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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
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
Job Aid

How to Log In to MO ACTS and Amazon Connect
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: OR
  - Cough
  - Shortness of Breath
  - Difficulty breathing
  - New olfactory disorder
  - New taster disorder

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

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

<table>
<thead>
<tr>
<th>Queue / List view</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts Awaiting Outreach</td>
<td>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 <strong>Awaiting Outreach</strong> status.</td>
</tr>
<tr>
<td>Contacts Monitoring &amp; Support</td>
<td>Displays all contact cases in MO ACTS that are set to <strong>Monitoring &amp; Support</strong> status.</td>
</tr>
<tr>
<td>My Contacts</td>
<td>Displays all contact cases <strong>owned by you</strong>, which require monitoring outreach. Contact Outreach Cases will appear in this view if the status is set to <strong>Monitoring &amp; Outreach</strong>.</td>
</tr>
</tbody>
</table>

### Additional Views Displayed for Contact Tracers

<table>
<thead>
<tr>
<th>Queue / List view</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recently Viewed</td>
<td>Displays all recently viewed (by you) contact cases.</td>
</tr>
<tr>
<td>All Open Contacts in my Jurisdiction</td>
<td>Displays all contact cases in all stages (Awaiting Outreach, Outreach Underway, Monitoring and Support) in your Jurisdiction and owned by anyone.</td>
</tr>
<tr>
<td>Contacts Outreach Underway</td>
<td>Displays all contact cases in MO ACTS that are set to the Outreach Underway status.</td>
</tr>
<tr>
<td>Contacts Closed</td>
<td>Displays all contact cases in MO ACTS that have completed quarantine or which status is closed for some other reason.</td>
</tr>
</tbody>
</table>
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
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. Scroll down further and review the contact details on the left-hand side of the case record to check if the contact is a member of a **household.** Additionally, check their contact type to learn their role in the household.
Completing an Initial Call to a Contact to a COVID-19 Case

Contact Tracing Guided Script

3. 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.

![Contact Details](image)

![Amazon Connect](image)
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.

![Symptom Check](image)

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.

![Symptom Check](image)
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Symptom Check

3. Ask the contact whether or not they would like to receive a SMS message to monitor their symptoms. If not, you can bypass auto case monitoring by using the **Opt Out of Symptom Monitoring** checkbox in the symptoms section.

4. Click **Next**.

**Note:** MO ACTS will automatically send **SMS messages** to contacts who have provided their phone number, email and date of birth during their quarantine duration in order to efficiently **track their symptoms** as they arise as well as the symptoms of members in their **household** unless the "**Opt Out of Symptom Monitoring**" box is checked. The contact tracer can also bypass auto case monitoring for the contact by using the checkbox within the **Case Details** under the Symptoms section. Auto monitored cases will automatically close when their quarantine ends.
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**. Select any **underlying health conditions** the person has in the list provided.

2. Enter any additional conditions into the **Unlisted Conditions** field.

### Additional Underlying Conditions
- Diabetes
- High Blood Pressure (Hypertension)
- Severe Obesity (BMI >= 40)
- Cardiovascular Disease
- Chronic Kidney (Renal) Disease
- Chronic Liver Disease
- Chronic Lung Disease (asthma, emphysema, COPD)
- Immunosuppressive Condition
- Autoimmune Disease
- Current Smoker
- Former Smoker
- Substance Abuse or Misuse
- Disability (neurologic, neurodevelopmental, intellectual, physical, vision or hearing impairment) if yes, please specify
- Psychological/psychiatric condition (if yes, please specify)

3. Click **Next**.

---

Clinical Information

Now I would like to ask if you have any of the following health conditions.

Do you have any underlying conditions?

- Available Options
  - Diabetes
  - High Blood Pressure (Hypertension)
  - Severe Obesity (BMI >= 40)
  - Chronic Liver Disease
  - Chronic Lung Disease (asthma, emphysema, COPD)

- Selected Options

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

Guided Script | Clinical Information & Referral

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 probable or confirmed case definition for your jurisdiction.

⚠️ NOTE: If the contact tracer documents that the contact meets the criteria for a probable or positive case, this data will flow back to EpiTrax for case investigation which will only begin once positive lab test results are received (e.g. a morbidity event occurs).

