



NEW YORK CITY
Test and Trace Application
Case Investigation Guide

Version 4.0

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	Welcome to the New York City Trace Application for Case Investigators course. As a Case Investigator, you will use the New York City Trace Application to conduct case investigations in which you will educate COVID-19 positive individuals about isolation to mitigate disease transmission and the services available to them during their isolation period, collect information about their symptoms, elicit the individuals with whom they have come into contact, and notify them about the New York City Trace Application. The New York City Trace Application provides a detailed call script that will guide you through every phone interaction with COVID-19 positive individuals. (continue to the next page)
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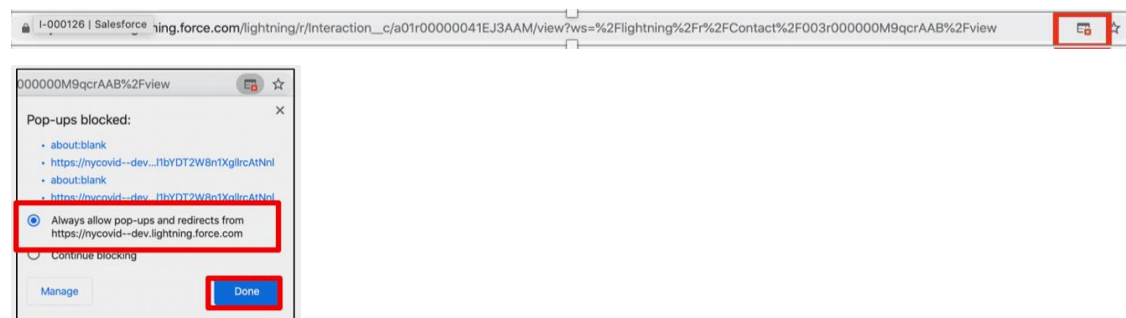
Setting Up Your Workspace

Before you begin conducting a Case Interview, you need to set up your workspace.

First, ensure your pop-up blockers are disabled on Google Chrome. This is handled via the pop-up box in the web address bar. To disable the pop-up blockers, simply click the blocker and select Always Allow and then Done. This will ensure the New York City Trace Application has the permissions it needs to function on your laptop.

Click the pop-up blocker icon

- Select **Always allow** option
- Click **Done**



You must also allow access to your microphone. If this is blocked, phone calls will not be able to be made or received. To turn off the microphone blocker, click the microphone icon in the web address bar. Follow the instructions to allow access to your microphone.

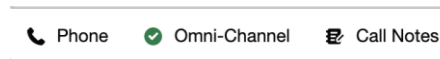


Now you are ready to log into the New York City Trace Application. You should have received an email from Salesforce with your username and a link to set up your password. Click on the link in the email to be routed to the Change Your Password screen. Complete the steps on the screen. Once you set up your password, you will be logged into the application.

Once logged in, you will see the Case Investigator General Queue and a list of Interaction records which we will cover in a minute.

When you are ready to make calls, click into Omni-Channel, choose **Online** as your status, then click into Twilio Flex and choose **Outbound Calling** as your status on Twilio Flex.

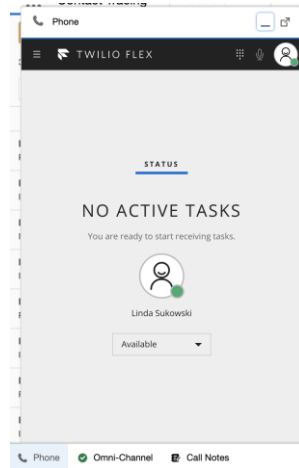
- Click **Omni-Channel** in the bottom left corner



- Click the drop-down arrow in the top right and choose **Online**
- Click **Phone** in the bottom left corner (Twilio)
- Click the drop-down arrow in the middle and select **Outbound Calling**

The **Outbound Calling** status on Twilio Flex means you are ready to place calls and the Online status on Omni-Channel means you are ready to auto-

receive and pick up Interaction records on which you will conduct case investigation.



- Minimize your Twilio window

To receive inbound calls, change your status on Twilio Flex to Available and your status on Omni-Channel to Offline. This ensures you are not sent Interaction records on Omni-Channel while you are receiving inbound calls.

It is important to ensure these statuses are correct based on whether you are placing outbound calls or receiving inbound calls as Twilio Flex and Omni-Channel work together to ensure your workspace is set up to place and receive calls.

It is also important to note that you should not pop out the Twilio screen while you are in the middle of a call as this will refresh the Twilio Flex screen and disconnect the call.

Ensure the volume on your audio device or headset connected to the laptop is turned on as this will be used to place and conduct your calls.

Locating and Selecting Cases in the Case Queue

Let's take a look at how a Case Investigator conducts a Case Interview in the New York City Trace App.

- Case Investigation General Queue displays

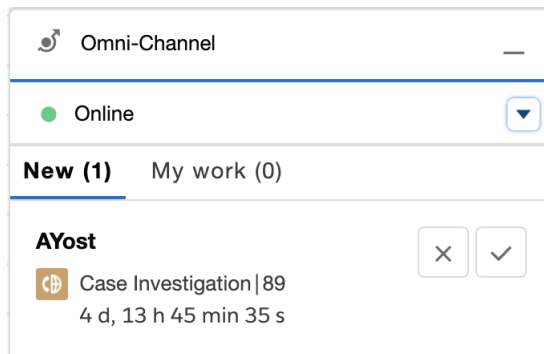
After logging in, the first thing you see is the Case Investigation General Queue. This queue shows a list of Interaction records for Cases that need to be investigated. More to come on Interactions in a few minutes.

In order to start working these Interactions, go to Omni-Channel, located in the bottom left corner of your screen.

- Click **Omni-Channel**
- Point out the **Interaction record in the Omni-Channel window**

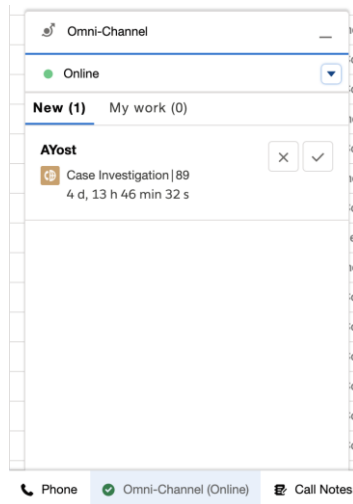
On the Omni-Channel window, you will automatically receive one Interaction record at a time. The Interaction record that has been in the queue the longest displays in the list.

Case in the list



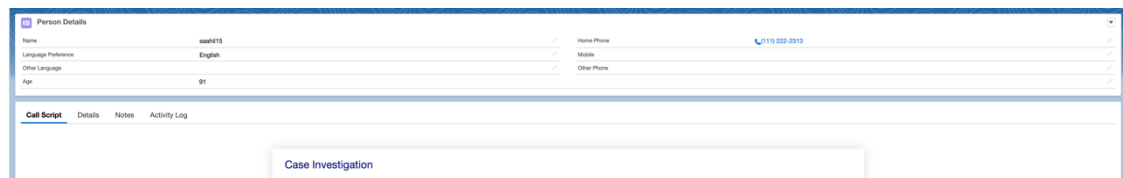
Notice that this Interaction shows as a Case Investigation and you also see the date of birth and age for the Case. Clicking the checkmark for the Case accepts it and takes you to the Interactions record. You can decline an Interaction record by clicking the X if approved by your manager and in line with the New York City Tracing Program protocol.

