause. The following list are some of the COVID-19 symptoms that can be mild to moderate for most people, but some people can experience more severe symptoms that require hospitalization. Please note that I am only asking for your symptoms and I cannot provide you with medical advice. This is to check what you may be experiencing and then I can refer you to a medical provider, if needed, to discuss any further medical testing or treatment you may require. Again any information you provide today on the call is confidential according to federal and state laws.

Are you experiencing, or have you experienced, any of the following symptoms?

If yes to any - indicate what date the symptoms started. Note in a section below you will be referring them to a provider for a test. Also, responses to illnesses is mandatory.

* Patient has symptoms
Yes

* Have you had a fever (>=100.4)?
Yes

Fever Degrees

* Felt Feverish (Subjective Fever)?
Yes

* Have you experienced chills?
Yes

* Have you experienced Rigors (severe shivering with chills)?
Yes

* Have you had muscle aches and pains?
Yes

2. If the person is experiencing symptoms, fill in the **Symptom Start Date**. Include a **Symptom Stop Date** if they had symptoms but are no longer experiencing them.

Are you still having symptoms? *If no Indicate when symptoms stopped.*

Symptoms Start Date
_____ 2

Symptoms Stop Date
_____ 2

3. Click the **Next** button.

Employer Phone
_____ 3

Previous Next



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Clinical Information & Referral

1. Next, ask the contact if they have any **underlying health conditions** and select Yes or No
2. Select any **underlying health conditions** the person has in the list provided. Enter any additional conditions into the **Unlisted Conditions** field.
3. Click **Next**.

The screenshot shows the 'Clinical Information' form. It includes a dropdown menu for 'Do you have any underlying conditions?' with 'Yes' selected (callout 1). Below are two scrollable lists: 'Underlying Conditions' with items like Diabetes, High Blood Pressure, Severe Obesity, Chronic Liver Disease, and Chronic Lung Disease (callout 2); and an empty 'Unlisted Conditions' text field (callout 2). At the bottom right are 'Previous' and 'Next' buttons (callout 3).

4. Read the **Referral section** script and capture if the contact has a healthcare provider and their testing status.
5. Based on the details provided, select Yes or No to indicate if this contact meets probably or confirmed case definition for your jurisdiction
6. Read the script at the bottom **if test results are pending, or the contact plans to get tested**. Then click the **Next** button.

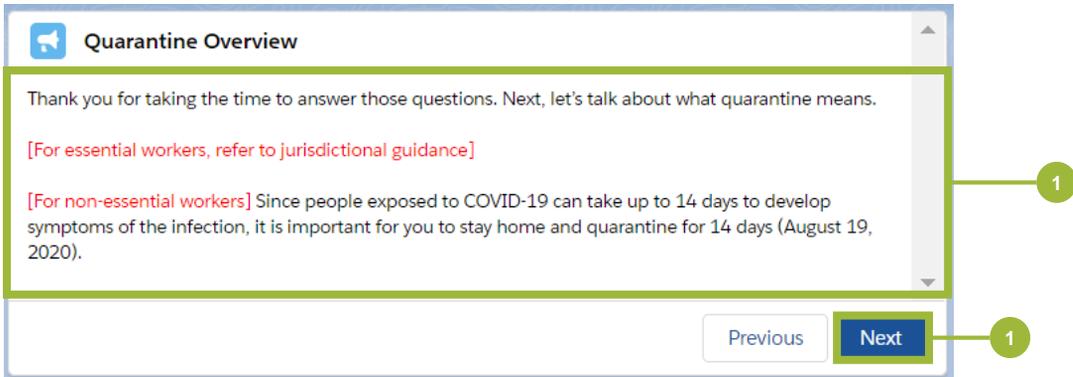
The screenshot shows the 'Referrals' form. It includes a dropdown for 'Do you have a healthcare provider?' with 'Yes' selected (callout 4). Below is a text field for 'Provider Name' (callout 4). The 'Testing Plan' dropdown is set to 'Already tested - pending results' (callout 4). A red note asks: '[Based on symptoms and testing does this contact meet probable or confirmed case definition for your jurisdiction?]'. Below is a dropdown for 'Probable or Confirmed Case?' with 'Yes' selected (callout 5). Another red note says: '[If test results pending or plan to get tested]: Please note that if you are tested and your test shows you have coronavirus, someone from the health department will contact you again to discuss the next steps.' (callout 6). At the bottom right are 'Previous' and 'Next' buttons (callout 6).



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Quarantine Overview & Specific Instructions

1. Read the Quarantine Overview script and click **Next**.



Quarantine Overview

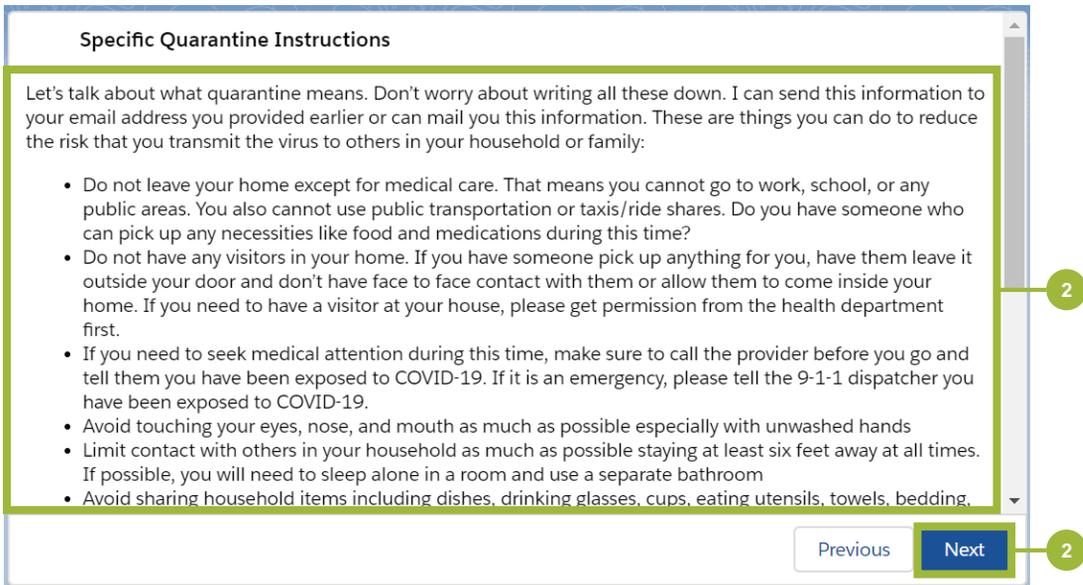
Thank you for taking the time to answer those questions. Next, let's talk about what quarantine means.

[For essential workers, refer to jurisdictional guidance]

[For non-essential workers] Since people exposed to COVID-19 can take up to 14 days to develop symptoms of the infection, it is important for you to stay home and quarantine for 14 days (August 19, 2020).

Previous **Next**

2. Read the Specific Quarantine Instructions script and click **Next**.



Specific Quarantine Instructions

Let's talk about what quarantine means. Don't worry about writing all these down. I can send this information to your email address you provided earlier or can mail you this information. These are things you can do to reduce the risk that you transmit the virus to others in your household or family:

- Do not leave your home except for medical care. That means you cannot go to work, school, or any public areas. You also cannot use public transportation or taxis/ride shares. Do you have someone who can pick up any necessities like food and medications during this time?
- Do not have any visitors in your home. If you have someone pick up anything for you, have them leave it outside your door and don't have face to face contact with them or allow them to come inside your home. If you need to have a visitor at your house, please get permission from the health department first.
- If you need to seek medical attention during this time, make sure to call the provider before you go and tell them you have been exposed to COVID-19. If it is an emergency, please tell the 9-1-1 dispatcher you have been exposed to COVID-19.
- Avoid touching your eyes, nose, and mouth as much as possible especially with unwashed hands
- Limit contact with others in your household as much as possible staying at least six feet away at all times. If possible, you will need to sleep alone in a room and use a separate bathroom
- Avoid sharing household items including dishes, drinking glasses, cups, eating utensils, towels, bedding,

Previous **Next**



Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Home Assessment

1. Read the **Home Assessment** script, making note of any needs that would require referral to a **Resource Coordinator, such as:**
 - Food
 - Support for Chronic Medical Conditions
 - Lack of Mobility or Support for ADLs
 - Specific Household items
 - Social Network Connection
 - Housing
 - Medication
 - Other

 **Home Assessment**

Next, we'd like to talk about helping you stay safe during your quarantine at home. We have some questions about your home and we can also talk about what quarantine means.

What type of home do you live in?:

- Apartment
- Single family house
- Condominium
- Shelter/homeless
- Assisted living
- Nursing home

Over the next 2-3 weeks, do you have reliable access to:

- Food (Reliable access to food: family, friend, neighbor able to deliver food while you remain in isolation or other food delivery service (local grocery store delivery, meals on wheels)
- Medications
- Heat
- Water
- Electricity
- Phone service
- Means of communication in the event of an emergency
- Infection prevention and control supplies- soap, water, disinfectant
- Identified network of family, friends, and other social networks
- Way to connect with social networks while in home isolation

- Do you have a separate room for sleeping and daily activities where you can stay away from others in your household?
- Do you have a separate bathroom that you can use? If no, do you or someone you live with have the ability to clean bathroom after each use?
- Ability to have separate food preparation space or someone who is able to prepare and bring food to your isolation area
- Are you independent with your daily activities such as bathing, moving around your house to do your activities or do you have appropriate
- Appropriate caregiver available at home who can help meet daily needs
 - If no caregiver available, is person able to meet their daily needs while in isolation or quarantine such as preparing meals, cleaning, taking medications, with a plan to call for help if needed
- Caregiver has access to mask if needs to be within 6 feet (2 meters) of patient to assist with activities of daily living
- Patient/contact themselves or caregiver able to manage medications
- Are you normally the primary caregiver for anyone else in your home or elsewhere?
 - If yes, is that person also ill with coronavirus?
- If that person is not already ill, is there someone else who can fill this role for you while you are ill and isolating?
- No need to leave home (or can make adjustments not to need to leave home) for other routine needs, such as taking out trash.

Do you live with anyone who:

- Is more than 65 years old
- Has chronic conditions such as: diabetes, chronic kidney disease, chronic lung disease, liver disease, or cardiovascular disease
- Is immunocompromised (e.g. Cancer patients receiving chemotherapy, patients on immunosuppressant drugs)
- Has extreme obesity?
- Is on dialysis?
- Has received a transplant?
- Is pregnant



Completing an Initial Call to a Contact to a COVID-19 Case

2. Check the Referred to Resource Coordinator and select **Social Network Connection** in the **Referred to Resource Coordinator Reason** field.

NOTE: if more than one reason needs to be selected, hold control and then select the appropriate reasons and click the right arrow to move it into **selected needs**.

3. Click **Next**.

2

Referred to Resource Coordinator

Referred to Resource Coordinator Reason

Available Needs

Selected Needs

Food

Support for Chronic Medical Cond...

Lack of Mobility or Support for ADLs

Specific Household Items

Social Network Connection

Previous

Next

2

3

Additional Referred to Resource Coordinator Reasons

- Food
- Support for Chronic Medical Conditions
- Lack of Mobility or Support for ADLs

4. Read the Closing Stage script and click **Finish**.

Closing Stage

What questions do you have regarding quarantine and your responsibilities? Thank you for taking the time to answer all of my questions. What other questions do you have for me?

Previous

Finish

4



Note: We recommend asking the contact during the outreach process whether or not they would like to receive a SMS message to monitor their symptoms. To learn more about Automated Monitoring please refer to the Go Live Action Guide on the MO ACTS Intranet Site.

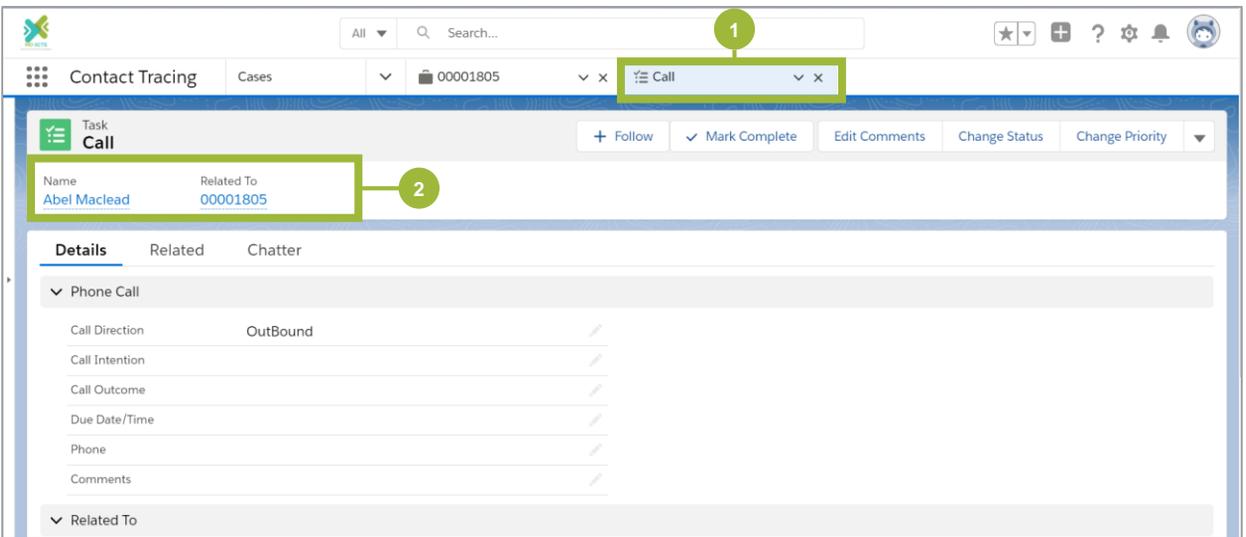


Completing an Initial Call to a Contact to a COVID-19 Case

Logging the Call

MO ACTS will automatically create a task for every outbound call after the call is disconnected. You can then update the task with the call intention and additional details.

1. After disconnecting an outbound call, a new **Task tab** will automatically open.
2. You will find the **Contact's name and Case number** on top of the new window.