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.

   ![Quarantine Overview]

   NOTE: The Quarantine End Date displayed here is calculated automatically based on the Last Exposure Date and the Number of Quarantine Days (both editable fields). This can be found under the Contact to a COVID-19 Case Details section and be referenced during contact outreach calls and while monitoring the case.

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

   ![Specific Quarantine Instructions]

Missouri Department of Health and Senior Services
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
- 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

Guided Script | Home Assessment

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.

4. Read the Closing Stage script and click Next.
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Case Status Stage

1. Select Monitoring and Support to complete the Case Status field.
2. Click the dropdown for Outreach Outcome and select Complete.
3. Click Next.

NOTE: If the contact does not have multiple exposures or is NOT a member of a household or address where there are additional contacts awaiting outreach, this step will be the end of the guided script and you should open your Amazon Connect softphone and click End Call.
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Additional Case Notice

1. If the contact has multiple exposures, you can apply their guided script answers to all of their open cases, if any, by selecting Yes.

   \textbf{NOTE:} If you do not apply their answers to all cases, then you will need to complete contact tracing for their other cases.

2. Click Next.
Completing an Initial Call to a Contact to a COVID-19 Case

Guided Script | Multiple Household Members

1. If the contact is a **member of a household** where there are **additional contacts awaiting outreach**, you will be asked if you would like to conduct contact tracing for another member of the household. Select **Yes**.

   **NOTE:** When you begin the new guided script flow for a household contact or contact at the same address, you will not be able to use the previous button. For full functionality, open the contact’s case and start the guided script.

2. Click **Next**.

![Guided Script - Contact Tracing](image)

   **NOTE:** If the contact case’s owner is an LPHA or Admin queue, you will automatically be assigned ownership of the case if you are not already the household/same address contacts case owner. If another contact tracer is already the owner, you will receive a flow error and will not be able to complete contact tracing for this contact until you claim ownership of the case.

3. Continue your contact tracing for each contact and progress through the **guided script** as we have previously shown.

![Guided Script - Introduction](image)
Completing an Initial Call to a Contact to a COVID-19 Case

4. You will continue to be prompted to begin a new script for household contacts until each person in the household has been addressed. When you’re done, select Finish to close the guided call script.

5. Open your Amazon Connect softphone and click End 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.

9. After you completed the guided script and logged the call, notice that the case 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*
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.
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.

![End call](image)

3

**Note:** Click **EnglishVM** or **SpanishVM** buttons to leave a pre-recorded voicemail message in English or Spanish.

4. In the **Guided Script**, click on the **No** option.

5. Click on the **Next** button.

![Guided Script](image)

4

5

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.
Leaving a Voicemail & Setting a Reminder to Call Back

⚠️ 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
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.

![Task tab image]

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

![Phone Call Details image]
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
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.
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
Completing Monitoring for a Contact to a COVID-19 Case

Open New Monitoring Activity

Contacts will receive automated messages for the duration of quarantine to monitor their symptoms that will save to their record unless they have decided to opt out and the Contact Tracer selects the Automated Monitoring Bypass checkbox on the Symptoms section of the Contact’s Case Details. If this is the case, follow the steps below to conduct case monitoring.

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**.

![](image)

**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.

![Image of a monitor record in MO ACTS](image-url)
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 either the checkbox in the **guided script** in the symptoms section, or by using the checkbox pictured below within the **Case Details** under the **Symptoms** section and can follow the standard case monitoring procedures in place.