- Select the Case to call and then click the checkmark to accept it



- Verify you are on the Call Script tab

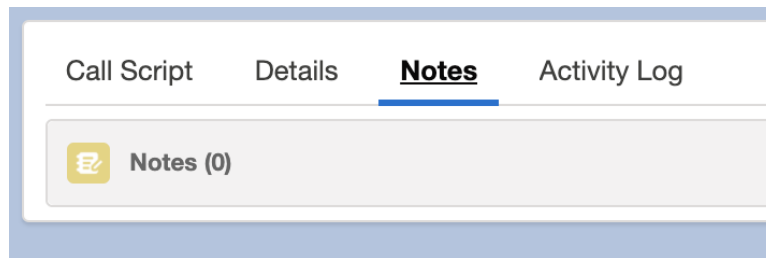
Clicking on the checkmark brings you directly into the Interaction record. At the top of the page, you see the Person Details section. Here you find the Name, Language Preference, Age, and Phone Numbers for the Case.



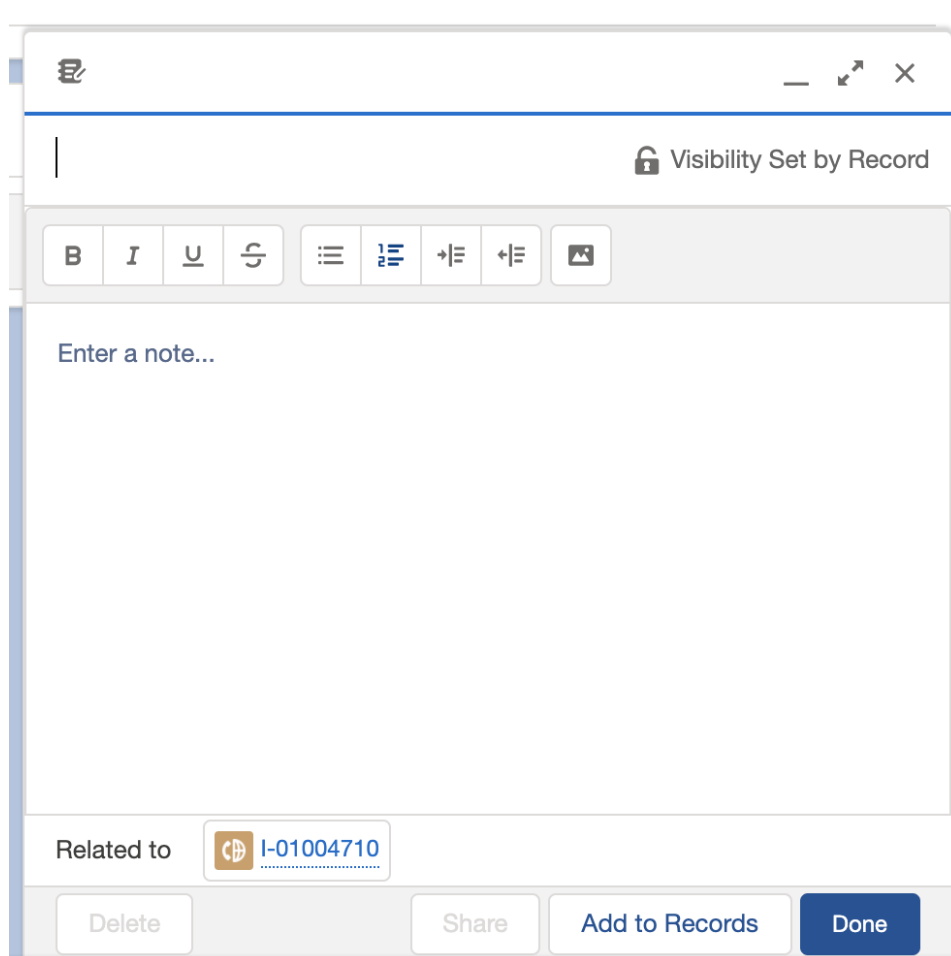
As a call center agent you have the ability to view the activity logs that were updated by the community engagement specialist. There you can view any interactions or comments that were captured between the case and the community engagement specialist.

Review the information in the Person Details section prior to making the call. Be sure you are on the Call Script tab when you are ready to call the Case. As you step through the scripts, you will be prompted for what to ask the Case as well as what information to enter. Let's get started!

Notes



On the interaction you are able to add notes that you collected before, during, and after the call. Click on the notes tab under the interaction record and click new to open new notes.



The notes will be automatically related to the interaction with you as the creator. You can share the notes with other call center agents and add the notes to other interaction records. Once you are done click done so the notes are saved to the interaction.

Initiating a Call

First, you want to open up the call script by clicking on Start Call on the Interaction record. This brings up the first page of the Call Script before you actually dial the number of the Case.

- Click the **Call Script** tab, if necessary
- Click the **Start Call** button
- Point out the **Home Phone** number in the **Person Details** section

As the Call Investigator, when you are ready to make the call to the Case, you click the phone number listed in the Person Details section. Clicking the number will launch Twilio Flex which automatically calls the Case.

Click the **Home Phone** number

The screenshot shows the 'Person Details' section of the Case Investigator interface. It includes fields for Name (Mr. trav-eller), Language Preference (Spanish), Other Language, and Age (0). The 'Home Phone' number is 408 540-1108. Below this, there is a 'Call Script' section with tabs for 'Details', 'Notes', and 'Activity Log'. The 'Call Script' section shows 'Case Investigation' with 'Current Disposition' as 'Call Completed' and 'Call Steps Completed' as '22 of 22'. A 'Start Script' button is visible at the bottom right of the 'Call Script' section.

If the phone number appears to not be a link or have a strikethrough on the phone icon, this means you are offline on Twilio Flex and must set your status to Outbound Calling or Available based on your designated task.

When the call is being placed, you will hear a standard phone ring through your device microphone. Minimize the Twilio window at this time.

- Minimize the Twilio window

Completing a Case Interview

Step 1:

Voicemail

The first step in the Call Script is **Voicemail**.

1. **Voicemail**
2. Introduction
3. Identity Verification
4. COVID-19 Education
5. Contact Information
6. Residence
7. Work & Living Setting
8. Symptoms
9. Exposed Contacts
10. Isolation
11. Whether previously a contact and reasons for testing
12. Hotel Interest
13. Wraparound Services
14. Monitoring Preference
15. Important Reminders
16. Medical Conditions
17. Recent Travel
18. Source of Infection
19. Employment
20. Race & Ethnicity
21. Gender & Sexual Orientation
22. Disability

Voicemail

*Phone number reached?
☐ Yes ☐ No

Save & Exit

Continue

When the phone number is not reached, you will leave a voicemail with the dialogue in the teal box. If the call is answered, you click “Yes” for Phone number reached

If the Case does not answer, click on No for the first question. When you select “No” a teal shaded box appears. The teal box includes dialogue you will read to the Case as well as guidance for special circumstances.

- Phone number reached? = Yes

Completing a Case Interview

Step 2:

Introduction

Introduction

Hello. My name is **Imran Chowdhury** and I am calling from New York City Health + Hospitals about an important health matter.

