Last Updated: 10/02/2020

Go Live
Action Guide

Contact Tracer

Missouri DHSS Department of Health and Senior Services

MO ACTS

Missouri's Advanced Contact Tracing System

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GETTING STARTED

CONTACT TRACING SCENARIOS

Missouri DHSS Department of Health and Senior Services

MO ACTS Missouri's Advanced Contact Tracing System

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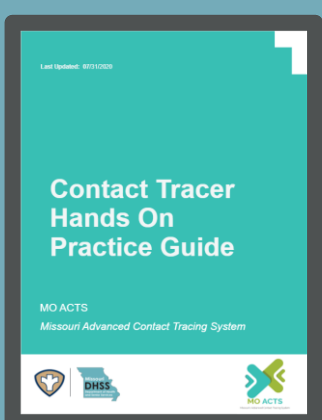
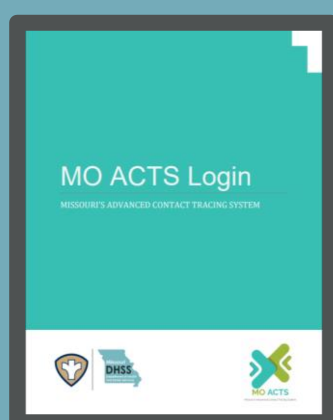
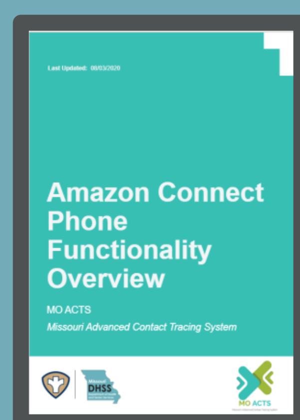
ADDITIONAL TIPS

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 DHSS Department of Health and Senior Services

MO ACTS
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://moct.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

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MO ACTS Missouri's Advanced Contact Tracing System

Job Aid

How to Log In to MO ACTS and Amazon Connect

Missouri DHSS Department of Health and Senior Services

MO ACTS 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

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:

- Cough
- Shortness of Breath
- Difficulty breathing
- New olfactory disorder
- New taster disorder

OR

Two or more:

- Fever
- Chills
- Rigors
- Myalgia
- Headache
- Sore throat
- Nausea or vomiting
- Diarrhea
- Fatigue
- Congestion or runny nose

OR

Severe respiratory illness with at least one of the following:

- 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 Awaiting Outreach status.
Contacts Monitoring & Support	Displays all contact cases in MO ACTS that are set to Monitoring & Support status.
My Contacts	Displays all contact cases owned by you, which require monitoring outreach. Contact Outreach Cases will appear in this view if the status is set to Monitoring & Outreach.

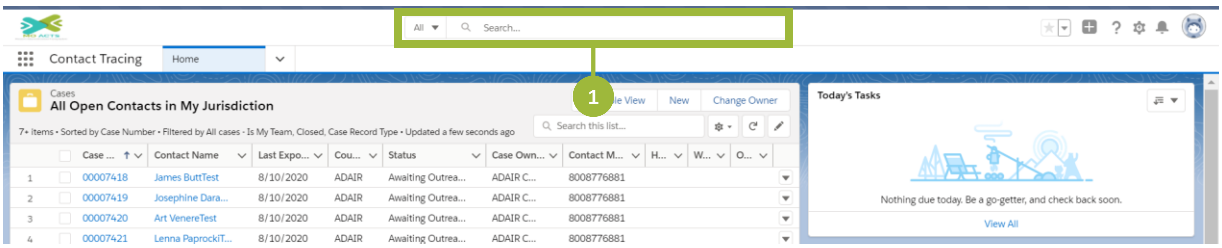
Additional Views Displayed for Contact Tracers

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

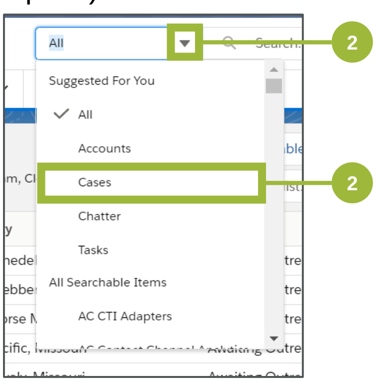
Search for a Contact to a COVID-19 Case

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

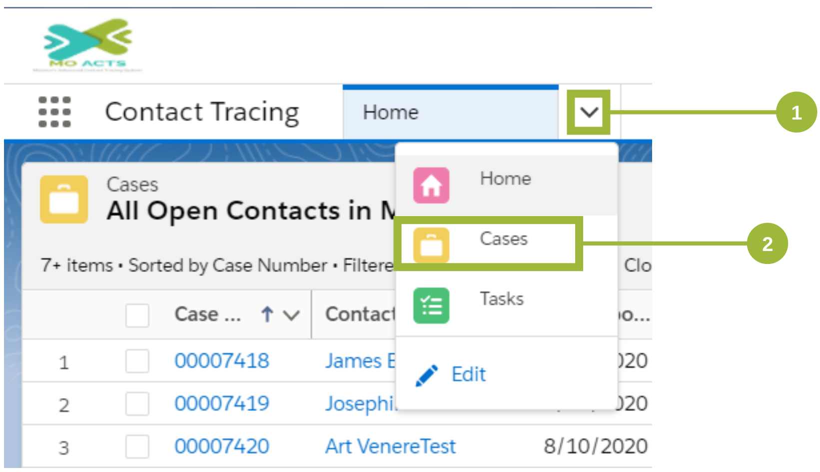
MO ACTS

Missouri's Advanced Contact Tracing System

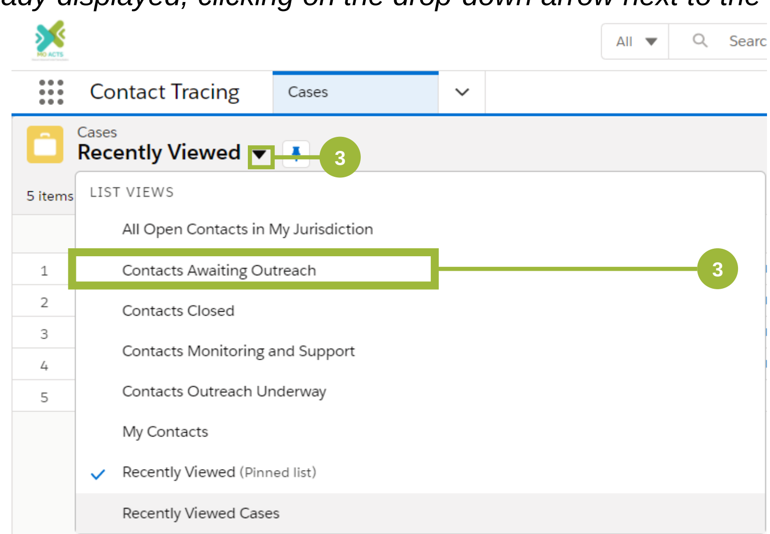
Completing an Initial Call to a Contact to a COVID-19 Case

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.



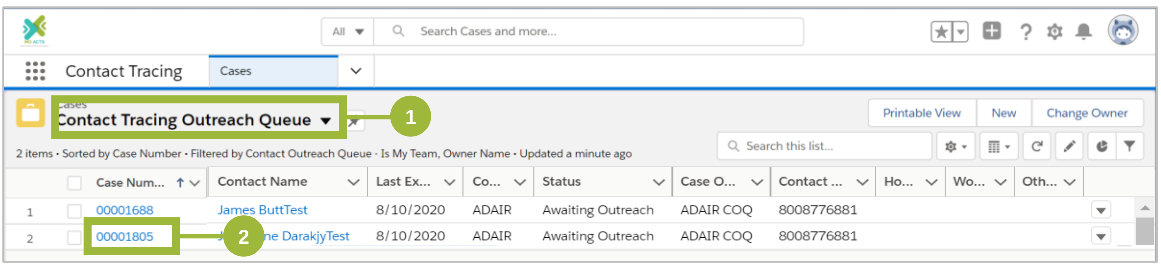
3. Open the **Contacts Awaiting Outreach queue** to view cases that are awaiting outreach. *If not already displayed, clicking on the drop-down arrow next to the queue name option*



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

Preparing to Call

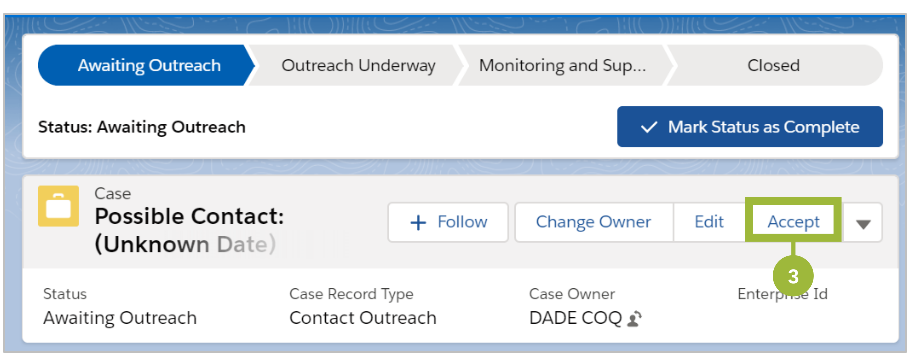
1. You will now see the **Contacts Awaiting Outreach queue**; this is the list of Contacts to COVID-19 Case requiring outreach. Other Contact Tracers will also select from this list.
2. Click on any **Case Number** to open the Contact to a COVID-19 Case.



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

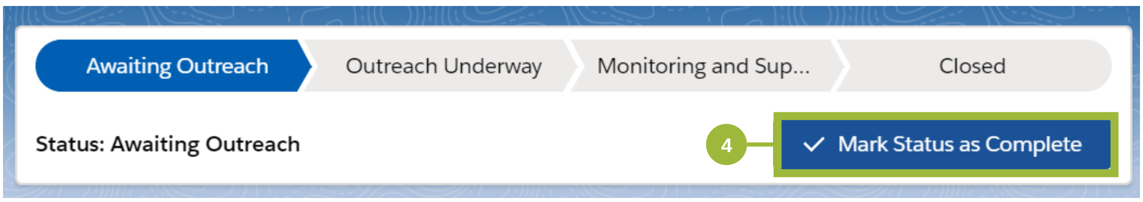
YOU MUST ACCEPT THE CASE BEFORE BEGINNING WORK ON IT.

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.

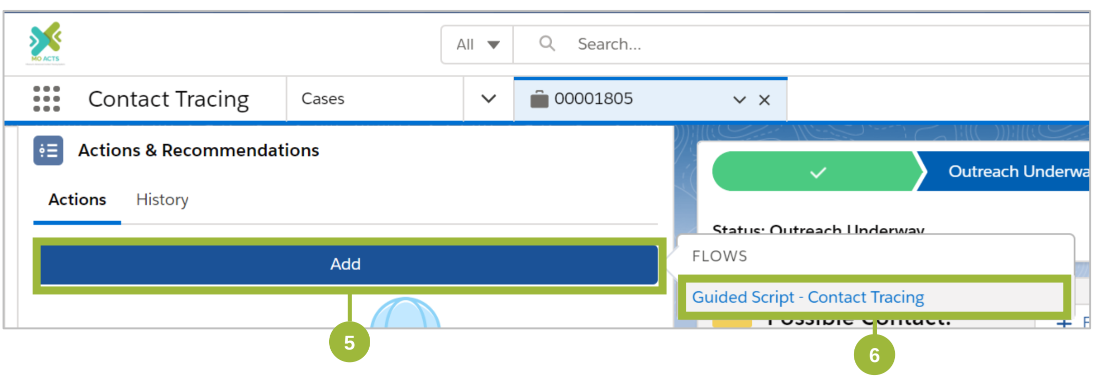


Completing an Initial Call to a Contact to a COVID-19 Case

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.

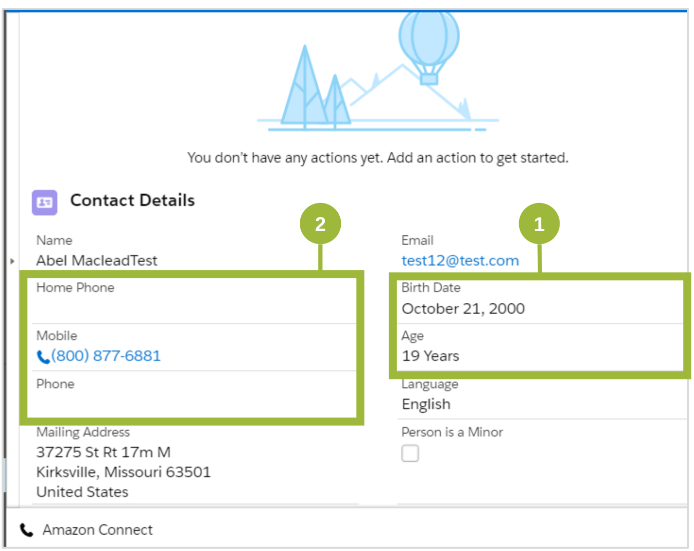


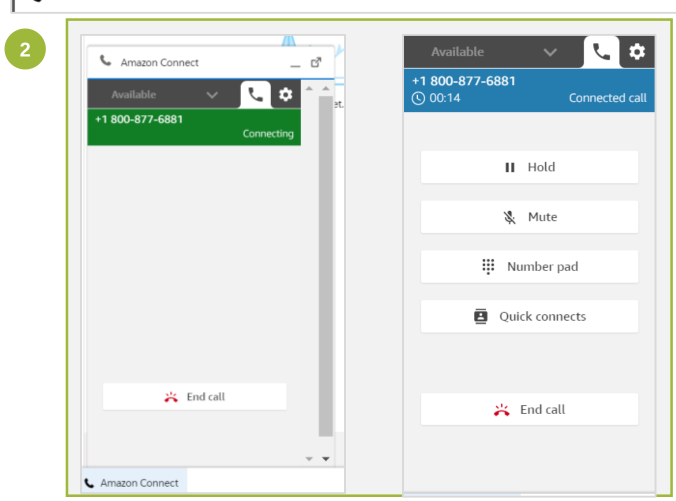
Completing an Initial Call to a Contact to a COVID-19 Case

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.

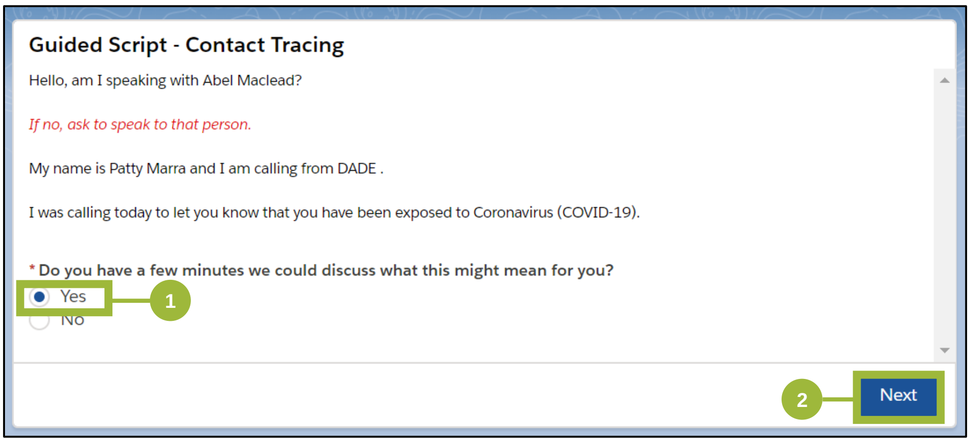




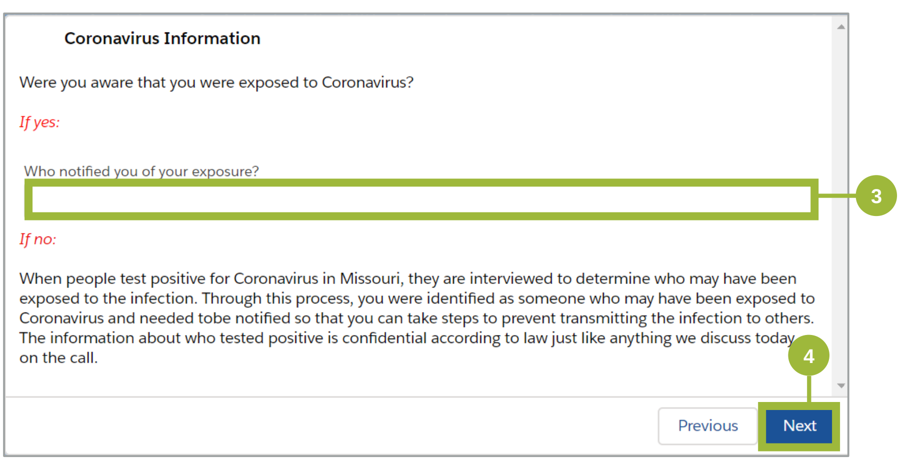
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Beginning the Call

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



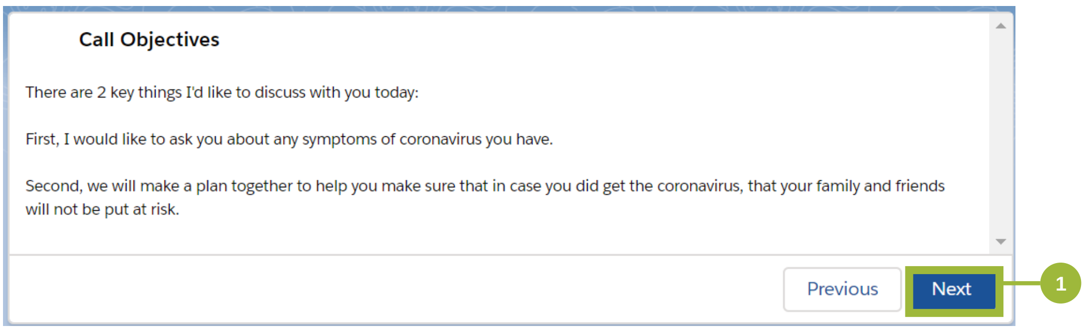
3. Read the script – if **yes**, enter who notified them of their exposure, if **no**, skip to the second script.
4. Click the **Next** button.



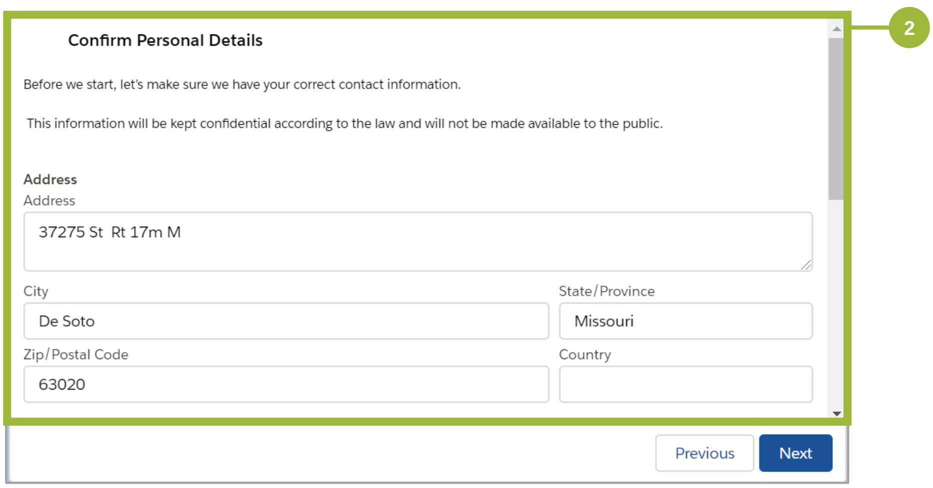
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Personal Details

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



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.