<table>
<thead>
<tr>
<th>Symptoms</th>
<th>Automated Monitoring Bypass</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Symptom Onset Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Symptom Resolution Date</strong></td>
<td></td>
</tr>
<tr>
<td>Fever</td>
<td>Yes</td>
</tr>
<tr>
<td>Fever Temperature</td>
<td></td>
</tr>
<tr>
<td>Feverish</td>
<td>Yes</td>
</tr>
<tr>
<td>Chills</td>
<td>Yes</td>
</tr>
<tr>
<td>Rigors</td>
<td>Yes</td>
</tr>
<tr>
<td>Muscle Aches &amp; Pains</td>
<td>Yes</td>
</tr>
<tr>
<td>Runny Nose</td>
<td>Yes</td>
</tr>
<tr>
<td>Sore Throat</td>
<td>Yes</td>
</tr>
<tr>
<td>Loss of Smell and/or Taste</td>
<td></td>
</tr>
<tr>
<td>Headache</td>
<td>Yes</td>
</tr>
<tr>
<td>Fatigue</td>
<td></td>
</tr>
<tr>
<td>Cough</td>
<td>Yes</td>
</tr>
<tr>
<td>Wheezing</td>
<td></td>
</tr>
<tr>
<td>Shortness of Breath</td>
<td>Yes</td>
</tr>
<tr>
<td>Difficulty Breathing</td>
<td></td>
</tr>
<tr>
<td>Chest Pain</td>
<td></td>
</tr>
<tr>
<td>Vomiting</td>
<td>Yes</td>
</tr>
<tr>
<td>Abdominal Pain</td>
<td>Yes</td>
</tr>
<tr>
<td>Diarrhea</td>
<td>Yes</td>
</tr>
<tr>
<td>Other Symptoms</td>
<td></td>
</tr>
</tbody>
</table>
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.

5. Additionally, for a contact in a household, they can continue to fill out symptom and monitoring information for the rest of the members of the household through the same process once they have submitted their own information and have returned to the screen with First Name, Last Name, and birthdate.

Note: If a member of a household is not a contact in MO ACTS, their monitoring information cannot be submitted. Additionally, once any household member fills out symptoms for a specific person, all of the active monitoring records for that person are disabled so no other person in the household can go in and resubmit symptoms for that person that day.
Job Aid

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

Closing a Case After Final Monitoring

Contacts will receive automated messages for the duration of quarantine to monitor their symptoms as well as the symptoms of members in their household. Their case will automatically be closed upon completion of their quarantine period unless they have decided to opt out of this program and the Contact Tracer has selected the Automated Monitoring Bypass checkbox in the Symptoms section of the contact’s Case Details. If this is the case, follow these steps to close their case.

Before closing a case, check the Last Exposure Date, Number of Quarantine Days and Quarantine End Date fields, which can be found under the Contact to a COVID-19 Case Details section.

- **Last Exposure Date**: Indicates the last date where the person has been in close contact with a positive case.
- **Number of Quarantine Days**: Shows the amount of days the contact is recommended to quarantine for. This will default to 14 days when the case is transferred over from EpiTrax. Both of these fields are editable, if needed.
- **Quarantine End Date**: Is calculated automatically based on the Last Exposure Date and the Number of Quarantine Days. This will show in the Guided Script as a clear reference when conducting outreach calls and can be referenced while monitoring the case.

1. While completing your final monitoring call, 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.

Missouri Department of Health and Senior Services
Completing End of Quarantine for a Contact to a COVID-19 Case

Closing a Case After Final Monitoring

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.

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

6. Click on Mark Status as Complete.

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

Closing a Case After Final Monitoring

7. A **Close this Case** window opens. Select **Closed** as the **Status and Save**.

8. The status now shows as **Closed**.

![Close This Case window](image)

**Note**: MO ACTS has functionality to allow a Contact Tracer to close cases in **bulk**. To learn more, please refer to the Go Live Action Guide on the MO ACTS Intranet Page.
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
Reopening a Case

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

![Image 1]

2. Change the reason to **None**.

3. Change the **Status** to the appropriate one and click **Save**.

![Image 2]

![Image 3]

**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
Additional Tips

Inbound Calling & Voicemail Functionality

In addition to Contacts to a COVID-19 case being able to call back through the MO ACTS number and Contact Tracers receiving these inbound calls, Contacts can now 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 (573-751-1656).

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.

If the Contact Tracer’s Amazon Connect status is set to Available but they do not answer the call, the caller will be on hold for two minutes and then will be prompted to leave a voicemail. 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 not appear; contact tracers should view the Tasks tab and filter for their respective jurisdiction as shown below in the LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case section.