* Is saahil15 available to speak?

☒ Yes ☐ No

* Before we continue, are you comfortable speaking in English?

☒ Yes ☐ No

At this point, you would say, "Hello. My name is [Case Investigator Name] and I am calling from New York City Health + Hospitals about an important health matter. Is [Case Name] available to speak?" Throughout the script, you will be reading both the text in the teal boxes as well as the questions presented below them.

In this training, we will point out where the text should be read and where it is simply instructional.

If the Case is not available to speak, choose "No" and then say *"Thank you. Please tell [Case Name] to call us back at 212-540-6921, select your language, then select option 1."*

ask the CASE NAME to call back using the number you provide. Click Save & Exit to stop the interview.

Other responses could be that the Case is hospitalized, deceased, or you have just simply dialed the wrong number. Follow the instructions in the teal box to read the correct dialogue based on the circumstance.

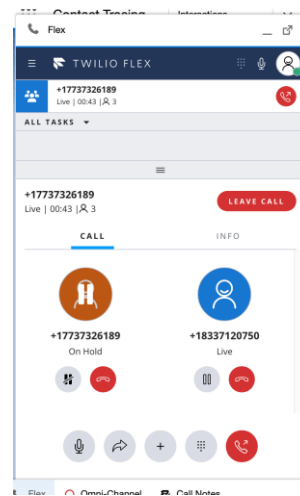
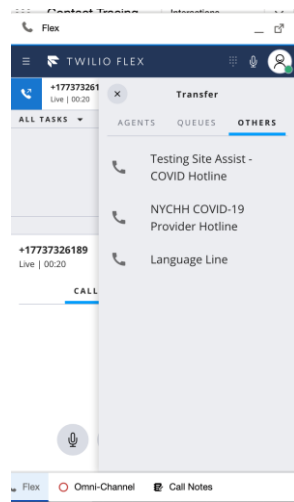
If the Case is available, choose "Yes," and then once the Case is on the phone with you, ask if he or she speaks English.

Is CONTACT NAME available to speak? = Yes
"Before we continue, are you comfortable speaking in English?"

If the Case does not speak English, you would choose "No" and ask them their preferred language as indicated in the call script. The gray box is instructional and gives you guidance on how to proceed. DO NOT read this out loud to the Case, but rather, follow the directions in the box.

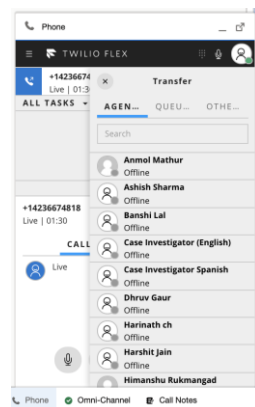
- Point out the language choices

	*What is your preferred language? Spanish ▼ Dial in Language Line. Press 1 for Spanish Press 2 Mandarin Press 3 Russian Press 4 Cantonese Press 5 Bengali Press 6 for all others and then it will prompt you to speak the language. Let the Case know that you will put them on a brief hold while you bring in a translator to accommodate their language preference. Next, click Phone in the bottom left corner to bring up Twilio Flex and place the Case on hold by clicking the Pause button. Select the Forward icon. A Transfer window will appear on Twilio Flex. Click on the Others tab and click on Language Line. This will place a call to the translation service. Open up the dial pad by clicking on the dial pad icon. Click on the appropriate number based on the preferred language. Wait until you answer the call. Then, bring the Case back on the call by clicking on the pause icon to take them off hold. • Click Phone in the bottom left corner • Click Pause to place the Case on hold • Click the Forward (arrow) icon • Click Others in the Transfer screen box. • Click on the label Language Line. • Click the dial pad icon on the bottom. • Click 1 on the dial pad. • Click Pause to bring the person back on the line • Hang up the call.
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I also want to mention that there may be times when you need to transfer a call to a different person. This is also done through Twilio. You can transfer a call to your supervisor, for example, by clicking the Arrow icon and then choosing the person for the transfer OR by clicking into the Queue tab and transferring to the Supervisor Queue.

- Click the **Arrow** icon
- Point out the names for the Transfer



- Close the Transfer window
- Minimize Twilio window

For this example, we won't transfer anyone or use a translator. Let's continue with Step One of the call script.

For this example, the Case speaks English.

Do you speak English? = Yes

Once you have the Case on the phone with you and the questions have been answered, click Continue. Clicking Continue saves the page and moves you to the next page.

- Click **Continue**

Completing a Case Interview

Step 3:

Identity Verification

The third step of the interview, **Identity Verification**, is very important.

Identity Verification

I want to let you know that this call will be recorded for quality assurance purposes.

Because I am calling about a health issue, I need to verify your identity.

What is your date of birth?

Nov 5, 1930

*Date of Birth Confirmed?

☒ Yes ☐ No

What is your address?

Primary Address

Street Address 486 Lafayette Ave
City Brooklyn
State NY
Zip 11205

Alternate Address

Street Address
City
State
Zip

If Primary Address is not confirmed:
"Do you have a previous or alternate address?"

*Address Confirmed?

☒ Yes ☐ No

When you are in the identity Verification page, let them know the call will be recorded for quality assurance purposes.

At this stage you will need to verify you are speaking to the right individual. Read the teal boxes to follow the script.

The Case's date of birth and address may already appear on the page and it is your job to ask the Case to confirm these details.

	If the Case presents the correct date of birth, indicate “Yes” for Date of Birth Confirmed? Otherwise, indicate No. Do the same for the address. If the address appears on the screen, ask the Case to confirm it, “What is your address?” and mark the correct response, “Yes” or “No.” If the Case confirms both date of birth and address, you will be able to click Continue. If the Case confirms only one, date of birth or address, you will also be able to Continue. However, if the Case does not confirm date of birth or address, you will notice the prompt states to say, “Thank you for your time. I think I have the wrong phone number.” You would click Save and Exit to end the interview. The Continue button would be disabled and would not be an option. For our example, we have successfully verified the identity of the Case by date of birth. • Date of birth confirmed? = Yes • Address confirmed? = No • Click Continue • If DOB + Address = Not Confirmed, identity is not verified and does not allow it to Continue. • If identity is not verified say: “Thank you for your time. I think I have the wrong phone number.”
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Completing a Case Interview Step 4:	The fourth step is COVID-19 Education. The information on this page helps to educate the Case and should be included just as you see it for quality purposes. Read the text in the teal boxes to follow the script.
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COVID-19 Education

COVID-19 Education

I am calling you today because you, Arjun Test Vaishnav4, were tested for COVID-19 on and that test was positive. That means you have the virus that causes COVID19. I am part of a citywide initiative called the Test and Trace Corps to stop COVID-19 infections in New York and help the city re-open. We are calling everyone in New York City who tested positive so that we can provide you with information on how to take care of yourself and your loved ones. New York City is working hard to stop the spread of COVID-19 so that all New Yorkers can stay safe and this call is part of that effort.

During this call, I will ask you questions about your health and people you may have come in close contact with and I will provide you with information on how to access some of the services you may need. This phone call takes most people less than 35 minutes. The information you provide me will only be used for the purposes of protecting your health and the health of other New Yorkers. The information will be kept confidential to the fullest extent of the law. I am not a doctor or nurse and cannot provide you with personalized medical advice.