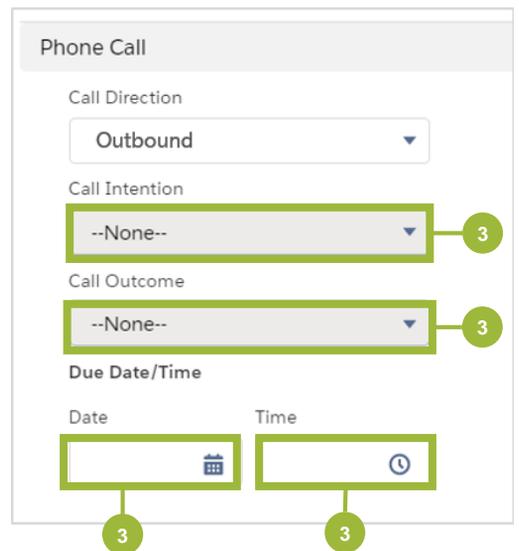
3. Complete the **Phone Call Details** by selecting the pencil icon to edit.

Call Direction: It will be auto-populated as Outbound.

Call Intention: Outbound Outreach Call

Call Outcome: Person was Reached

Due Date / Time: when placed your call



Completing an Initial Call to a Contact to a COVID-19 Case

4. Scroll past the Related to section to the **Task Information** section.
5. Click in the **Subject** field and select **Call: Person was Reached**.
6. Change the **Status** field to **Completed**.
7. Click **Save**.

The screenshot shows the 'Task Information' section of a contact tracing application. The 'Subject' field is set to 'Call: Person was reached' (marked with a green circle 5). The 'Assigned To' field is 'Contact Tracer'. The 'Status' field is set to 'Completed' (marked with a green circle 6). The 'Priority' is 'Normal'. The 'System Information' section shows 'Created By' and 'Last Modified By' as 'Contact Tracer' on '9/10/2020, 10:58 AM'. A 'Save' button is highlighted with a green circle 7.

8. Your call is logged and shows in the **Activity History** section under the contact's Details section.

The screenshot shows the 'Activity History' section of a contact tracing application. It displays a log entry for 'Call: Person was Reached' with a 'Create Date' of '7/31/2020, 1:17 PM'. The entry is highlighted with a green circle 8.



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.



Completing an Initial Call to a Contact to a COVID-19 Case

Marking Case Outreach Complete

1. In the **Details** pane, click the pencil icon in the **Outreach Outcome** row.

The screenshot shows a 'Details' pane with two columns of fields. The 'Outreach Outcome' field at the bottom is highlighted with a green box and a pencil icon, with a green circle containing the number '1' pointing to it. Other fields include 'Does contact know about their exposure?', 'Last Exposure Date', 'Is Healthcare Worker?', 'Connected to Congregate Setting?', 'Congregate Setting Type', 'Congregate Setting Location', 'Congregate Setting Other Details', 'Speaking with Household Member', 'Status' (set to 'Outreach Underway'), 'Closed Reason', 'Closed Reason: If Other, Please Specify', 'Date/Time Opened' (7/27/2020, 12:37 AM), 'Date/Time Closed', and 'Date of Death'.

2. Select **Completed** in the **Outreach Outcome**.

3. Click **Save**.

The screenshot shows the 'Outreach Outcome' field with a dropdown menu set to 'Completed'. A green circle containing the number '2' points to the dropdown menu. Below the field are 'Cancel' and 'Save' buttons, with a green circle containing the number '3' pointing to the 'Save' button. The field is highlighted with a yellow background.



Note:

- You must remember to press **Save** when in edit mode or else your changes will not be committed.
- ***If you do not fill out the Outreach Outcome an error will appear when trying to manually move the case to "Monitoring and Support."***

4. Notice at the top of the right side of the window, the status is now automatically set to **Monitoring and Support**.

The screenshot shows the status bar at the bottom of the software interface. The status is set to 'Monitoring and Support' and is highlighted with a green box and a green circle containing the number '4'. A 'Mark Status as Complete' button is visible on the right.



Job Aid

Leaving a Voicemail & Setting a Reminder to Call Back

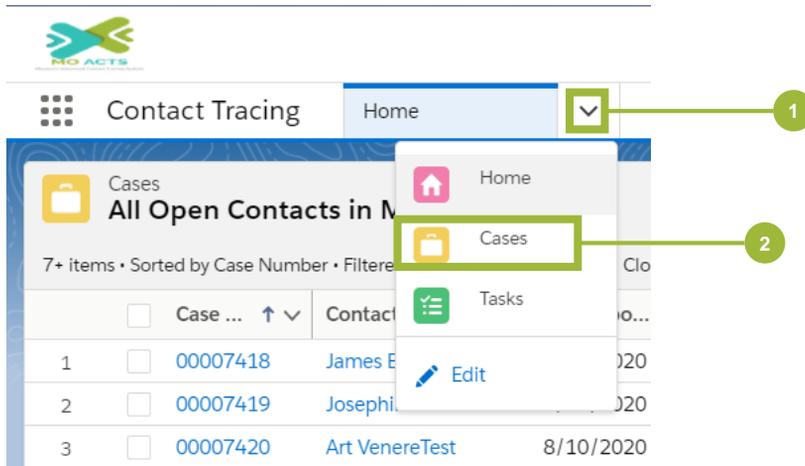


Missouri's Advanced Contact Tracing System

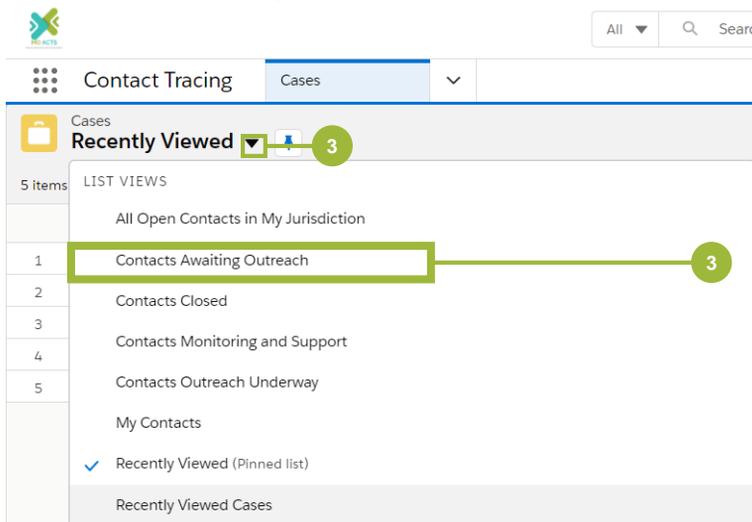
Leaving a Voicemail & Setting a Reminder to Call Back

Getting Started

1. On the Homepage, find and click on the drop-down arrow next to the **Home** tab.
2. Click on the **Cases** option.



3. Open the **Contacts Awaiting Outreach** queue to view cases that are awaiting outreach. *If not already displayed, clicking on the drop-down arrow next to the queue name option*



Leaving a Voicemail & Setting a Reminder to Call Back

Preparing to Call

1. You will now see the **Contacts Awaiting Outreach queue**; this is the list of Contact to a COVID-19 Cases requiring outreach. Other Contact Tracers will also select from this list.
2. Click on any **Case Number** to open the Contact to a COVID-19 Case.

Case Number	Contact Name	Last Exp...	County	Status	Case Owner Alias	Contact ...	Home P...	Work Ph...	Other P..
1	Abel MacleadTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
2	Ina NaboursTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
3	Adell LipkinTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
4	Ahmed AngalichTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
5	Aja GehrettTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COO	8008776881			

3. Find and click on the **Accept** button in the upper right corner of the window. This will give you ownership of the Contact to a COVID-19 Case.

YOU MUST ACCEPT THE CASE BEFORE BEGINNING WORK ON IT.

 **Note:** If someone else's name shows as the Case Owner, someone else has already accepted the Case and you need to pick another one.

Awaiting Outreach Outreach Underway Monitoring and Sup... Closed

Status: Awaiting Outreach [Mark Status as Complete](#)

Case Possible Contact: (Unknown Date) [+ Follow](#) [Change Owner](#) [Edit](#) [Accept](#)

Status: Awaiting Outreach Case Record Type: Contact Outreach Case Owner: DADE COQ Enterprise Id

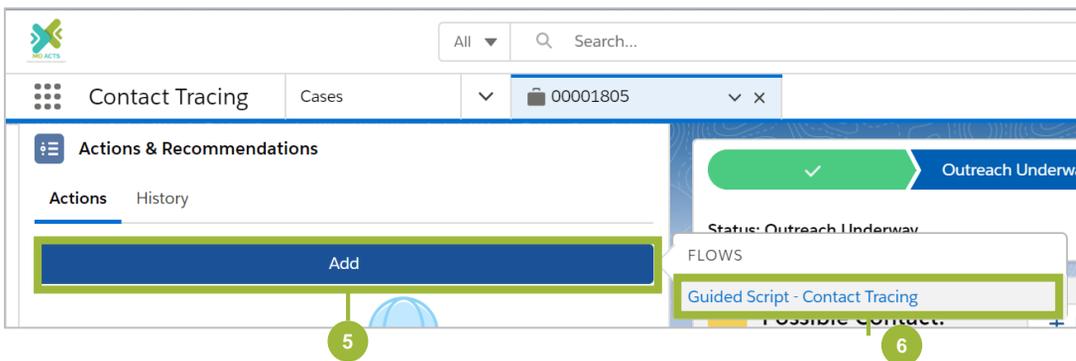


Leaving a Voicemail & Setting a Reminder to Call Back

4. Click the **Mark Status as Complete** button to move the case to the Outreach Underway status.



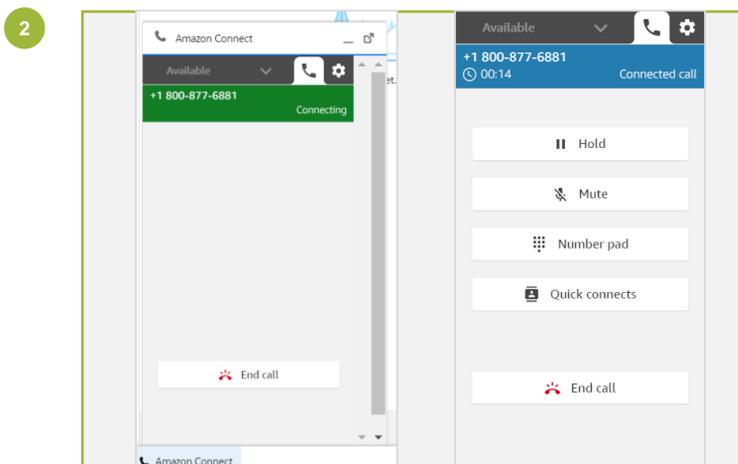
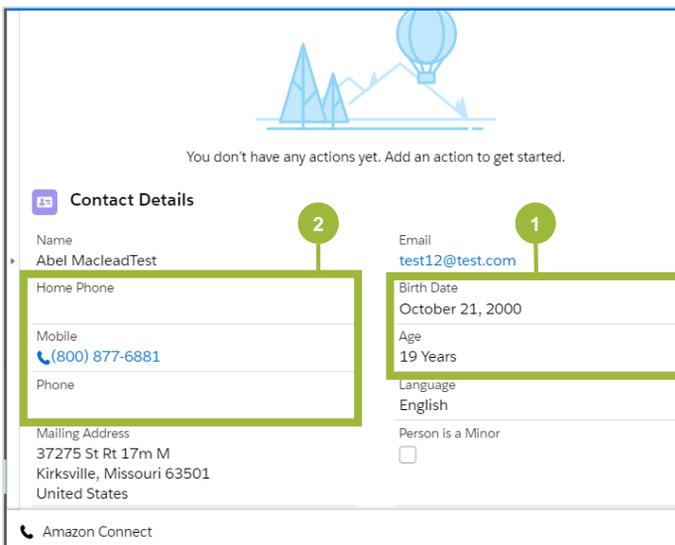
5. On the left panel of the page, click the **Add** button.
6. From the pop out, click the **Guided Script – Contact Tracing** button. This will open the call flow script that you will follow.



Leaving a Voicemail & Setting a Reminder to Call Back

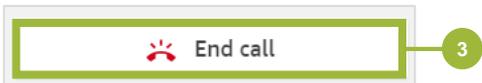
Contact Tracing Guided Script

1. Scroll down on the left side of the window until you find the **Contact Details**. Look at the **Person is a Minor** checkbox. If this is checked, look at the Contact to a COVID-19 Case's age.
 - a. If the Contact to a COVID-19 Case is 12 years old or younger, ask to speak to their parent or guardian and complete the interview with them.
 - b. If the Contact to a COVID-19 Case is 13 to 17 years old, ask to speak to the parent or guardian to either complete the interview with them or gain their permission prior to completing the interview with the Contact to a COVID-19 Case.
2. You are now ready to call the Contact to a COVID-19 Case. Click the blue phone icon next to the phone number to launch the call from Amazon Connect.

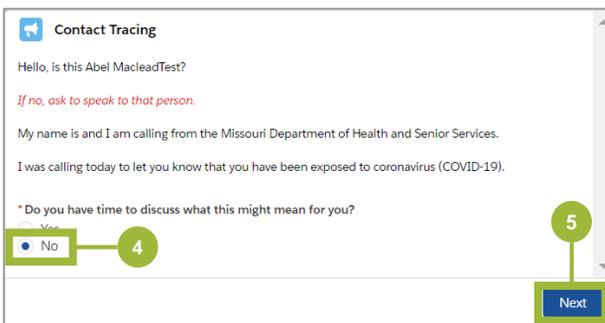


Leaving a Voicemail & Setting a Reminder to Call Back

3. If the contact does not pick up - leave your voicemail (following any local guidance) and disconnect the call.



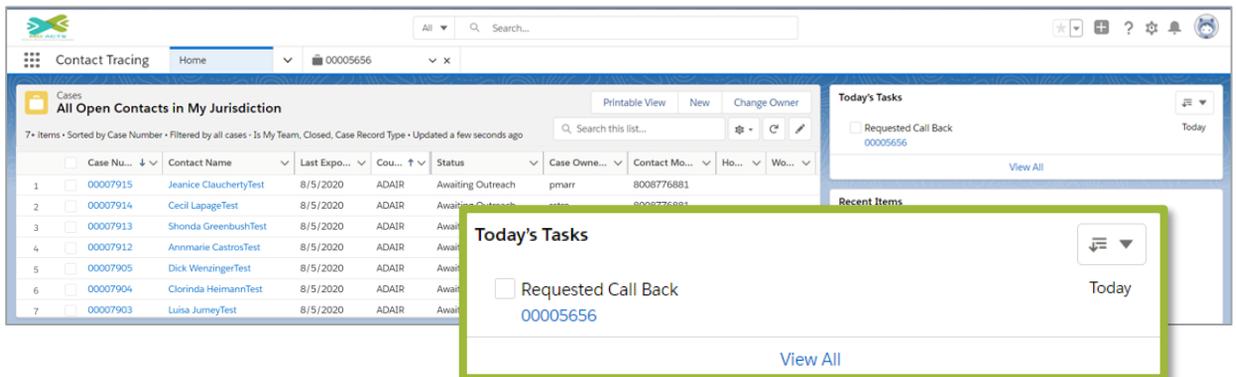
4. In the **Guided Script**, click on the **No** option.
5. Click on the **Next** button.