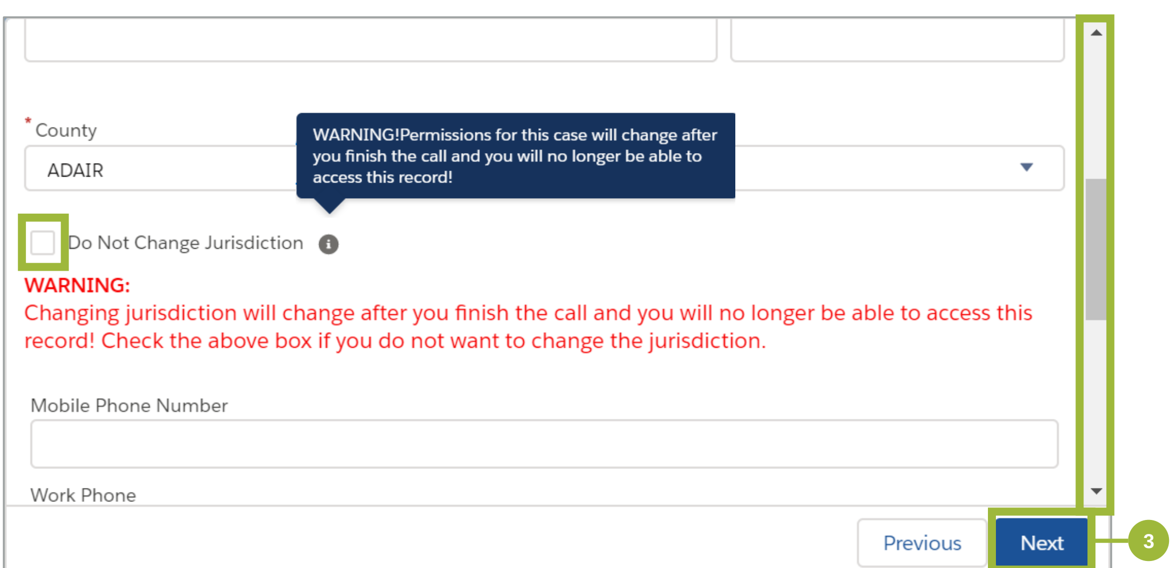
Completing an Initial Call to a Contact to a COVID-19 Case

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:

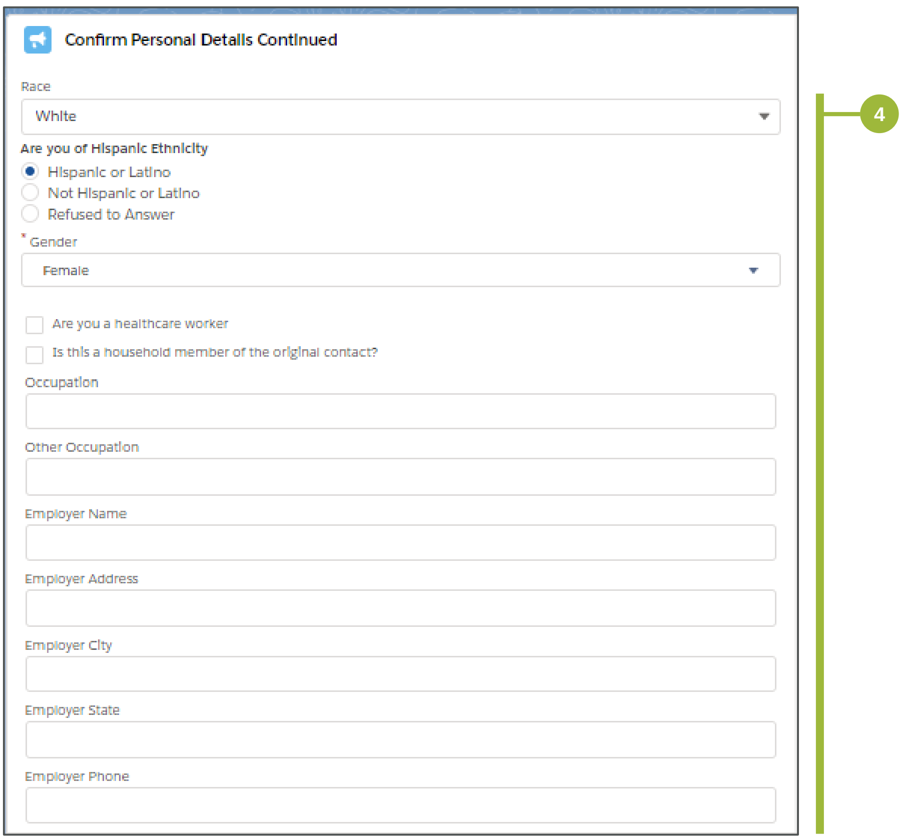
- **Permissions** for this case will change as well, preventing you from accessing this record after saving. The case will also disappear from the current queue once it is closed (e.g. once the call ends).
- If the jurisdiction that the case is assigned to does not have any users in the MO ACTS platform, 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.



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.

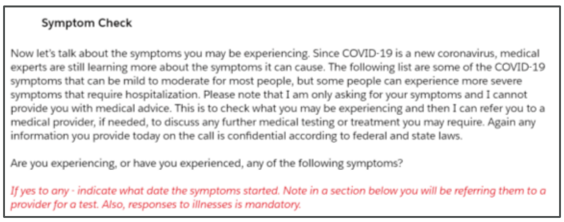


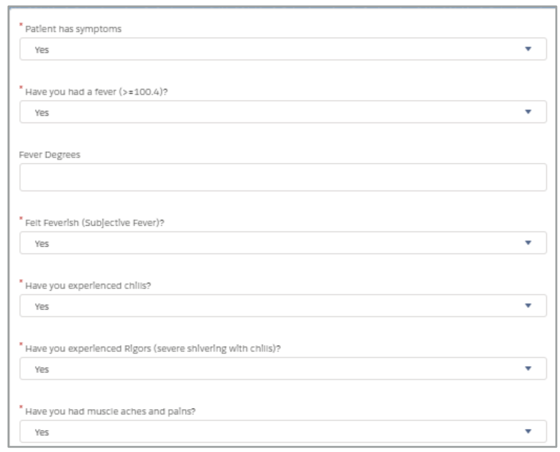
5. Click **Next.**

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

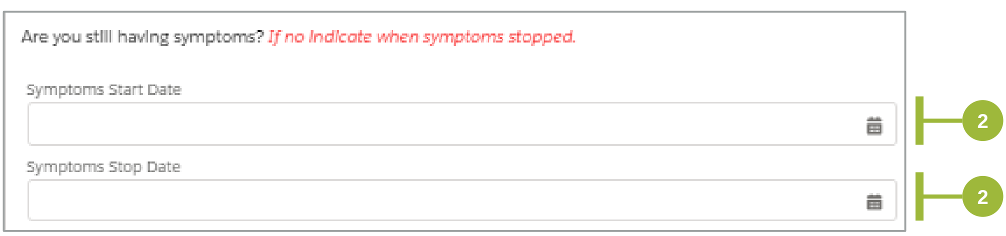
Guided Script | Symptom Check

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.





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.

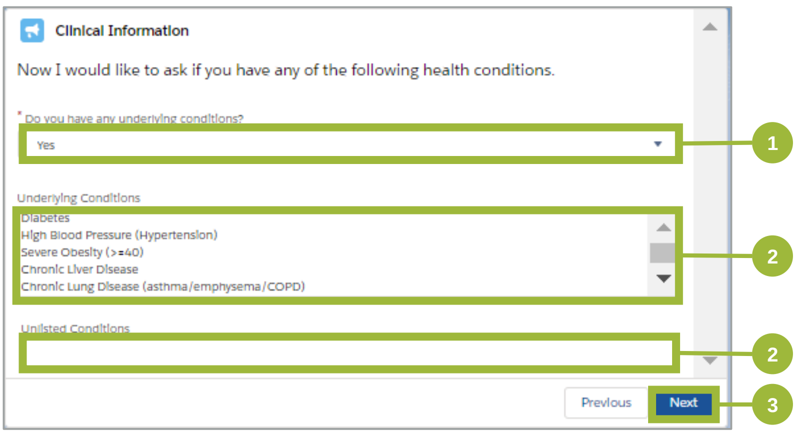


3. Click the **Next** button.

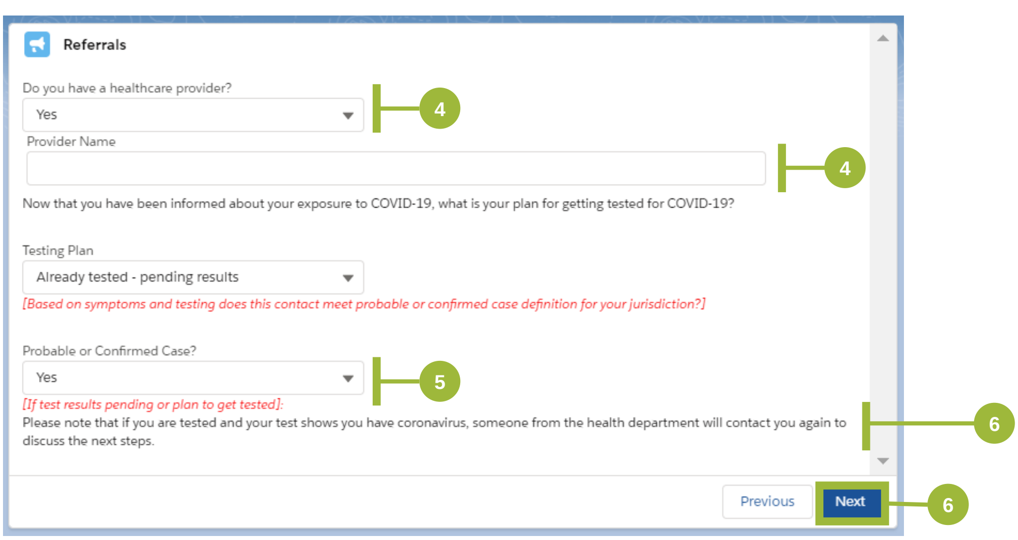
Completing an Initial Call to a Contact to a COVID-19 Case

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**.



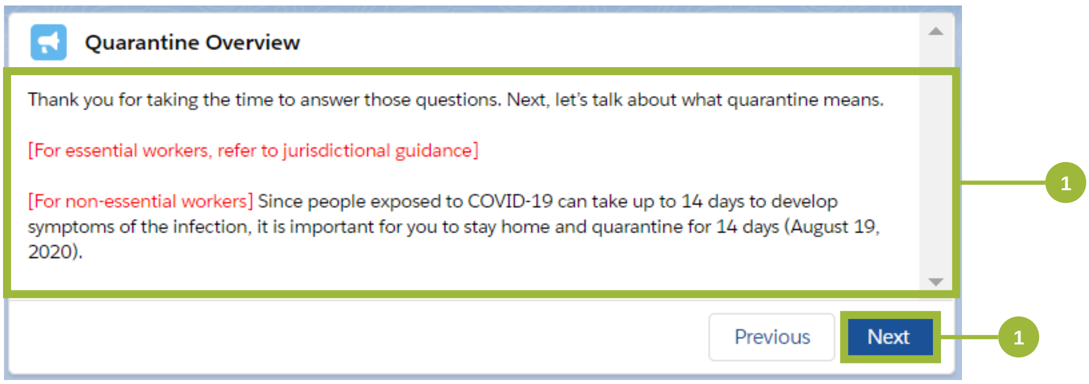
4. Read the **Referral section** script and capture if the contact has a healthcare provider and their testing status.
5. Based on the details provided, select Yes or No to indicate if this contact meets probably or confirmed case definition for your jurisdiction
6. Read the script at the bottom **if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



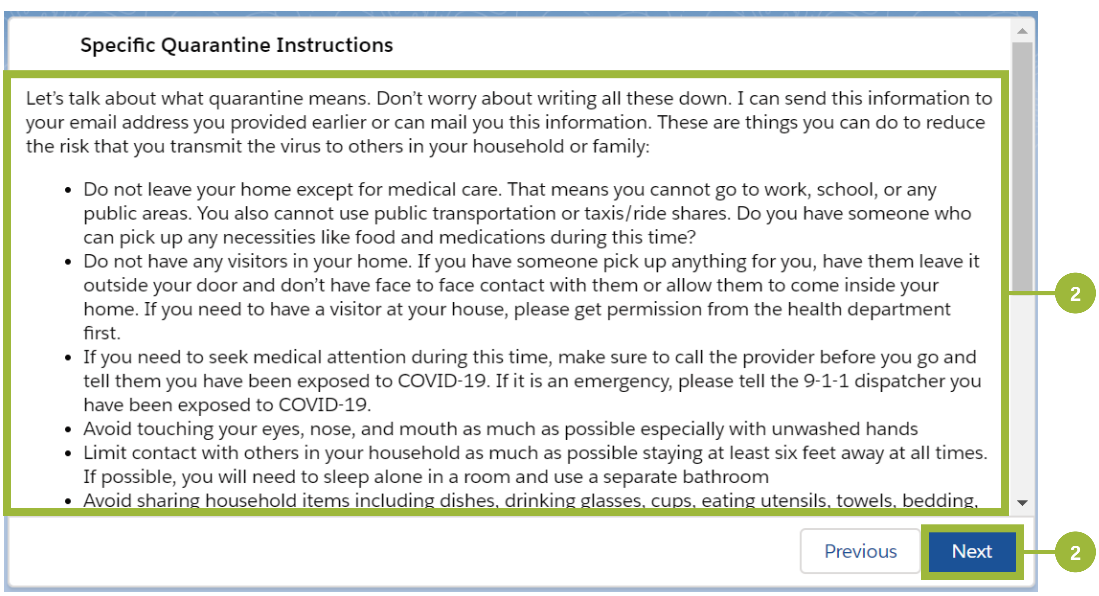
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Quarantine Overview & Specific Instructions

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



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

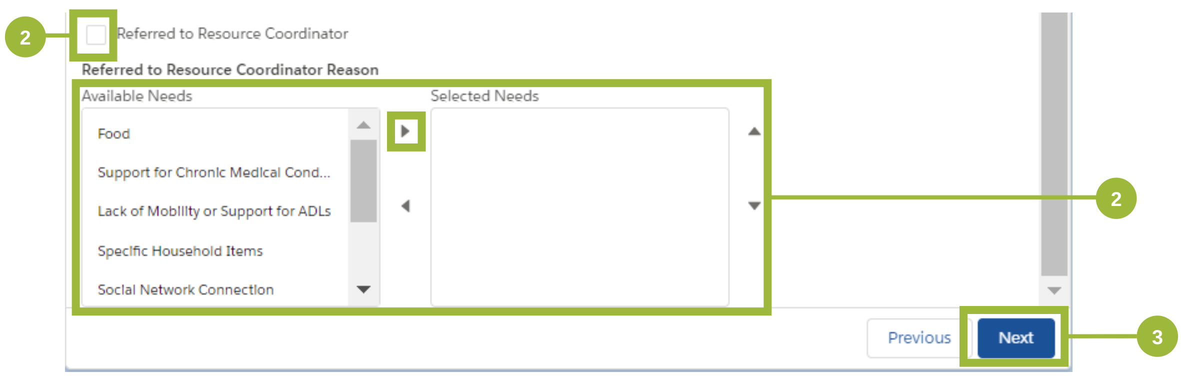
- Is more than 65 years old
- Has chronic conditions such as: diabetes, chronic kidney disease, chronic lung disease, liver disease, or cardiovascular disease
- Is immunocompromised (e.g. Cancer patients receiving chemotherapy, patients on immunosuppressant drugs)
- Has extreme obesity?
- Is on dialysis?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

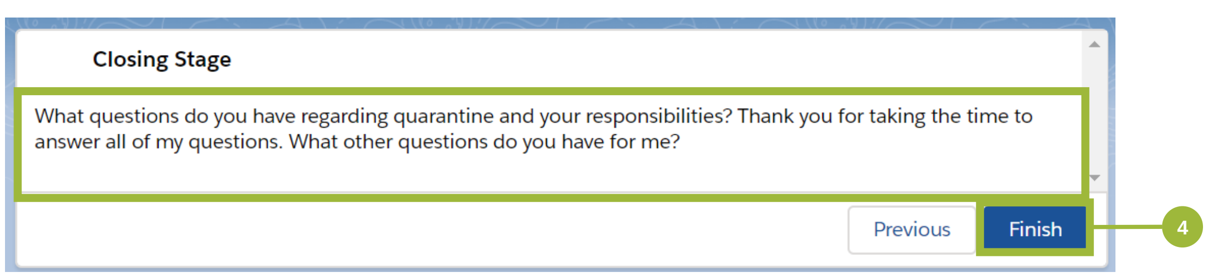
3. Click **Next**.



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**.



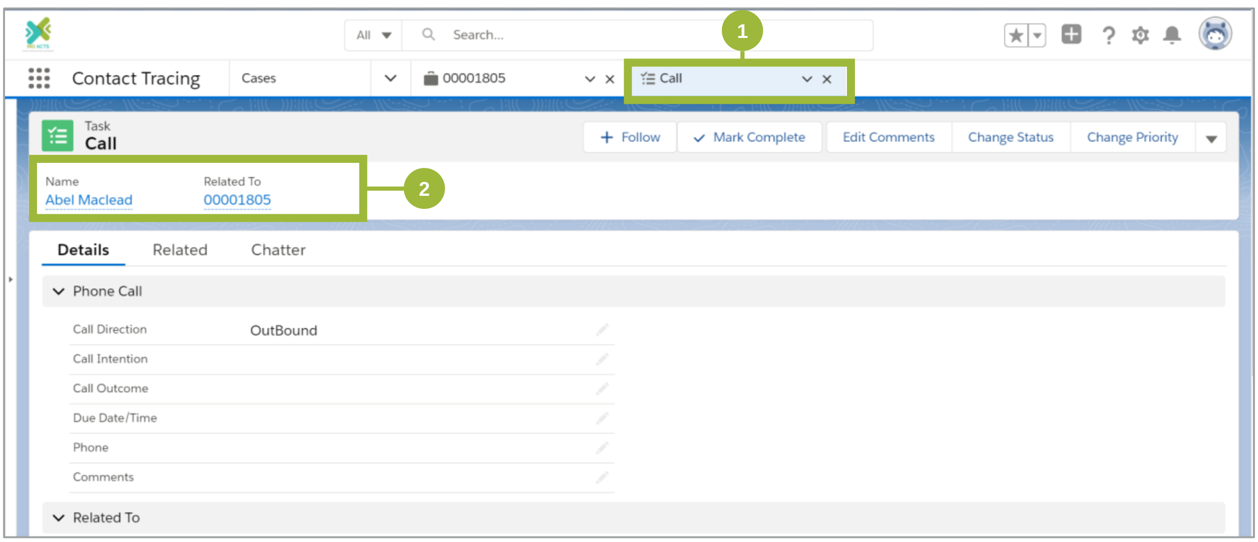
Note: We recommend asking the contact during the outreach process whether or not they would like to receive a SMS message to monitor their symptoms. To learn more about Automated Monitoring please refer to the Go Live Action Guide on the MO ACTS Intranet Site.

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

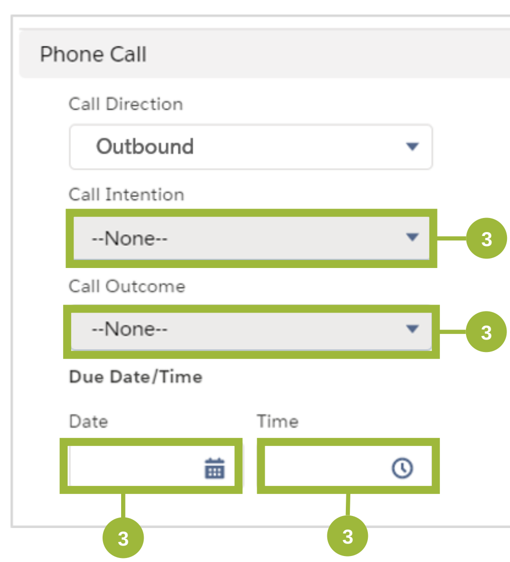
Logging the Call

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.



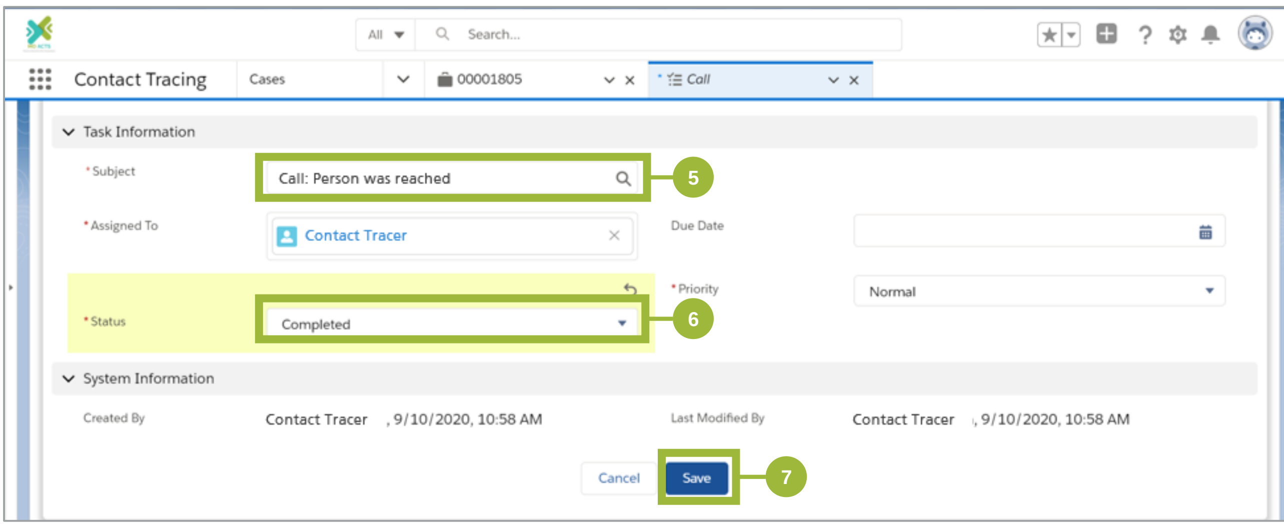
3. Complete the **Phone Call Details** by selecting the pencil icon to edit**.**



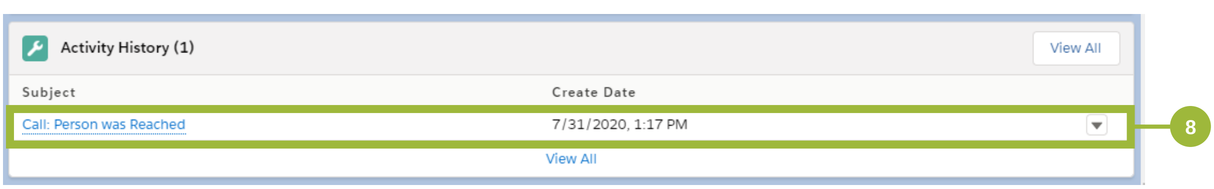
Call Direction: It will be auto-populated as Outbound.
Call Intention: Outbound Outreach Call
Call Outcome: Person was Reached
Due Date / Time: when placed your call

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.**



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

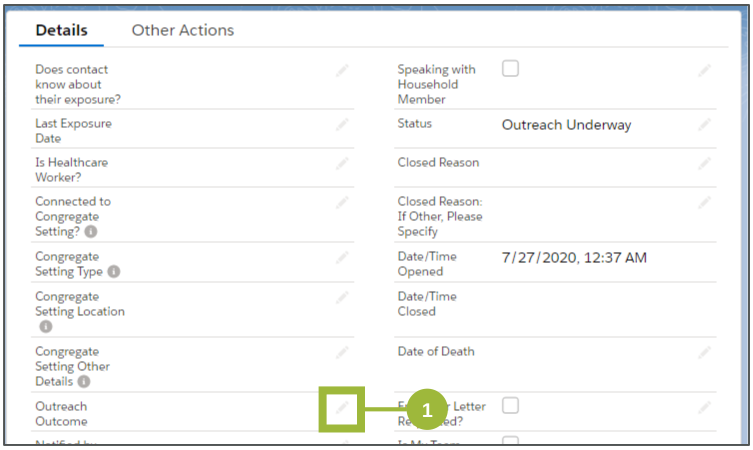


Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.

