INVALID/MISSING NUMBER PROTOCOL: CASES

<table>
<tr><th>SCENARIOS</th><th>PROTOCOL FOR CI & CT</th><th>BATCH CALLING TEAM</th></tr>
<tr><td>CASE: Missing phone number</td><td>1. Leave Status in "Outreach Underway’
2. Task (Open Activities-> Create Task) as "Missing/Invalid Number" and assign it to Gabriella Marrone
3. Indicate that the number was missing
4. Reassign case ownership to Gabriella Marrone

*These cases will be batch reviewed and phone numbers will be updated and cases put back in queue.</td><td rowspan="2">1.Review the “Missing/Invalid Number” task list
2.Change “Assigned to”, to yourself
3.Contact hospital/provider/lab/workplace for contact info
• Complete 3 attempts in 3 days to obtain the information
4.Complete the task when number is obtained or after all required attempts
• Number Obtained: Change the Case Owner on the Contact to the Positive Outreach Queue
• Number NOT Obtained: Close the Positive Case as “Was never reached”</td></tr>
<tr><td>CASE: Wrong/invalid number</td><td>1. Leave Status in "Outreach Underway"
2. Task (Open Activities- Create Task) as "Missing/Invalid Number" and assign to Gabriella Marrone
3. Indicate that the number was invalid - Where did the number dial to? Was it a workplace?
4. Reassign case ownership to Gabriella Marrone.

*DO NOT remove the invalid number. These will be batch reviewed and phone numbers will be updated as available.</td></tr>
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INVALID/MISSING NUMBER PROTOCOL: CONTACTS

<table>
<tr><th>SCENARIO</th><th>PROTOCOL</th></tr>
<tr><td>CONTACT: Missing phone number</td><td>

IF YOU CREATED THE CONTACT, maintain ownership of the contact, uncheck the “Send to Contact Trace Queue” box.

Change the Status to Outreach Underway
Create a “Missing/Invalid Number” task and assign to yourself
Complete 2 attempts with the parent case (or another identified source from the case, e.g. one of the other contacts) to obtain a phone number for the Contact
Try to collect contact information through allowed places to call (see next slide)
Complete the task if valid number obtained

If valid number obtained from parent case, change the Case Owner to the Contact Outreach Queue
If valid number is not obtained, Close the Contact as “Was never reached”

IF YOU PICKED UP CONTACT FROM OUTREACH QUEUE, take ownership of contact

Change the Status to Outreach Underway
Create a “Missing/Invalid Number” task and assign that task to the parent case owner
Reassign the contact to the parent case Case Investigator to attempt obtaining valid number as above

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<tr><td>Settings with multiple contacts</td><td>

See <u>Settings with Multiple Close Contacts</u>. Escalate to cluster queue (EIU) if you have questions. Don’t forget to fill out the Complex Contact Tracing form <u>every time</u> you call a business or other public place to collect contacts.

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COLLECTING CONTACT PHONE NUMBERS

SCENARIO	PROTOCOL
Calling a <u>provider office</u> (doctor, dentist, etc.) to collect name/number for exposed contacts	During case investigation, try to gather the names of the specific contacts at the medical appointment that the case was in contact with. This may not be possible if the case doesn't know all the names: for example, they may have had several students or hygienists working in the office. ***A reminder that we are not allowed to divulge the case's name to the office***, so there are two things we can do: 1. During the initial case investigation, or later if provider needs it, ask the case if we have permission to disclose their information to the medical office. Document that in the CRM through a Task as 'Other work completed' just so it's noted that this specific permission was given. 2. You can give the office the date of the case's visit (without sharing any identifying information) and offer everyone who was working that day a test pass for testing for COVID-19.
Calling a <u>workplace</u> to collect name/number exposed contacts	**If the corresponding case is a coworker** and was at work during the infectious period, please see the protocol for Settings with Multiple Close Contacts. **If the corresponding case visits the place of work** and that is where the exposure occurred, this also fits in to the above protocol (possibly requiring escalation for consideration).

CALLING CONTACTS AT PLACE OF EMPLOYMENT

SCENARIO	PROTOCOL

Calling a business to speak with a contact who is an employee	**If we only have the place of employment as the information to reach the contact**, we'd like to avoid calling workplaces for this situation when we can.
	• First, ask the case if they will inform the contact of the exposure. Give the case the inbound line phone number for the contact to call.
	    • Make sure that the contact is added as a contact in the CRM
	
	• If the case is not willing to tell the contact about the exposure, and you've done your best to explain to the case why this is important without success, and the only way to connect with the contact is by calling their place of work, you should proceed.
	• A CI / CT can call the contact's place of work using the following steps:
	    1. Verify you are speaking with the correct person before revealing information, as usual.
	    2. If someone other than the specific contact asks why you are calling, you should state, "This is an informational phone call for <<insert name>>, is there a better time for me to call back?".
	
	Do not reveal the reason you are calling or any other identifying information other than the name!