6. Enter a **Callback Time** by selecting a date and time in the next 24 hours.
7. Click the **Next** button.
8. The guided script closes.



Note: If you return to the home page, you will now see this callback task listed under "Today's Tasks"



Leaving a Voicemail & Setting a Reminder to Call Back

Logging your Call

1. First, fill in the Phone Call section with details about the call you placed by clicking on the pencil icons:

Call Direction: It is auto-populated as Outbound
Call Intention: Outbound Outreach Call
Call Outcome: Voicemail
Due Date / Time: When you placed the call

The screenshot shows the 'Phone Call' form with the following fields and callouts:

- Call Direction:** OutBound (dropdown)
- Call Intention:** Outbound: Outreach Call (dropdown, callout 1)
- Call Outcome:** Voicemail (dropdown, callout 1)
- Due Date/Time:** Date and Time fields (callout 1 for Date, callout 1 for Time)

Scroll past the Related to section to the **Task Information** section.

2. Click in the **Subject** field and select **Call: Voicemail**.
3. Change the **Status** to **Completed**.
4. Click **Save**.

The screenshot shows the 'Task Information' section with the following fields and callouts:

- * Subject:** Call: Voicemail (dropdown, callout 2)
- * Assigned To:** Contact Tracer (dropdown)
- * Status:** Completed (dropdown, callout 3)
- * Priority:** Normal (dropdown)
- Due Date:** (calendar icon)
- Created By:** Contact Tracer, 9/10/2020, 10:58 AM
- Last Modified By:** Contact Tracer, 9/10/2020, 10:58 AM
- Buttons:** Cancel and Save (callout 4)



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.



Job Aid

Completing a Call When the Contact to a COVID-19 Case is Not Available

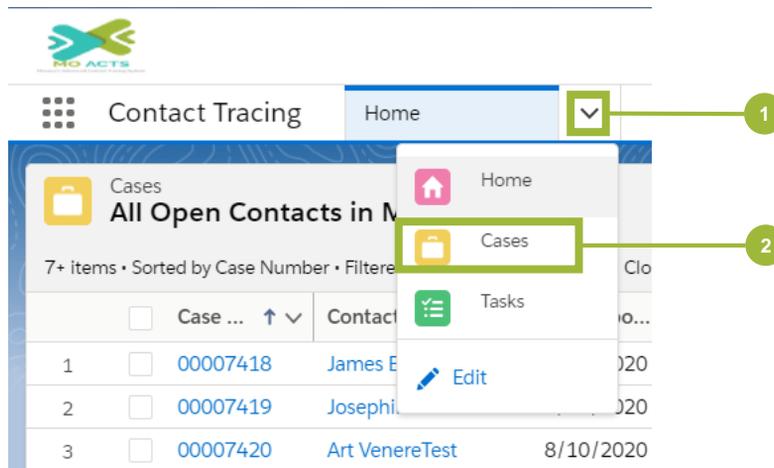


Missouri's Advanced Contact Tracing System

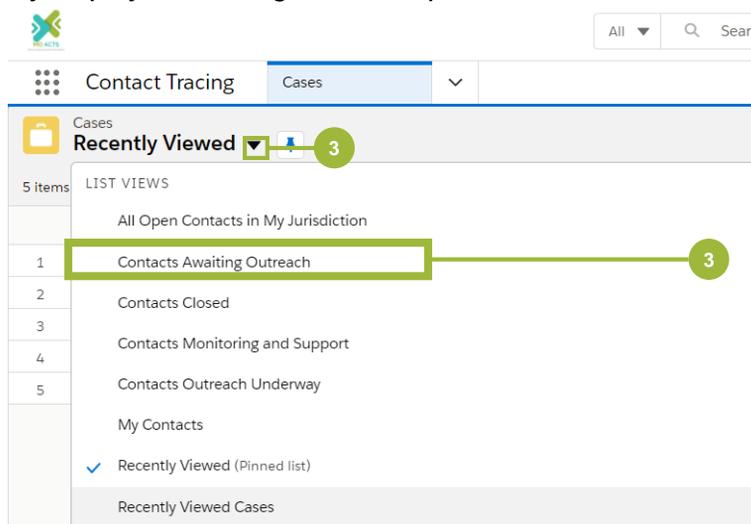
Completing a Call when the Contact to a COVID-19 Case is Unavailable

Getting Started

1. On the Homepage, find and click on the drop-down arrow next to the **Home** tab.
2. Click on the **Cases** option.



3. Open the **Contacts Awaiting Outreach** queue to view cases that are awaiting outreach. *If not already displayed, clicking on the drop-down arrow next to the queue name option*



Completing a Call when the Contact to a COVID-19 Case is Unavailable

Preparing to Call

1. You will now see the **Contacts Awaiting Outreach queue**; this is the list of Contact to a COVID-19 Cases requiring outreach. Other Contact Tracers will also select from this list.
2. Click on any **Case Number** to open the Contact to a COVID-19 Case.

Case Number	Contact Name	Last Exp...	County	Status	Case Owner Alias	Contact ...	Home P...	Work Ph...	Other P...
00004905	Abel MacleadTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
00004543	Jelina NaboursTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
00004600	Adell LipkinTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
00004652	Ahmed AngalichTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COQ	8008776881			
00004548	Aja GehrettTest	8/10/2020	ADAIR	Awaiting Outreach	ADAIR COO	8008776881			

3. Find and click on the **Accept** button in the upper right corner of the window. This will give you ownership of the Contact to a COVID-19 Case.

YOU MUST ACCEPT THE CASE BEFORE BEGINNING WORK ON IT.

 **Note:** If someone else's name shows as the Case Owner, someone else has already accepted the Case and you need to pick another one.

Awaiting Outreach Outreach Underway Monitoring and Sup... Closed

Status: Awaiting Outreach [Mark Status as Complete](#)

Case Possible Contact: (Unknown Date) [+ Follow](#) [Change Owner](#) [Edit](#) [Accept](#)

Status: Awaiting Outreach Case Record Type: Contact Outreach Case Owner: DADE COQ Enterprise Id

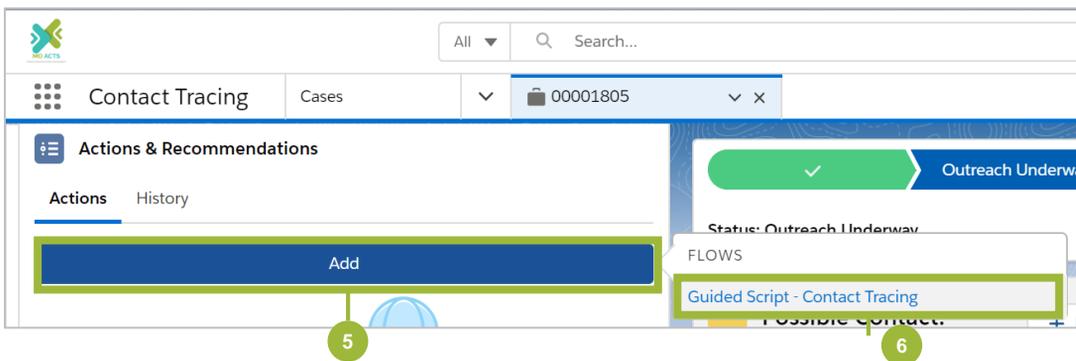


Completing a Call when the Contact to a COVID-19 Case is Unavailable

4. Click the **Mark Status as Complete** button to move the case to the Outreach Underway status.



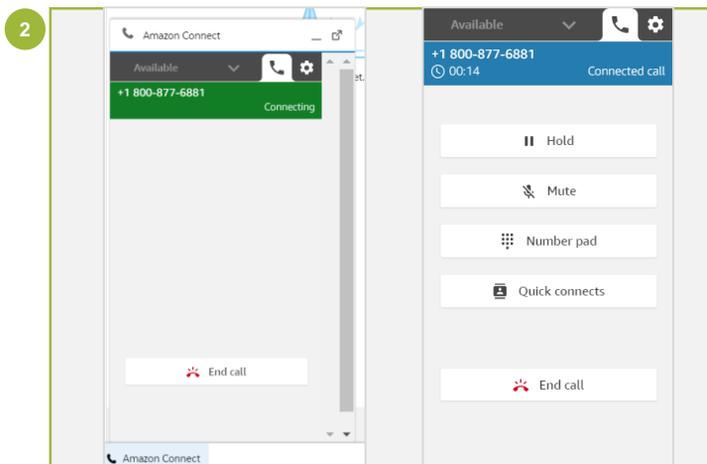
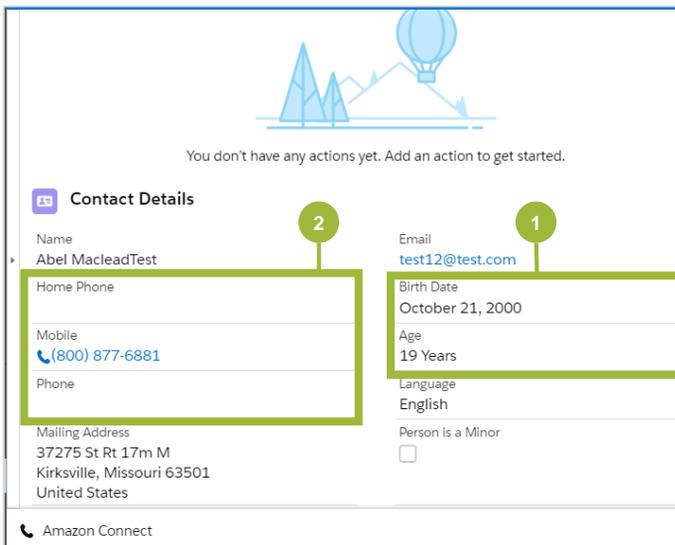
5. On the left panel of the page, click the **Add** button.
6. From the pop out, click the **Guided Script – Contact Tracing** button. This will open the call flow script that you will follow.



Completing a Call when the Contact to a COVID-19 Case is Unavailable

Contact Tracing Guided Script

1. Scroll down on the left side of the window until you find the **Contact Details**. Look at the **Person is a Minor** checkbox. If this is checked, look at the Contact to a COVID-19 Case's age.
 - a. If the Contact to a COVID-19 Case is 12 years old or younger, ask to speak to their parent or guardian and complete the interview with them.
 - b. If the Contact to a COVID-19 Case is 13 to 17 years old, ask to speak to the parent or guardian to either complete the interview with them or gain their permission prior to completing the interview with the Contact to a COVID-19 Case.
2. You are now ready to call the Contact to a COVID-19 Case. Click the blue phone icon next to the phone number to launch the call from Amazon Connect.



Completing a Call when the Contact to a COVID-19 Case is Unavailable

Guided Script | Beginning the Call

1. Read the script and click the **No** radio button.
2. Click the **Next** button.

Contact Tracing

Hello, is this Abel Maclead?

If no, ask to speak to that person.

My name is Clair Marcus and I am calling from the Missouri Department of Health and Senior Services.

I was calling today to let you know that you have been exposed to coronavirus (COVID-19).

* Do you have time to discuss what this might mean for you?

Yes

No

Next

3. Work with the person to identify a good time to call in the next 24 hours and capture it in the **Callback Time** fields.
4. Click Next.

Call Back

When is a better time to call in the next 24 hours?

* Callback Time

Previous Next

5. The call back shows in the **Open Activities** section

Open Activities (1) New Task New Event

Subject	Create Date	Due Date	Assigned To
Requested Call Back	8/4/2020, 6:27 PM	8/4/2020	Patty Marra

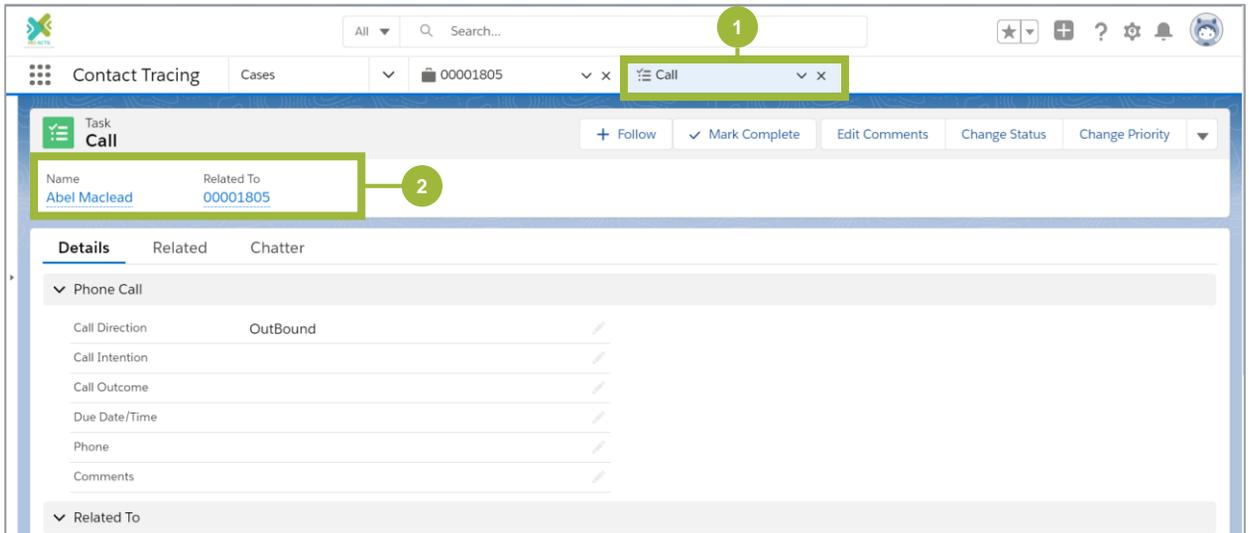
[View All](#)



Completing a Call when the Contact to a COVID-19 Case is Unavailable

Logging the Call

1. After disconnecting an outbound call, a new **Task tab** will automatically open.
2. You will find the **Contact's name and Case number** on top of the new window.