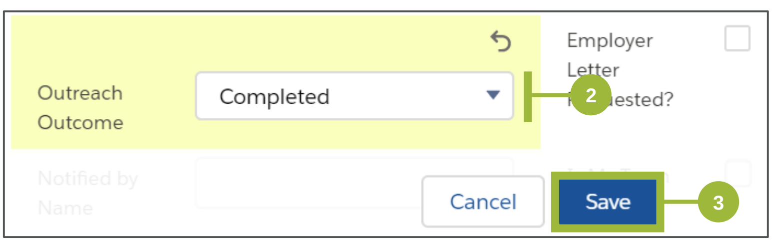
Completing an Initial Call to a Contact to a COVID-19 Case

Marking Case Outreach Complete

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



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

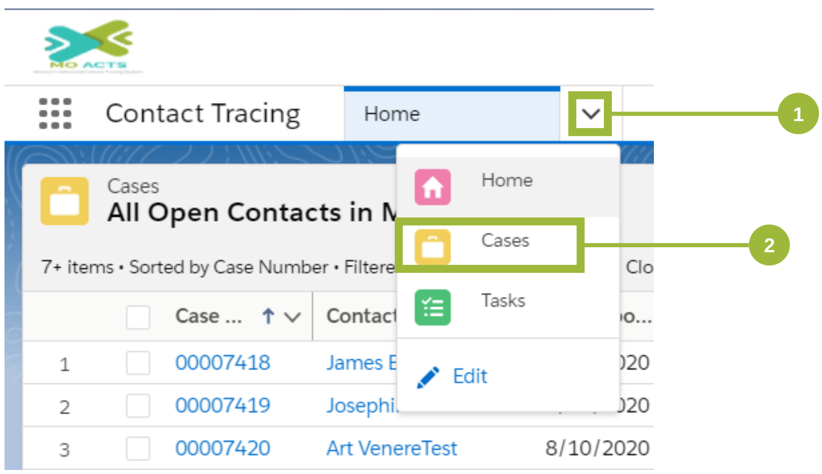
Job Aid

Leaving a Voicemail & Setting a Reminder to Call Back

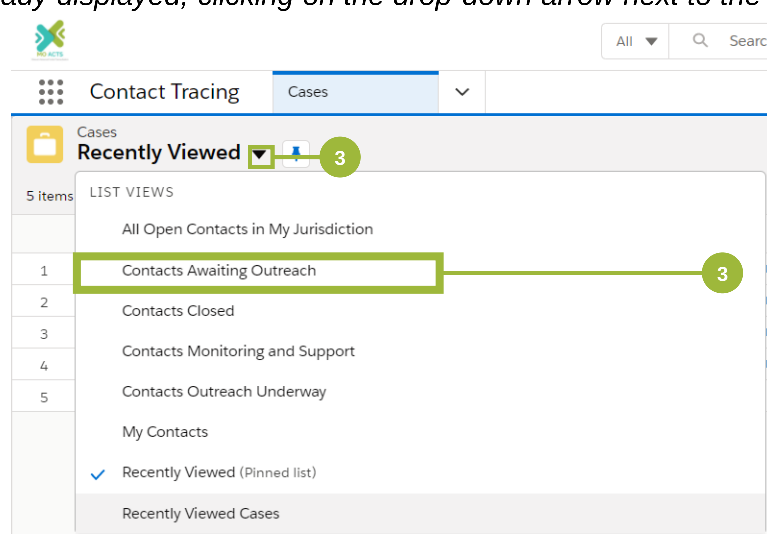
Leaving a Voicemail & Setting a Reminder to Call Back

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.



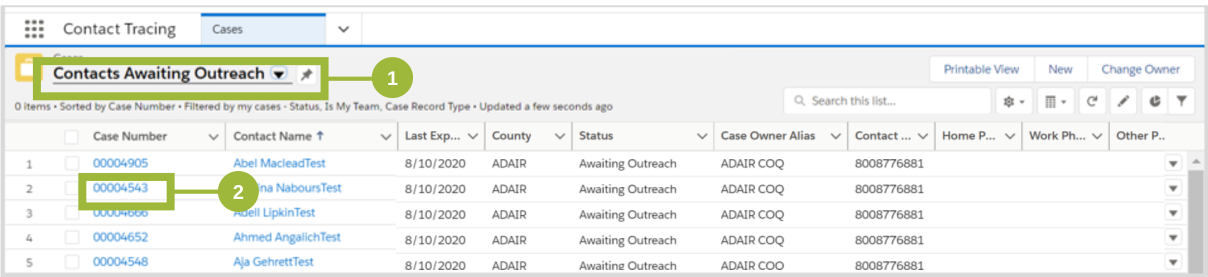
3. Open the **Contacts Awaiting Outreach queue** to view cases that are awaiting outreach. *If not already displayed, clicking on the drop-down arrow next to the queue name option*



Leaving a Voicemail & Setting a Reminder to Call Back

Preparing to Call

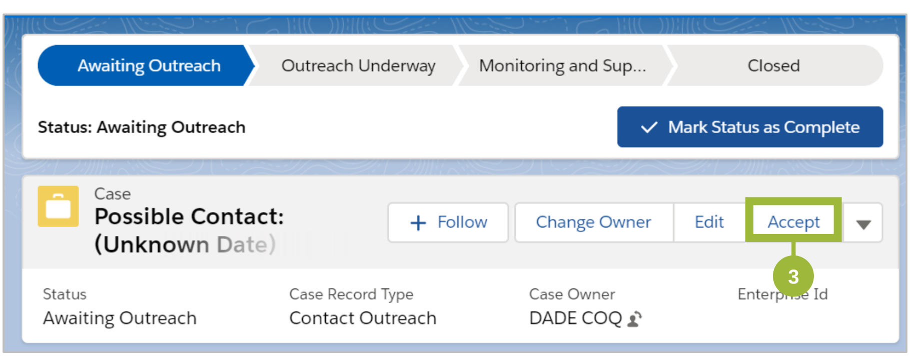
1. You will now see the **Contacts Awaiting Outreach queue**; this is the list of Contact to a COVID-19 Cases requiring outreach. Other Contact Tracers will also select from this list.
2. Click on any **Case Number** to open the Contact to a COVID-19 Case.



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.

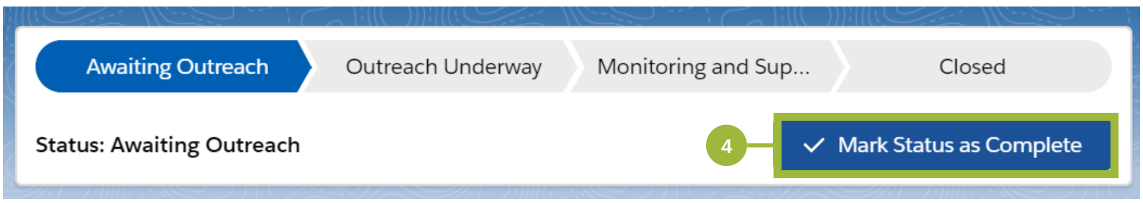
YOU MUST ACCEPT THE CASE BEFORE BEGINNING WORK ON IT.

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.

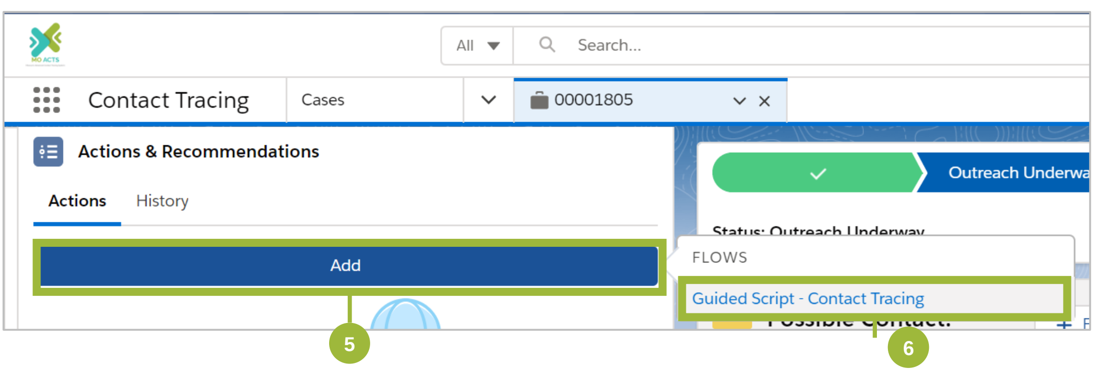


Leaving a Voicemail & Setting a Reminder to Call Back

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.

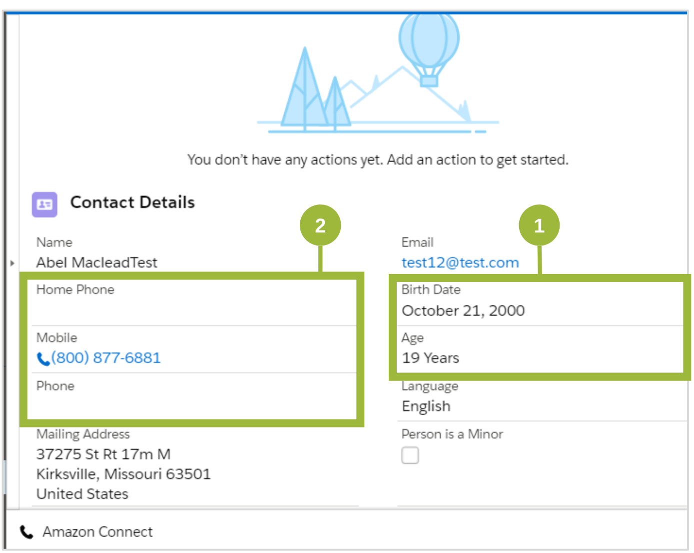


Leaving a Voicemail & Setting a Reminder to Call Back

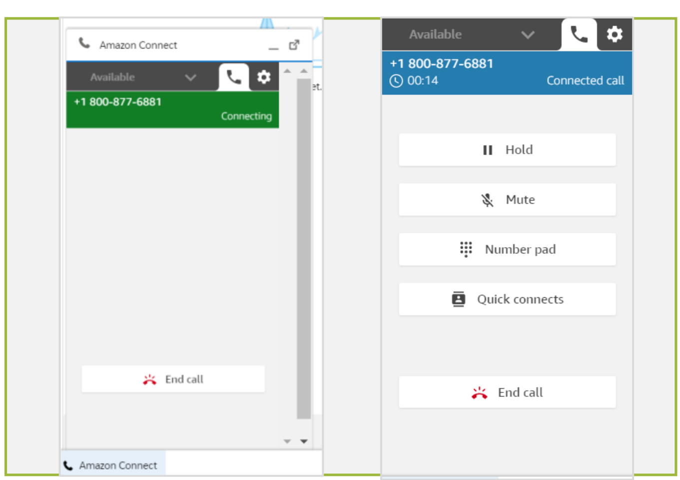
Contact Tracing Guided Script

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.

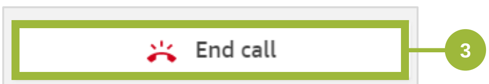


2

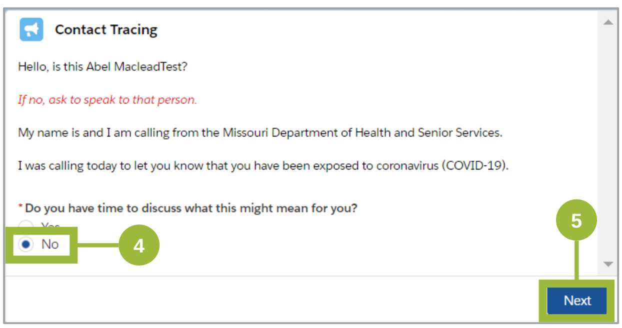


Leaving a Voicemail & Setting a Reminder to Call Back

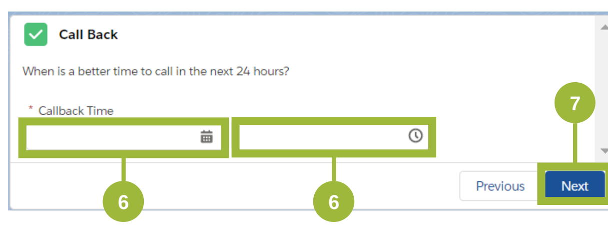
3. If the contact does not pick up - leave your voicemail (following any local guidance) and disconnect the call.



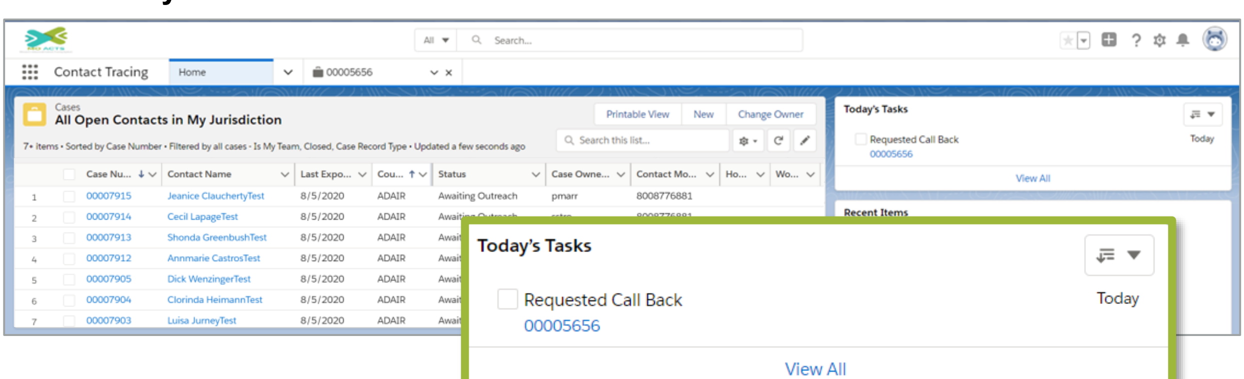
4. In the **Guided Script**, click on the **No** option.
5. Click on the **Next** button.



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”**

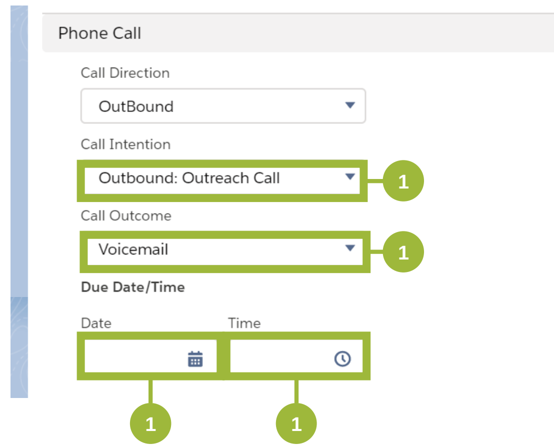


Leaving a Voicemail & Setting a Reminder to Call Back

Logging your Call

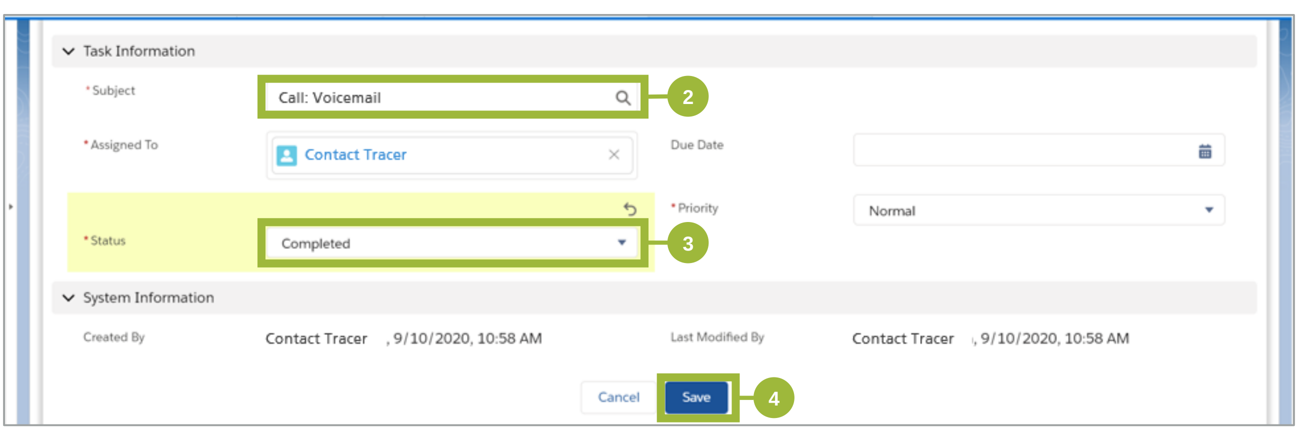
1. First, fill in the Phone Call section with details about the call you placed by clicking on the pencil icons:

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



   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.**



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

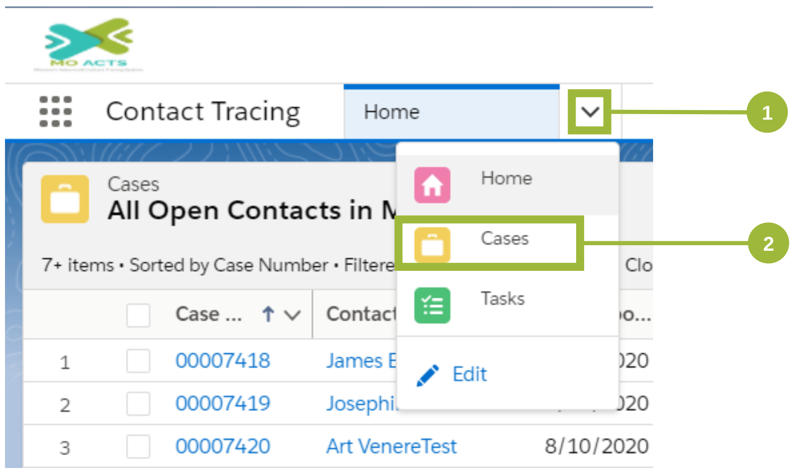
Missouri DHSS Department of Health and Senior Services

MO ACTS Missouri's Advanced Contact Tracing System

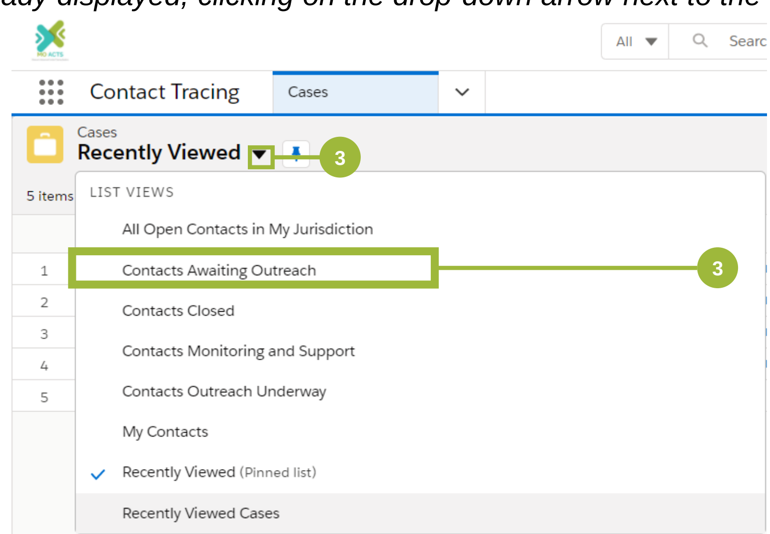
Completing a Call when the Contact to a COVID-19 Case is Unavailable

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.



