



NEW YORK CITY

Test and Trace Application

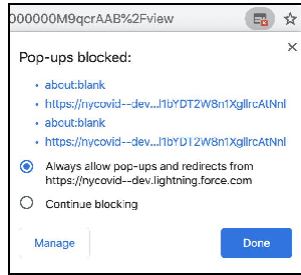
Contact Intake Guide

Version 4.0

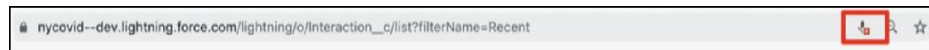
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	Welcome to the New York City Trace Application for Monitors course, Contact Intake. As a Monitor, you will use the New York City Trace Application to conduct Contact Intake in which you will educate individuals about quarantine to mitigate disease transmission and the services available to them during their quarantine period, collect information about their symptoms, 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 exposed contacts.
Setting Up Your Workspace	Before you begin conducting a Contact Intake, 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 



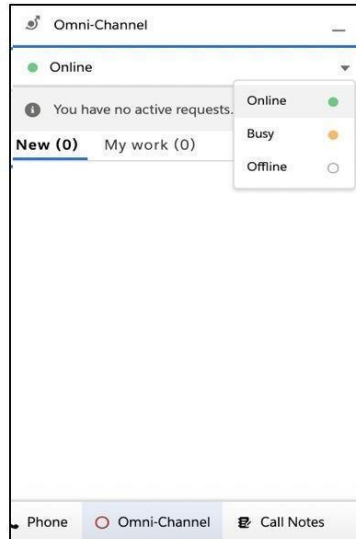
You must also allow access to your microphone. If this is blocked, phone calls will not be able to be made or received. To turn off the microphone blocker, click the microphone icon in the web address bar. Follow the instructions to allow access to your microphone.



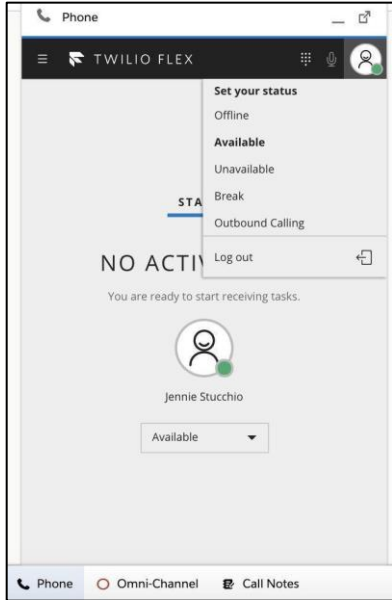
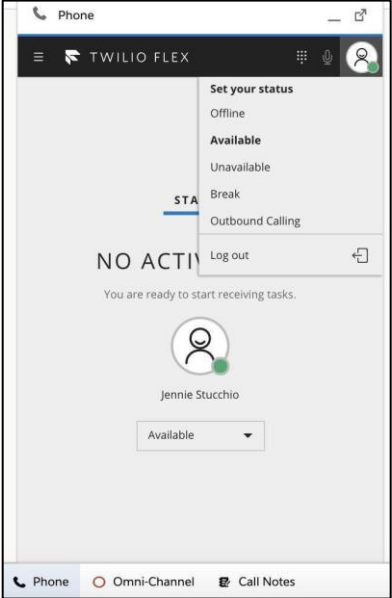
Now you are ready to log into the New York City Trace Application. You should have received an email from Salesforce with your username and a link to set up your password. Click on the link in the email to be routed to the Change Your Password screen. Complete the steps on the screen. Once you set up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

	Once logged in, you will see the Monitor 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
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- Click **Phone** in the bottom left corner (Twilio)
- Click the circular status icon on the top right and select **Outbound Calling Minimize** your Twilio window

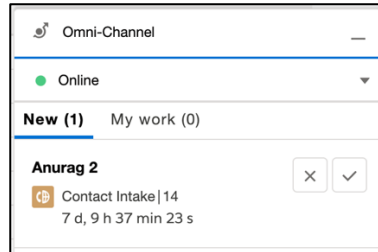


The **Outbound Calling** status on Twilio Flex means you are ready to place calls and the Online status on Omni-Channel means you are ready to auto-receive and pick up Interaction records on which you will conduct Contact Intake, Contact Monitoring, and Case Monitoring.

	 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.