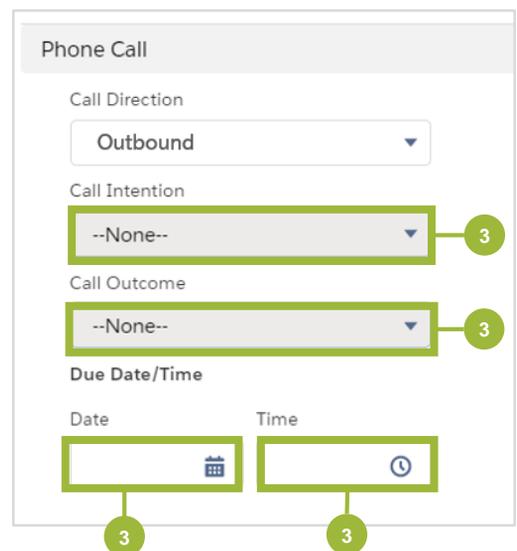
3. Complete the **Phone Call Details** by selecting the pencil icon to edit.

Call Direction: It will be auto-populated as Outbound.

Call Intention: Outbound Outreach Call

Call Outcome: Person was Reached

Due Date / Time: when placed your call



Completing a Call when the Contact to a COVID-19 Case is Unavailable

4. Scroll past the Related to section to the **Task Information** section.
5. Click in the **Subject** field and select **Call: Person was Reached**.
6. Change the **Status** field to **Completed**.
7. Click **Save**.

The screenshot shows the 'Task Information' section of a contact tracing application. The 'Subject' field is set to 'Call: Person was reached' (marked with a green circle 5). The 'Assigned To' field is 'Contact Tracer'. The 'Status' field is set to 'Completed' (marked with a green circle 6). The 'Priority' is 'Normal'. The 'System Information' section shows 'Created By' and 'Last Modified By' as 'Contact Tracer' on '9/10/2020, 10:58 AM'. A 'Save' button is highlighted with a green circle 7.

8. Your call is logged and shows in the **Activity History** section under the contact's Details section.

The screenshot shows the 'Activity History' section of a contact tracing application. It displays a log entry for 'Call: Person was Reached' on '7/31/2020, 1:17 PM'. The entry is highlighted with a green circle 8.



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.



Job Aid

Reassigning a Contact to a COVID-19 Case to a New Owner



Missouri's Advanced Contact Tracing System

Reassigning a Contact to a COVID-19 Case to a New Owner

Understanding When a Contact to a COVID-19 Case Needs to be Reassigned

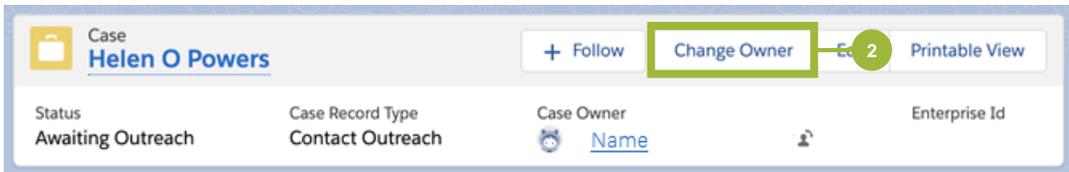
As you continue your work as a Contact Tracer, you may encounter a contact case that needs to be escalated or reassigned to someone else. Reasons for this may include:

- The Contact to a COVID-19 Case has not answered your calls after several attempts
- You were able to reach the Contact to a COVID-19 Case and start the monitoring process with them, but now the Contact to a COVID-19 Case is unreachable
- The Contact to a COVID-19 Case has asked for more information about their quarantine instructions, the positive case, etc., which are beyond your scope of work as a Contact Tracer
- A Contact Tracer will be out and needs someone else to take ownership of their cases
- A supervisor is assigning Contact Cases to Contact Tracers or specific queues

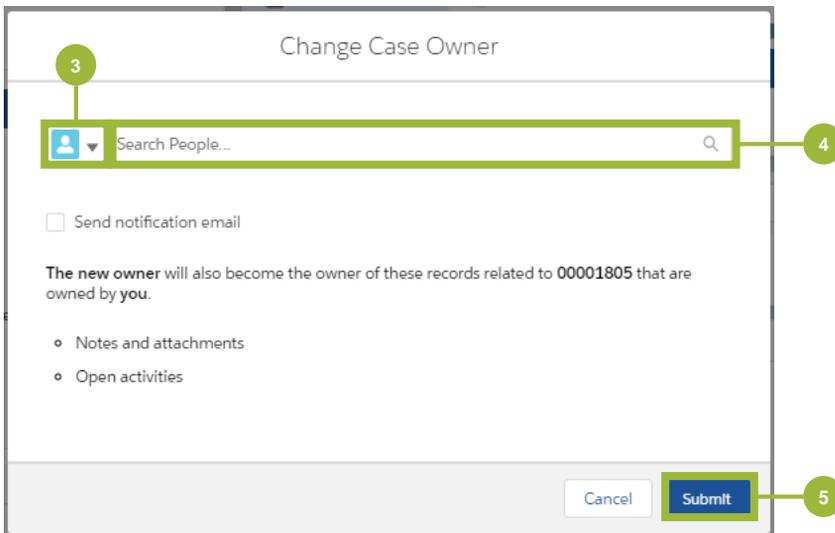
Reassigning a Contact to a COVID-19 Case to a New Owner – Option 1

How to Reassign a Case to a New Owner

1. Open the contact case in MO ACTS.
2. In the **Case** section on the right side of the screen, click the **Change Owner** button.



3. In the popup, select the person icon to reassign the case to another colleague, or the queue icon to assign it to a queue.
4. Begin typing the name of the person or queue to whom you are reassigning the Contact to a COVID-19 Case and click on their name when it appears.
5. Click **Submit**.



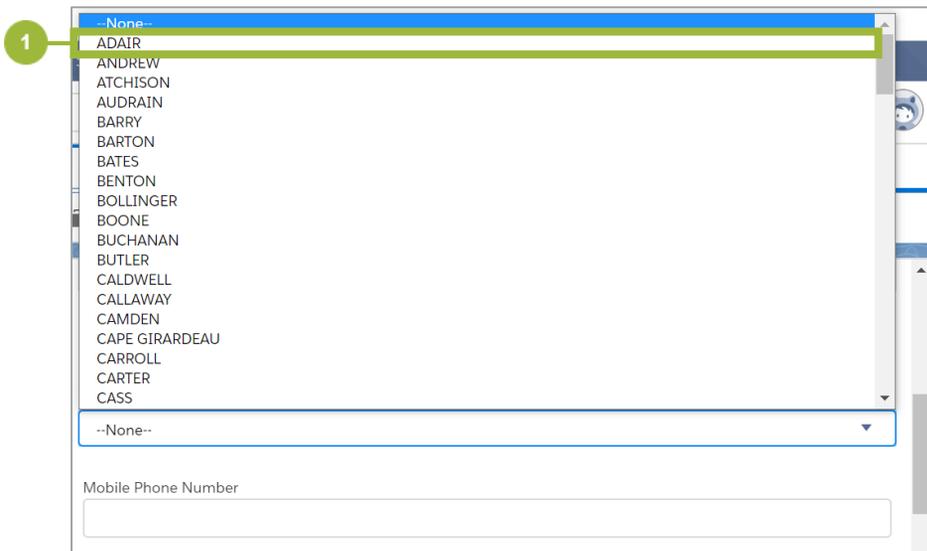
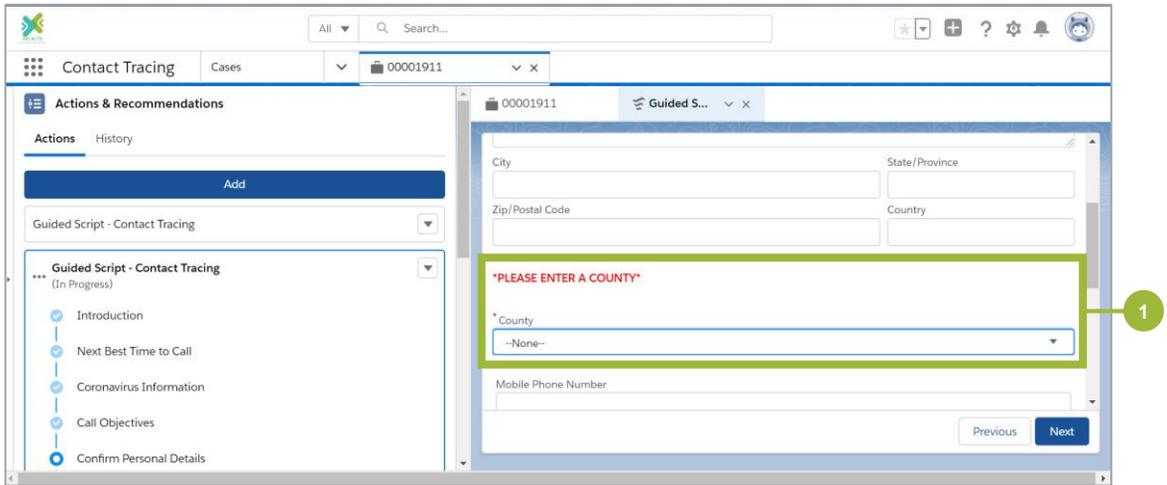
6. The case details show the new **Case Owner**.



Reassigning a Contact to a COVID-19 Case to a New Owner – Option 2

How to Reassign a Case to a County or Jurisdiction

1. To change the county, click on the drop-down field and select the correct County.



Reassigning a Contact to a COVID-19 Case to a New Owner – Option 2

How to Reassign a Case to a County or Jurisdiction

2. If you want to change the county but NOT the jurisdiction select the Do Not Change Jurisdiction checkbox.

* County
ADAIR

2 Do Not Change Jurisdiction ⓘ

WARNING:
Changing jurisdiction will change after you finish the call and you will no longer be able to access this record! Check the above box if you do not want to change the jurisdiction.

Mobile Phone Number

Work Phone

Previous Next



Note: If you **do not** use this checkbox, the jurisdiction will change and therefore:

Permissions for this case will change as well, preventing you from accessing this record after saving. The case will also disappear from the current queue once it is closed (e.g. once the call ends).

If the jurisdiction that the case is assigned to does not have any users in the MO ACTS platform, the case will be directed to the **Administration queue**.

Job Aid

Completing Monitoring for a Contact to a COVID-19 Case



Missouri's Advanced Contact Tracing System

Completing Monitoring for a Contact to a COVID-19 Case

Open New Monitoring Activity

1. Open the case you wish to monitor by going to the Contacts Monitoring and Support queue and clicking on the **Case Number**.

<input type="checkbox"/>	Case Num... ↑ ↓	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Ow...
1	<input type="checkbox"/> 00001805	Abel Maclead	Possible Contact: (Unknown Date)	Monitoring and Support	Medium	7/27/2020, 12:37 AM	pmarr



2. Scroll down to the **Monitoring** section in the **Detail pane** on the right side of the screen and click the **New** button.



3. Fill in the **Information** section with details about the monitoring outreach, including:

- Outcome
- Assessment Date
- Assessment Time

4. Fill in the **Monitoring Status** section, confirming details for:

- Seen your Provider since we spoke?
- Is quarantine or isolation ending today?
- Require assistance to remain isolated?

5. Fill in the **Quarantine Tracking** section, confirm:

- Had a test since we spoke?



Completing Monitoring for a Contact to a COVID-19 Case

6. Fill in the **Symptoms** section to reflect contact's current symptoms.
7. Click **Save**.

Symptoms 6

New Symptoms? --None--

Chills --None--

Abdominal Pain

Fever --None--

Measured temperature

Unit

Cancel Save & New Save 7



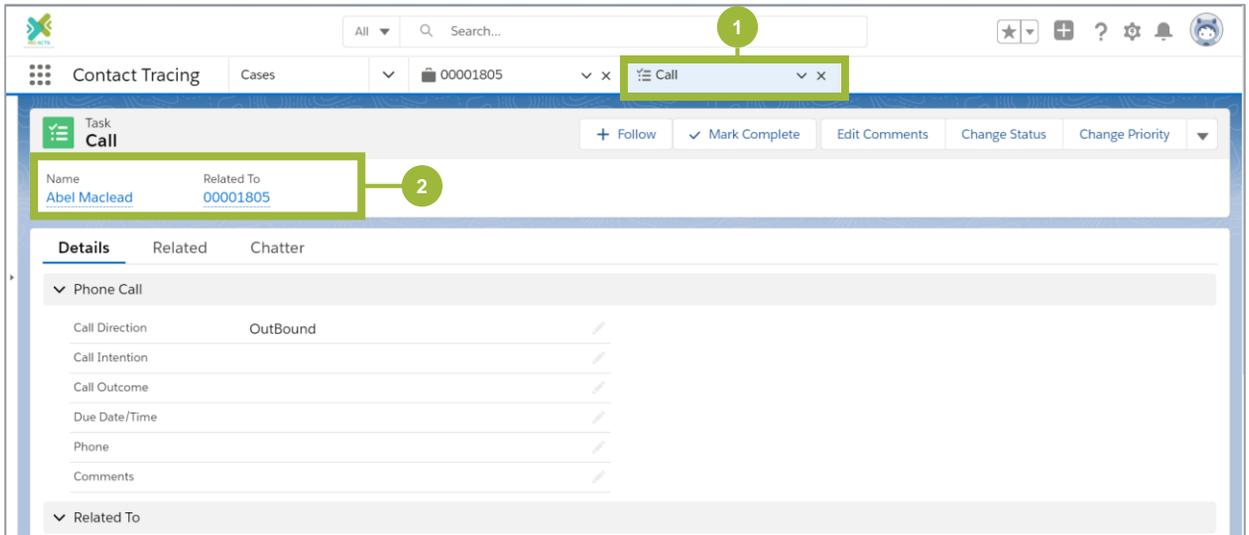
Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.



Completing Monitoring for a Contact to a COVID-19 Case

Logging the Call

1. After disconnecting an outbound call, a new **Task tab** will automatically open.
2. You will find the **Contact's name and Case number** on top of the new window.