When you complete this interview and provide us a mailing address, we will send you a care package of items that will help keep your loved ones safe. The package will include masks, hand sanitizer, thermometers and a pulse oximeter (which is a device that will help you know if it is time to seek emergency medical care). You can view the contents of this box at TestandTrace.NYC/TakeCarePackage

"Do not ask them if they have time to speak, just tell them you plan to continue, if they stop you then mark "no", otherwise, mark "yes"."

* I am going to continue now, we'll be as fast as we can.

☒ Yes ☐ No

Do not read the text in the grey aloud, continue with the first question if they stop you they have decided to not go forward. If they say yes you are able to continue.

"I am going to continue now, we'll be as fast as we can?"

Click **No** to show the Date and Time fields to choose a call time.

Clicking "No" to this question means you will Save & Exit the interview after completing the best time to call back within the next 24 hours. If you Save & Exit, you will need to select the Disposition and enter Disposition Notes. Limit date to the current day and the day after. And say the following dialogue:

	*I am going to continue now, we'll be as fast as we can. ☐ Yes ☒ No What is a good time to call you back today? Date Time Thank you for your time. One of my colleagues will call you back at that time. You can also call us back at 212-540-6921 at that time or earlier if convenient for you. If we don't reach you in the next day we may come visit you at your home to make sure you have what you need to safely separate and keep your loved ones safe, so please pick up next time we call or call us when you can today. If you feel like your health is getting worse, you should talk to your health care provider. If it is an emergency, call 911. Unless you are having an emergency, we ask that you stay in your residence. This will help to keep others safe. If you are in an indoor space with other people, please stay in one room and away from other people as much as possible. Wash your hands often with soap for 20 seconds, especially after you cough or sneeze. Cover your nose and mouth with a mask or cloth face covering such as a bandana or scarf when you are in the same room as others. If the answer is "Yes," you will continue with additional details. You will read the text in the teal box to continue the COVID education. - Click Yes to show additional details - Click Continue
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Completing a Case Interview Step 5: Contact Information	The fifth step is Contact Information.
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	Contact Information To get started, I'd like to ask you some basic questions about yourself. What is your date of birth? Sep 22, 1999 *What is the best phone number at which to reach you? (123) 545-7656 Do you have an alternate phone number where you can be reached? ☐ Yes ☒ No In case of an emergency, who should we call? Please provide their: First Name Last Name Relationship Phone Number ← Previous Save & Exit Continue Enter or verify answers for all questions based on the call script questions and then click Continue. Complete all questions/answers and click Continue
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Completing a Case Interview Step 6: Residence	Step six is Residence and where you confirm the address for the Case. Enter the address information and then ask if the Case will be staying overnight in NYC for the next 10 days.
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Residence

What is the address where you normally live?

*Street Address

160 Scott Avenue

Borough

Brooklyn

*City

Brooklyn

State

NV

*Zip

77989

*Will you be staying overnight in NYC in the next 10 days?

☐ Yes ☐ No

*Is the address where you normally live the same as the one where you will be staying at overnight for the next 10 days?

☐ Yes ☐ No

← Previous

Save & Exit

Continue

If the Case is staying overnight in NYC in the next 10 days, select “Yes” for the question, “Will you be staying overnight in NYC in the next 10 days?” and complete the last question.

- Will you be staying overnight in NYC in the next 10 days? = Yes
- Is the address where you normally live . . .overnight for the next 10 days? = Yes or No
 - If NO selected, enter the address where you will be staying most nights for the next 10 days.

After completing the Residence information, you would click Continue.

If the Case is not staying overnight in NYC in the next 10 days, select “No” for the question, “Will you be staying overnight in NYC in the next 10 days.” Then continue to the next question. Read the text thanking them for their time and click Save & Exit.

- Will you be staying overnight in NYC in the next 10 days? = No
- Is the address where you normally live . . .overnight for the next 10 days? = Yes or No
 - If NO selected, enter the address where you will be staying most nights for the next 10 days.

	Read the text in teal shaded box *Will you be staying overnight in NYC in the next 10 days? ☐ Yes ☒ No *Is the address where you normally live the same as the one where you will be staying at overnight for the next 10 days? ☐ Yes ☒ No What is the address where you will be staying most nights for the next 10 days? *Street Address Borough *City Select an Option State *Zip NY Thank you for your time, your case will be transferred to the appropriate public health official to follow-up. Unless you are having an emergency, we ask that you stay inside your residence. This will help to keep others safe. If you are in an indoor space with other people, please, as much as possible, stay in one room and away from other people. Wash your hands often with soap for 20 seconds, especially after you cough or sneeze. Cover your nose and mouth with a mask or cloth face covering such as a bandana or scarf when you are in the same room as others. ← Previous Save & Exit Continue Select “Yes” for the second question, answer the third question and click Continue.
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Completing a Case Interview Step 7: Work Setting	Step seven asks questions about Work and Living Setting.
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Work & Living Setting

*Do you currently live in a group or congregate setting? A congregate setting is an environment where a number of people live in close proximity. Examples include homeless shelters, nursing homes, assisted living facilities, group homes, prisons, and detention centers.

☐ Yes ☒ No

*Are you an essential worker? An essential worker is someone who performs work involving providing essential needs for human life or the protection of property. Some examples of essential workers are people who work in grocery stores, pharmacies, food production, emergency personnel, public safety officers, and government employees who report that they have been told by their employer that they are essential.

☐ Yes ☒ No

*Do you work in a healthcare setting?

☐ Yes ☒ No

*Do you work in a group or congregate setting? A congregate setting again is one where multiple people live in close proximity like a nursing home or a homeless shelter.

☐ Yes ☒ No

*Are you currently hospitalized?

☐ Yes ☒ No

If the answer to the first question is “Yes,” you will follow up with “What is the name of the setting?” “What is the address?” (street, borough, state, zip)

- Do you currently live in a congregate setting? = Yes
- Read out the text in the teal shaded box

	Work & Living Setting *Do you currently live in a group or congregate setting? A congregate setting is an environment where a number of people live in close proximity. Examples include homeless shelters, nursing homes, assisted living facilities, group homes, prisons, and detention centers. ☒ Yes ☐ No *What is the name of the setting? What is the address? Street Address City State Select an Option Zip Code Borough Select an Option Thank you for your time. One of my colleagues will be calling you soon. If you feel like your health is getting worse, you should talk to your health care provider. If it is an emergency, call 911. Unless you are having an emergency, we ask that you stay in your residence. This will help to keep others safe. If you are in an indoor space with other people, please, as much as possible, stay in one room and away from other people. Wash your hands often with soap for 20 seconds, especially after you cough or sneeze. Cover your nose and mouth with a mask or cloth face covering such as a bandana or scarf when you are in the same room as others. If the answer to the question is “No,” you will need to complete the rest of the 5 questions. For any question where the answer is “Yes,” additional information may be required.
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Completing a Case Interview Step 8:	Step eight is where we collect information about the Case’s Symptoms.
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Symptoms

Symptoms

I am going to read you a list of symptoms that are associated with COVID-19. Please think back to the last three-and-a-half weeks. After I get done reviewing, I'm going to ask you about the first date you experienced any of these symptoms. This date will help us determine your infectious period and how long you need to stay safely separated from others. After we have a date, I will review the symptoms one by one, so you can tell me more about your illness.