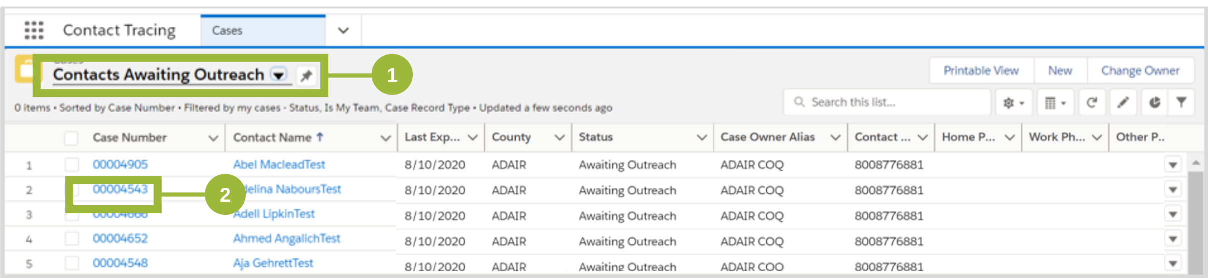
3. Open the **Contacts Awaiting Outreach queue** to view cases that are awaiting outreach. *If not already displayed, clicking on the drop-down arrow next to the queue name option*



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

Preparing to Call

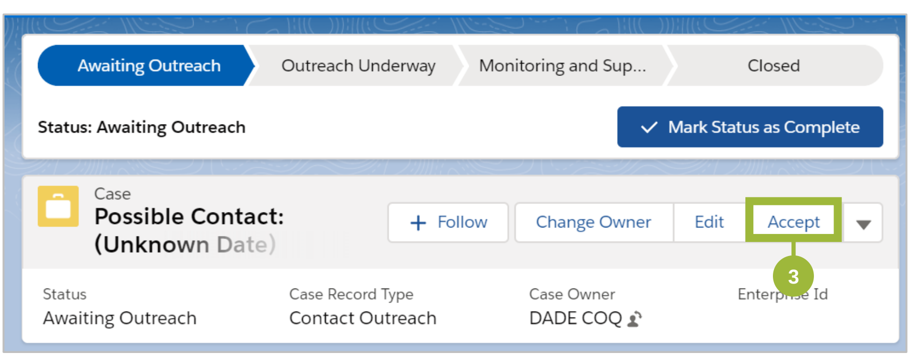
1. You will now see the **Contacts Awaiting Outreach queue**; this is the list of Contact to a COVID-19 Cases requiring outreach. Other Contact Tracers will also select from this list.
2. Click on any **Case Number** to open the Contact to a COVID-19 Case.



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.

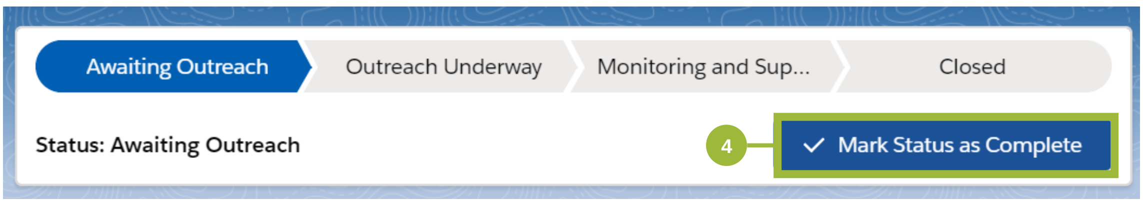
YOU MUST ACCEPT THE CASE BEFORE BEGINNING WORK ON IT.

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.

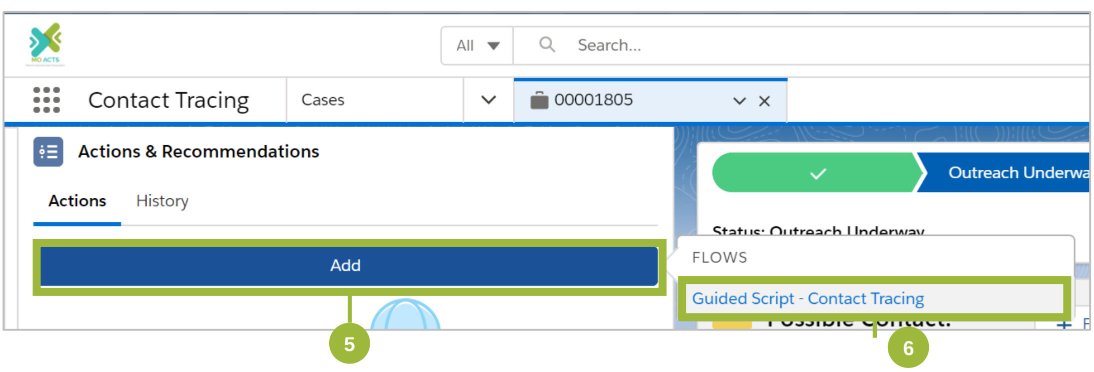


Completing a Call when the Contact to a COVID-19 Case is Unavailable

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.

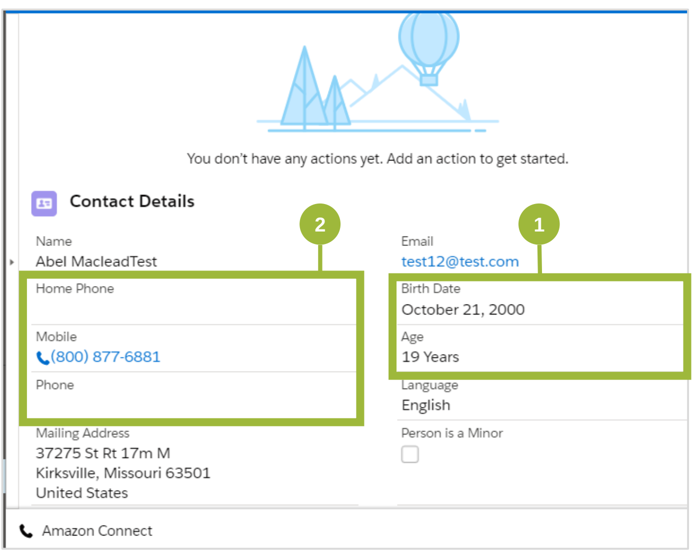


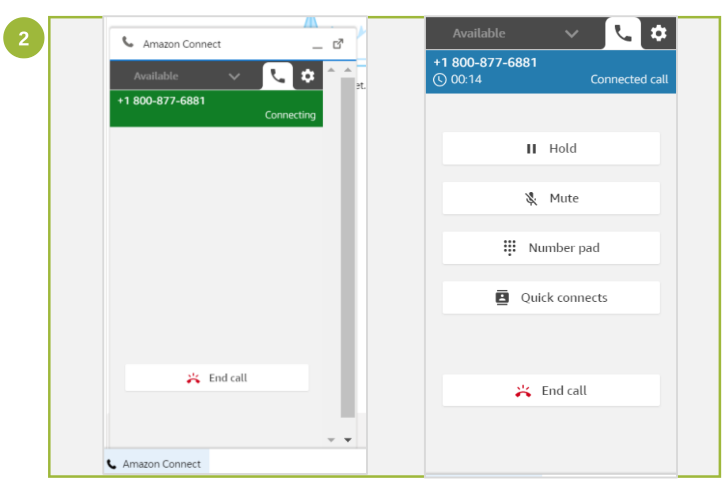
Completing a Call when the Contact to a COVID-19 Case is Unavailable

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.

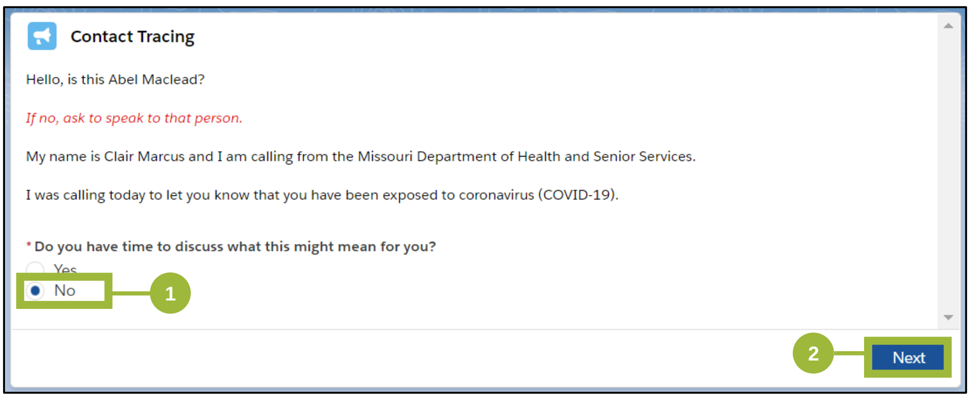




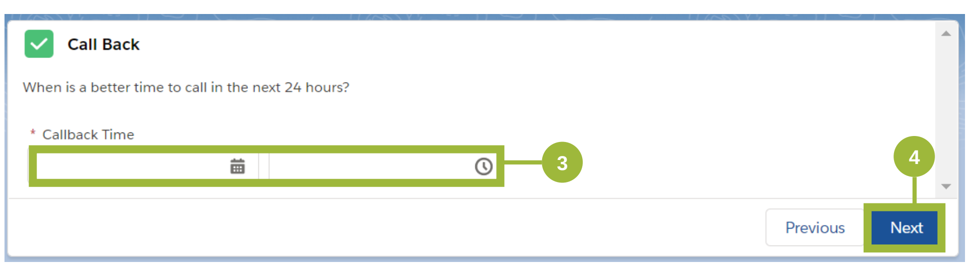
Completing a Call when the Contact to a COVID-19 Case is Unavailable

Guided Script | Beginning the Call

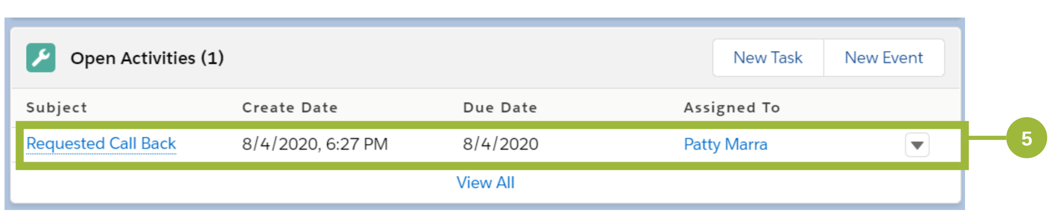
1. Read the script and click the **No** radio button.
2. Click the **Next** button.



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.



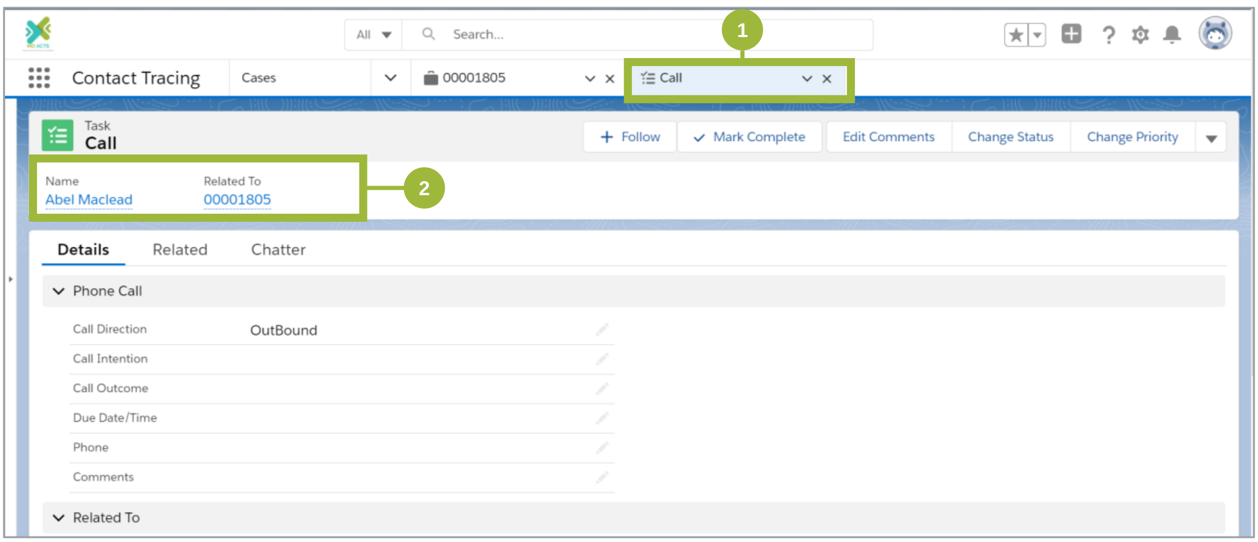
5. The call back shows in the **Open Activities** section



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

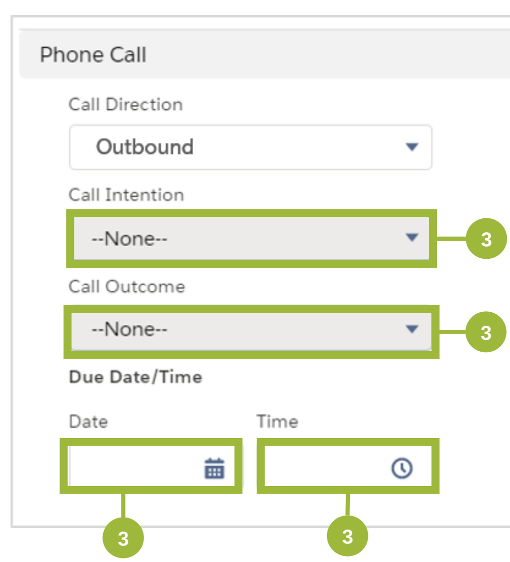
Logging the Call

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.



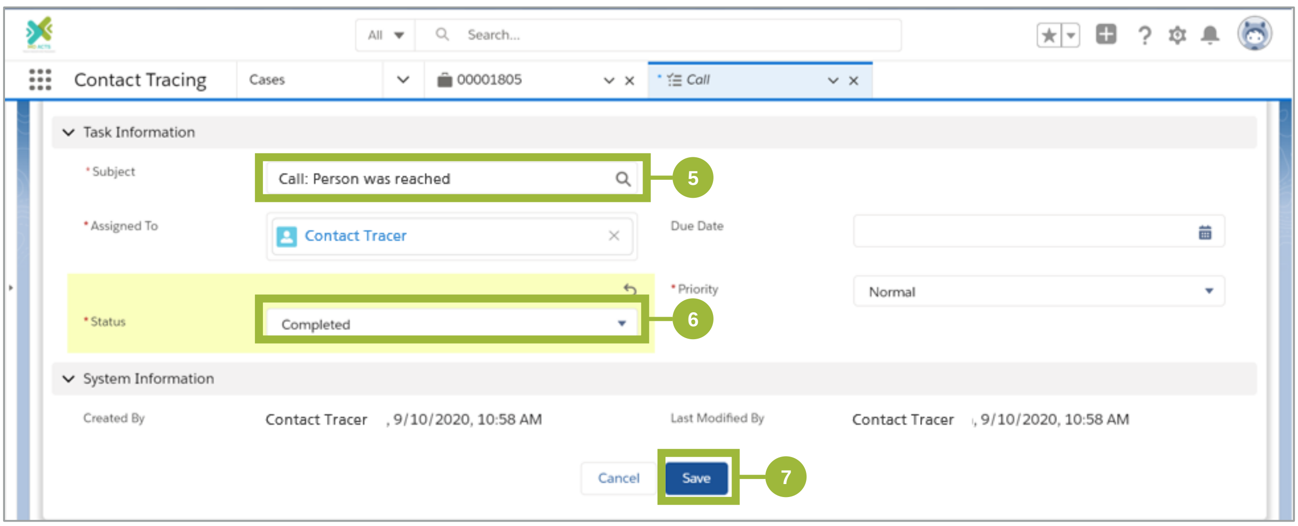
3. Complete the **Phone Call Details** by selecting the pencil icon to edit.

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

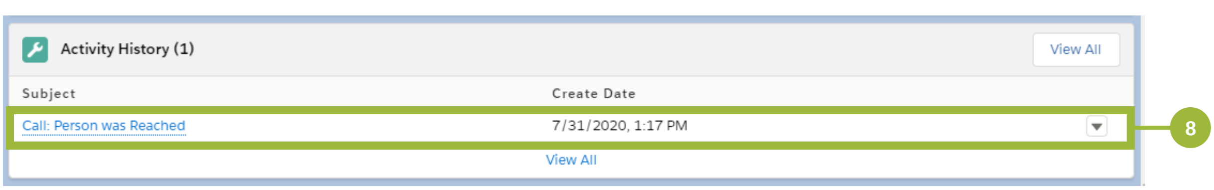


Completing a Call when the Contact to a COVID-19 Case is Unavailable

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.**



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.

Job Aid

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

Missouri DHSS Department of Health and Senior Services

MO ACTS 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:

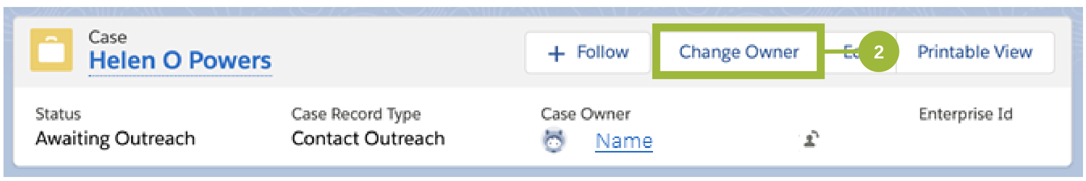
- The Contact to a COVID-19 Case has not answered your calls after several attempts
- You were able to reach the Contact to a COVID-19 Case and start the monitoring process with them, but now the Contact to a COVID-19 Case is unreachable
- The Contact to a COVID-19 Case has asked for more information 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.

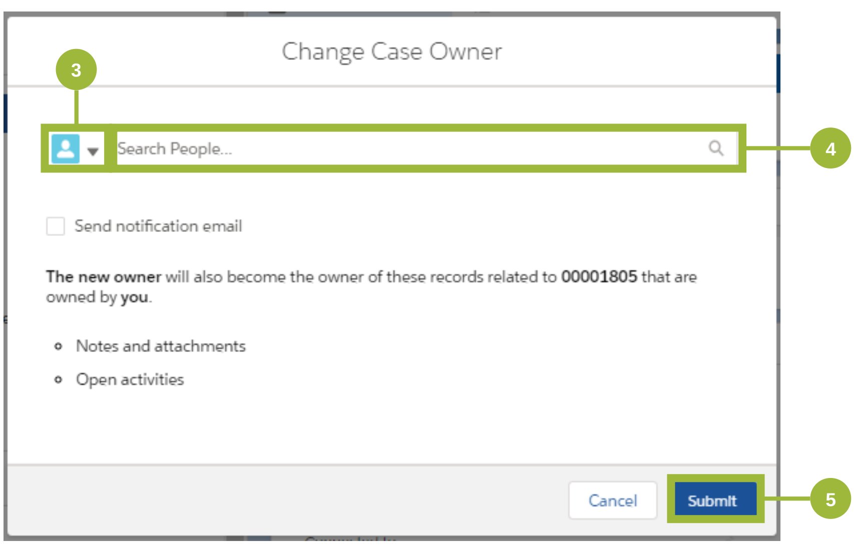
2. In the **Case** section on the right side of the screen, click the **Change Owner** button.



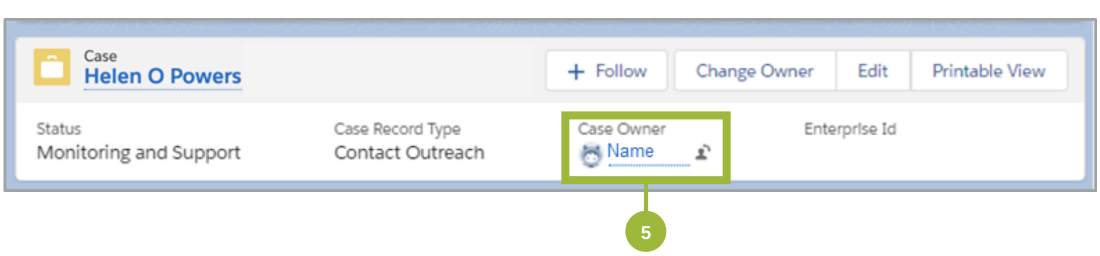
3. In the popup, select the person icon to reassign the case to another colleague, or the queue icon to assign it to a queue.

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**.