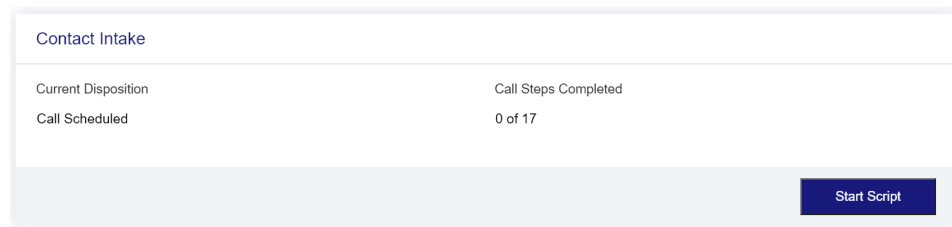
Locating and Selecting Contact in the Contact and Cases Intake and Monitoring Queues	Let's take a look at how a Monitor conducts a Contact Intake in the New York City Trace App. • Click the List Views dropdown • Point out the Monitor General Queue and the Monitor Spanish
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	The Monitor General Queue will display the interaction records for Contact Intake, Contact Monitoring, and Case Monitoring that get created after the Case Investigation is completed. 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. Notice that this Interaction shows as a Contact Intake and you also see the date of birth and age for the Contact. Clicking the checkmark for the Contact Intake and accept it, this takes you to the Interactions record. You can decline an Interaction record by clicking the X • Select the Contact to call and then click the checkmark to accept it



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 Contact.

- Point out the **Person Details**
- Point out the **Call Script tab**



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 contact 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 Contact.

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.

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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.

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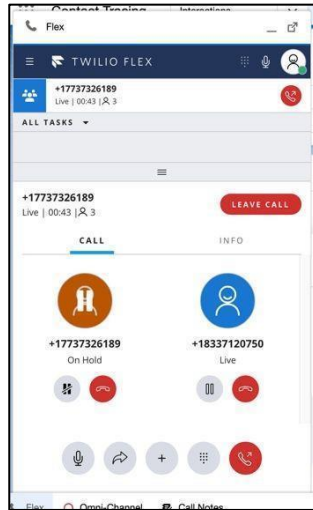
Initiating a Call	First, you want to open up the call script by clicking on Start Script on the Interaction record. This brings up the first page of the Call Script before you actually dial the number of the Contact. Click the Call Script tab, if necessary, Click the Start Call button
	Point out the Phone number in the Person Details section As the Monitor, when you are ready to make the call to the Contact, you click the phone number listed in the Person Details section. Clicking the number will launch Twilio Flex which automatically calls the Contact. Click the Phone number 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
Contact Intake Step 1: Voicemail	The first step in the Call Script is Voicemail. 1. Voicemail 2. Introduction 3. COVID-19 Education 4. Contact Information 5. Residence 6. Work & Living Setting 7. Symptoms 8. Quarantine 9. Hotel Interest 10. Wraparound Services 11. Monitoring Preference 12. Medical Conditions 13. Employment 14. Race & Ethnicity 15. Gender & Sexual Orientation 16. Disability 17. End of Intake Voicemail *Phone number reached? ☐ Yes ☐ No Save & Exit Continue If the Contact 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 Contact as well as guidance for special circumstances. When the phone number is not reached, you will leave a voicemail with the dialogue in the teal box.

	Voicemail *Phone number reached? ☐ Yes ☒ No Hello Syed P Ismail, my name is Monitor English and I'm calling from New York City Health + Hospitals about an important health matter. I will call you back again soon. You can also call us back at 212-242-2692, select your language, then select option 1. It is critical we speak as soon as possible. If we don't reach you today, you may be contacted by our home visit team. Please call us back or answer the call the next time you see this or a similar number. Thank you. If the call is answered, you click "Yes" for the Phone number reached. Phone number reached? = Yes
Contact Intake Step 2: Introduction	The second step in the Call Script is Introduction. Introduction Hello. My name is Monitor English and I am calling from New York City Health + Hospitals about an important health matter. *Is Nikitha Bala 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 YOUR NAME and I am calling from New York City Health + Hospitals about an important health matter. Is <CONTACT 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 Contact is not available to speak, choose "No" and then ask the Contact to call back using the number you provide. Click Save & Exit to stop the interview. Other responses could be that the Contact 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.

