Community Tracing Collaborative

Partners In Health

Knowledge Assessment: What am I learning during training?

This self-assessment tool is a guide to help you understand what you'll be learning in each module. After each training session, review this self-assessment and ask yourself:

- Do I understand this topic?
- What questions do I have?
- Would I feel comfortable performing these actions in the real world?

If you feel uncertain about any skill or topic, talk to your trainer and review the resources provided during the training.

General Learning Tips

- Start a new notebook (whether on paper or a digital tool like OneNote) to take notes throughout training.
- Bookmark the URL for the Sandbox training environment and TalentBoost to make it simple to navigate to your training resources.
- Write down questions you have and bring them to a live session to discuss with your trainer.
- Practice hands-on whenever possible! Key in the practice scenarios in the Sandbox – you'll remember the demos much better if you try it yourself.
- Use breaks to get up and stretch or take a short walk.
- Be patient with yourself – you're learning a large amount of information in a short time span. There are many people and resources here to support you along the way.

DAY 2 – INTRODUCTION TO CONTACT TRACING

Contact Tracing Workflows (9:30 a.m. – 10:30 a.m.)

By the end of this session, you should understand:

☐How and when data moves between MAVEN and the CRM (Salesforce)
☐The high-level workflow followed by a Case Investigator
☐The high-level workflow followed by a Contact Tracer

AWS and Case Investigation 101 Videos (10:30 a.m. – 12:30 p.m.)

After watching these videos, you should recognize*:

☐What Amazon Web Services (AWS) is used for
☐Logging in to AWS
☐AWS statuses
☐Making a phone call in AWS
☐Dialing in the translator line
☐Logging out of AWS
☐What the CRM (Salesforce) looks like
☐The end-to-end Case Investigator workflow within Salesforce

**Please note you'll receive a chance to practice the above in a training environment – these videos are simply to familiarize you with the process.*

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Systems Deep Dive: Case Investigation Using Salesforce and AWS (12:30 p.m. – 3 p.m.)
By the end of this session, you should be able to:

Salesforce and AWS
☐Be able to access and log into the training environment
☐Understand how to log into AWS and make outbound calls
☐Set your status in AWS throughout the day (e.g. available, lunch, break)
☐Use AWS quick connects
☐Complete an auto-logged task
☐Know how and when to log out of AWS

Finding a Case
☐Understanding and finding list views
☐Open a case

Starting a Case
☐Assign a case to yourself
☐Change the case status
☐Identify the Case Record type and Test Taken Date
☐Navigate your Salesforce dashboard
☐ Identifying Self-Reported Positives

Data Collection
☐Complete Contact Details (e.g. phone number, address and occupation)
☐Indicate if someone is a Healthcare Worker or lives in a Congregate Care setting
☐Collect symptoms
☐Collect clinical information
☐Request exposure information
☐Perform a home assessment
☐Perform isolation instructions
☐Collecting contacts
☐Creating or linking households

Create a Task
☐Record call results using manual-task logging
☐Create a new open task
☐Determine which subject to use
☐Understand how and where to record call notes
☐Refer a task to another team member
☐Set reminders

Completing a Case
☐Selecting your Outreach Outcome

☐Choosing the correct status
☐Closing a case, when necessary

Watch CI Role Play Recording (3 p.m. – 5 p.m.)
After watching this session, you should:
☐Have a high-level understanding of what a real Case Investigator call may look like
☐Identify a question you may want to ask during tomorrow's Q&A session with a Case Investigator during the CI Role Play

DAY 3: SYSTEM DEEP DIVE

Sandbox Practice (10 a.m. – 12 p.m.)
By the end of this session, you should understand:
☐Opening a contact for Contact Tracing using list views and from a case☐ Locating the Exposure Date
☐Referring to a provider or for testing

This session will primarily be spent reviewing the take home assignment and should be used to address any questions you have about yesterday's Salesforce demonstration.

Peer-to-Peer Role Play (1 p.m. – 2:30 p.m.)
Peer-to-peer role play exercises are designed to give you an opportunity to read the script out loud and ask questions while simultaneously entering information into Salesforce. By the end of this role play, you should have a better understanding of combining reading the script with navigating the CRM.

Special Topics (3 p.m. – 5 p.m.)
By the end of this session, you should understand:
☐Sending Email from Salesforce
☐Self-Reported Positives☐Home Monitoring and Support
☐The WalkMe tool and how it can help guide you through the CRM

Care Resource Coordinator Training (3 p.m. – 5 p.m.)
For Care Resource Coordinators only
By the end of this session, you should understand:
☐The role of the Care Resource Coordinators
☐The philosophy of PIH in ensuring each team has a Care Resource Coordinator
☐Contributions Care Resource Coordinators make to the local community
☐The workflow of Care Resource Coordinators
☐Where to locate resources to refer cases/contact to
☐Performing CCRC functionality in Salesforce
☐Home Assessment
☐Creating Tasks

☐Managing your tasks and workload
☐CCRC-specific list views

DAY 4: PROCESS TRAINING

Advanced Processes (9 a.m. – 11 a.m.)

By the end of this session, you should understand:

☐Current callback protocols – how often to reach out to people difficult to contact
☐Quarantine and isolation – when you can clear someone from quarantine and isolation, and what questions you need to ask
☐Who qualifies for referral to a Care Resource Coordinator
☐Cases and contacts who are healthcare workers or live in congregate care settings
☐When it's okay to talk to someone other than the patient
☐Tips for managing your workload and re-assigning cases to other team members
☐Understand when you may want to discuss a difficult case with your supervisor or participate in Psych office hours

Walkthrough of Teams Resources (3:30 p.m. – 4 p.m.)

By the end of this session, you should understand where to find:

☐The daily bulletin
☐Additional training resources
☐Current processes and protocols
☐Job aids for new system releases

DAY 5: FIRST DAY ON-UNIT:

By the end of Day 5, you should:

☐Understand logistics behind how to start making calls
☐Know your team number, unit number, supervisor, and unit CI lead
☐Know where to find your work schedule
☐Meet with your supervisor and new team
☐Have logged in successfully to Salesforce and AWS
☐Shadowed a CT/CI on calls and asked them questions about their experience