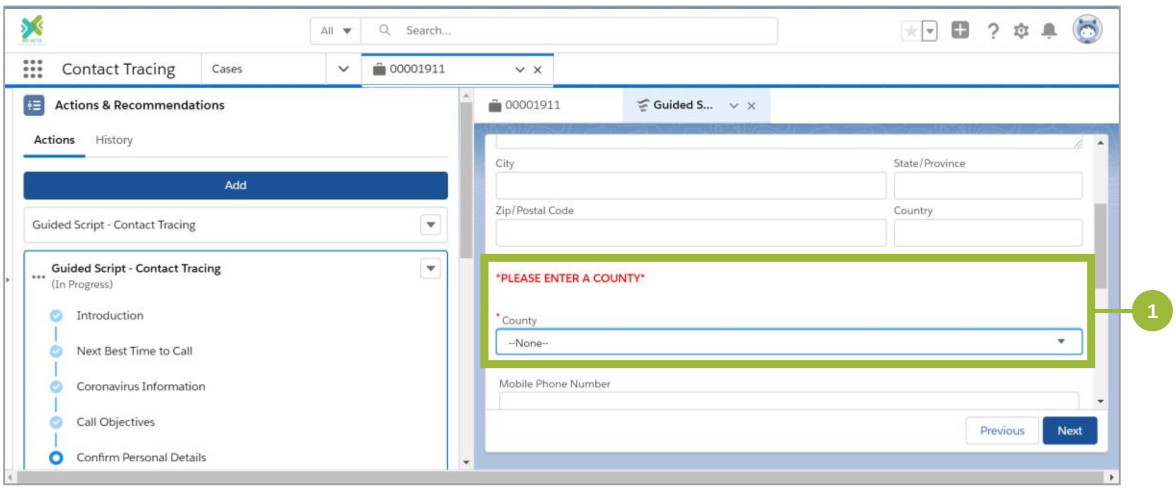
6. The case details show the new **Case Owner**.

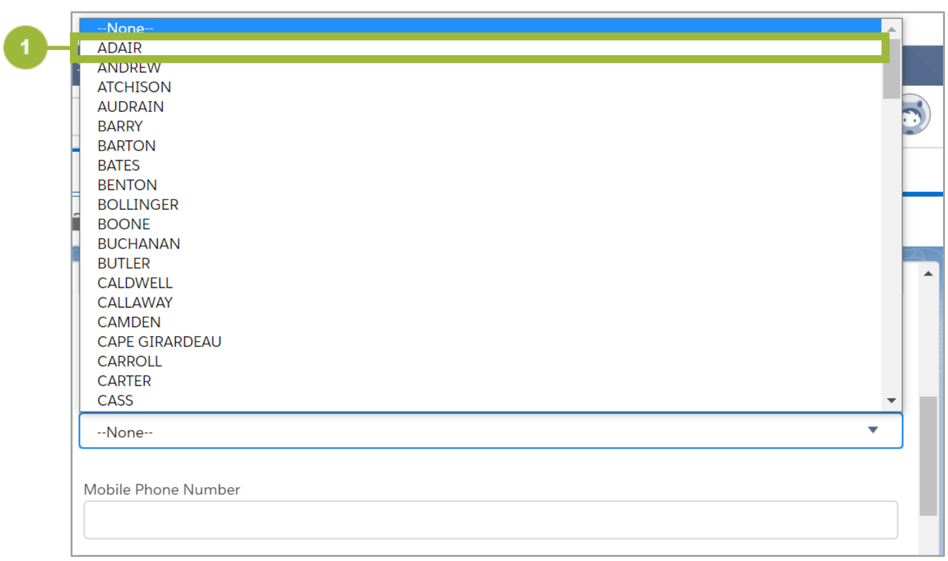


Reassigning a Contact to a COVID-19 Case to a New Owner – Option 2

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.

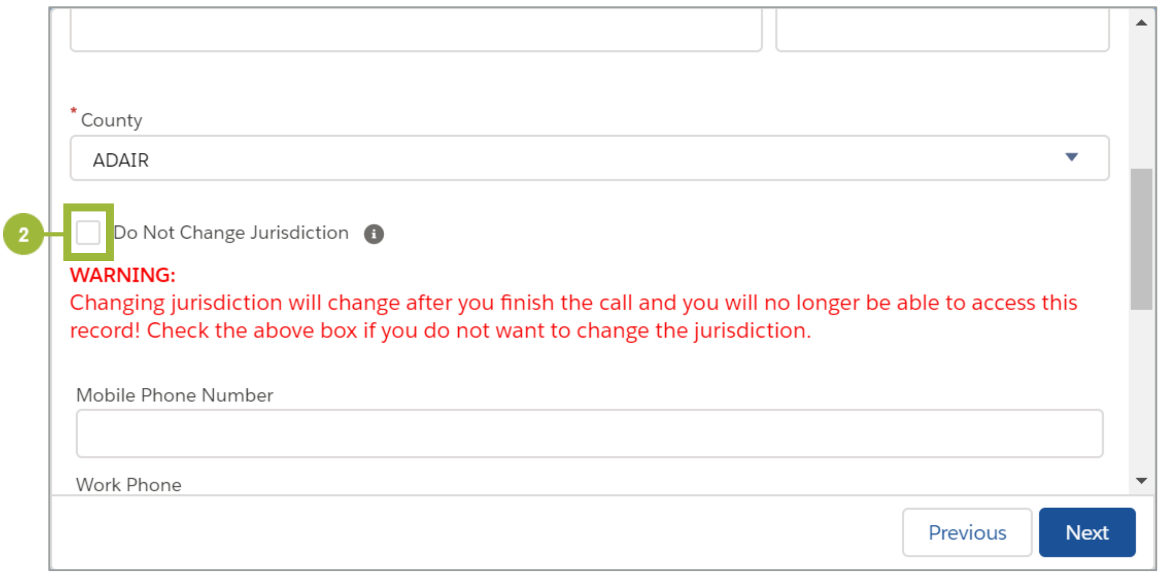




Reassigning a Contact to a COVID-19 Case to a New Owner – Option 2

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.



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

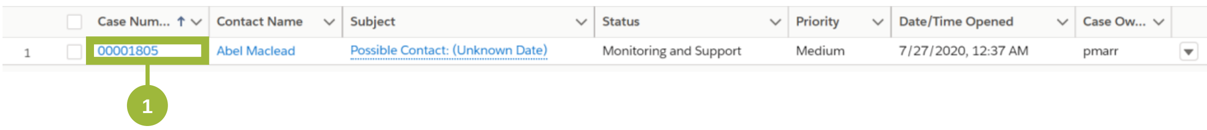
Missouri
DHSS
Department of Health and Senior Services

MO ACTS
Missouri's Advanced Contact Tracing System

Completing Monitoring for a Contact to a COVID-19 Case

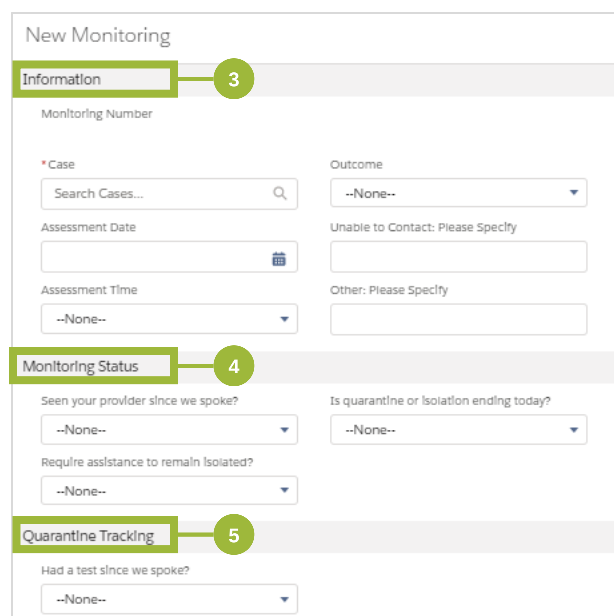
Open New Monitoring Activity

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



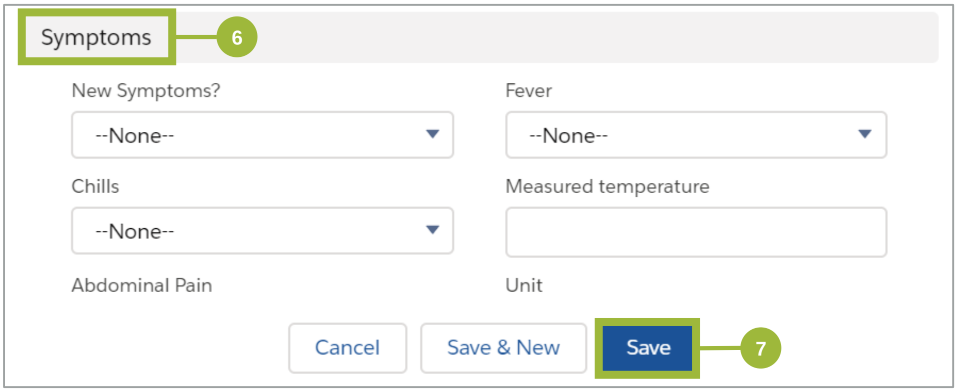
2. Scroll down to the **Monitoring** section in the **Detail pane** on the right side of the screen and click the **New** button.

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.**

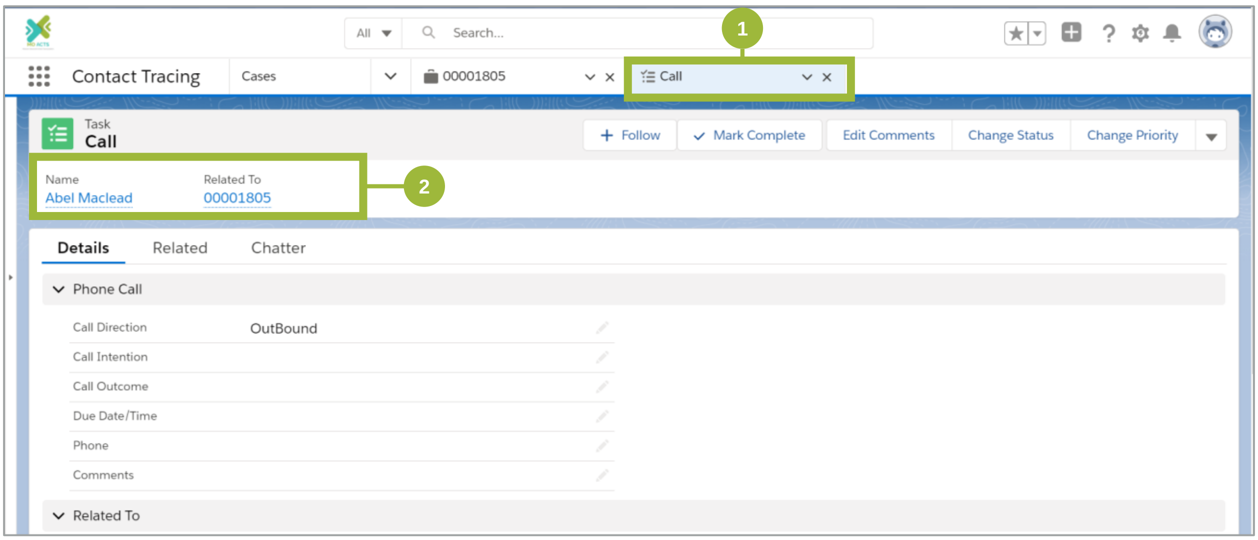


Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.

Completing Monitoring for a Contact to a COVID-19 Case

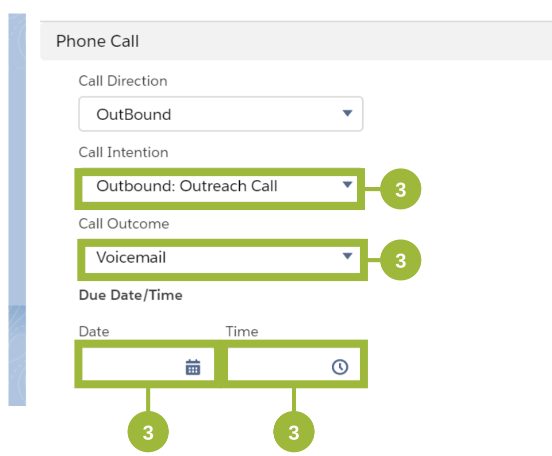
Logging the Call

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.



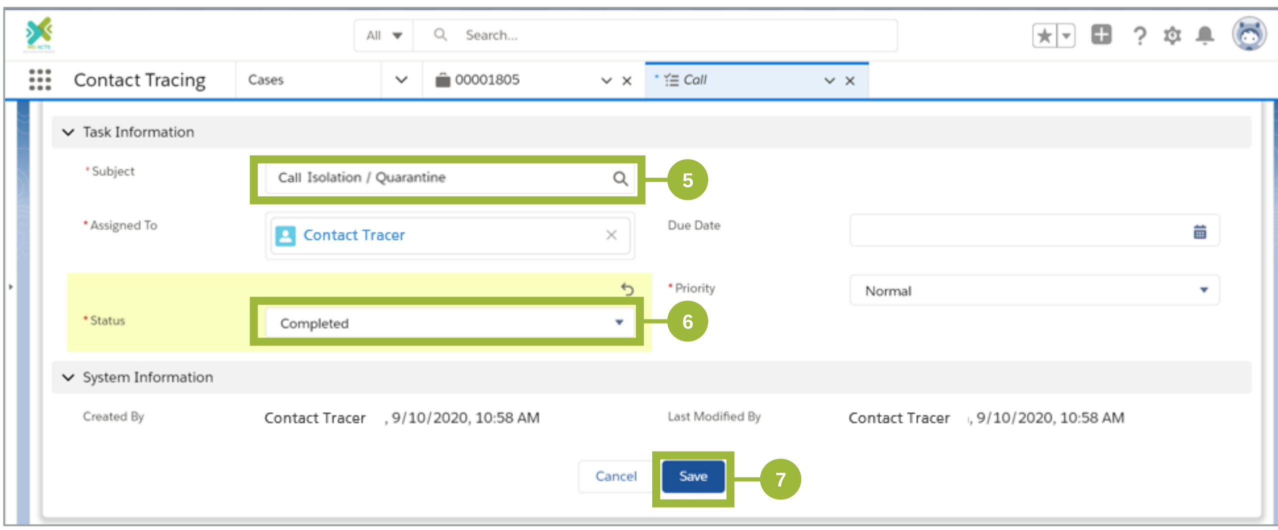
3. Complete the **Phone Call Details** by selecting the pencil icon to edit.

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.**



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.

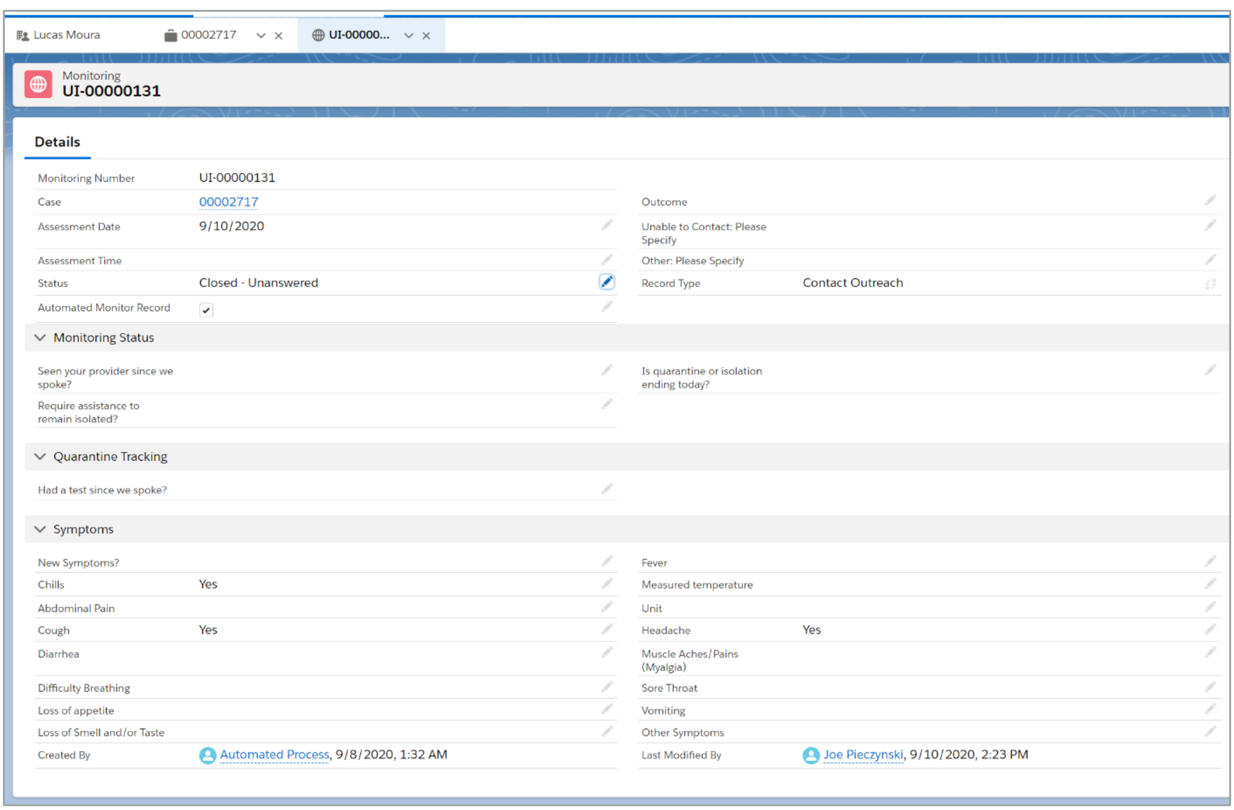
Completing Monitoring for a Contact to a COVID-19 Case

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.



Lucas Moura | 00002717 | UI-00000...

Monitoring
UI-00000131

Details

Monitoring Number	UI-00000131		
Case	00002717	Outcome	
Assessment Date	9/10/2020	Unable to Contact: Please Specify	
Assessment Time		Other: Please Specify	
Status	Closed - Unanswered	Record Type	Contact Outreach
Automated Monitor Record	✓		

Monitoring Status

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

Quarantine Tracking

Had a test since we spoke?	

Symptoms

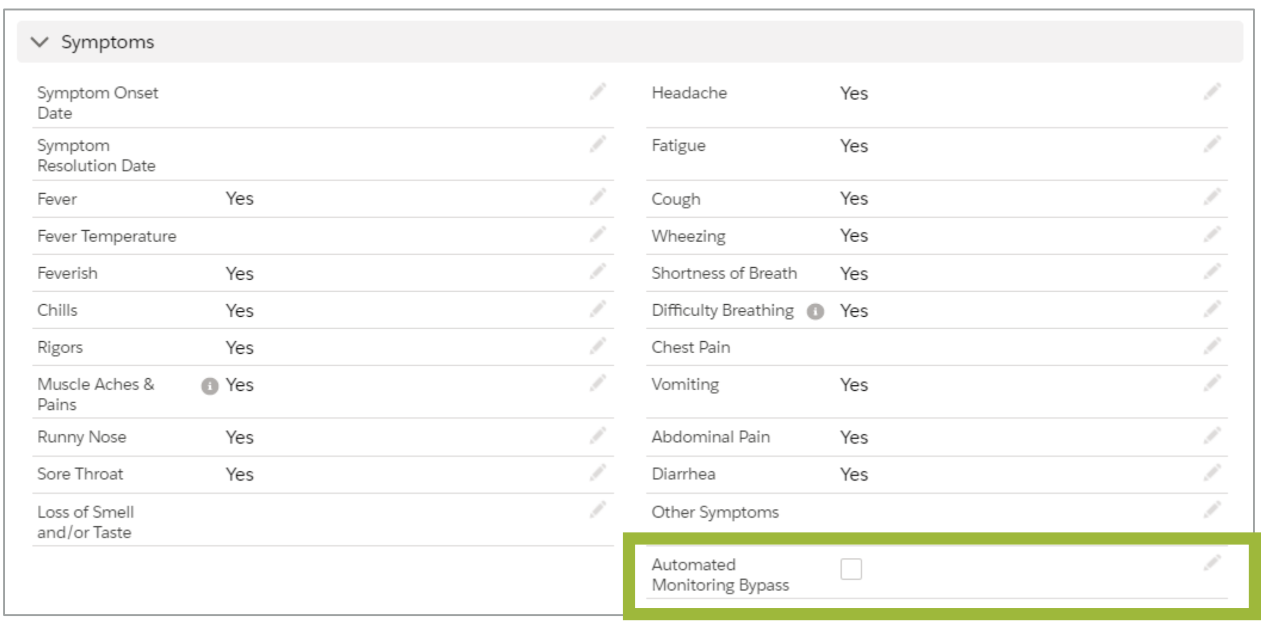
New Symptoms?		Fever	
Chills	Yes	Measured temperature	
Abdominal Pain		Unit	
Cough	Yes	Headache	Yes
Diarrhea		Muscle Aches/Pains (Myalgia)	
Difficulty Breathing		Sore Throat	
Loss of appetite		Vomiting	
Loss of Smell and/or Taste		Other Symptoms	
Created By	Automated Process, 9/8/2020, 1:32 AM	Last Modified By	Joe Pieczynski, 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.