**Scenario C - Phone Number has No Associated Jurisdiction (Unknown Caller):**
The Call will route to their associated LPHA queue after a series of prompts or the Administration queue. Once routed, 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 not appear; contact tracers should view the Tasks tab and filter for their respective jurisdiction as shown below in the LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case section. See below for more information on Unknown Call Routing.
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.

![Inbound Calling & Voicemail Functionality screenshot]

**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

Unknown Call Routing

In this section you will learn how a call is routed when a contact calls in using a phone number not associated with their case. This can happen when that contact calls from a new or borrowed phone number.

When the contact calls in, they will be prompted to state their county. If the caller’s speech is understood by the system bot, they can confirm the county name by pressing 1 to be transferred over. If the caller’s speech is not understood, the caller can either press 3 to enter their five-digit zip code on the number pad or will be prompted to speak up to two more times before they must enter their zip code. This process ensures that the caller will be directed to the correct jurisdiction.

⚠️ **NOTE:** If users select the wrong county or enter the wrong zip code, they will be routed to the zip code they enter regardless. If users enter an invalid zip code, they will be routed to the Admin Queue.

Receiving a Missed Call from Contacts who Share a Phone

If a contact is calling using a phone that they share with another contact and their call goes unanswered, a missed call task along with a voicemail will be created and appended to the case that was last updated.

⚠️ **NOTE:** Keep in mind that any time a contact tracer calls someone back, it is best practice to validate who you are speaking with first.
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 either **Call: No Answer, No Voicemail**, to notify that there was no voicemail left, or **Call: Voicemail**, to notify that there was a voicemail left. Click the notification.

3. 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.
Additional Tips

Inbound Calling & Voicemail Functionality

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 owned by a Contact Tracer, their call will be routed to the appropriate queue (jurisdiction or Admin). If the call goes unanswered, a missed call task will be created for the queue that can be found by viewing the tasks assigned to the respective queue. The missed call task can then be reassigned to a contact tracer to begin work on the contact case.

To view the missed call tasks for an LPHA or Admin Queue

1. Navigate to the Tasks tab and use the drop down to open the Open Activities List View
2. Click the Filter button
3. Click on Filter by Owner
4. Select Queue Owned Tasks, then select a Queue from the drop down
Additional Tips

Inbound Calling & Voicemail Functionality

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

5. Click Done

6. Click Save

7. Now your newly filtered list view will display
Additional Tips

Inbound Calling & Voicemail Functionality

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

If reassigning the case to yourself or another Contact Tracer, please follow the steps below:

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**.

![Image showing the contact details section]

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

![Image showing the details section with pencil icon highlighted]

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.

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![Image 1](image1.png)

![Image 2](image2.png)
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**.
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**.
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**.
Additional Tips

Resource Coordination

After a contact tracer has conducted outreach to a Contact to a COVID-19 case and confirmed they require additional resources like food, support for chronic medical conditions, or specific household items during quarantine, the contact tracer will mark the contact to be referred to a resource coordinator. Now a resource coordinator can be assigned to the contact’s case to begin follow-up. Contact Tracers can view all contacts requiring resource coordination, assign a resource coordinator to a case, and then how to view cases assigned to you for resource coordination.

Resource coordinators will manage all records that need resource coordination for contacts during quarantine. They may be the same person who is doing contact tracing activities or they may be a different person, either way, the resource coordinator role has the same permissions in MO ACTS as a contact tracer.

How to View All Contacts Requiring Resource Coordination

1. Navigate to the Cases Tab and use the drop down to select All Open Resource Coordination List View to view all of the contacts that require resource coordination.
Additional Tips

Resource Coordination

How to View All Contacts Requiring Resource Coordination

2. All Open Resource Coordination List View will display; please note that there are columns for resource coordination status and notes that can help you identify contacts requiring resource coordination. This list view is automatically filtered to display cases that have Awaiting Outreach or Outreach Underway as the resource coordination status.
Additional Tips

Resource Coordination

How to Assign a Resource Coordinator to a Case

1. When you have opened a case, navigate to the Home Assessment section. You’ll notice that the checkbox field ‘Referred to Resource Coordinator’ is already checked. A Contact Tracer will check this box during their outreach call with a contact to COVID-19 case if they require additional resources or support during quarantine.