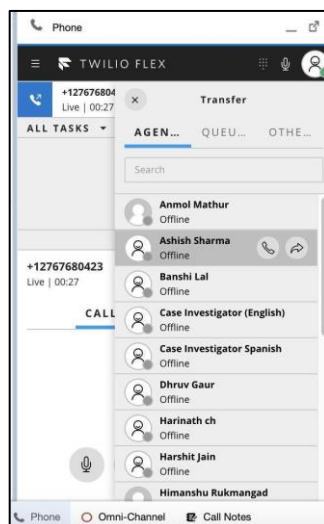
	If the Contact is available, choose “Yes,” and then once the Contact is on the phone with you, ask if he or she speaks English.
	Is CONTACT NAME available to speak? = Yes Do you speak English? = No If the Contact does not speak English, you would choose “No” and ask them their preferred language as indicated 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 Contact, but rather, follow the directions in the box. • View the language choices • Choose Spanish as the preferred language 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 Contact 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 Contact 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 a person answers the call. Then, bring the Contact 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

	Contact 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 Contact back on the line
	Click Leave Call.



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
- View 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 Contact speaks English. - Do you speak English? = Yes Once you have the Contact 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
Contact Intake Step 3: COVID-19 Education	The Third step is COVID-19 Education. This information helps to educate the exposed contact and should be included just as you see it for quality purposes. Read through the script which is in the text in the teal boxes.

	COVID-19 Education I want to let you know that this call will be recorded for quality assurance purposes. I am calling you today because you, Wyman, have been identified as a close contact of someone who has COVID-19. This does not mean that you have COVID-19 now, but it does mean you are at a higher risk of getting sick. I am calling as part of the Test & Trace Corps, a citywide initiative to stop COVID-19 infections in New York and help the city re-open. I am going to provide you with information so that you can take precautions to keep you and your loved ones safe. COVID-19 is caused by a virus. It often spreads from one person to another through breathing, coughing, or sneezing. While COVID-19 causes only mild illness in most people, it can cause severe illness in some people, and could lead to hospitalization and/or death. During this call, I will ask you questions about your health and provide you with information on how to access some of the services you may need. This phone call will take about 20 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, and thermometers. 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 callback time. Clicking "No" to this question means you will Save & Exit the interview after completing the best time to callback 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 inside 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
Contact Intake Step 4: Contact Information	The fourth step is Contact Information. Enter or verify answers for all questions based on the call script questions and then click Continue.

	Contact Information To get started, I'd like to ask you some basic questions about yourself. What is your date of birth? May 5, 1937 *What is the best phone number at which to reach you? (111)222-2415 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 • Complete all questions/answer • Click Continue
Contact Intake Step 5: Residence	Step five is Residence and where you confirm the address for the Contact. Enter the address information and then ask if the Contact will be staying overnight in NYC for the next 14 days.

	Residence What is the address where you normally live? *Street Address 1945 66TH ST Borough Brooklyn *City BROOKLYN State NY *Zip 11204 *Will you be staying overnight in NYC in the next 14 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 14 days? ☒ Yes ☐ No
	If the Contact is staying overnight in NYC in the next 14 days, select “Yes” for the question, “Will you be staying overnight in NYC in the next 14 days?” and complete the last question. - Will you be staying overnight in NYC in the next 14 days? = Yes - Is the address where you normally live . . .overnight for the next 14 days? = Yes or No - If NO selected, enter the address where you will be staying most nights for the next 14 days. After completing the Residence information, you would click Continue. If the Contact is not staying overnight in NYC in the next 14 days, select “No” for the question, “Will you be staying overnight in NYC in the next 14 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 14 days? = No - Is the address where you normally live . . .overnight for the next 14 days? = Yes or No - If NO selected, enter the address where you will be staying most nights for the next 14 days. - Read the text in teal shaded box

	*Will you be staying overnight in NYC in the next 14 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 14 days? ☐ Yes ☒ No What is the address where you will be staying most nights for the next 14 days? *Street Address Borough Select an Option ▼ *City State NY ▼ *Zip 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.
Contact Intake Step 6: Work and Living Setting	Step six asks questions about Work and Living Setting. 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 questions. For any question where the answer is “Yes,” additional information may be required. For our example, we will answer “No” for most questions and then select Continue. Do you currently live in a congregate setting? = No Are you an essential worker? = Yes (do this to explain employer) What is the name of your employer? – Be sure to mention that this is a company name and not an individual name Are you an essential worker? = No
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	Do you work in a healthcare setting? = Yes Point out the Facility Name field Do you work in a healthcare setting? = No Do you work in a congregate setting? = No Are you currently hospitalized? = Yes Point out the Hospital Name field If the Contact is Hospitalized record the name of the hospital. *Are you currently hospitalized? ☒ Yes ☐ No Can you please tell me where you are hospitalized? *Hospital Name Are you currently hospitalized because of COVID-19? ☐ Yes ☐ No No Click Continue
Contact Intake Step 7: Symptoms	Step seven is Symptoms. Read the questions in the script, select the option based on the Contact's answers, and then click Continue.