*The list of symptoms associated with COVID-19 include: fever, cough, chills, difficulty breathing or shortness of breath, sore throat, muscle aches, diarrhea, headache, vomiting or nausea, loss of smell or taste, fatigue, sinus congestion. In the last three-and-a-half weeks, have you experienced new onset of any of these symptoms?

☐ Yes ☒ No

Begin by reading the text in the teal box, then ask them the first question regarding symptoms. If they say yes, a list of symptoms will appear and you will go through each one and answer yes or no to each.

If the answer to any of the other questions is "Yes," you may need to provide additional information about the symptom.

- Fever = Yes
- Enter temperature of 101 degrees Fahrenheit
- Cough = No
- Chills = No
- Difficulty Breathing or Shortness of Breath = Yes
- Sore Throat = No
- Muscle Aches = No
- Enter No for the remaining symptoms

After capturing the symptoms, you will ask when the Case first experienced these health issues and enter the date.

"When did you first experience these health issues?"

The answers provided will determine the informational text that appears in the teal shaded box at the bottom of the page. Some symptoms are considered more serious and require different recommendations.

If individual said yes to Difficulty Breathing OR Shortness of Breath OR Chest Pains OR Confusion, read them the text in the teal box:

	Based on your answers, we strongly recommend that you speak with your doctor about the symptoms you are experiencing. If you do not have a doctor or you cannot get ahold of your doctor, you can call NYC Health + Hospitals at 1-844-692-4692. To reach the COVID-19 Provider Hotline, press 0. If at any point you feel your symptoms require emergency medical attention, call 911 or go to your nearest Emergency Room. For all other symptoms read the given text on the teal box. If you have any medical questions about your symptoms or about having COVID-19, I encourage you to speak with your doctor. If you do not have a doctor or you cannot get ahold of your doctor, you can call New York City Health + Hospitals at 1-844-692-4692. To reach the COVID-19 Provider Hotline, press 0. If at any point you feel your symptoms require emergency medical attention, call 911 or go to your nearest Emergency Room. Click Continue
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Completing a Case Interview Step 9: Exposed Contacts	Step nine, Exposed Contacts, is where you capture the details of any of the Case's exposed contacts so they too can be monitored for the next 14 days. We can also do intake on any exposed contacts. You will begin by reading the teal text box. (Continue to the next page)
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Exposed Contacts

One of the most important things that we as a community can do to stop the spread of this virus is to identify people who were exposed and who are at risk of getting COVID-19. We need your help to do this and to help keep your family and loved ones safe.

For this reason, I have some questions about the people with whom you had close contact at any time since September 5, 2020 through September 17, 2020.

We want to make sure that your contacts do not get sick from COVID-19, to let them know what to do if they do start to feel sick, and to encourage them to get tested.

When we reach out to them, we will not share your name and they will not find out that you have COVID. However, if you feel comfortable, we recommend that you contact them yourself to let them know that we will be calling them and to encourage them to separate from others.

*Do you live with anyone in your home such as family members, roommates, housemates, or a spouse?

☒ Yes ☐ No

[+ Add Contact](#)

Then you will continue with gathering answers for the questions that follow.

There are four categories of exposed contacts. When the answer to any of these four questions is “Yes,” you will be required to gather information about these individuals.

- Do you live . . . family members, roommates, . . . ? = Yes

Click the **Add Contact** button and add a Contact (Your Choice) – Enter First Name, Last Name, Date of Last Contact, Birth Date, and Phone Number.

Add Contact

Exposure Relationship Type
Household Member

*Exposure Relationship Detail
Select Relationship Detail

*First Name

*Last Name

Date of Birth

*Date of Last Contact

CONTACT INFORMATION

Home Phone

Mobile Phone

Alternate Phone

Cancel

Add Contact

For Household contact, if the Case provides a name for a household contact but does not provide a phone number, read the text in teal.

Add Contact

PERSONAL INFORMATION

If case names a household contact but does not provide a phone number, please read:

Thank you for providing me with the name of your household contact. Are you sure you do not have a phone number for this person? Household contacts, including family members, roommates, or guests, are at an increased risk of contracting COVID-19. If you cannot find a phone number for this person, we will list your phone number and call you each day to check in on that person. This may mean that you get multiple calls a day from our team. One of the calls would be to check in on you, and the other calls would be to check in on this other person. When we call you about this other person, you can put them on your phone but please note that this may allow them to learn that you have COVID. Also, it is important that they not touch your phone because there would be a risk that they could get infected; instead, you can put them on speaker phone.

Exposure Relationship Type
Household Member

*Exposure Relationship Detail
Select Relationship Detail

*First Name

*Last Name

Cancel

Add Contact

As you are creating a new Contact, be sure to capture the Exposure Relationship Detail. You can do this by saying something like this, “I’d like to collect a little more information on them. What more can you tell me about this individual?”

*Do you live with anyone in your home such as family members, roommates, housemates, or a spouse?
☒ Yes ☐ No

+ Add Contact

- Point out newly added Contact (in blue)

	• Mention to add more Contacts, click Add Contact again To make changes to a Contact you have already entered, click the View Details link. • Do you have . . . not members of your household . . . ? = No • Did anyone such as a home health . . . in your household . . . ? = No Have you had close . . . for at least 10 minutes? = No For the personal relationship question, read the grey box and only ask them the question if they are answering on their own behalf and must be 18 years of age or older. As a case investigator you should select no to this question unless the case says yes to answering the relationship question. Follow the grey box to determine the next step. Only ask this question if the person doing the interview is answering questions for themselves (that is, the interview is not being done using a proxy) and the person is 18 years of age or older. If the person doing the interview is a proxy or the person is less than 18 years of age, then do not ask the next question. Are you comfortable answering questions about your personal relationships? If No, answer no to the question below. If Yes, proceed below. If the case says yes to proceed as them the relationship question. Then continue to add the contact they provide. * Do you have any partners who are not members of your household that you kissed or had intimate relations with since September 19, 2020? ☒ Yes ☐ No + Add Contact If the case answered no to all contact questions a new question will appear. Ask the question and record their answer. Once you have done so, read the teal box and click continue.
--	---

	*You haven't provided any close contacts. Is that because: ☐ You haven't had any close contact with anyone since September 19, 2020 ☐ You can't remember whom you've been in contact with ☐ You are hesitant to provide me with contacts At this time, we are recommending that ALL contacts of cases, not only those that you've just listed, get tested for COVID-19. We ask that you get in touch with anyone you've had contact with and suggest that they get tested. They can arrange for a test by visiting nyc.gov/covidtest or calling 311. • Click Continue
--	--

Completing a Case Interview Step 10: Isolation	Step ten, Isolation, is more educational. Begin by reading the text in the teal boxes. Isolation To keep your loved ones safe and to help stop the spread of the virus through New York City, you must stay inside your home and away from other people starting immediately, except for essential medical care such as dialysis or for emergencies, until at least Sep 30, 2020. I know it may be difficult to stay in your home and away from other people for that long and that this news may be stressful to hear. I am now going to walk you through a number of services we are providing to make this period easier and doable. First, one of the hardest parts of staying home is not being able to work. In response to the COVID-19 outbreak, New York State has guaranteed some workers get job protection and financial compensation if they are required to separate from others because of COVID-19. If you need a letter to give to your employer explaining that you cannot go to work or have questions about the new Paid Family Leave program related to COVID-19, please call 1-855-491-2667. The Case will learn about the importance of isolation as well as how to best isolate themselves. There are also valuable mental health guidelines.
---	---