2. To assign yourself or someone else as a Resource Coordinator scroll to the Case Team Section and select Add Member.
Additional Tips

Resource Coordination

How to Assign a Resource Coordinator to a Case

3. Type in the name of the resource coordinator you would like to own the case and then select that individual. Ensure you search using People to assign a MO ACTS user to the case; do NOT set a Contact to a COVID-19 Case as a team member.

4. Click Save

5. A notification will appear saying you have successfully added a case team member.
Additional Tips

Resource Coordination

How to View All Cases Assigned to Yourself as a Resource Coordinator

1. Navigate to the My Resource Coordination list view using the drop down. This list view is automatically filtered to display cases that have Awaiting Outreach or Outreach Underway as the resource coordination status.

2. The My Open Resource Coordination queue will display. As the resource coordinator continues to work with the Contact to COVID-19 case they can progress the case’s resources status as needed.

**NOTE:** updating the status for resource coordination will not change the Contact to Covid-19 case status but rather will be a way for a resource coordinator to keep track of their work.
Additional Tips

Household Management

MO ACTS now has functionality to manage multiple contacts in a household. If the contact is a household member (e.g. resides in the same living space with other contacts) a contact tracer can streamline outreach by speaking with household members at once and updating their cases together versus individually calling each member.

In this section we will show you how to view if a contact is a part of a household and view additional details that can help inform your contact tracing activities.

Households are established in EpiTrax and the data flows over to MO ACTS using the Case CMR number to link together contacts within a household. Relationship to a case in EpiTrax will display as Contact Type in MO ACTS.

Contact Type helps group members of a household through their various roles. You will see the following attributes used:

• Adult Household (Default for Adults in Household)
• Child by case mother (Biological child)
• Child by other mother (Non-biological child)
• Household (Any person sharing the same household)
• Infant (Child under 1 year of age)
• Spouse Sexual Contact (External Sexual Contact to a Spouse/Adult in Household)

**NOTE:** Users will not have the ability to create a household in MO ACTS. It is best practice not to edit relationships within a household as this data is pre-determined in the case investigation process within EpiTrax and should be used solely to inform contact tracers about the contact's they will be tracking.
Additional Tips

Household Management

How to Review a Contact’s Household Details

1. Review the contact details on the left-hand side of a case record to check if the contact is a member of a household. Additionally, check their contact type to learn their role in the household.

To see additional details regarding a contact’s household information, continue with these optional steps:
Additional Tips

Household Management

How to Review a Contact’s Household Details

2. Click into the household record to open a new tab, titled [CaseCMR] Household, and view all of the contacts associated with it.

3. The new tab will display. Click into any household member’s name to display their Person Account.
Additional Tips

Household Management

How to Review a Contact’s Household Details

4. The Person Account details will display. Here you can see additional details about the contact, including if they are part of a secondary household.

If a contact is a member of a secondary household, this means that they are not only part of the primary household but are also part of a second household living with potentially more contacts to COVID-19 cases. These are based on EpiTrax Case CMR Numbers.

The primary household represents the first exposure event. The secondary household represents a secondary exposure event occurring after the first
## Additional Tips

### Household Management

**How to Review a Contact’s Household Details**

5. Scroll down further on the Person Account Details page to see all cases this contact is associated with and all households they members of.

### Note:

If a contact tracer needs to re-assign ownership of a case to a county not in their jurisdiction, they will need to reassign ownership of each household contact case individually. It’s important to keep in mind that once a household member is transferred outside of the contact tracer’s jurisdiction, the contact tracer will no longer have permission to view that individuals case record or the household record of other members of the household remaining in the contact tracer’s jurisdiction.
Additional Tips

In App Prompts

How to Use In App Prompts

MO ACTS features In App Prompts that will direct users through a URL link to the latest Release Notes document on the MO ACTS Intranet Site providing important information on the system enhancements. The prompts will appear the day after deployment occurs until the Thursday of the release week. If a user dismisses the notification, it will reappear after two days, giving them another opportunity to be directed to the Release Notes. This notification will appear, and will similarly need to be dismissed, on both the Home and Case tabs so that users will see the notification no matter what screen you were last viewing.
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