	Symptoms Have you experienced any of the following health issues in the past two weeks? Please respond yes or no as I walk you through the options. Please only indicate YES if the symptom is new and not related to a chronic condition. *New Fever ☐ Yes ☒ No *New Cough ☐ Yes ☒ No *New Chills ☐ Yes ☒ No *Difficulty Breathing or Shortness of Breath ☐ Yes ☒ No *New Sore Throat ☐ Yes ☒ No *New Muscle Aches ☐ Yes ☒ No Begin by reading the text in the teal box, then go through each question to confirm any symptoms. 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 Contact 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.
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	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 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 develop symptoms that require emergency medical attention, call 911 or go to your nearest Emergency Room. Click Continue
Contact Intake Step 8: Quarantine	Step eight is Quarantine. This section educates the Contact on quarantining and mental health. - This section starts with a statement about quarantine. Read the statement and ask the healthcare/essential worker question. Start with asking if they are a healthcare worker. If the answer is Yes, click yes and read the Healthcare Worker Call Script. - If the answer is No, don't click No. Proceed to ask if they are an essential worker. If the answer is Yes, click Yes, and read the Essential Worker Call Script. If the answer is No, click No, and read the Call Script. - Click Yes, point out the Healthcare and Essential Work Call Scripts Quarantine Are you healthcare personnel or an essential worker? 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

	Healthcare Personnel: Healthcare personnel are now required to undergo quarantine. Because you have been exposed by a close contact to COVID-19, you must stay inside and separate from others until Aug 18, 2020 unless directed otherwise by your employer. You should not leave your home for anything other than essential medical care such as dialysis or for emergencies. In response to the COVID-19 outbreak, New York State has guaranteed some workers required to quarantine job protection and financial compensation. If you need a letter to give 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 855-491-2667. New York City's COVID-19 Test and Trace Corps will monitor you until Aug 18, 2020. Essential Worker: Essential workers may continue to go to work, but they must: limit unnecessary contact with others; wash their hands frequently; and wear a face covering at all times when out of the home. You should check with your employer on their specific protocols and policies. If you are an essential worker, you must follow this guidance until at least Aug 18, 2020. • Click No and point out the Call Script
	Quarantine Are you healthcare personnel or an essential worker? Some examples of essential workers are people who work at grocery stores or pharmacies or in food production, and emergency personnel, and public safety officers. ☐ Yes ☒ No To keep your loved ones safe and to help stop the spread of the virus through New York City, starting immediately, you must stay inside your home and away from other people, except for essential medical care such as dialysis, chemotherapy, or for any emergencies. You must separate from others until at least Aug 18, 2020. In response to the COVID-19 outbreak, New York State has guaranteed some workers required to quarantine job protection and financial compensation. 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 855-491-2667. Next, read through the Mental Health Call Scripts and click Continue to move to the next step.

	Mental Health Additionally, we understand that exposure to 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. Click Continue
Contact Intake Step 9: Hotel Eligibility	Step nine pertains to Hotel Interest. Read through the Call Script, noting the gray box is instructional. If the Contact is interested in a Hotel, mark the response as Yes.

	Hotel Interest Finally, during your period of quarantine, 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. The hotel includes high quality services, including food. *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 you are asked questions about the hotels: 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" Read the Call Script and click Continue. - Click Yes and point out the Call Scripts If the Contact is not interested in Hotel services, select No. If the Contact is not sure, click yes. Lastly, the Call Script will notate that a request for a reservation will be submitted. As a Monitor, you do not need to take any additional steps. Simply click Continue to move to the next step. - Click Continue
Contact Intake Step 10: Wraparound Services	Step 10, Wraparound services, references services that may be available to the Contact. Basic Necessities Questions *To help you remain in your home, except for essential medical care or emergencies, do you need help getting basic necessities, like food? ☐ Yes ☐ No

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

If the Contact indicates that they do not need assistance, select No and move to the next Step.