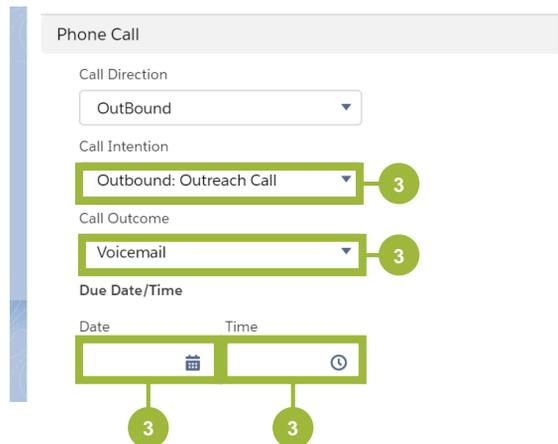
3. Complete the **Phone Call Details** by selecting the pencil icon to edit.

Call Direction: It will be auto-populated as Outbound.

Call Intention: Outbound: Quarantine Follow Up

Call Outcome: Person was Reached

Due Date / Time: when placed your call



Completing Monitoring for a Contact to a COVID-19 Case

4. Scroll past the Related to section to the **Task Information** section.
5. Click in the **Subject** field and select **Call: Isolation/ Quarantine Follow up**.
6. Change the **Status** field to **Completed**.
7. Click **Save**.

The screenshot shows the 'Task Information' section of a contact tracing application. The 'Subject' field is set to 'Call Isolation / Quarantine' (highlighted with a green box and a green circle with the number 5). The 'Assigned To' field is set to 'Contact Tracer'. The 'Status' field is set to 'Completed' (highlighted with a green box and a green circle with the number 6). The 'Priority' field is set to 'Normal'. The 'System Information' section shows 'Created By' and 'Last Modified By' as 'Contact Tracer' on '9/10/2020, 10:58 AM'. At the bottom, the 'Save' button is highlighted with a green box and a green circle with the number 7.

8. Your call is logged and shows in the **Activity History** section under the contact's Details section.



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.



Completing Monitoring for a Contact to a COVID-19 Case

SMS Messages Functionality

MO ACTS will automatically generate SMS messages to actively monitor contacts by linking to a form to collect symptoms every day for the duration of quarantine (14 days since the last exposure date). This will occur as long as the case meets the following criteria, which is used when the contact validates their identify when self-logging symptoms:

- The **phone number field** on the case record is populated
- The **email field** on the case record is populated
- The **birth date** field on the case record is populated

The data entered by the Contact each day will generate a monitor record in MO ACTS as depicted below which the Contact Tracer can view in the Contact to a COVID-19 Case record.

Monitoring	
UI-00000131	
Details	
Monitoring Number	UI-00000131
Case	00002717
Assessment Date	9/10/2020
Assessment Time	
Status	Closed - Unanswered
Automated Monitor Record	<input checked="" type="checkbox"/>
Outcome	
Unable to Contact: Please Specify	
Other: Please Specify	
Record Type	Contact Outreach
Monitoring Status	
Seen your provider since we spoke?	
Require assistance to remain isolated?	
Is quarantine or isolation ending today?	
Quarantine Tracking	
Had a test since we spoke?	
Symptoms	
New Symptoms?	
Chills	Yes
Abdominal Pain	
Cough	Yes
Diarrhea	
Difficulty Breathing	
Loss of appetite	
Loss of Smell and/or Taste	
Fever	
Measured temperature	
Unit	
Headache	Yes
Muscle Aches/Pains (Myalgia)	
Sore Throat	
Vomiting	
Other Symptoms	
Created By	Automated Process, 9/8/2020, 1:32 AM
Last Modified By	Joe Pleczynski, 9/10/2020, 2:23 PM



Completing Monitoring for a Contact to a COVID-19 Case



NOTE: The MO ACTS system will attempt to send a message if there are one or more phone number(s) pre-populated to the case record, even if the phone is a landline. At this time, we cannot track if a message was received,

We recommend asking the contact during the outreach process whether or not they would like to receive a SMS message to monitor their symptoms.

If not, the contact tracer can bypass auto case monitoring for the contact by using the checkbox pictured below within the **Case Details** under the **Symptoms** section and can follow the standard case monitoring procedures in place.

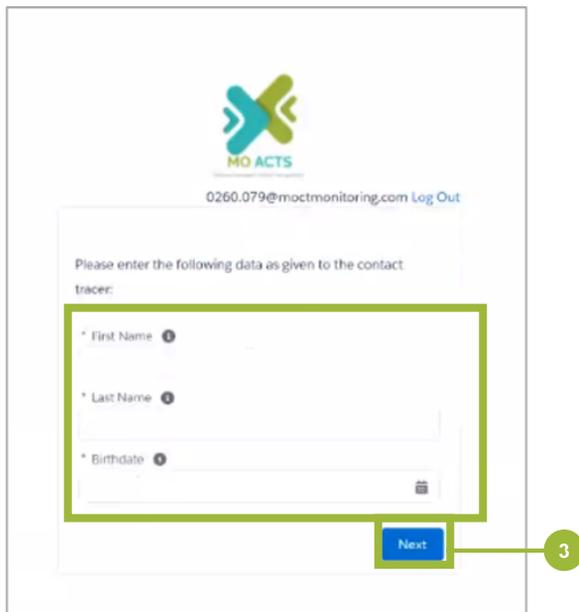
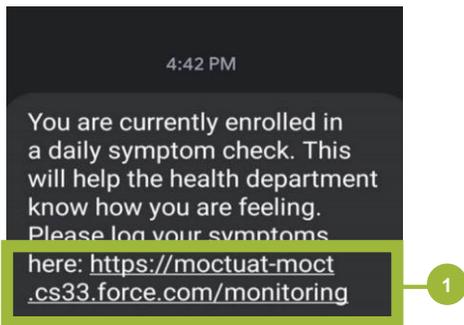
Symptoms	
Symptom Onset Date	Headache Yes
Symptom Resolution Date	Fatigue Yes
Fever Yes	Cough Yes
Fever Temperature	Wheezing Yes
Feverish Yes	Shortness of Breath Yes
Chills Yes	Difficulty Breathing ⁱ Yes
Rigors Yes	Chest Pain
Muscle Aches & Pains ⁱ Yes	Vomiting Yes
Runny Nose Yes	Abdominal Pain Yes
Sore Throat Yes	Diarrhea Yes
Loss of Smell and/or Taste	Other Symptoms
Automated Monitoring Bypass <input type="checkbox"/>	



Completing Monitoring for a Contact to a COVID-19 Case

For awareness, this is what the Contact to a COVID-19 Case will see and the steps they will take once they receive the text to provide and track their symptoms, starting with signing in for the first time.

1. The contact will receive the SMS message at **9 AM CST** every day during the quarantine period.
2. The contact will click the link, and then will need to select **Sign Up** for their first-time logging in. If not, they will receive an error message.
3. Once signed up and authenticated, they will enter their information (**First Name, Last Name, and Birthdate**) as was given to the contact tracer and select **Next**.



Completing Monitoring for a Contact to a COVID-19 Case

- Then, they will be able to track their symptoms which will then be collected in the monitor record automatically.


0260.079@mactmonitoring.com [Log Out](#)

Lucas, in the last 24 hours have you experienced any of the following symptoms:

- Sore Throat No
- Headache No
- Vomiting No
- Loss of Appetite No
- Diarrhea No
- Fever No
- Cough No
- Chills No



Job Aid

Completing End of Quarantine for a Contact to a COVID-19 Case



Missouri's Advanced Contact Tracing System

Completing End of Quarantine for a Contact to a COVID-19 Case

Closing a Case After Final Monitoring

1. While completing your monitoring call, if you identify that your Contact to a COVID-19 Case meets the criteria for ending quarantine, you will say, “**Your quarantine has ended.**” and select **Yes** in the “**Is quarantine or isolation ending today?**” field.
2. Click **Save**.

The screenshot shows a form with two main sections: 'Monitoring Status' and 'Quarantine Tracking'. In the 'Monitoring Status' section, there are two dropdown menus. The first is 'Seen your provider since we spoke?' with 'No' selected. The second is 'Require assistance to remain isolated?' with 'No' selected. In the 'Quarantine Tracking' section, there is a dropdown menu 'Had a test since we spoke?' with 'No' selected. To the right, a larger dropdown menu 'Is quarantine or isolation ending today?' is open, showing options: '--None--', 'Yes', 'No', and 'Unknown'. The 'Yes' option is highlighted with a green box and a circled '1'. At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a green box and a circled '2'.



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.

3. Click on the Case number tab to open the record. The screenshot shows a tab labeled 'Cases' with a dropdown arrow. To its right is a search box containing the case number '00004905' and a close button 'x'. A green box highlights the search box and the case number, with a circled '3' to its right.
4. Scroll to the top of the Details section and locate the **Closed Reason** field. Click the **pencil** to edit it.

The screenshot shows the 'Details' section of a case record. It has two tabs: 'Details' (selected) and 'Other Actions'. The 'Details' section is divided into two columns. The left column contains fields: 'Does contact know about their exposure?', 'Last Exposure Date' (8/5/2020), 'Is Healthcare Worker?', 'Connected to Congregate Setting?', 'Congregate Setting Type', 'Congregate Setting Location', and 'Congregate Setting Other Details'. The right column contains fields: 'Speaking with Household Member' (checkbox), 'Status' (Monitoring and Support), 'Closed Reason', 'Closed Reason: If Other, Please Specify', 'Date/Time Opened' (8/20/2020, 4:25 PM), 'Date/Time Closed', and 'Date of Death'. A green box highlights the 'Closed Reason' field, which has a pencil icon to its right. A circled '4' is to the right of the pencil icon.



Completing End of Quarantine for a Contact to a COVID-19 Case

Closing a Case After Final Monitoring

5. Select **Quarantine Completed** as the **Closed Reason** and click the **Save** button.

Member

* Status: Monitoring and Support

Closed Reason: --None--

Closed Reason: If Other, Please Specify: --None--

Quarantine completed

Referred to LBoH

Referred to other provider

Was never reached

Lost to follow up

Declined

Contact diagnosed with COVID-19

Cancel Save & New Save



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.

*If you do not fill out the **Closed Reason** an error will appear when trying to move the case to “Closed” status.*

6. Click on **Mark Status as Complete**.
7. A **Close this Case** window opens. Select **Closed** as the **Status** and **Save**.
8. The status now shows as **Closed**.

00001805 UI-0000...

Monitoring and Support Closed

Status: Monitoring and Support

Mark Status as Complete

Close This Case

* Status: Select a closed stage...
Select a closed stage...
Closed

Cancel Save

00001805 UI-0000...

Awaiting Outreach Outreach Underway Monitoring and Support Closed

Status: Closed

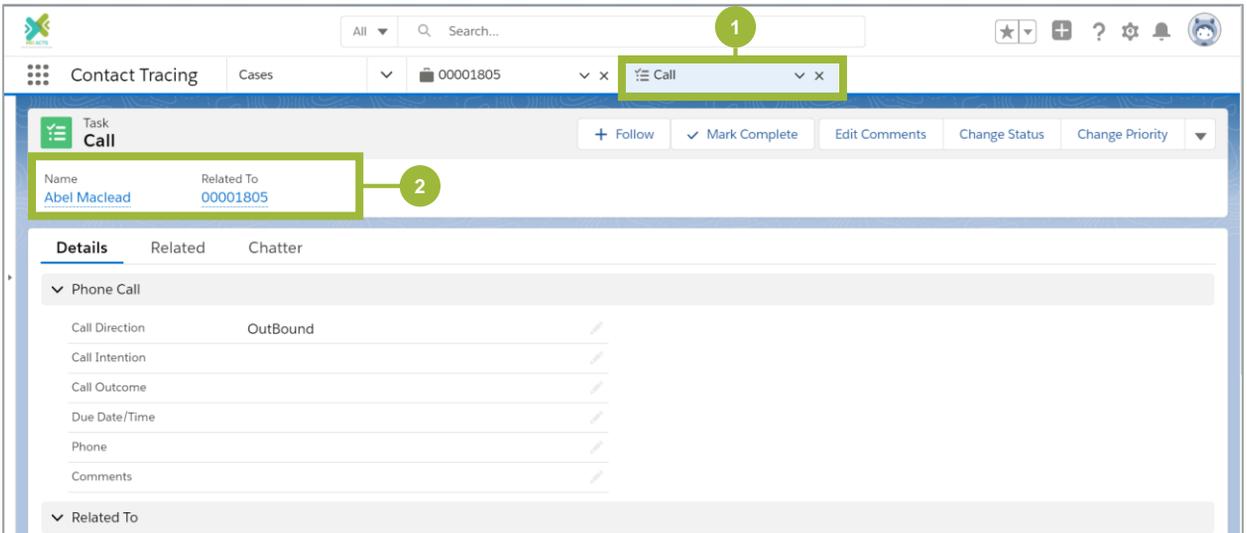
Change Closed Status



Completing End of Quarantine for a Contact to a COVID-19 Case

Logging the Call

1. After disconnecting an outbound call, a new **Task tab** will automatically open.
2. You will find the **Contact's name and Case number** on top of the new window.



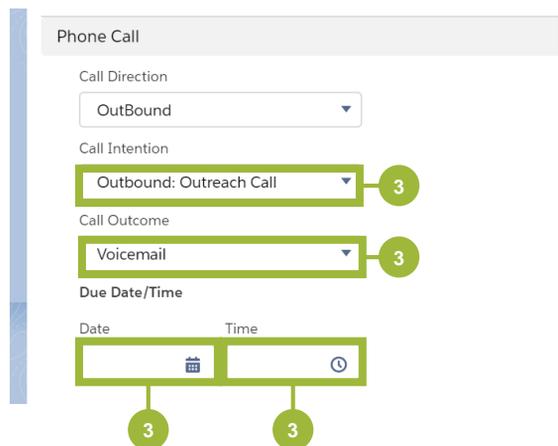
3. Complete the **Phone Call Details** by selecting the pencil icon to edit.

Call Direction: It will be auto-populated as Outbound.

Call Intention: Outbound: Quarantine Follow Up

Call Outcome: Person was Reached

Due Date / Time: when placed your call



Completing End of Quarantine for a Contact to a COVID-19 Case

4. Scroll past the Related to section to the **Task Information** section.
5. Click in the **Subject** field and select **Call: Person was Reached**.
6. Change the **Status** field to **Completed**.
7. Click **Save**.