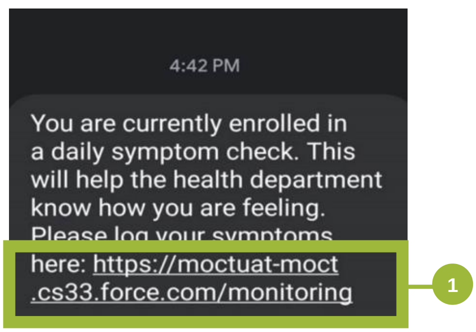
Symptoms

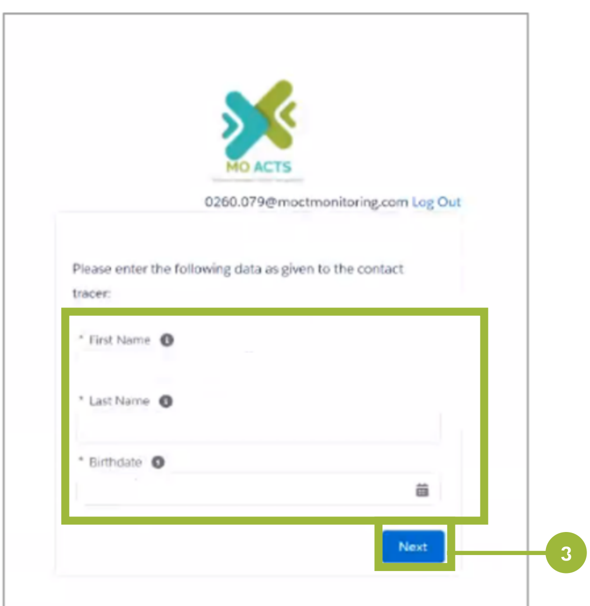
Symptom Onset Date		Headache	Yes
Symptom Resolution Date		Fatigue	Yes
Fever	Yes	Cough	Yes
Fever Temperature		Wheezing	Yes
Feverish	Yes	Shortness of Breath	Yes
Chills	Yes	Difficulty Breathing	Yes
Rigors	Yes	Chest Pain	
Muscle Aches & Pains	Yes	Vomiting	Yes
Runny Nose	Yes	Abdominal Pain	Yes
Sore Throat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

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.

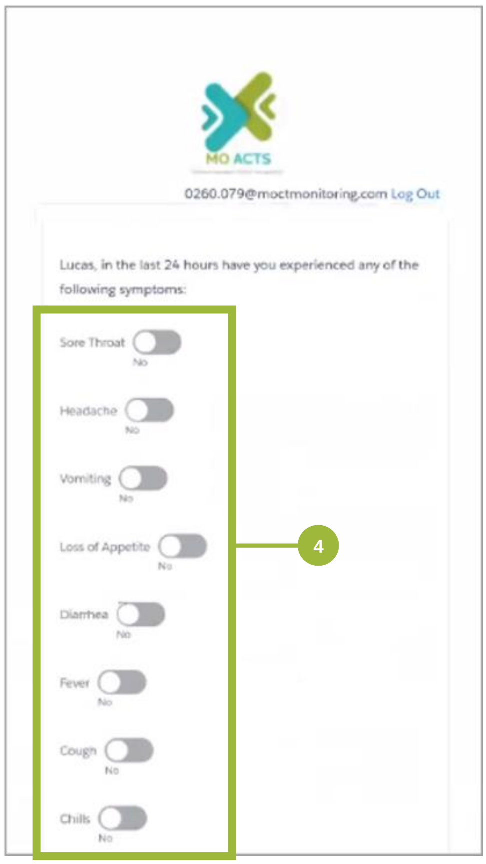
1. The contact will receive the SMS message at **9 AM CST** every day during the quarantine period.
2. The contact will click the link, and then will need to select **Sign Up** for their first-time logging in. If not, they will receive an error message.
3. Once signed up and authenticated, they will 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

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



Job Aid

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

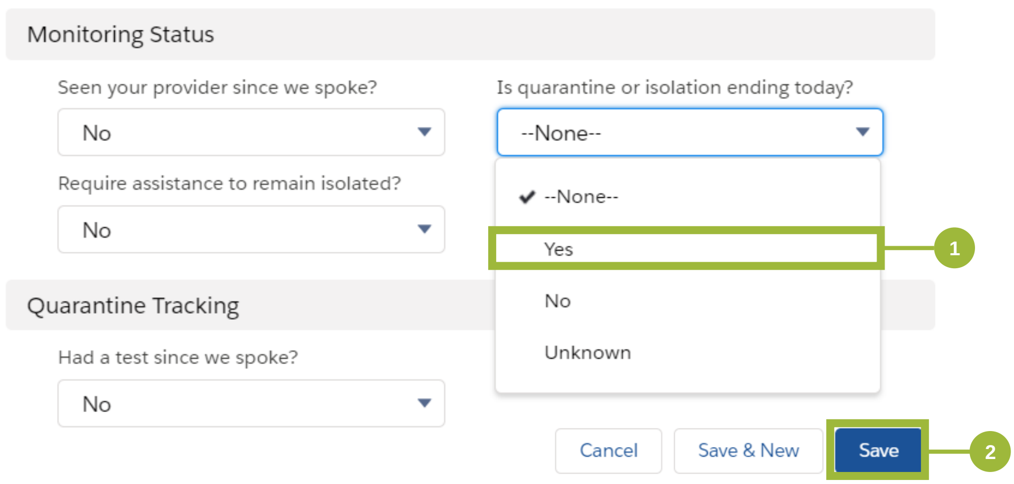
Missouri DHSS Department of Health and Senior Services

MO ACTS
Missouri's Advanced Contact Tracing System

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

Closing a Case After Final Monitoring

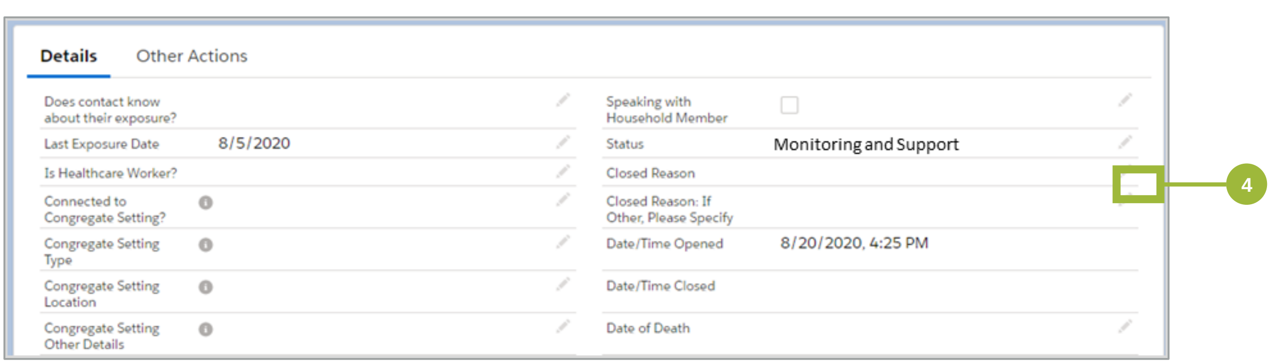
1. While completing your monitoring call, if you identify that your Contact to a COVID-19 Case meets the criteria for ending quarantine, you will say, **“Your quarantine has ended.”** and select **Yes** in the **“Is quarantine or isolation ending today?”** field.
2. Click **Save.**



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.

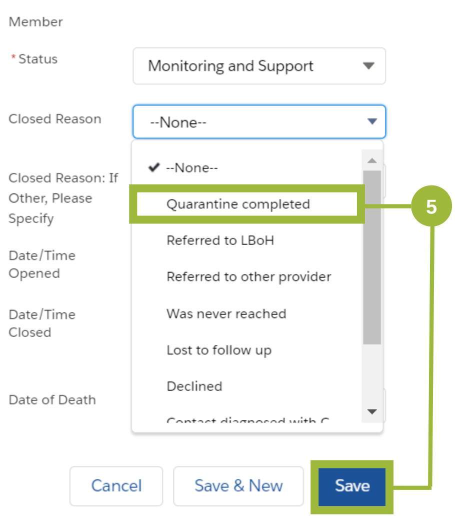
4. Scroll to the top of the Details section and locate the **Closed Reason** field. Click the **pencil** to edit it.



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

Closing a Case After Final Monitoring

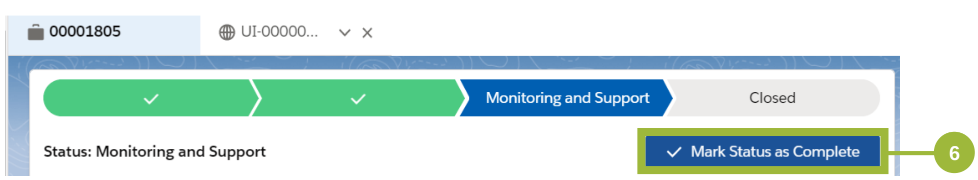
5. Select **Quarantine Completed** as the **Closed Reason** and click the **Save** button.

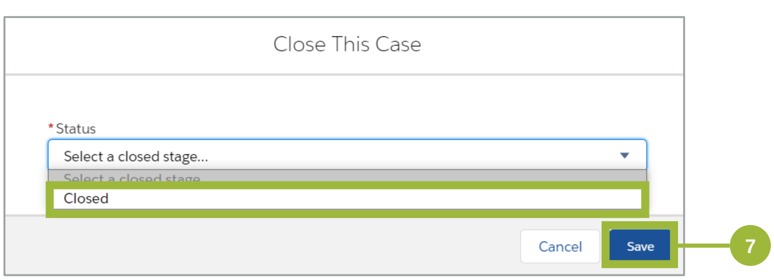


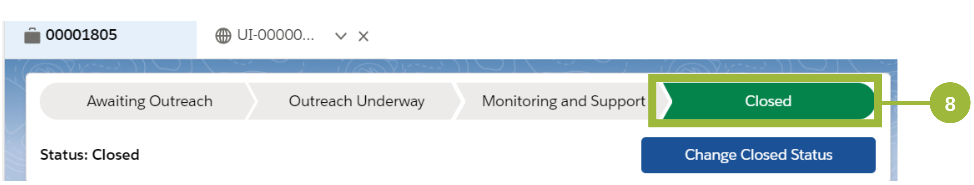
Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.

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.**



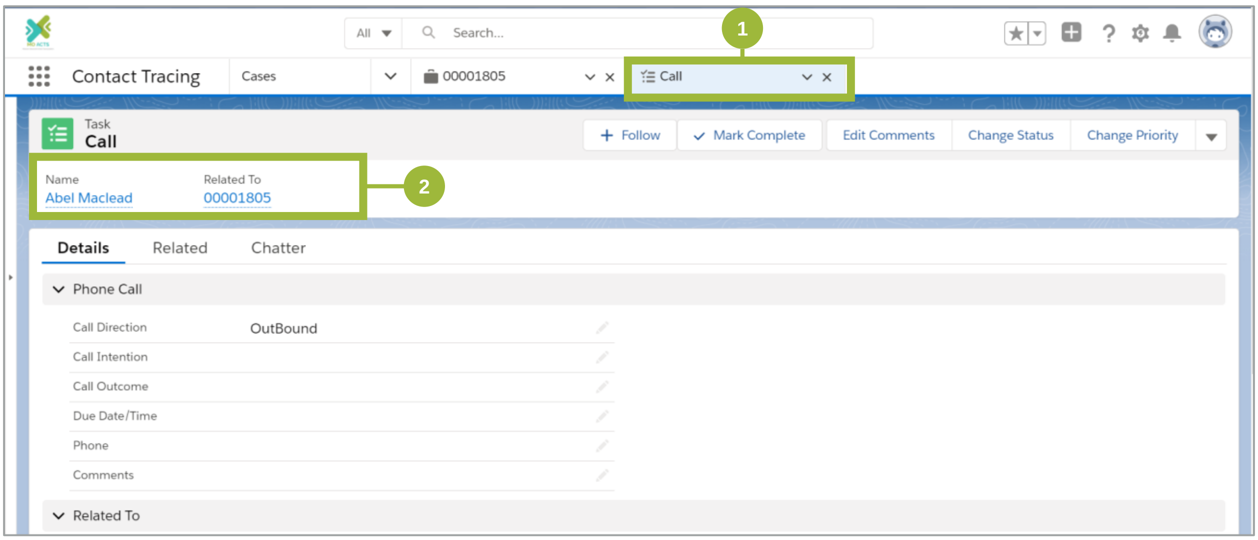




Completing End of Quarantine for a Contact to a COVID-19 Case

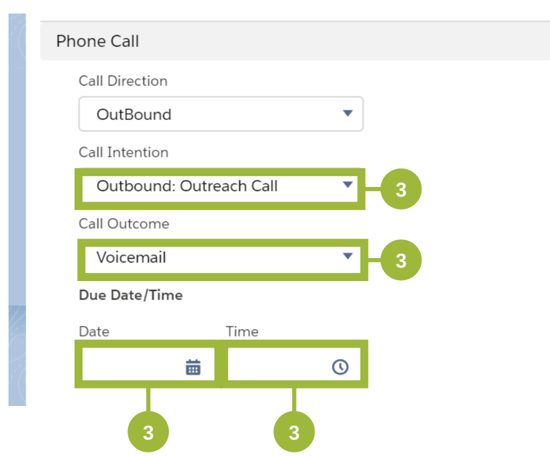
Logging the Call

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.



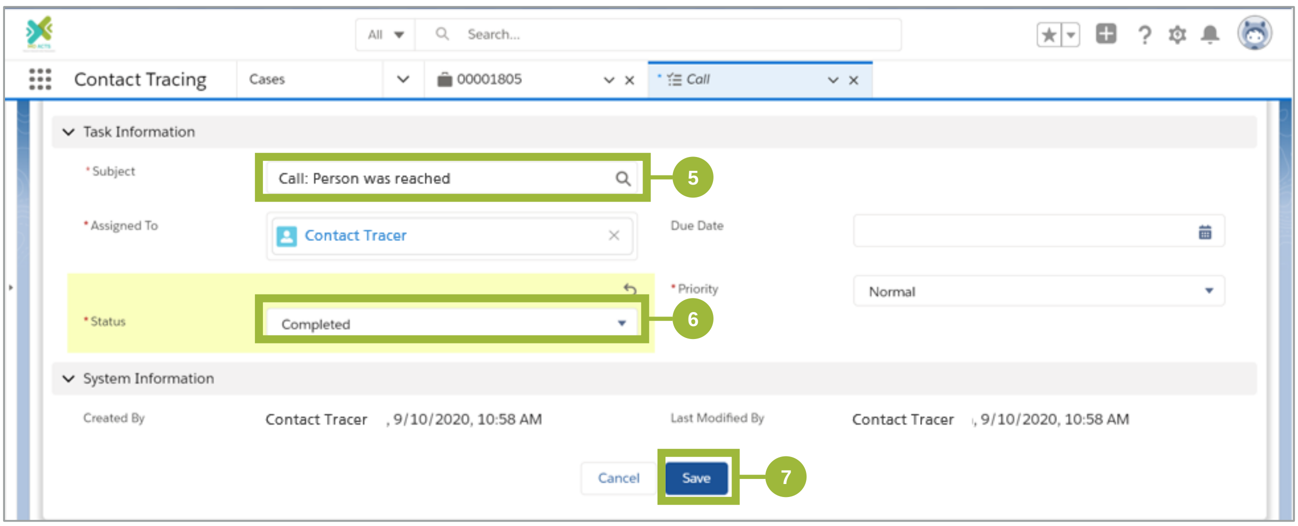
3. Complete the **Phone Call Details** by selecting the pencil icon to edit**.**

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

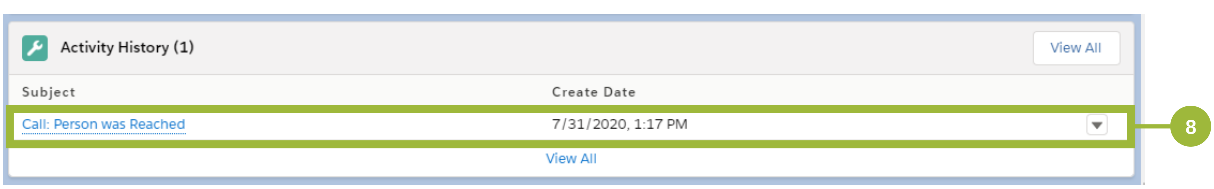


Completing End of Quarantine for a Contact to a COVID-19 Case

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.**



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.

Job Aid

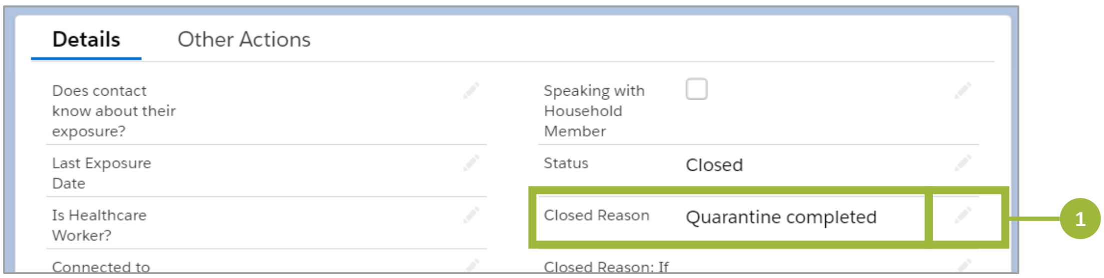
Reopening a Case

MO ACTS

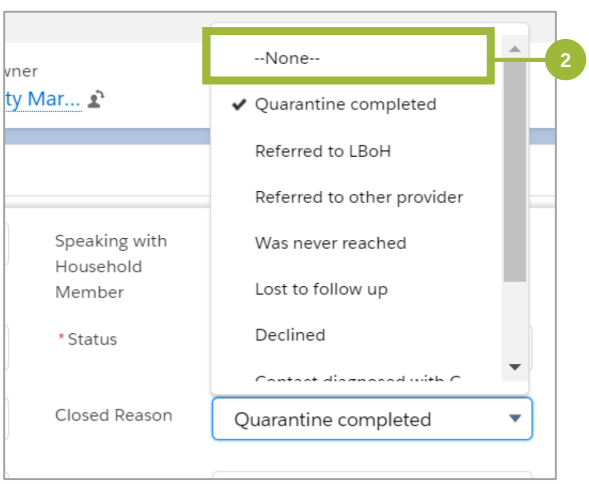
Missouri's Advanced Contact Tracing System

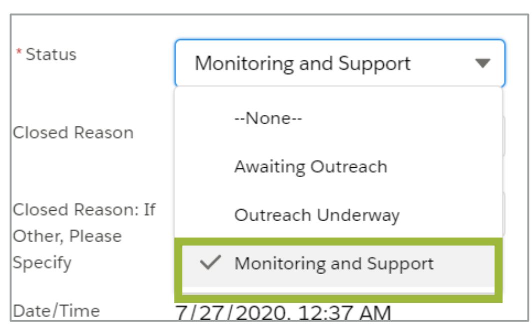
Reopening a Case

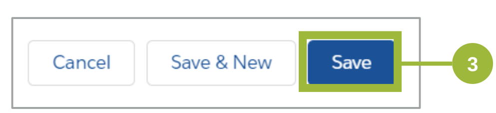
1. Find the **Closed Reason** field, and click the **pencil** to edit it.



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



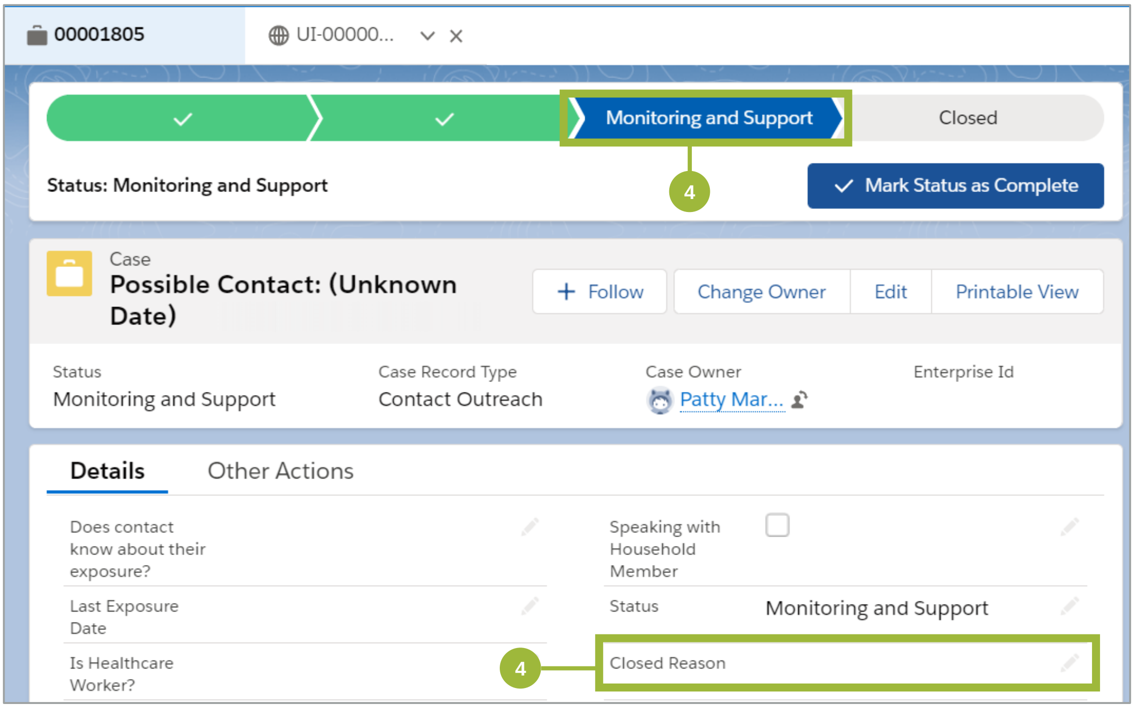




Note: You must remember to press **Save** when in edit mode or else your changes will not be committed.
If you do not change the Close Reason to "None" an error will appear when trying to manually move the case to “Monitoring and Support."