	Mental Health Second, we understand that COVID-19 can be very stressful. If you need someone to talk to, you can call 1-888-NYC-WELL (1-888-692-9355) or text "well" to 65173. We also know COVID-19 is causing stress for families. We have seen an increase in family violence and threats, so we are telling everyone that if you don't feel safe at home, you can call 1-800-621-HOPE(4673). And of course, if you're in immediate danger, you should call 911. These calls are confidential and you can trust the people answering the phone to help you. After reading the information to the Case, click Continue. - Point out the text in the teal shaded boxes, including Isolation and Mental Health sections - Click Continue
--	---

Completing a Case Interview Step 11: Whether previously a contact and reason for testing	In Step eleven, Whether previously a contact and reason for testing, is where you capture the details of whether previously a contact and reason for getting tested. (Continue to the next page)
---	---

	Whether previously a contact and reasons for testing *In the last 21 days, were you told by any health professional such as a contact tracer like myself that you were exposed to the virus that causes COVID? ☐ Yes ☐ No *Why did you decide to get tested for COVID? (select all that apply) ☐ A health professional such as a contact tracer or my doctor told me to get tested ☐ I had contact with someone who had or might have had COVID ☐ To meet screening requirements for some program, event, or travel ☐ I had symptoms of COVID ☐ A friend or family member told me to get tested ☐ My work required that I get tested ☐ I regularly go to get tested ☐ Other ← Previous Save & Exit Continue Confirm with the Case the two questions and capture answers before clicking continue. • In the last 21 days, were you told by any health professional such as a contact tracer like myself that you were exposed to the virus that causes COVID? = Yes or No • Why did you decide to get tested for COVID? = Select all that apply ◦ If Other selected, then provide additional information • Click Continue
--	---

Completing a Case Interview Step 12: Hotel Interest	Step twelve is Hotel Interest. Begin reading the text in the teal box. (Continue to the next page)
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Hotel Interest

Third, during your period of isolation, you may be eligible to stay in a hotel room in New York City, free of charge.

In particular, we are offering these free hotel rooms to people who do not have their own bedroom or bathroom, or whose living circumstances generally would make it difficult to keep their distance from others in their household.

We are also offering these free hotel rooms to people who are concerned about basic necessities such as food, electricity, and phone service, while isolating at home. The hotels offer all basic services, including meals.

***Are you interested in staying in a hotel room? I can connect you to a reservationist who can give you more information about the hotel program.**

☐ Yes ☐ No

For Yes or Maybe, check Yes

If case asks you questions about the hotel:

Use the Hotel Program FAQ Job Aide to answer their questions. If you cannot answer their questions you can say "I'm sorry but I don't have the answer to that question but I can provide you with a number to ask more questions about the hotels: 212-242-2692 (Press 2)" or if they are unsure about the hotel, you can say "If you change your mind or if have questions about the hotels in the future, you can always call 212-242-2692 (Press 2) to ask more questions and get connected to the hotel program".

Since the Case is a confirmed Case, he or she may be eligible for a hotel room during isolation.

Point out the gray shaded box If the Case asks questions about the hotels and you do not feel comfortable answering their questions, apologize and state you do not have the answers.

After reading the text about Hotel Interest, if the Case is interested in staying in a hotel room, you will ask additional Hotel Exclusion Questions. For example, if the Case uses oxygen or breathing machines, we are unable to accommodate those Cases in hotels currently.

If the Case says yes to a hotel, move to Monitoring Preferences
If the Case says No to a hotel, move to Wrap-Around Services

Completing a Case Interview

Step 13:

Wraparound Services

Step thirteen is **Wrap-Around Services**.

Basic Necessities Questions

*To help you remain in your home, without leaving except for essential medical care or for emergencies, do you need help getting basic necessities, like food?

☒ Yes ☐ No

If yes, state the below, and if they agree to the below place referral to Resource Navigator and continue to the following 4 questions. If they do not agree then change the last question to "no" and move to Monitoring Preference.

Great. I am going to place a referral to a resource navigator who can help you get basic necessities like food and other services you may need. To place the referral, I will need to share limited information, with a partner Community Based Organization working with our team to help people access resources. Your information will remain confidential. Do you agree to let me place the referral and share information so that the resource navigator can contact you?

If yes continue with script as is, if no, change the last question to "no" and move to Monitoring Preference.

My colleague will call you back. In the meantime, let me see if I can help you.

Wraparound Services are provided for Cases needing necessities, like food, if they choose to remain at home.

Continue with wrap around service questions.
"Are you concerned about having enough to eat?"

If yes, read the text in the teal box.

Food

Are you concerned about having enough to eat?

☒ Yes ☐ No

You can call 311 and say "GetFood" or visit nyc.gov/getfood for information about the closest food pantry or free meal delivery. As a person who has COVID-19, you are eligible to have meals delivered even if you do not meet the general requirements for free meal delivery. Your resource navigator will set that up for you when they call you back.

If not, continue.

Medications

"Are you concerned about getting your medications?"

If yes, read the text in the teal box.

Medications

Are you concerned about getting your medications?

☒ Yes ☐ No

Many pharmacies are delivering; you can find out about pharmacy delivery by calling your pharmacy or doctor. If you need a doctor, you can call **1-844-NYC-4NYC (1-844-692-4692)** for a new patient tele-medicine appointment. For methadone, treatment programs are now delivering; you can call your treatment program to request home delivery. We are here to support you, if you are unable to make these calls right now, when your resource navigator calls you they can assist you in setting up pharmacy delivery as well.

If No, continue.

Phone

"Will you have access to a phone and minutes to reach out for help if you need it?"

If Yes, continue to the next question.

If not, read the text in the teal box.

	I want to remind you that you can always call 911, even if you do not have minutes or a phone plan and we may be able to help you access more minutes. The Resource Navigator can speak with you about this. Utilities “Are you concerned about your air conditioning, heat, water, or electricity being shut off?” If yes, read the text in the teal box. I want you to know that right now, no utility can turn off a service if a person cannot pay their bill. More information is available if you call 311 and say “rent and utilities”. If no, continue to Monitoring Preference. • Click Continue
--	--