The screenshot shows the 'Task Information' section of a contact tracing application. The 'Subject' field is set to 'Call: Person was reached' (marked with a green circle 5). The 'Assigned To' field is set to 'Contact Tracer'. The 'Status' field is set to 'Completed' (marked with a green circle 6). The 'System Information' section shows 'Created By' and 'Last Modified By' as 'Contact Tracer' on '9/10/2020, 10:58 AM'. A 'Save' button is highlighted with a green circle 7.

8. Your call is logged and shows in the **Activity History** section under the contact's Details section.

The screenshot shows the 'Activity History (1)' section. The table below has columns for 'Subject' and 'Create Date'. The entry 'Call: Person was Reached' is highlighted with a green circle 8.

Subject	Create Date
Call: Person was Reached	7/31/2020, 1:17 PM



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.



Job Aid

Reopening a Case



Missouri's Advanced Contact Tracing System

Reopening a Case

1. Find the **Closed Reason** field, and click the **pencil** to edit it.

The screenshot shows a 'Details' tab with several fields. The 'Closed Reason' field is highlighted with a green box and a pencil icon, with a callout '1' pointing to it. The 'Status' field is set to 'Closed'. Other fields include 'Does contact know about their exposure?', 'Last Exposure Date', 'Is Healthcare Worker?', 'Speaking with Household Member', and 'Closed Reason: If Other, Please Specify'.

2. Change the reason to **None**.
3. Change the **Status** to the appropriate one and click **Save**.

The first screenshot shows the 'Closed Reason' dropdown menu with '--None--' selected, with a callout '2'. The second screenshot shows the 'Status' dropdown menu with 'Monitoring and Support' selected, with a callout '3'. The 'Status' field is also highlighted with a green box.



Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.

If you do not change the Close Reason to "None" an error will appear when trying to manually move the case to "Monitoring and Support."



Reopening a Case

- 4. The **Status bar** at the top reflects the new status, and the **Closed reason** is now empty.

00001805 UI-00000... x

Monitoring and Support Closed

Status: Monitoring and Support 4 [Mark Status as Complete](#)

Case Possible Contact: (Unknown Date) [+ Follow](#) [Change Owner](#) [Edit](#) [Printable View](#)

Status	Case Record Type	Case Owner	Enterprise Id
Monitoring and Support	Contact Outreach	Patty Mar...	

Details Other Actions

Does contact know about their exposure?	<input type="checkbox"/>	Speaking with Household Member	<input type="checkbox"/>
Last Exposure Date		Status	Monitoring and Support
Is Healthcare Worker?	4	Closed Reason	



Job Aid

Additional Tips



Missouri's Advanced Contact Tracing System

Additional Tips

Inbound Calling & Voicemail Functionality

Contact to a COVID-19 Case are able to call back through the MO ACTS number and Tracers will receive these inbound calls and Contacts can leave voicemails if their call is unanswered. A voicemail will trigger the creation of a missed call task and a notification will be sent to the assigned Contact Tracer. In this section you will learn how the voicemail functionality works in a few key scenarios and how it affects the routing logic for receiving inbound calls.

The Contact to a COVID-19 Case will be calling the existing AWS number for both inbound calling and for SMS call backs (314-696-69920).

When a Contact to a COVID-19 Case calls, the call will follow routing logic based first on the case being associated to a phone number or next through the associated jurisdiction/county. Resulting from this, a missed call task will be created automatically.

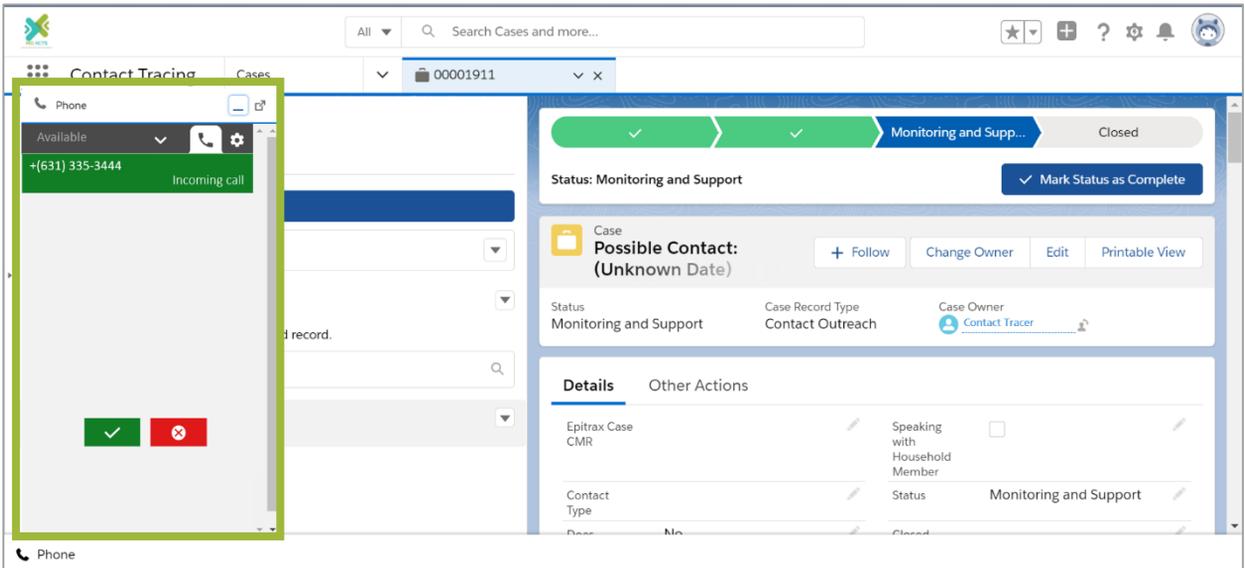
There are three potential scenarios:

- **Scenario A - Phone Number is Associated to a Case and Assigned to a Contact Tracer:** The call will route to the Contact Tracer assigned to the Contact to COVID-19 case and if they are unavailable, a missed call task along with a voicemail will be created automatically and appended to that case. A missed call notification will appear for the Contact Tracer on the notification bell.
- **Scenario B - Phone Number is Associated with a Jurisdiction:** The call will route to the associated LPHA queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the LPHA queue is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and appended to that case. A missed call notification will appear for the Account owner on the notification bell.
- **Scenario C - Phone Number has No Associated Jurisdiction:** The Call will route to the Administration queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the Administration queue (DHSS) is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and appended to that case. A missed call notification will appear for the Account owner on the notification bell.

Additional Tips

Inbound Calling & Voicemail Functionality

Upon the contact tracer receiving an inbound call, the Contact Tracer's Amazon Connect softphone will automatically pop-up and show a screen similar to the one below if their status is set to available.



NOTE:

- The phone number of the Contact to a COVID-19 Case of the incoming call will be displayed on top of the Amazon Connect screen.
- You will also find buttons to **Accept** or **Decline** the incoming call.

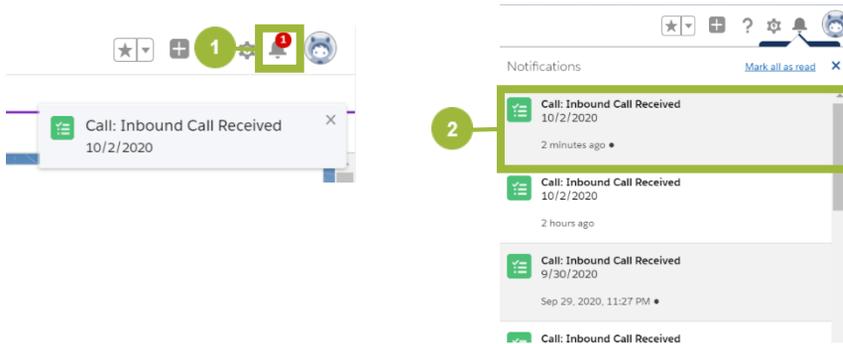
Additional Tips

Inbound Calling & Voicemail Functionality

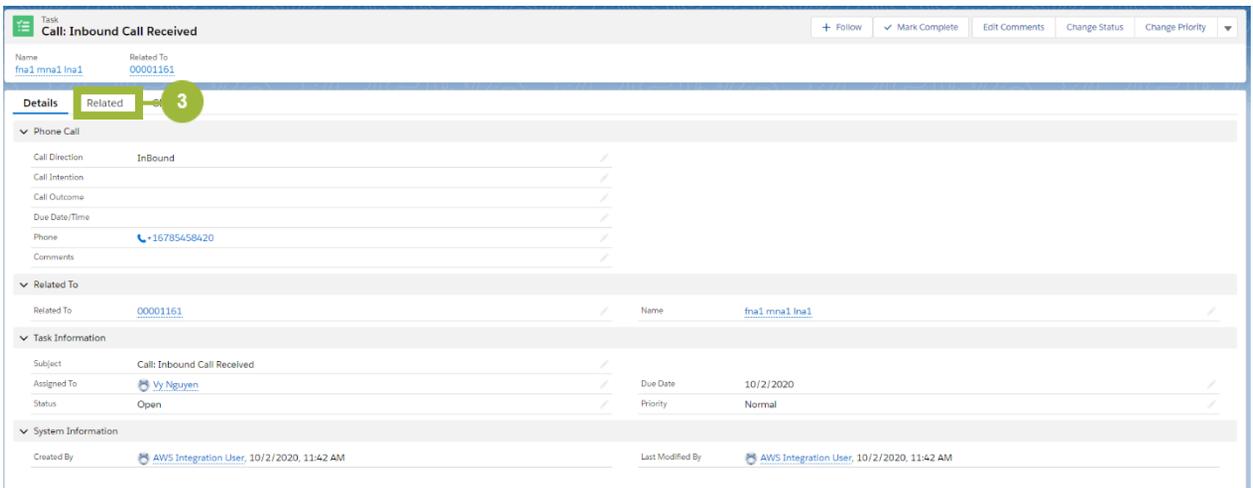
Contact Tracer: Receiving a Missed Call Notification and Listening to the Voicemail

Below are the steps recognizing when you have missed a call and how to access the missed call task and associated voicemail.

1. From any screen on MO ACTS, a Contact Tracer will be able to see that they have a missed call notification through the Notification Bell at the top right of the MO ACTS screen. You can also check the Today's Tasks section from the Home Screen.
2. When you click the bell, a drop down will appear, showing you that you have a missed call. This notification will be titled Call: Inbound Call Received. Click the notification.



3. Click on the notification. From here, a new window will open showing you the Details tab of the missed call task. Next, click the Related tab. Here you will be able to see the caller's voicemail message if one was left.

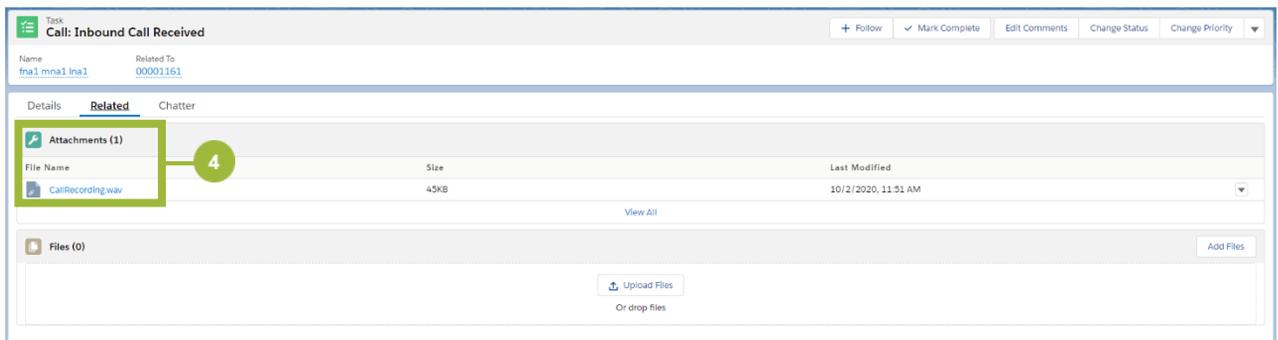


Additional Tips

Inbound Calling & Voicemail Functionality

Contact Tracer: Receiving a Missed Call Notification and Listening to the Voicemail

4. Click Attachments to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.



Account Owner of an LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case

When a Contact to a COVID-19 case calls from a phone number that is not yet associated with a Contact Tracer, their call will be routed to either the appropriate queue (jurisdiction or Admin) and if the call goes unanswered, a missed call task will be created and the queue Account owner (jurisdiction or Admin) will receive a notification. The Account Owner can then either act on the missed call or choose to reassign the case to another Contact Tracer. For an Account owner to view the notification and listen to a voicemail, please replicate the steps above. If reassigning the case to a Contact Tracer, please follow the steps below:

Additional Tips

Inbound Calling & Voicemail Functionality

Account Owner of an LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case

1. Click Attachments to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.

Task: Call: Inbound Call Received

Name: fna1 mna1 lna1 | Related To: 00001161

Details | Related | Chatter

Phone Call

Call Direction	InBound
Call Intention	
Call Outcome	
Due Date/Time	
Phone	+16785458420
Comments	

Related To

Related To	00001161	Name	fna1 mna1 lna1
------------	----------	------	----------------

Task Information

Subject	Call: Inbound Call Received		
Assigned To	Ryan Weidinger	Due Date	10/2/2020
Status	Open	Priority	Normal

System Information

Created By: AWS Integration User, 10/2/2020, 11:42 AM | Last Modified By: AWS Integration User, 10/2/2020, 11:42 AM

2. Click on the pencil icon to edit the **Assigned To** field and search the name of the contact tracer you want to assign the case to.

Task Information

*Subject: Call: Inbound Call Received

*Assigned To: Search People... (Vy Nguyen selected)

*Status: Open

System Information

Created By: AWS Integration User, 10/2/2020, 11:42 AM

3. Click **Save**. The case will now be assigned to a Contact Tracer and they will receive a notification stating the Account Owner assigned a case to them.