Reopening a Case

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



Job Aid

Additional Tips

Missouri DHSS Department of Health and Senior Services

MO ACTS

Missouri's Advanced Contact Tracing System

Additional Tips

Inbound Calling & Voicemail Functionality

Contact to a COVID-19 Cases 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.

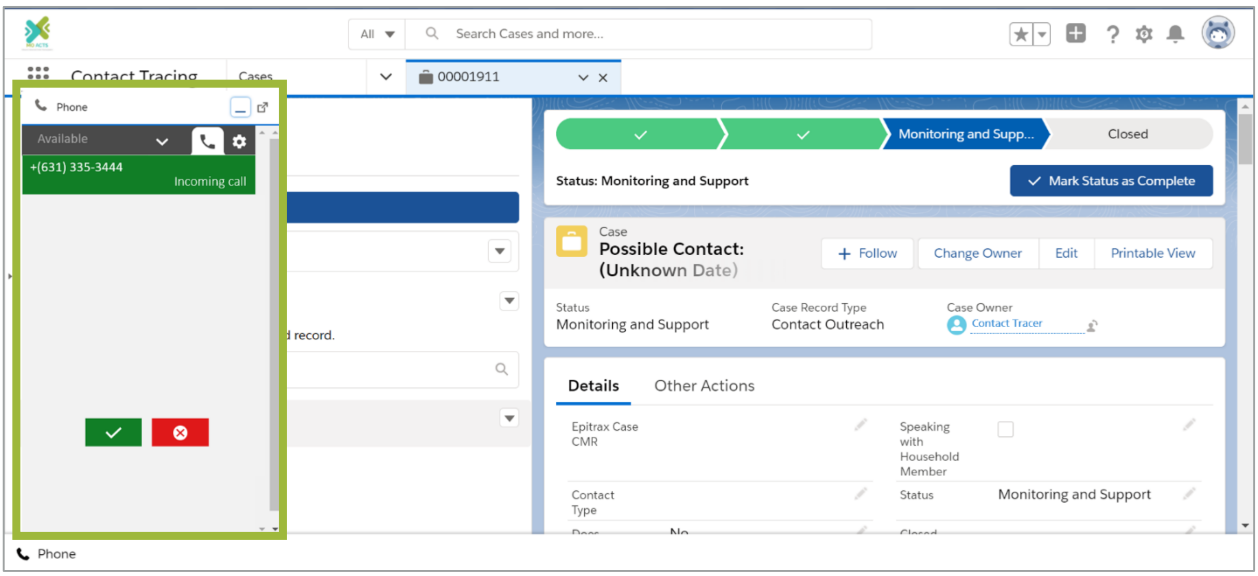
- **Scenario B - Phone Number is Associated with a Jurisdiction**: The call will route to the associated LPHA queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the LPHA queue is available to answer, the contact can leave a voicemail and a missed call task will 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.

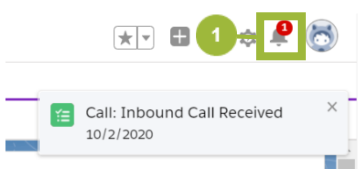
Additional Tips

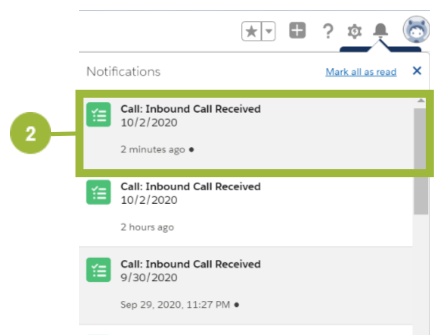
Inbound Calling & Voicemail Functionality

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

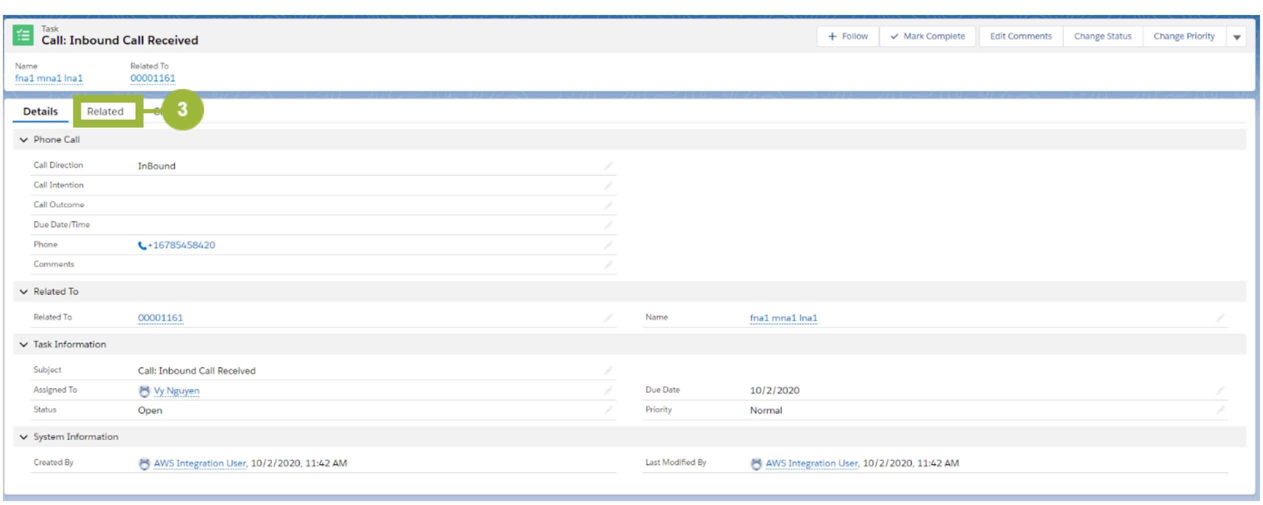
Below are the steps recognizing when you have missed a call and how to access the missed call task and associated voicemail.

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.

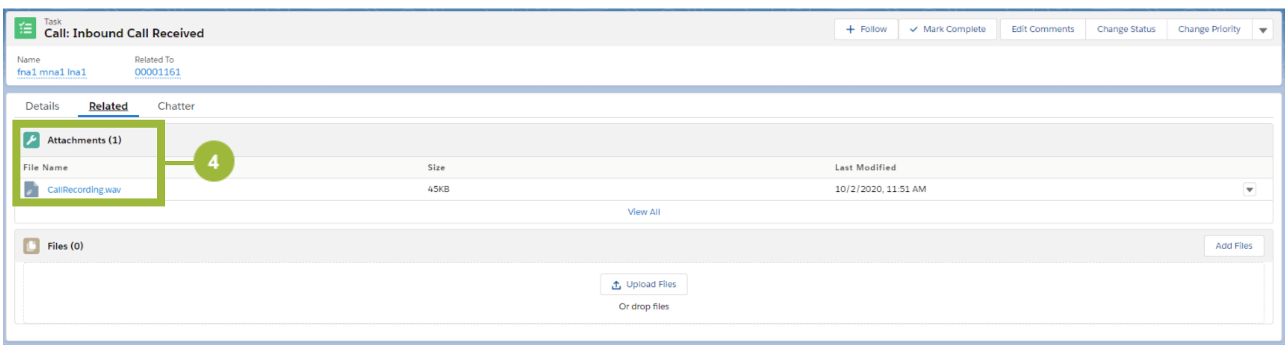


Additional Tips

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

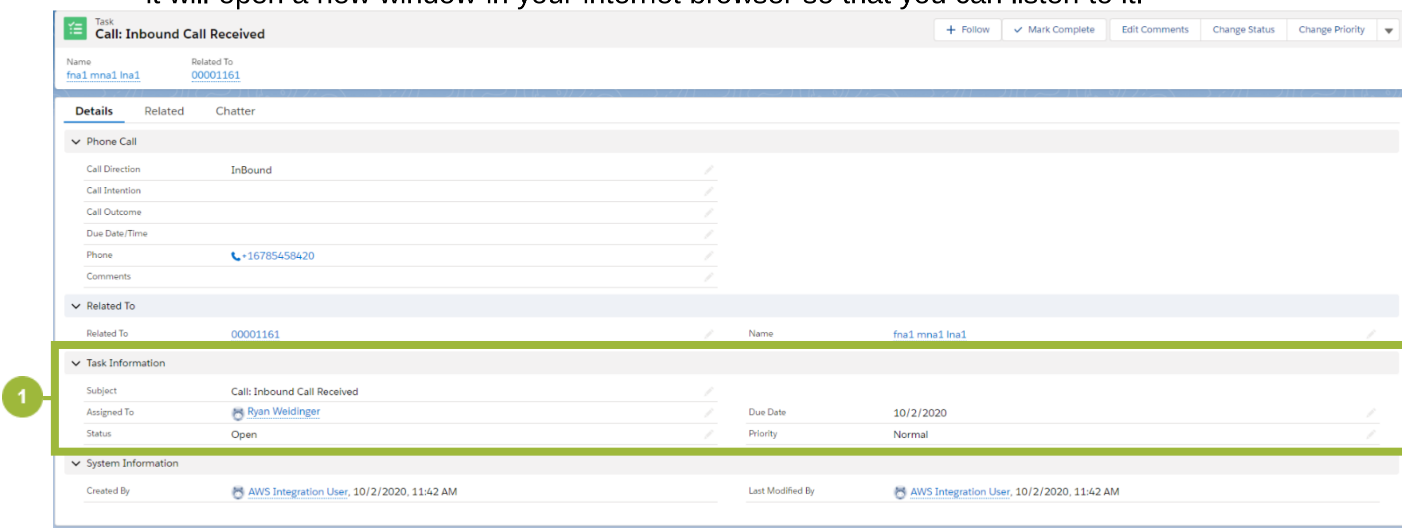
When a Contact to a COVID-19 case calls from a phone number that is not yet associated with a Contact Tracer, their call will be routed to either the appropriate queue (jurisdiction or Admin) and if the call goes unanswered, a missed call task will be created and the queue Account owner (jurisdiction 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

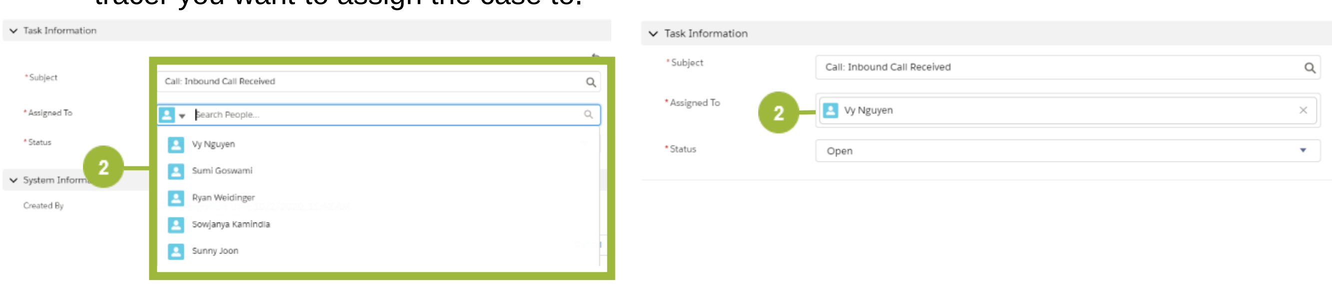
Inbound Calling & Voicemail Functionality

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

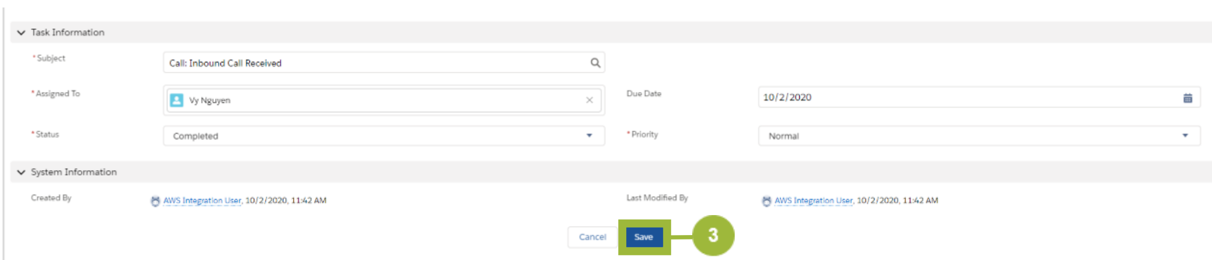
1. Click Attachments to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.



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.



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.

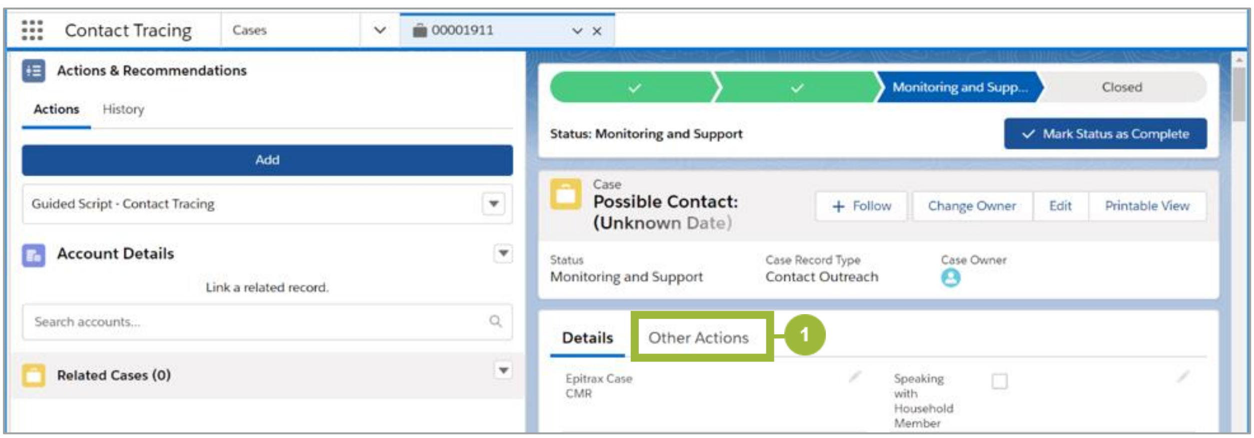


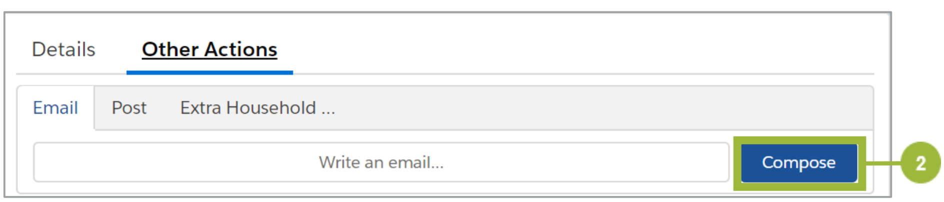
Additional Tips

Email Functionality

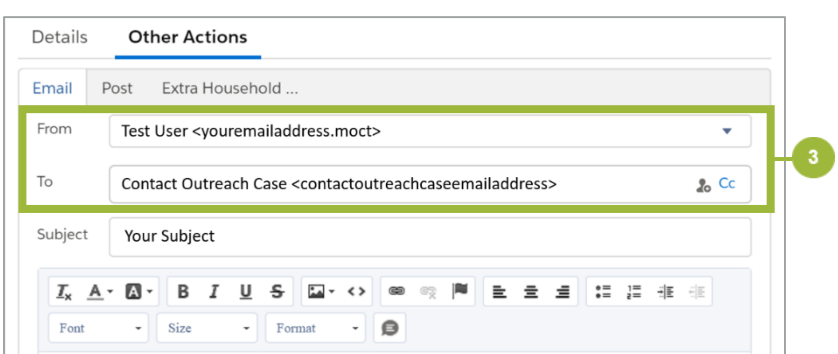
Users can send an email to a contact after a call has successfully been completed when the Contact to a COVID-19 Case is in the Outreach Underway or Monitoring and Support statuses.

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.



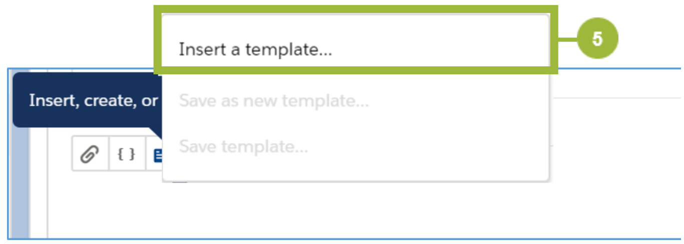


3. The Email window displays. You will see your email address defaulted in the **From** field. Also, the Contact to a COVID-19 Case's email address (if provided) will be pre-populated in the **To** field. These fields are editable, if necessary.

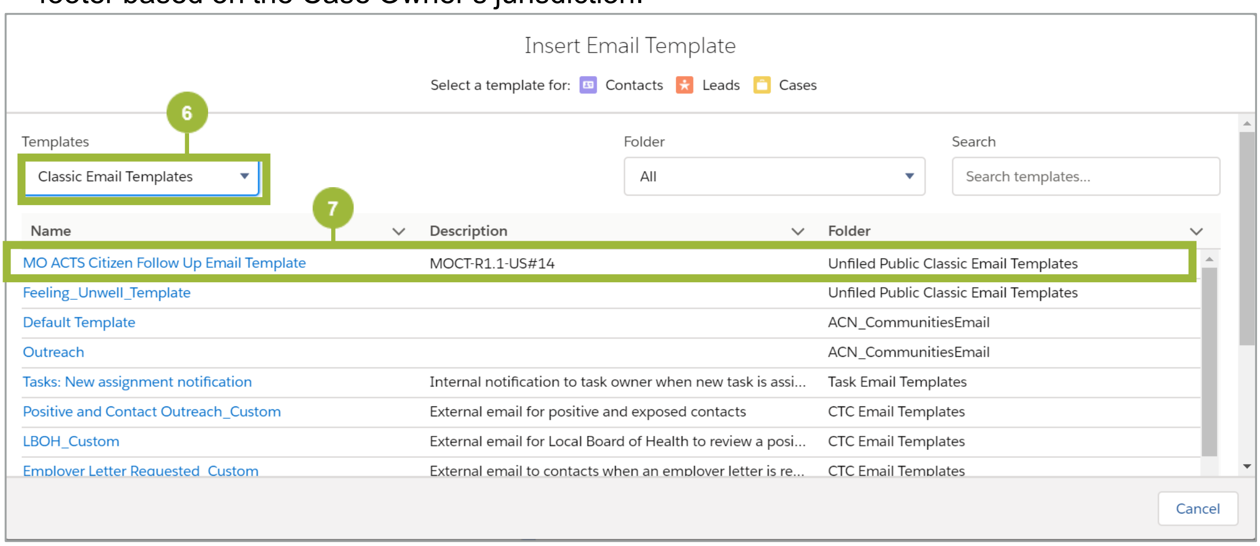


Additional Tips

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

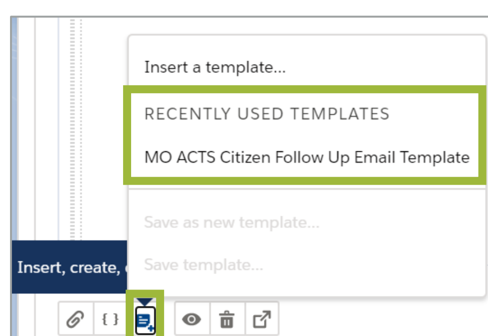


6. A new window opens. On the left, select **Classic Email Templates** category from the drop-down.
7. Select **MO ACTS Citizen Follow Up Email** template. This will render an email header and footer based on the Case Owner's jurisdiction.