Completing a Case Interview Step 14: Monitoring Preference	For Step fourteen, Monitoring Preference, informs the Contact that there will be daily monitor calls or text messages until the monitor end date. This date is determined by the onset date provided previously. Monitoring Preferences Starting tomorrow we'll do daily check-ins until at least Sep 17, 2020. Most of your daily check-ins will happen over the phone or by text message. You may also receive a visit from someone on our team to see how you are doing and confirm that you are able to safely separate from others. Each day, whether over the phone, text message or in-person, you will have the ability to request assistance with services to help you stay separated from others. You will also have the ability to provide the name and contact information for a close contact you may have forgotten to include today. If you prefer to complete your daily check-in with us before we contact you, you can call us at 212-242-2692. You can also call that same number if you have questions for us. We are open 9am-9pm every day of the week. Would you like us to call you or would you prefer to receive a text message for these daily check-ins? Note: In order to be eligible to use SMS monitoring, you must have an Android or iPhone smartphone running the supported operating system. ☐ Phone ☐ SMS
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	Begin with reading the text in the teal box so the contact is notified of the two ways to do the daily check ins. If the contact decides to go with the phone, click the phone then continue to the next step. If the contact decides to receive text messages, click on SMS. Then you will read to them the additional information in the teal box that will pop up. Would you like us to call you or would you prefer to receive a text message for these daily check-ins? Note: In order to be eligible to use SMS monitoring, you must have an Android or iPhone smartphone running the supported operating system. ☐ Phone ☒ SMS *What mobile phone number can we use for these check-ins? Only US mobile numbers are supported for SMS check-ins. Thank you for providing your mobile phone number for SMS monitoring. You are about to receive a series of SMS messages from the Test & Trace program. Please respond "Yes" to these messages to complete your enrollment in SMS monitoring. Each day during monitoring, we'll send you a text message with a link to a secure website and a brief list of questions. If you do not respond by text by 2 PM, you will receive a call from a contact tracer to complete your monitoring. By providing your phone number, you agree to receive messages from the NYC Health + Hospitals. Message and data rates may apply. You can reply STOP to cancel at any time. Once you have completed the Monitoring Preference click Continue. Click Continue
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Completing a Case Interview Step 15:	For Step fifteen, Important Reminders, read the information in the teal shaded box. (Continue to the next page)
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Important Reminders	Important Reminders Let's review what you should do to protect others from getting sick. This information is available at www.cdc.gov if you want to refer back to it. • Do not leave your home except to seek essential medical care or for emergencies or if you are going to an isolation hotel with our program. • Stay at least 6 feet from everyone in your home. If you cannot stay 6 feet from others, wear a mask or face covering. • Stay in a separate room away from others and sleep alone in a room that has a window with good airflow. If you share a bathroom, disinfect surfaces and fixtures (anything you touch) after each use. • Avoid sharing any household items (plates, combs, toothbrush, cups, sheets/blankets etc.) with others. • Wash your laundry separately with detergent. • Cover your mouth with tissue when coughing or sneezing, throw the tissue away and avoid touching your face as much as possible. • Wash your hands frequently throughout the day with soap and water for at least 20 seconds. • Throw away your gloves, tissues, masks, and other trash in a tied bag immediately after use. • Anyone you come in contact with (including anyone in your home) should watch themselves for fever, cough, and other symptoms, and should seek testing even if they do not have symptoms. If they develop symptoms, they should get tested again and speak to their healthcare provider. And let's review things you can do to take care of yourself: • Stay hydrated and drink plenty of water. • Stay away from caffeine and alcohol. • Get plenty of rest. If you are currently working out of the house you now need to stay home, if you are working at home take it easy or stop working so you can give your body rest needed to help recover. • Seek healthcare if your symptoms worsen. • Click Continue
Completing a Case Interview Step 16: Medical Conditions	Step sixteen is Medical Conditions. This page is for capturing any chronic conditions for the Case. (Continue to the next page)

	Medical Conditions We are almost done; we've got about five minutes left. I am going to ask you a few questions about yourself that will help our team understand how to fight the virus and keep New Yorkers safe. Next, I'm going to read you a list of chronic conditions. Please indicate whether you have any of these conditions by saying 'yes' or 'no' as I walk you through the options: *Do you have a weak immune system because of a medical condition or because of medications you take? ☐ Yes ☐ No *Do you have chronic lung disease, like COPD or asthma? ☐ Yes ☐ No *Do you have heart disease? ☐ Yes ☐ No As the Case Investigator, you read a list of chronic conditions to the Case and indicate the responses. You will say to the case, "Next, I'm going to read you a list of chronic conditions. Please indicate whether you have any of these conditions by saying 'yes' or 'no' as I walk you through the options" • Answer "Yes" to the first question • Answer "No" to the remaining questions • Click Continue
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Completing a Case Interview Step 17: Recent Travel	Step seventeen is the Recent Travel. This page is for capturing any places the case has visited outside of New York State. You will begin with your question. If the answer is yes provide all states or territories that were visited. Recent Travel In the two weeks before becoming sick or getting tested, have you traveled to another state or territory outside of New York State? ☒ Yes ☐ No Which states or territories have you traveled? <table style="width: 100%;"> <thead> <tr> <th style="text-align: left;">Available</th> <th style="text-align: left;">Selected</th> </tr> </thead> <tbody> <tr> <td>Alabama</td> <td></td> </tr> <tr> <td>Alaska</td> <td></td> </tr> </tbody> </table>	Available	Selected	Alabama		Alaska	
Available	Selected						
Alabama							
Alaska							

Indicate any countries outside of the United states they have visited as well on the second question.

In the two weeks before becoming sick or getting tested, have you traveled internationally?

☒ Yes ☐ No

Which countries?

- Click **Continue**

Completing a Case Interview

Step 18:

Source of Infection

Step eighteen is **Source of Infection**. This page is for capturing where the case may have been infected. You will begin with the text in the teal box.

Source of Infection

I'd like to ask you how you think you became infected with or exposed to COVID-19.

Do you think you know who exposed you to the virus that causes COVID?

☐ Yes ☐ No

In the two weeks before becoming sick or getting tested, did you have an in-person interaction with anyone who was sick or anyone who was diagnosed with COVID-19?

☐ Yes ☐ No

In the two weeks before becoming sick or getting tested, did you go to any events or gatherings where you were not able to maintain 6 feet of distance from others – you should answer yes if you went to any restaurants or bars, houses of worship etc...?

☐ Yes ☐ No

In the two weeks before becoming sick or getting tested, did you go to work in-person?

☐ Yes ☐ No

In the two weeks before becoming sick or getting tested, did you interact with people outside of your home who were not wearing face coverings?

☐ Yes ☐ No

In the two weeks before becoming sick or getting tested, did you interact with people outside of your home while you were not wearing a face covering?

☐ Yes ☐ No

If the case answers yes to the first question, proceed to asking the next couple of questions.

Do you think you know who exposed you to the virus that causes COVID?

☒ Yes ☐ No

We would like to check our system to see if this person is known to have COVID. We may also follow up with this person but we will not tell them that you gave us their name. We will preserve your confidentiality. Would you be comfortable giving us their name and some related information?

☒ Yes ☐ No

PERSONAL INFORMATION

First Name

Last Name

Date of Birth

Phone number

ADDRESS INFORMATION

Street

Borough

City

State

Zip

Date of getting infection

Why do you think this person gave you the virus? (select as many of the below answers as needed)

☐ We work together
 ☐ We live together

☐ We exercise together
 ☐ We are intimate partners

☐ We took transport together
 ☐ We were at school, college, or university together

☐ They work or support me in my home (e.g., home health aide, cleaning, childcare)
 ☐ We were at a childcare facility, camp, or after school activity together

☐ We went to an indoor social gathering such as a party, restaurant, religious service, or musical event together
 ☐ We went to an outdoor social gathering such as a party, restaurant, religious service, or musical event together

☐ Other

- Do you think you know who exposed you to the virus that causes COVID? = Yes
- We Would like to check our system...some related information? = Yes
 - Fill in details for the Personal information and Address Information
 - Why do you think this person gave you the virus? (Select as many of the below answers as needed)

If the case answers yes to the third question read to them the text in the teal box that will pop up.