Task Information

*Subject: Call: Inbound Call Received

*Assigned To: Vy Nguyen

*Status: Completed

Due Date: 10/2/2020

Priority: Normal

System Information

Created By: AWS Integration User, 10/2/2020, 11:42 AM | Last Modified By: AWS Integration User, 10/2/2020, 11:42 AM

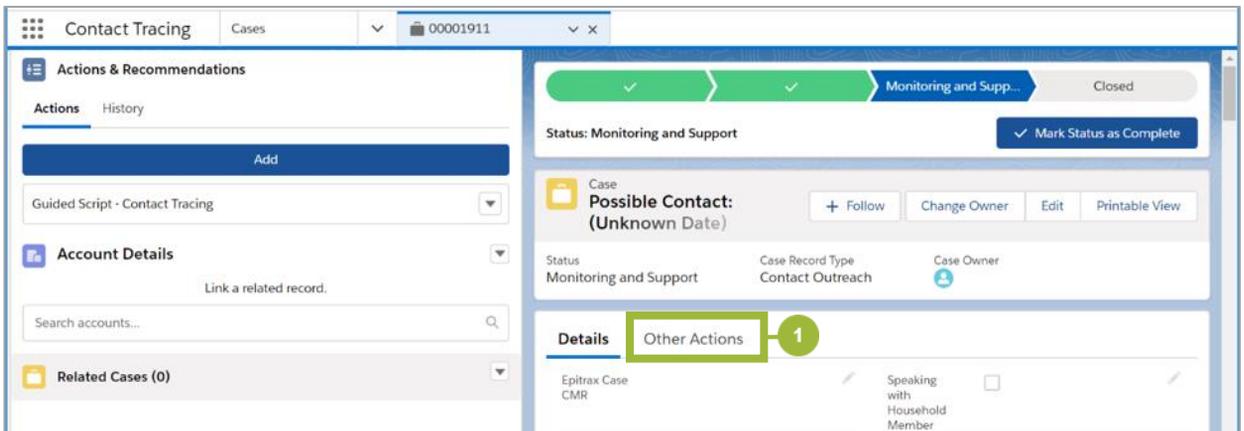
Cancel | Save

Additional Tips

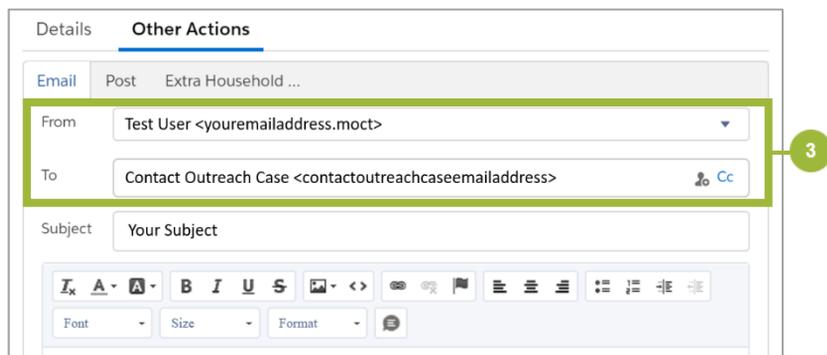
Email Functionality

Users can send an email to a contact after a call has successfully been completed when the Contact to a COVID-19 Case is in the Outreach Underway or Monitoring and Support statuses.

1. Navigate to the selected Case tab. On the **Details** section, click the **Other Actions** tab.
2. The Email tab will open. Click on the **Compose** button.

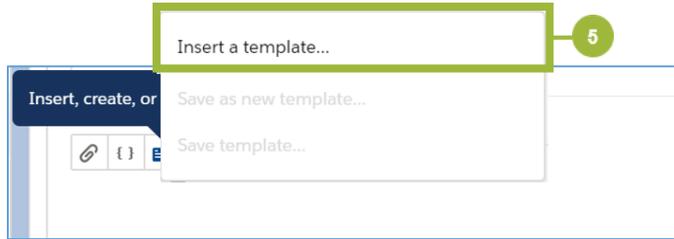
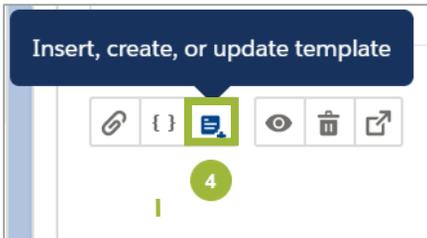


3. The Email window displays. You will see your email address defaulted in the **From** field. Also, the Contact to a COVID-19 Case's email address (if provided) will be pre-populated in the **To** field. These fields are editable, if necessary.



Additional Tips

- Before composing your message, scroll down and click on the **Insert, create, or update template** button.
- Click on **Insert a template**.



- A new window opens. On the left, select **Classic Email Templates** category from the drop-down.
- Select **MO ACTS Citizen Follow Up Email** template. This will render an email header and footer based on the Case Owner's jurisdiction.

Insert Email Template

Select a template for: 📁 Contacts ✖ Leads 📁 Cases

Templates

Classic Email Templates

Folder

All

Search

Search templates...

Name	Description	Folder
MO ACTS Citizen Follow Up Email Template	MOCT-R1.1-US#14	Unfiled Public Classic Email Templates
Feeling_Unwell_Template		Unfiled Public Classic Email Templates
Default Template		ACN_CommunitiesEmail
Outreach		ACN_CommunitiesEmail
Tasks: New assignment notification	Internal notification to task owner when new task is assi...	Task Email Templates
Positive and Contact Outreach_Custom	External email for positive and exposed contacts	CTC Email Templates
LBOH_Custom	External email for Local Board of Health to review a posi...	CTC Email Templates
Employer Letter Requested_Custom	External email to contacts when an employer letter is re...	CTC Email Templates

Cancel

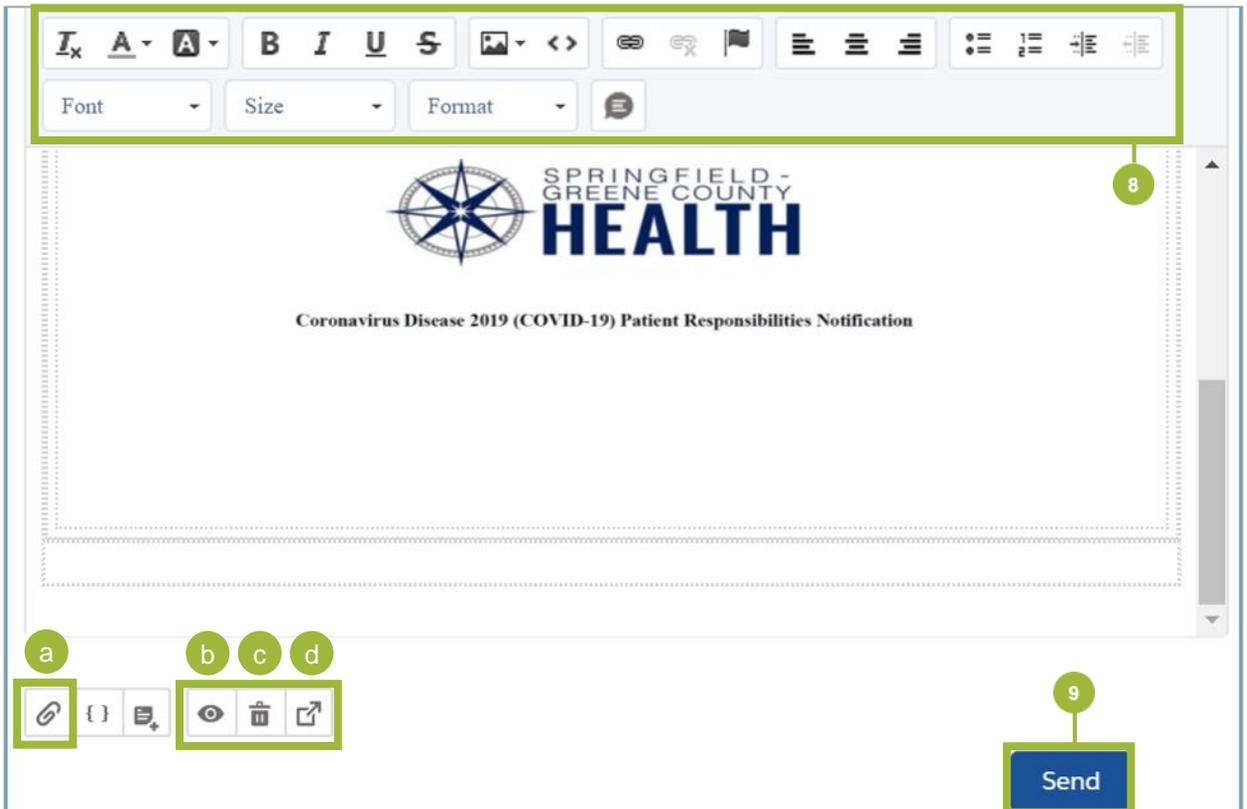


NOTE:

- Templates vary among jurisdictions so no pre-set body message will display.
- After selecting a template once, it will become available as a **Recently Used Template**. You will find it for later use when clicking on the **Insert, create or update template** icon.

Additional Tips

8. Fill in the desired content - either by typing a message, or copy-pasting one into the window. You can use the **tools bar** on top to change its format or the tools bar at the bottom to perform different actions:
 - a) Attach file
 - b) Preview email
 - c) Clear email and revert
 - d) Pop out to docked view
9. Once you are satisfied with your message, click **Send**.



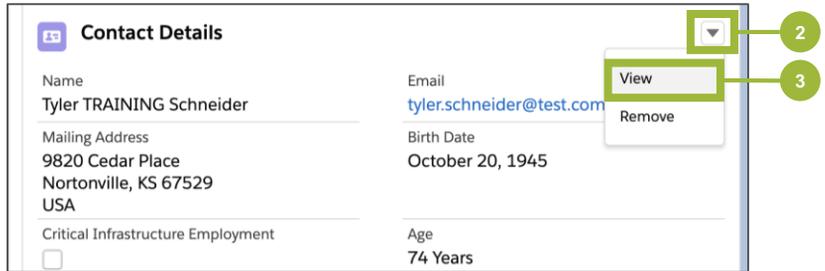
10. MO ACTS keeps a log of all your sent emails in the **Details** section of the Contact to a COVID-19 Case, under the **Email** category. Any replies from the contact will be routed to the **sender's inbox**.

Subject	From Address	To Address	Message Date	
Confidential: Follow ...	youremailaddress.moct	ContactOutreachCase...	8/20/2020, 10:51 AM	10

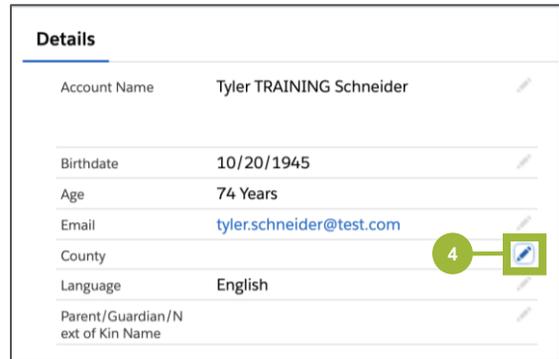
Additional Tips

Correcting a Contact's Case Information

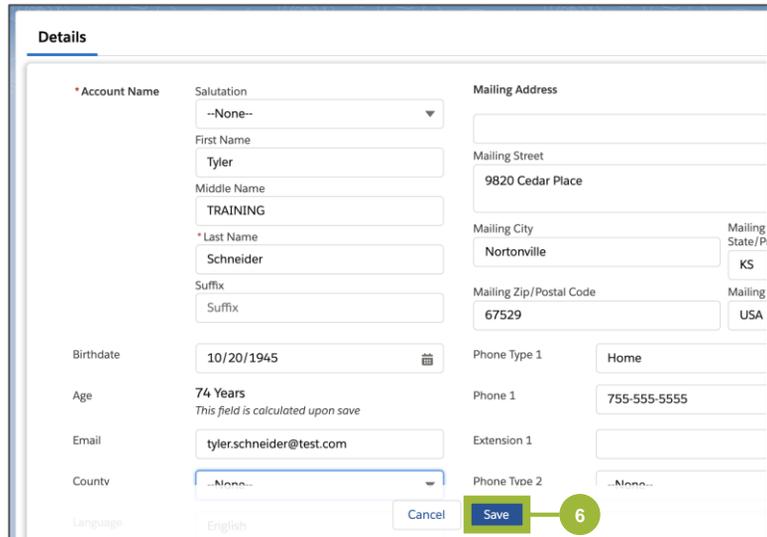
1. Open the contact's case in MO ACTS.
2. Click the drop-down arrow next to the **Contact Details** on the left side of the screen.
3. Click **View**.



4. Click on a **pencil icon** next to any item in the Details section.



5. Change the information that requires updating.
6. Click the **Save** button.

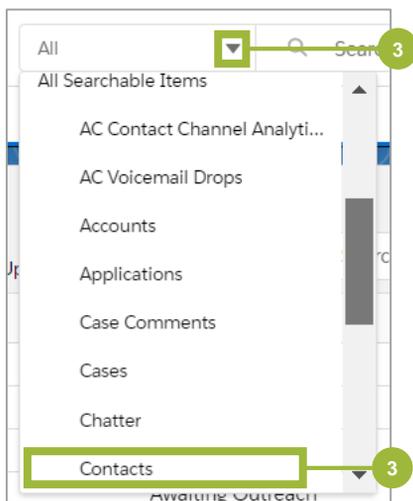


Additional Tips

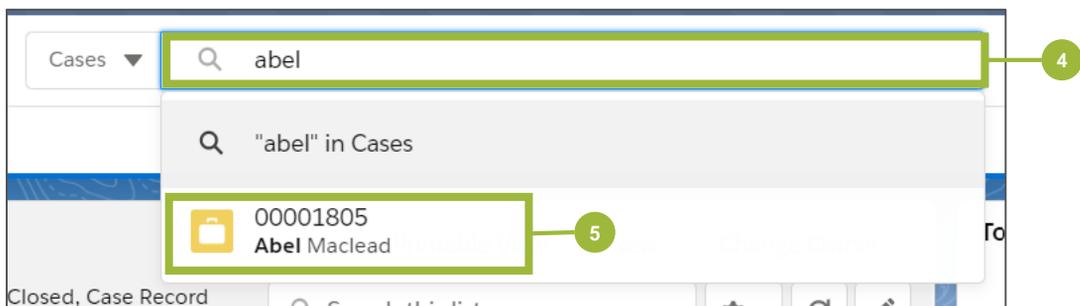
Speaking with Multiple Household Members During One Call

If you are calling someone from a household where multiple Contacts to a COVID-19 Case live, you can log multiple calls in MO ACTS and move onto the next Contact to a COVID-19 Case without having to hang up the call by following the process below:

1. Once you are done speaking with the first contact to a COVID-19 case, **log the call**.
2. Click the Cases tab.
3. In the search bar, click the drop-down arrow next to All and select Contacts.