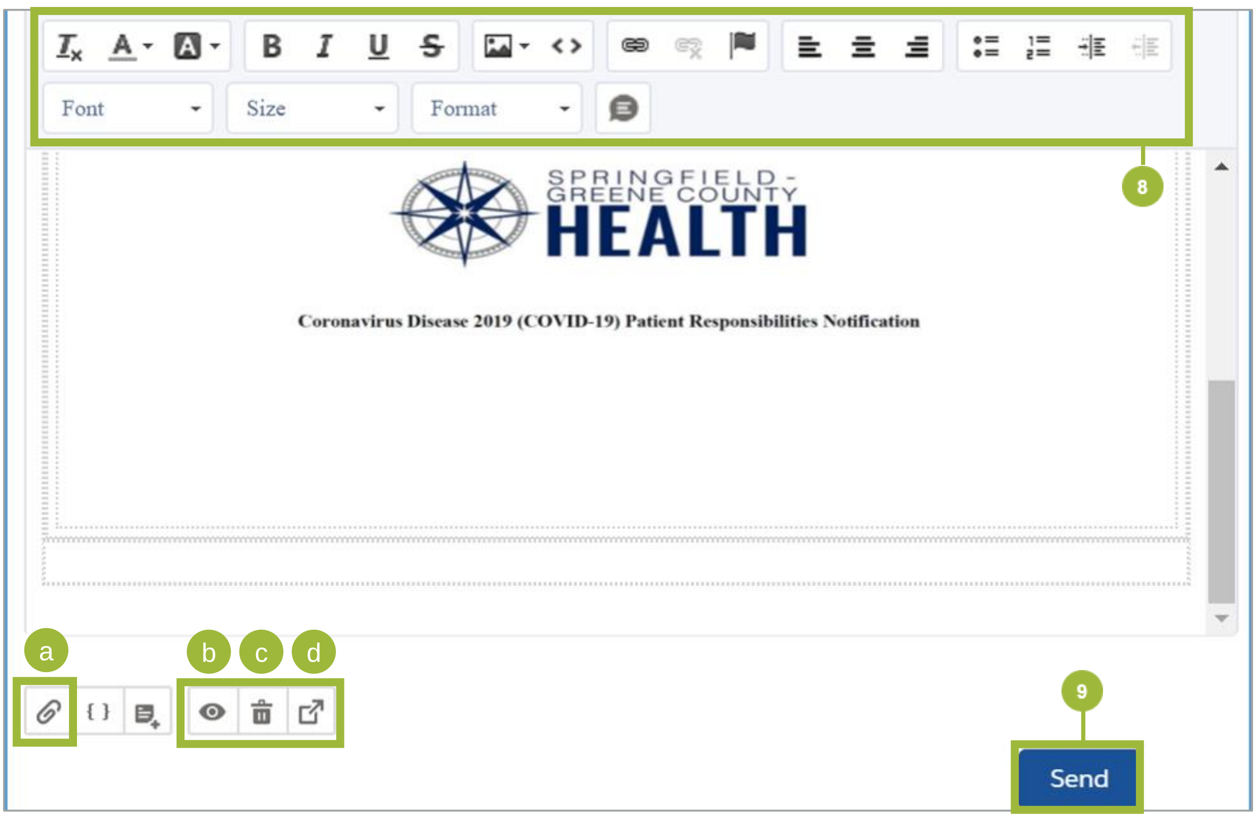
NOTE:

- 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.

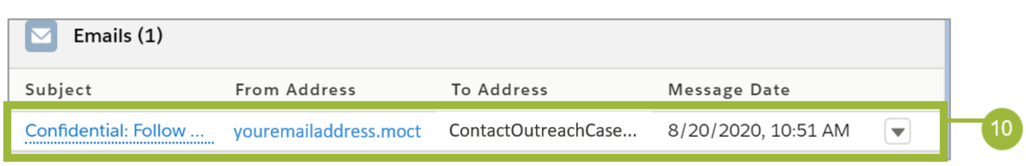


Additional Tips

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**.



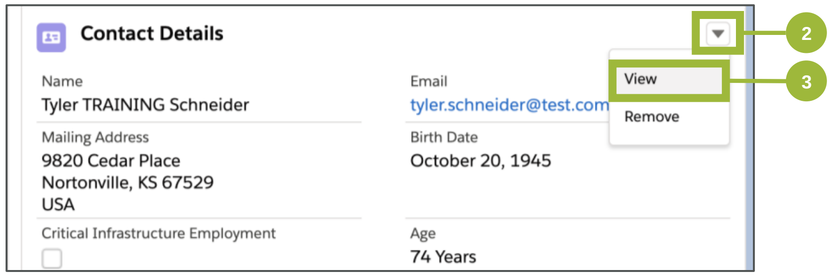
10. MO ACTS keeps a log of all your sent emails in the **Details** section of the Contact to a COVID-19 Case, under the **Email** category. Any replies from the contact will be routed to the **sender's inbox**.



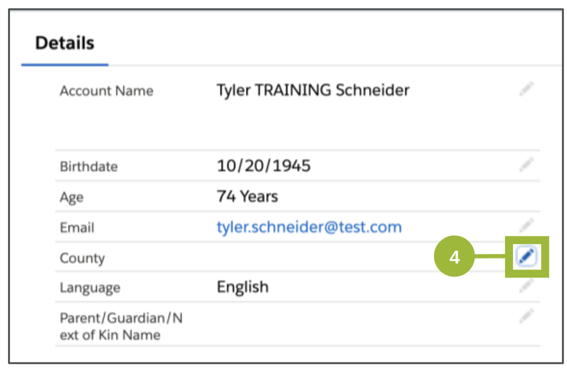
Additional Tips

Correcting a Contact's Case Information

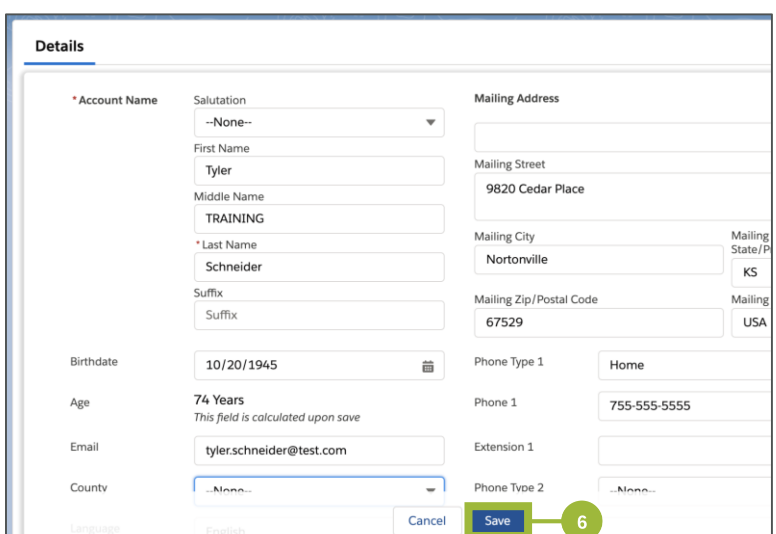
1. Open the contact's case in MO ACTS.
2. Click the drop-down arrow next to the **Contact Details** on the left side of the screen.
3. Click **View**.



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.

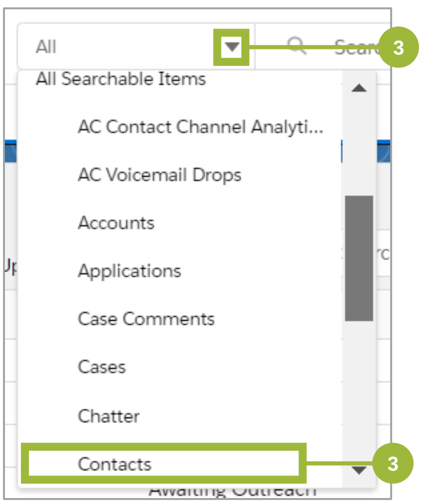


Additional Tips

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.

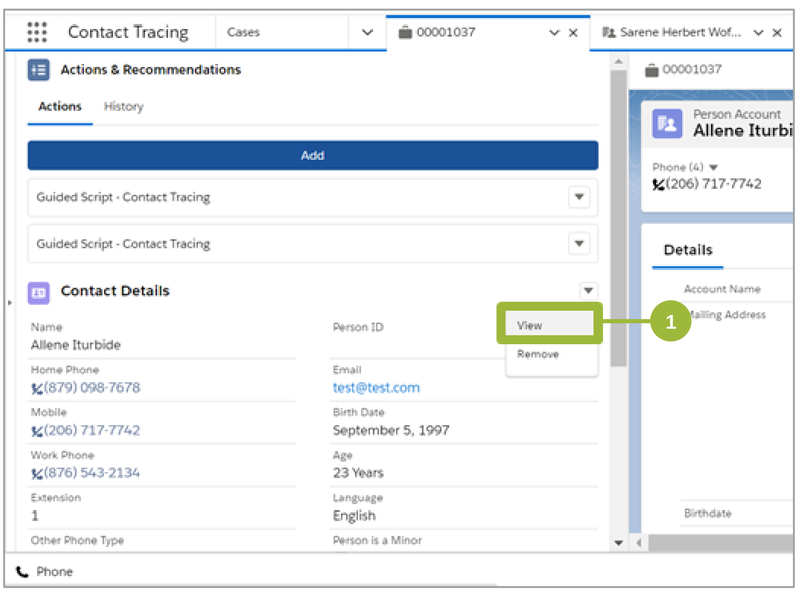
Additional Tips

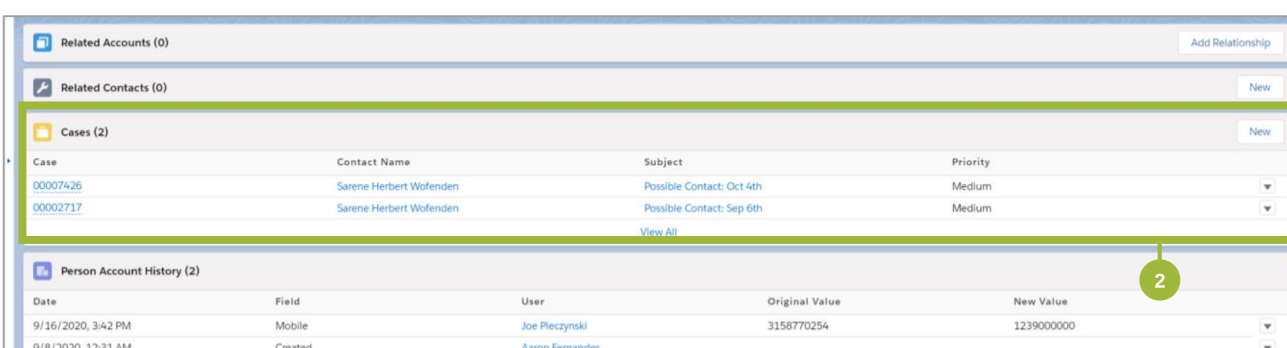
MO ACTS Multiple Exposures for One Contact

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.





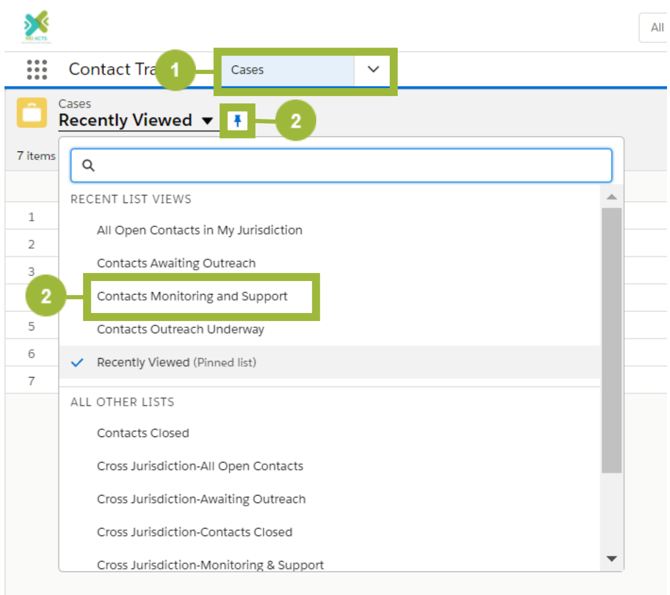
Additional Tips

Bulk Contact Case Actions

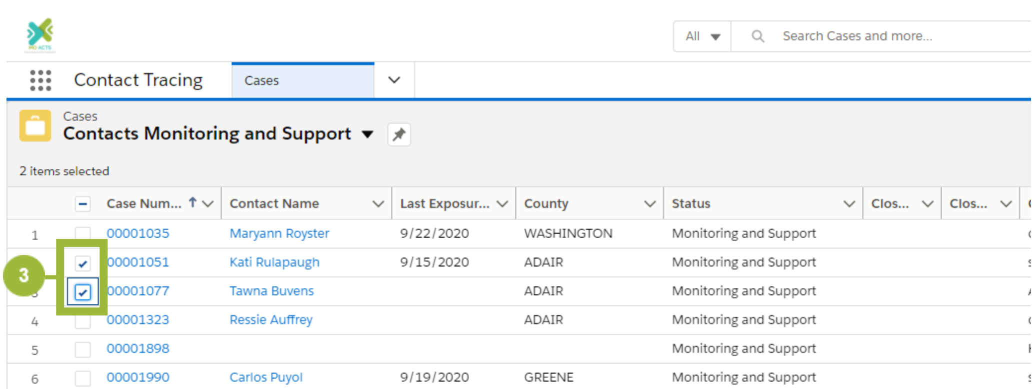
Closing Cases in Bulk

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.



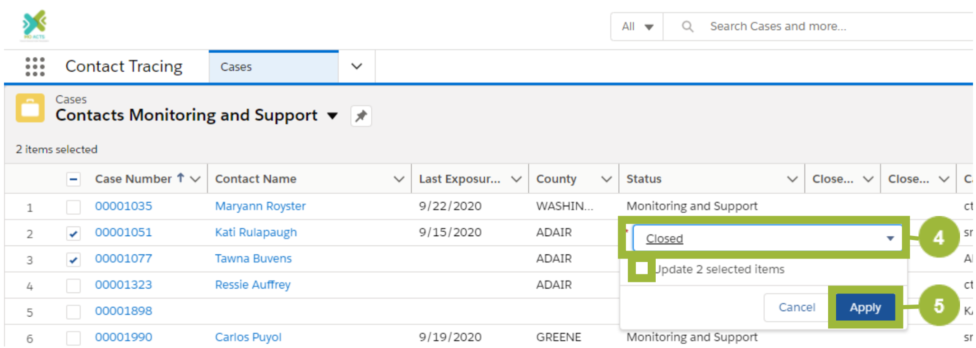
Additional Tips

Bulk Contact Case Actions

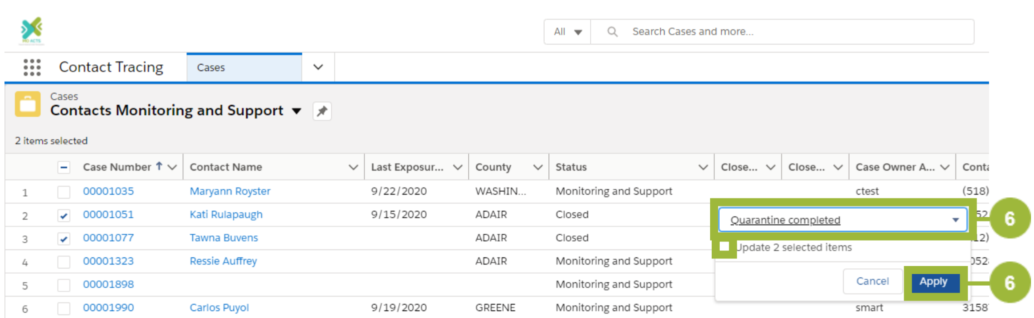
Closing Cases in Bulk

4. 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.'

5. Click **Apply**.



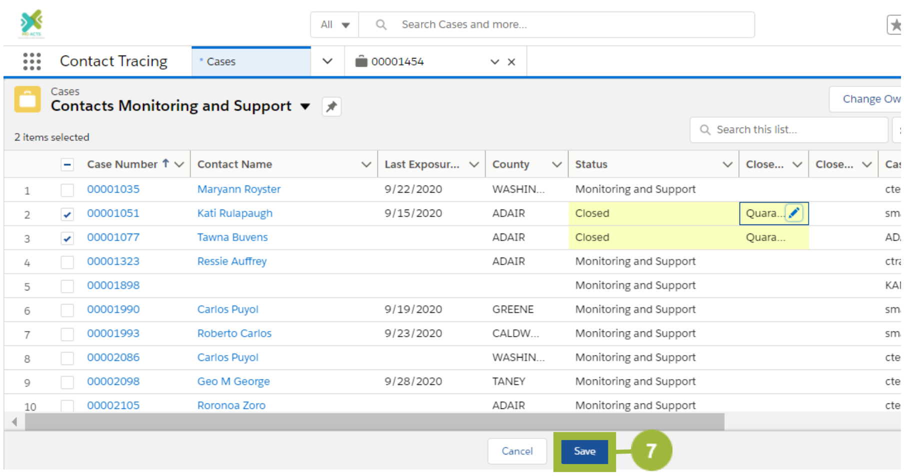
6. Lastly, choose the **Closed Reason**. Contact Tracers have the option to choose individual Closed Reasons or, similar to Step 4, you can select the checkbox to mass update the selected items with the same Closed Reason. Click **Apply**.



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.**



Additional Tips

Bulk Contact Case Actions

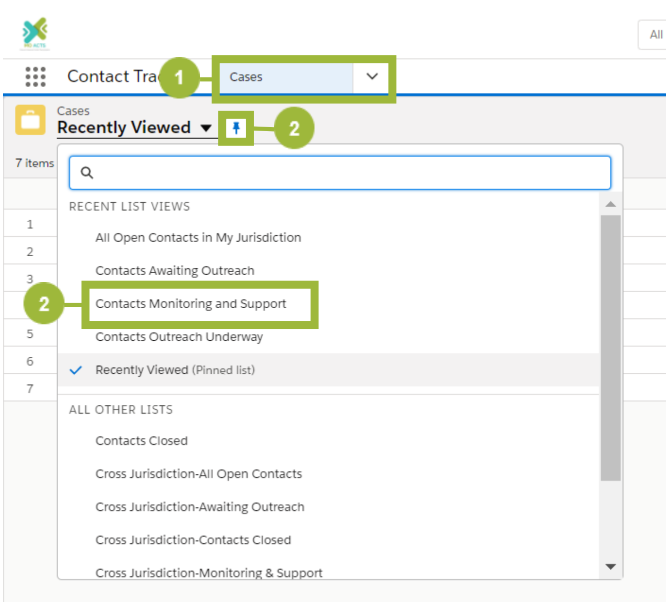
Reassigning Cases in Bulk

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).

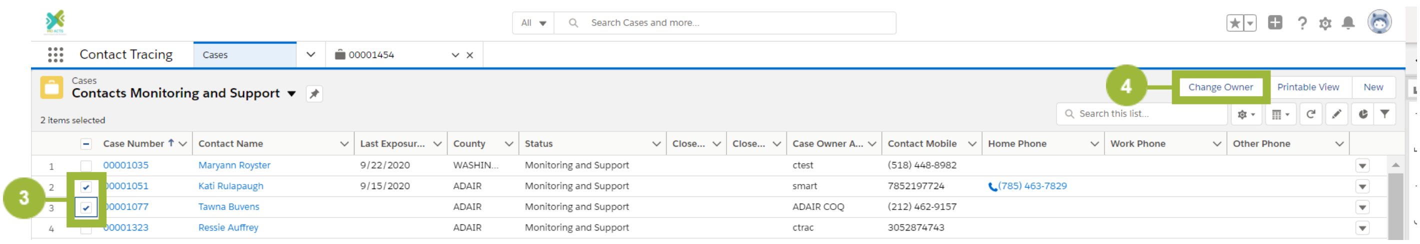


Additional Tips

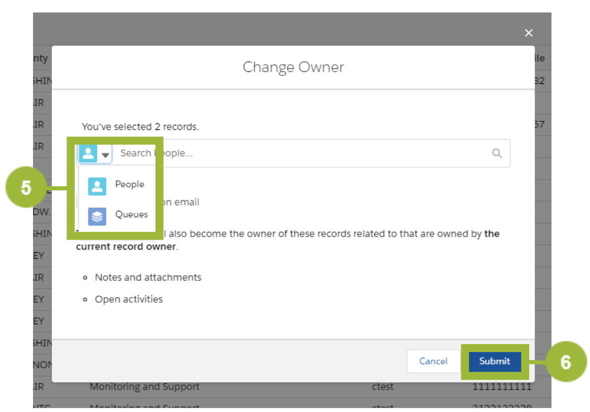
Bulk Contact Case Actions

Reassigning Cases in Bulk

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



5. You can now either choose to select a **Queue (jurisdiction)** or a **Person** to reassign the case to.
6. 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 DHSS Department of Health and Senior Services

MO ACTS
Missouri's Advanced Contact Tracing System