# Massachusetts Community Tracing Collaborative (CTC) Self-Paced Orientation

***Please note links are internal and will not work if not an employee of Partners In Health – should instead be used as an example to guide training programs***

## Dear CHCs,

## Welcome to the CTC! We are thrilled to have you come on board!

As you know, this orientation is self-paced as you prepare yourself for making calls on the CTC. We suggest completing the following activities in order to learn all that you need to know in order to start working.

### *After each training session,  ask yourself:*

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

If you feel uncertain about any skill or topic, talk to the CI and/or mentor who is supporting you and review the resources again.

Throughout this document, you will find prompts to practice and check your understanding. Please do practice as you go along-- it will make things a lot easier for you if you build your skills as you go!

### *General Learning Tips*

- Keep track of your progress! You are busy-- this we know! Take a moment to plan out your approach. We suggest keeping track, at least, of the check-lists that you'll see below. The check lists are ways that you can make sure that you are accomplishing what we hope you accomplish throughout the onboarding.
- 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 OneNote to make it simple to navigate to your training resources
- Write down questions you have to ask your CI trainer. If you cannot reach your CI trainer, if they have a day off or are working on a time-consuming case, for example, you can always reach out to a Mentor for help via the Question and Support Channel.
- Practice hands-on whenever possible!
- Please do NOT print out documents, including protocols or scripts, as they are updated frequently. We want to be sure you are using the most up-to-date documents at all times. Please reference OneNote to make sure that you are using the most up-to-date versions.
- Be patient with yourself –you're learning a lot of information in a short time span.
- There are many people and resources here to support you along the way. Please reach out as soon as you have a question-- don't wait until you are struggling!

### *Need help?*

The Accenture helpdesk should be contacted with any questions about SalesForce or AWS where there is a user question or issue. Questions/issues include:

- Navigation questions (where do I click, not what is the clinical protocol for...)
- Password resets (should use self-service reset first, if issues persist, call helpdesk)
- Email creation/access

## Let's get started!

### Foundations:

- Welcome to the CRC and to Partners In Health!
- Health as a Human Right and the Universal Declaration of Human Rights
- PIH's Advocacy Work
- What is Contact Tracing?
- Introduction to Workflows and Updated Workflows
- Case Investigation and Contact Tracing:
    - CI Role Play
    - Contact tracing role play Video (note: some of the system functionality in this role play is outdated. Please watch to see the general flow and use it as an example of how the conversation should go)
- Orientation to MS Office, Teams and Outlook Note: we heavily rely on MS Teams. If you are unfamiliar with Teams, please watch this tutorial.

#### *At this point, 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

#### *Practice: With your CI trainer, get an introduction to the following:*

Microsoft Teams, OneNote, and Outlook
How to call and chat with a colleague; how to join a meeting or training
Who are the Mentors and how to ask a question in the Question and Support Channel
Where to find the Daily Bulletin, where to look for what's new on OneNote

### Getting Started:

#### *Practice: With your CI trainer, get an introduction to the following:*

Logging into AWS
Making a call in AWS
Setting your AWS status

- Auto logging
- Quick Connects – Internal Language Line and Quick Connects UPDATE
- Interpreter Service Job Aid
- CTC Walk Me and WalkMe Refresher
- QA Call Monitoring Criteria

***At this point, you should understand:***

What Amazon Web Services (AWS)is used for
AWS statuses
Making a phone call in AWS
Dialing in the translator line

## Get the Big Picture:

### Cases: Conducting Outreach

**Read through the Scripts and steps for conducing outreach here**

└ Cases: Conducting Outreach (Web view) (link internally to One Note).

- Metric: Number of Close Contacts per Case

***At this point, you should understand:***

What the CRM (Salesforce) looks like
The end-to-end Case Investigator workflow within Salesforce

### Contacts: Conducting Outreach

Read through the Scripts and steps for conducting outreach here

└ Contacts: Conducting Outreach (Web view) (link internally to One Note).

***At this point, you should understand:***

Differences in process when performing Contact Tracing

### Data Collection and our use of the CRC

Data Best Practices / Data Best Practices PPT deck

***At this point, you should understand:***

How and why we collect the data that we do

## Making Calls

- Claiming a case
- Verify Demographics
- Unanswered Calls Protocol
- Declining to Speak with Us and Declining to Provide Contacts Protocol
- Call Result Protocol

***Practice: With your CI trainer, practice the following skills in the Salesforce Sandbox***

AWS

Access and log into the training environment
Log into AWS
Make outbound calls
Set your status in AWS throughout the day (e.g., lunch, break
Use AWS quick connects
Complete an auto-logged task

Find a Case

Find list views

Open a case

Starting a Case

Assign a case to yourself

Change the case status

Identify the Case Record type

Navigate your Salesforce dashboard –know where to find contact details, your script,

Use the Chatter window, activities, and where to enter data

Data Collection

Complete Contact Details (e.g. phone number, address, and occupation)

Link a record to a household

Indicate if someone is a healthcare worker or lives in a congregate care setting

## Home Assessment

- Home Assessment
- Linking Households 16 minutes

## Referring for Testing

- Referring for Testing
- Referring Contacts for Testing Protocol
- Types of Testing - 18 minutes PPT Deck Here!