4. Type the name of the next contact to a COVID-19 in the household that you would like to speak with.
5. Click on the correct **case** to open it if shown, otherwise click enter to search.



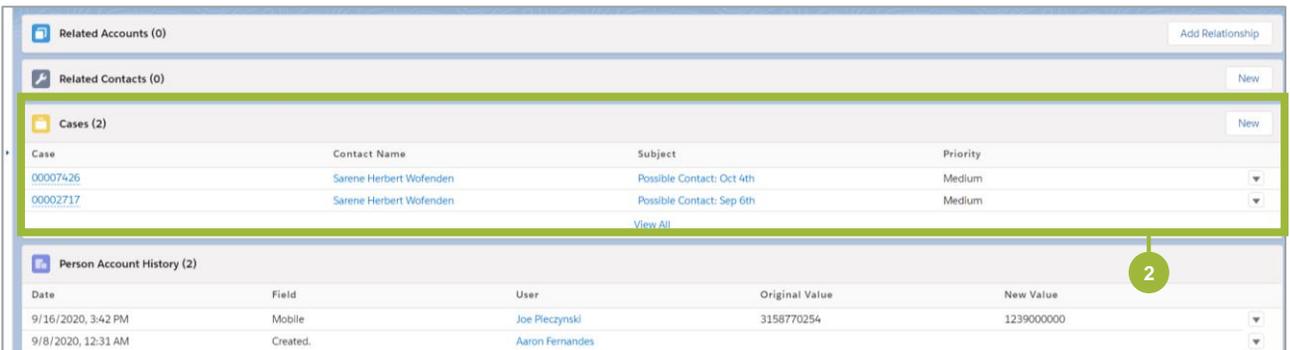
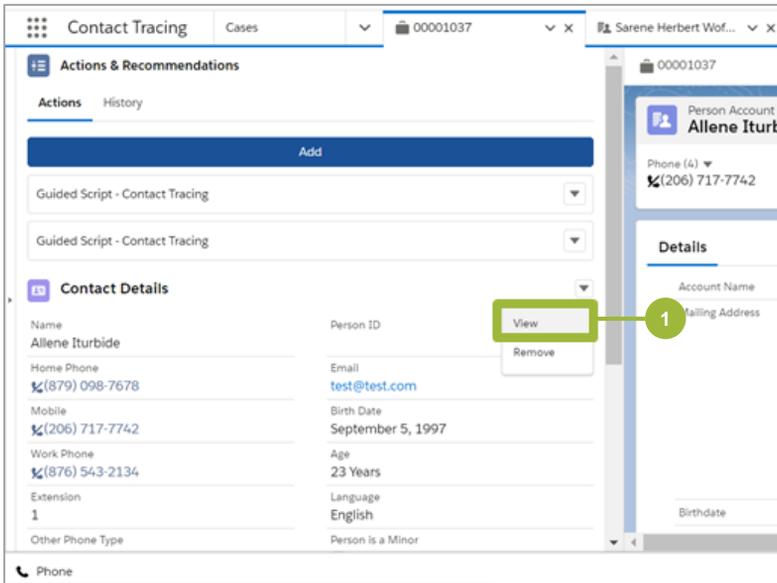
Additional Tips

MO ACTS Multiple Exposures for One Contact

On the **Person Account** section of the Contact to COVID-19 case, contact tracers can see multiple exposures to positive or probable COVID-19 cases listed out under the **Cases Section**.

NOTE: The contact to COVID-19 case is de-duped when the information comes over from EpiTrax into MO ACTS.

1. To see the multiple exposures, navigate to the **Person Account** by clicking on the **Contact Name** from the List Queue or select **View** from the drop-down field under **Contact Details** from the **Case**.
2. The list of Positive or Probable Cases for the Contact will displayed under **Cases** if applicable.



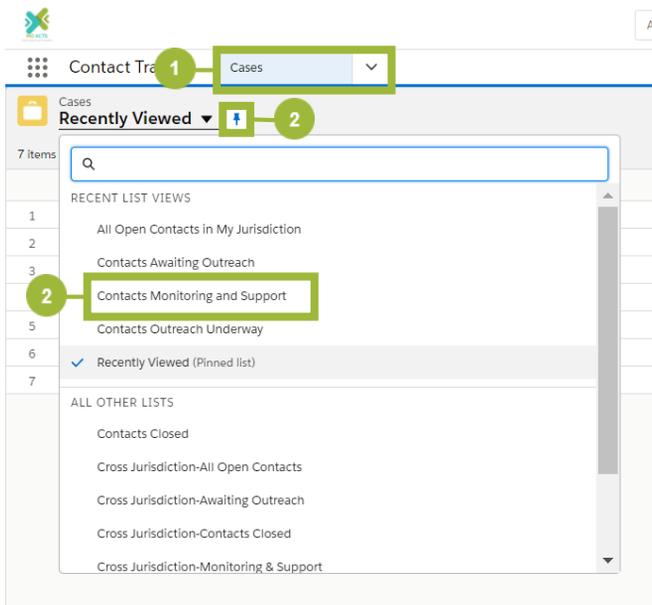
Additional Tips

Bulk Contact Case Actions

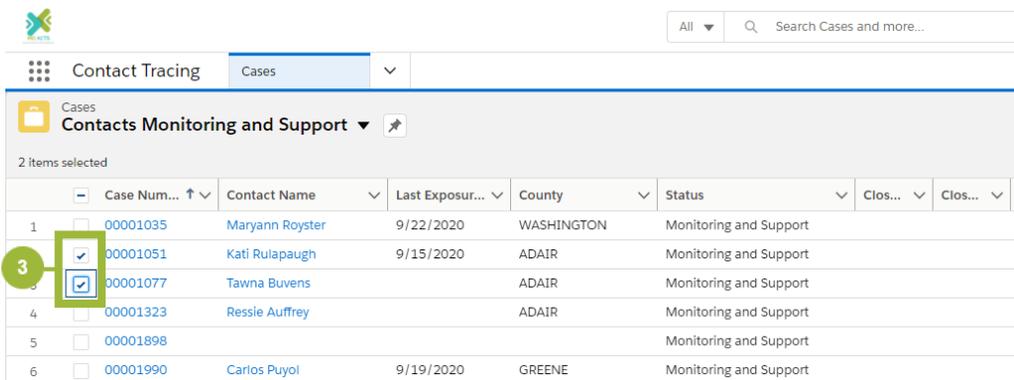
Closing Cases in Bulk

Contact Tracers now have the ability to close cases in bulk. This new functionality allows for you to close up to 200 cases at a time. Below are the steps to close a case in bulk.

1. From the home screen, navigate to the Cases tab.
2. From the cases tab, click the drop-down arrow and select an appropriate queue (e.g. Monitoring and Support).



3. Now, you will see all the cases you own that are in the monitoring phase. Select the cases you wish to close by clicking to the left of the case number in the checkbox.



Additional Tips

Bulk Contact Case Actions

Closing Cases in Bulk

- Next, under **Status** update a case to **Closed** from the dropdown, then click the checkbox for **Update selected items** to mass update every selected case status to 'Closed.'
- Click **Apply**.

Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...	C
1	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			ct
2	Kati Rulapaugh	9/15/2020	ADAIR	Closed			sr
3	Tawna Buvens		ADAIR				Al
4	Ressie Auffrey		ADAIR				ct
5	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			K
6							sr

- Lastly, choose the **Closed Reason**. Contact Tracers have the option to choose individual Closed Reasons or, similar to Step 4, you can select the checkbox to mass update the selected items with the same Closed Reason. Click **Apply**.

Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...	Case Owner A...	Cont
1	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			ctest	(518)
2	Kati Rulapaugh	9/15/2020	ADAIR	Closed				52
3	Tawna Buvens		ADAIR	Closed				(2)
4	Ressie Auffrey		ADAIR	Monitoring and Support				052
5	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			smart	3158
6								3158
7	Roberta Carline	0/23/2020	CAI PM	Monitoring and Support			smart	3158

Additional Tips

Bulk Contact Case Actions

Closing Cases in Bulk

7. Once all your changes are complete, click **Save**. Now, all the cases you just closed will be in the **Contacts Closed List View**.

The screenshot shows the 'Contact Tracing' interface with a table of cases. The table has columns for Case Number, Contact Name, Last Exposure, County, Status, and Close. Two cases are selected (checked), and their status is 'Closed'. The 'Save' button at the bottom is highlighted, and a green circle with the number '7' is placed over it, indicating the step in the process.

	Case Number	Contact Name	Last Exposur...	County	Status	Close...	Close...	Car
1	<input type="checkbox"/> 00001035	Maryann Royster	9/22/2020	WASHIN...	Monitoring and Support			cte
2	<input checked="" type="checkbox"/> 00001051	Kati Rulapaugh	9/15/2020	ADAIR	Closed	Quara...		sm
3	<input checked="" type="checkbox"/> 00001077	Tawna Buvens		ADAIR	Closed	Quara...		AD.
4	<input type="checkbox"/> 00001323	Ressie Auffrey		ADAIR	Monitoring and Support			ctri
5	<input type="checkbox"/> 00001898				Monitoring and Support			KAI
6	<input type="checkbox"/> 00001990	Carlos Puyol	9/19/2020	GREENE	Monitoring and Support			sm
7	<input type="checkbox"/> 00001993	Roberto Carlos	9/23/2020	CALDW...	Monitoring and Support			sm
8	<input type="checkbox"/> 00002086	Carlos Puyol		WASHIN...	Monitoring and Support			cte
9	<input type="checkbox"/> 00002098	Geo M George	9/28/2020	TANEY	Monitoring and Support			cte
10	<input type="checkbox"/> 00002105	Roronoa Zoro		ADAIR	Monitoring and Support			cte

Additional Tips

Bulk Contact Case Actions

Reassigning Cases in Bulk

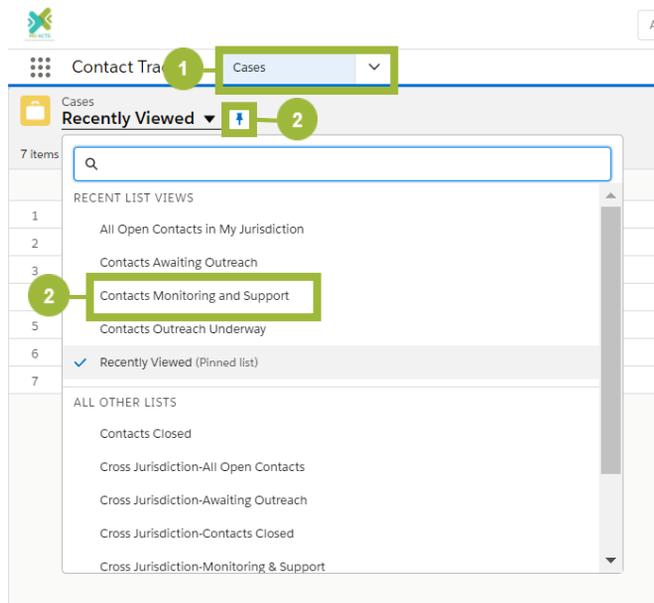
Contact Tracers can now mass reassign Contact to COVID-19 cases. This will allow a contact tracer to reassign their contact cases to someone else, a supervisor to assign contact cases to individual contact tracers, or a contact tracer to reassign contact cases to a different jurisdiction's queue. This functionality allows you to reassign up to 200 cases at a time.



Note: If a user is actively in the Contact to COVID-19 Case record making updates and their case is reassigned before they save their changes, they will no longer have access to the case and they will get an error message when they try to save their changes.

Below are the steps to reassign a case in bulk.

1. From the home screen, navigate to the **Cases tab**.
2. From the **Cases tab**, click the drop-down arrow and select an appropriate list view (e.g. Monitoring and Support).

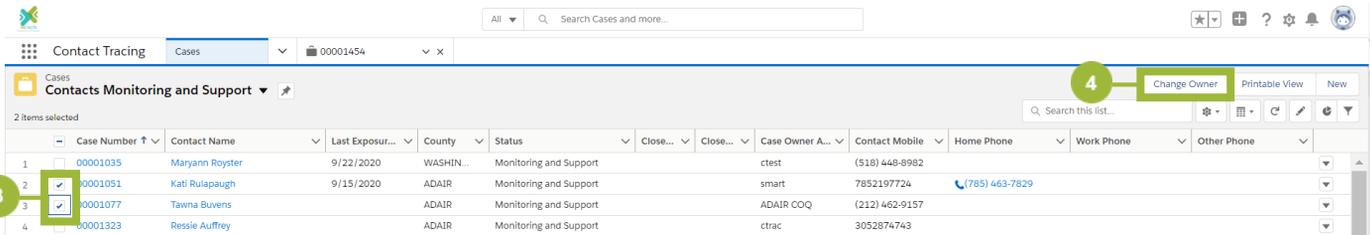


Additional Tips

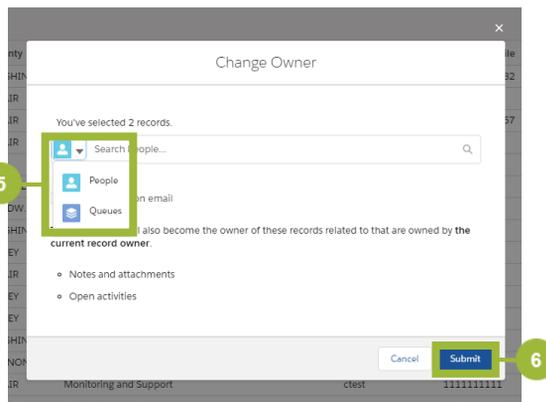
Bulk Contact Case Actions

Reassigning Cases in Bulk

- Once the list view opens, select the cases you wish to reassign by clicking to the left of the case number in the checkbox.
- Click the **Change Owner** button.



- You can now either choose to select a **Queue (jurisdiction)** or a **Person** to reassign the case to.
- Click **Submit**.



Thanks!

Contact the MO ACTS Helpdesk with questions:
Telephone: (573) 526-9533
Email: MOACTS@health.mo.gov
Hours: 8:00 am – 8:00 pm, Monday - Friday



Missouri's Advanced Contact Tracing System