- Click No

If a Contact indicates they do have a need for Wrap-around services, read the appropriate Call Script and proceed with the additional questions.

Basic Necessities Questions

*To help you remain in your home, except for essential medical care or 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 don't agree 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.

- Click **Yes**
- View the **additional questions**
- Are you concerned about having enough to eat? = Yes Point out text in teal shaded box
- Are you concerned about getting your medications? = Yes Point out text in teal shaded box
- Will you have access to a phone and minutes . . . if you need it? = No Point out text in teal shaded box

	- Are you concerned about your heat . . . being shut off? = Yes Point out text in teal shaded box If it is determined that Wraparound Services are needed, a resource navigator will reach out to the Contact to assist them. - Click Continue 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 been exposed to 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.
Contact Intake Step 11: Monitoring Preference	Step eleven, 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 We are almost done. I want to review the two most important take-a-ways for you before we wrap up: first: you should go get tested. You can find the testing location closest to you at nyc.gov/covidtest. Second: one of my colleagues will be checking in on you daily until at least Sep 17, 2020. These daily check-ins will not take as much time as this first call. 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. 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 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
Contact Intake Step 12: Medical Conditions	Step twelve is Medical Conditions. This page is for capturing any chronic conditions for the Contact.

	Medical Conditions We only have a couple more questions – this will be less than five minutes. Answers to these questions will help me and my colleagues stop the spread of COVID19 and keep you, your loved ones and all 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 Do you have liver disease or cirrhosis? ☐ Yes ☐ No As the Monitor, you read a list of chronic conditions to the Contact and indicate the responses. • Answer “Yes” to the first question Answer “No” to the remaining questions Click Continue
Contact Intake Page 13: Employment	Step thirteen is Employment. This page is for recording the employment status of the contact, 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 ☐ Management or Business and Financial Operations ☐ Retail salesperson ☐ Sales or related, other than retail ☐ Educational instruction and library ☐ Food preparation and serving related ☐ Healthcare support ☐ Health care practitioner or other technical health care ☐ Arts, design, entertainment, sports, and media ☐ Transportation ☐ Building and grounds cleaning and maintenance ☐ Construction and extraction ☐ Personal care and service ☐ Emergency Response services ☐ Other What is the name of your employer? How do you primarily get to work? (select all that apply) ☐ Subway or bus ☐ Taxi or ride-sharing app (such as Uber or Lyft) ☐ Driving your own car or a rented car ☐ Biking ☐ Walking ☐ Work from home ☐ Other ☐ Don't know / Not sure • Click Continue
Contact Intake Page 14: Race and Ethnicity	Step fourteen is Race & Ethnicity. Begin with reading the teal box and asking 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 the 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
Contact Intake Page 15: Gender & Sexual Orientation	For Step fifteen, 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. (Continue to the next page)

	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 ☐ Man/Boy ☐ Transgender Woman ☐ Transgender Man ☐ Non-binary or Genderqueer Person ☐ A gender identity not listed ☐ Unknown ☐ Declined to answer What sex were you assigned at birth? Please select one: ☐ Female ☐ Neither female nor male ☐ 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. (Continue to the next page)
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	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 y ☐ Gay or Lesbian ☐ Queer ☐ Straight or Heterosexual ☐ Questioning ☐ Bisexual ☐ A sexual orientation not listed ☐ Unknown ☐ 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
Contact Intake Page 16: Disability	Step sixteen 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. (Continue to the next page)

	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.
Contact Intake Step 17: End of Intake	The last step of Contact Intake is End of Intake. Read the End of Intake Call Script, inform the Contact that someone will be following up with them, thank them for their time, and click the Submit button to complete the Intake process. Click Submit

	End of Intake Thank you for your time! You indicated earlier in the call that you have symptoms consistent with COVID-19. Because you are a contact of someone who has been diagnosed with COVID-19 and you have symptoms of COVID-19, you should get tested. You can find the testing location closest to you by visiting nyc.gov/covidtest or by calling 311. Alternatively, I can connect you to someone who can schedule a priority appointment at one of the NYC Health + Hospitals testing sites. From this point forward, we will treat you like you have COVID-19 because of the symptoms you reported. Please stay separated from your loved ones as we discussed. One of my colleagues will be following-up with you to walk you through additional guidance and ask questions about your contacts. If you have any questions, you can also call us back at 212-242-2692. Thank you and good bye! 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. • View the Twilio Flex Phone icon and Hang Up button • View 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 Contact Intake process
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