***At this point, you should understand:***

Referring for testing

***Practice: With your CI trainer, practice the following skills in the Salesforce Sandbox***

Collect symptoms

Refer for testing

Perform a home assessment

Send an e-mail from within Salesforce

Use Chatter

## Isolation and Quarantine

- Isolation and Quarantine definitions and epidemiology
    - Please note that this was recorded before isolation guidance went from 7 days to 10 days.
- Isolation and quarantine Protocol
- Employer & Release from Isolation/Quarantine letters Protocol
- Update on Isolation & Recovery Sites Protocol
- Updates to Isolation and Recovery facilities
- Employer & Release from Isolation/Quarantine letters Protocol
- Exposure Dates
- DIY PPE and Cleaning Instructions

***At this point, you should understand:***

Exposure Date

***Practice: With your CI trainer, practice the following skills in the Salesforce Sandbox***

Refer for testing
Perform isolation/quarantine instructions
Send an e-mail from within Salesforce

## High Risk and Complex Investigation and Tracing

- High Risk protocols - Updated
- Deep Dive into Complex Contact Tracing and PPT deck
- Settings with Multiple Close Contacts
- Cluster Protocol version 1

***At this point, you should understand:***

Cases and contacts who are healthcare workers or live in congregate care settings
What we do for clusters

## Follow Up and Monitoring

Start by reading through the steps for follow-up and monitoring here
└ Follow-Up and Monitoring (Web view) (link internally to One Note).

- Monitoring and Support

***At this point, you should understand:***

Creating a home monitoring and isolation record

## Closing Cases and Contacts:

Start by reading through the process here
└ Closing a Case or Contact (Web view) (link internally to One Note).

- Closing Procedures Protocol
- Closing Cases

## Referrals within the CTC:

- Referring to a CRC- Updated Protocol
- Medical Referral Pathways Protocol
- Supervisor and LBOH Escalations

***At this point, 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
When to get help and when to escalate a case or contacts to the LBOH

## Documenting your work

- Case Status and Outreach Outcomes
    - Outreach Underway
- Log Contacts Video
- Using Chatter and a bit about Tasks Protocol and Using Chatter from a Salesforce perspective

- CTC Notes for Local Health: Free Text Field for LBOH Protocol
- Deep Dive on Tasks
- QA Call Monitoring Criteria

***Practice: With your CI trainer, practice the following skills in the Salesforce Sandbox***

Create a Task
Record call results using auto-task logging
Create a new task
Determine which subject to use
Understand how and where to record call notes
Refer a task to another team member
Set reminders
Verify that call log/ monitoring logs are correct

## Putting it all together: Training to Deepen your Understanding of the Work:

- Psychological First Aid and Self-care during the Pandemic
- Managing Grief
- Call Center Accompaniment
- Active Listening
- Asking Open-ended question

***At this point, you should understand:***

- 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 ok to talk to someone other than the patient
- Tips for managing your workload and re-assigning cases to other team members
- When you may want to discuss a difficult case with your supervisor or participate in Mental Health office hours

## Additional protocols to guide your work:

- Calling 911 Protocol
- Domestic Violence Protocol
- Immigration Concerns Protocol
- Know your rights – Covid 19 and Immigration Protocol
- Out of State & Airline Travel Protocol
- Pathways for Mental Health Referrals
- Pandemic Unemployment Assistance (PUA)
- Elder Services Referral Pathways

## Role Play

***Practice: With your CI trainer do a role play of a complete CI and CT interview***

Instructions:

Use the Sandbox environment and share your screen via Teams with your CI trainer. The CI will play the role of the case and contact you will call. You will play yourself!

Conduct a full CI and CT interview making sure to:

Greet the case and contact appropriately
Follow the scripts
Record the work in the sandbox environment
Make the appropriate referrals (ie: For testing and a CRC)
Debrief and discuss any questions that came up.

Now that you've made it through the training content, please complete the
REQUIRED TRAINING ATTESTATION FORM

## Assessment:

We have two assessments that you must pass in order to get credentials for Salesforce and to begin making live calls. Once you and your guide (either a CI or a mentor) agree that you are ready to take the assessments, please reach out to Caitlyn Bradburn to schedule that assessment (cbradburn@pih.org)

## Next Steps

Now that you've passed your assessments:

- Make sure you've set up your Salesforce and AWS credentials
  - If you need troubleshooting, call the Help Desk at (781)-328-9234•
- Read the Daily Bulletin and check for updates at the start of each workday!
- View copies of the scripts
- Ensure you've installed your WalkMe extension–this will help guide you through Salesforce
- Continuously review the OneNote and read what's new each day. The RAQ are updated all the time-- check in to see what's new!
- Review Team Huddle notes or anticipate following team-specific procedures for ensuring awareness of day-to-day changes and new

## Where to go for ongoing support:

- If you have a question about protocols or the CRM:
  - Direct your question the "Questions and Support Channel" staffed by CTC Mentors.
  - They'll answer your question or escalate it!
- If you have a question about your hours or schedule in NICE
  - Direct those to your supervisor
- If you have questions about benefits or HR matters:
  - Direct those to your CHC management channels
- If you have questions about ongoing training,
  - You can find the Training calendar here: ▼Welcome! Upcoming training opportunities (Web view)
  - You can find the required trainings here: └ Required Training (Web view)