	Where was this gathering and when? If it was at an establishment like a house of worship or a restaurant please list the name, address, and date you went. If it was at a private party or gathering, – including small dinner parties – please list the name of the host and their contact information and the date. If the case answers yes to the fifth question read to them the text in the teal box that will pop up. Can you tell me more about that or those interactions? Please make sure to record any contact information available. Finish the final questions. • Click Continue.

Completing a Case Interview step 19: Employment	Step nineteen is Employment. This page is for recording the employment status of the case, you will begin with asking questions about their employment status. If they reply no continue to Race and Ethnicity If they reply yes, ask them the questions that follow.
--	--

	Employment Are you currently employed? ☒ Yes ☐ No What sector do you work in? ☐ Office and administrative support ☐ Retail salesperson ☐ Educational instruction and library ☐ Healthcare support ☐ Arts, design, entertainment, sports, and media ☐ Building and grounds cleaning and maintenance ☐ Personal care and service ☐ Other ☐ Management or Business and Financial Operations ☐ Sales or related, other than retail ☐ Food preparation and serving related ☐ Health care practitioner or other technical health care ☐ Transportation ☐ Construction and extraction ☐ Emergency Response services What is the name of your employer? How do you primarily get to work? (select all that apply) ☐ Subway or bus ☐ Driving your own car or a rented car ☐ Walking ☐ Other ☐ Taxi or ride-sharing app (such as Uber or Lyft) ☐ Biking ☐ Work from home ☐ Don't know / Not sure Click Continue
--	---

Completing a Case Interview Step 20: Race and Ethnicity	Step twenty is Race & Ethnicity. Begin with reading the teal box and ask if they are comfortable answering the race and ethnicity questions. Follow the grey box with instructions depending on their answer. (Continue to the next page)
--	--

Race & Ethnicity

The next set of questions are about groups you may identify with and some people consider these questions very personal. If you do not feel comfortable answering these questions, we can skip them, but they really help us understand subpopulations who may be most affected by COVID.

Are you comfortable answering questions about your race and ethnicity?

If No, skip the questions below and move on to the next step.

If Yes, proceed to ask the questions below.

If they decide to answer the questions, read to them, all the questions and check all that apply. Once you finish, click continue.

Do you identify as Hispanic, Latino, or Latina?

☐ Yes ☐ No ☐ Unknown ☐ Declined to answer

Which race do you identify as? You may choose more than one as I walk you through the options.

☐ Asian, including South Asian	☐ Native Hawaiian or Pacific Islander
☐ Black, including African American or Afro-Caribbean	☐ I do not identify as any of these races
☐ Native American or Alaskan Native	☐ Unknown
☐ White	☐ Declined to answer

Which specific ethnic or cultural groups do you identify as, if any? You may choose more than one as I walk you through the options.

☐ Arab	☐ Chinese
☐ Dominican	☐ Guyanese
☐ Haitian	☐ Indian
☐ Italian	☐ Jamaican
☐ Puerto Rican	☐ Another group or groups. Please Specify
☐ Russian	☐ I do not identify as any specific ethnic or cultural group
☐ Jewish	☐ Declined to answer
☐ Mexican	

[< Previous](#)

[Save & Exit](#)

[Continue](#)

Click **Continue**

**Completing
a Case
Interview**

Step 21:

**Gender &
Sexual
Orientation**

For Step twenty-one, **Gender & Sexual Orientation**, read teal box regarding if they are comfortable with answer questions for gender and sexual orientation. Follow the grey box with instructions depending on their answer.

Gender & Sexual Orientation

Are you comfortable answering questions about your gender?

If No, Skip the next two questions.

If Yes, proceed to ask the next two questions.

How do you currently identify your gender?

Do not read the options out loud and instead let them self-identify their gender.

- | | |
|---|--|
| ☐ Woman/Girl | ☐ Non-binary or Genderqueer Person |
| ☐ Man/Boy | ☐ A gender identity not listed |
| ☐ Transgender Woman | ☐ Unknown |
| ☐ Transgender Man | ☐ Declined to answer |

What sex were you assigned at birth? Please select one:

- | | |
|---|-------------------------------|
| ☐ Female | ☐ Male |
| ☐ Neither female nor male | ☐ Unknown |

Only ask this question if the person doing the interview is answering questions for themselves (that is, the interview is not being done using a proxy) and the person is 18 years of age or older. If the person doing the interview is a proxy or the person is less than 18 years of age, then do not ask the next question.

If they decide to answer, ask them the questions and follow the instructions on the grey boxes.

For the assigned sex question, only ask this question if the person doing the interview is answering for themselves.

Are you comfortable answering questions about people you have intimate relations with?

If No, skip the question below and move on to the next step.

If Yes, proceed to ask the question below.

Which of the following best describes your sexual orientation? Please select the one that best describes you.

- | | |
|--|---|
| ☐ Gay or Lesbian | ☐ Bisexual |
| ☐ Queer | ☐ A sexual orientation not listed |
| ☐ Straight or Heterosexual | ☐ Unknown |
| ☐ Questioning | ☐ Declined to answer |

Continue with the rest of the questions and teal boxes. Once you are done press continue to proceed with the script.

- Click **Continue**

(Continue to the next page)

**Completing
a Case
Interview**

Step 22:

Disability

Step twenty-two is **Disability**, here you will record any disability that the case confirms to have. Read teal box regarding if they are comfortable with answer questions for disability. Follow the grey box with instructions depending on their answer.

If they say yes, ask the questions and record the answers.

Disability

Are you comfortable answering questions about disabilities?

If No, skip the questions below and proceed to end of intake.

If Yes, proceed to ask the questions below.

Are you deaf or do you have serious difficulty hearing?

☐ Yes ☐ No

Are you blind or do you have serious difficulty seeing, even when wearing glasses?

☐ Yes ☐ No

Because of a physical, mental, or emotional condition, do you have serious difficulty concentrating, remembering, or making decisions?

☐ Yes ☐ No

Do you have serious difficulty walking or climbing stairs?

☐ Yes ☐ No

Do you have difficulty dressing or bathing?

☐ Yes ☐ No

Because of a physical, mental, or emotional condition, do you have difficulty doing errands alone such as visiting a doctor's office or shopping?

☐ Yes ☐ No

Once you have recorded the questions go to end of intake.

End of Intake

That concludes your interview. Thank you so much for taking the time to talk with me today. One of my colleagues will be in touch with you tomorrow. You can always call us at 212-242-2692. We are here 9am-9pm. Please remember to keep your family safe by following the guidelines you've heard today. Thank you.

Read the end of intake teal box and click submit to finish your call with the case.

To disconnect the call, click the Phone app and click Hang Up. This will put you into a Wrap-up status so that you can complete any additional work or notes on the record.

- Point out **Twilio Flex Phone** icon and **Hang Up** button Point out **Wrap-up**

Make any final notes on the record, click the 'X' on the tab to close the screen and click the Click to Finish button to end the interaction and put you back into Available status, ready to accept your next interaction.

- Click the 'X' on the tab
- Click the **Click to Finish** button

This concludes the Case Investigator process