

GM CONTACT TRACING CASE MANAGEMENT SYSTEM (CMS) TRAINING GUIDE

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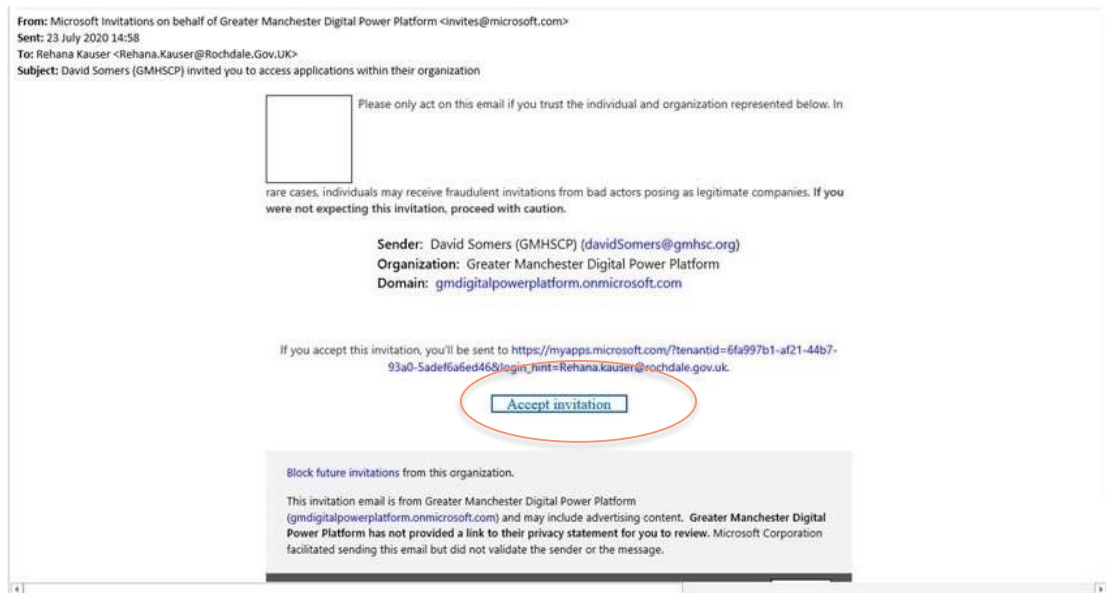
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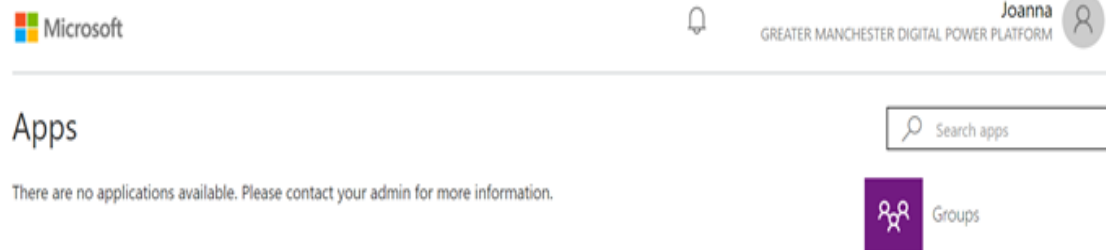
OVERVIEW

HOW TO LOGIN

STEP 1 - Once your account has been created you will receive an e-mail from Microsoft on behalf of the GM digital Platform. Please accept the invitation in the body of the e-mail



STEP 2 - If successful you are taken to the Greater Manchester Digital Power Platform

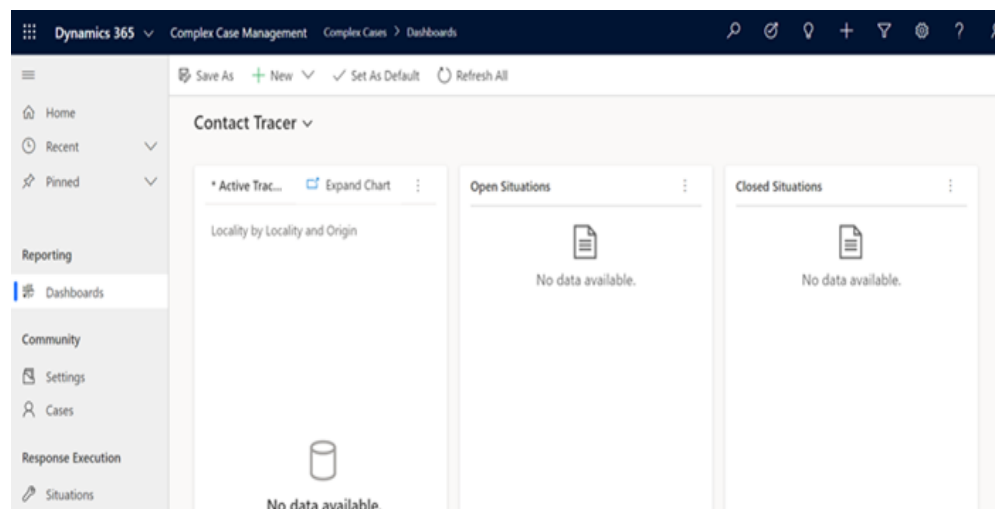


HOW TO LOGIN

STEP 3 - To then access the case management system please copy and open this link into Microsoft Edge web browser, where you will be prompted for your local organisations username and password details to login

<https://gmcattddev0.crm11.dynamics.com/main.aspx?appid=6dffd311-c993-4f45-bd41-f2e9a055731f>

STEP 4 – Once logged in, you should be presented with this screen, which will differ slightly depending on the permissions you've been given



USER ROLES

User Roles ensure that those with access to the GM CT CMS are only authorised view information relevant to their role and responsibilities. The following four user roles have been created, with the analyst role to be further outlined and agreed post MVP launch

ADMINISTRATOR- responsible for maintenance of the system, uploading new cases and has access to all locality records.



CASE MANAGER- responsible for undertaking/co-ordinating contact tracing and consequence management. Only has access to cases allocated to them by supervisor.



SUPERVISOR - responsible for triaging new cases once in the system, allocating to case managers and escalating cases into GM Hub for triaging where appropriate. This role will also have access to all locality records



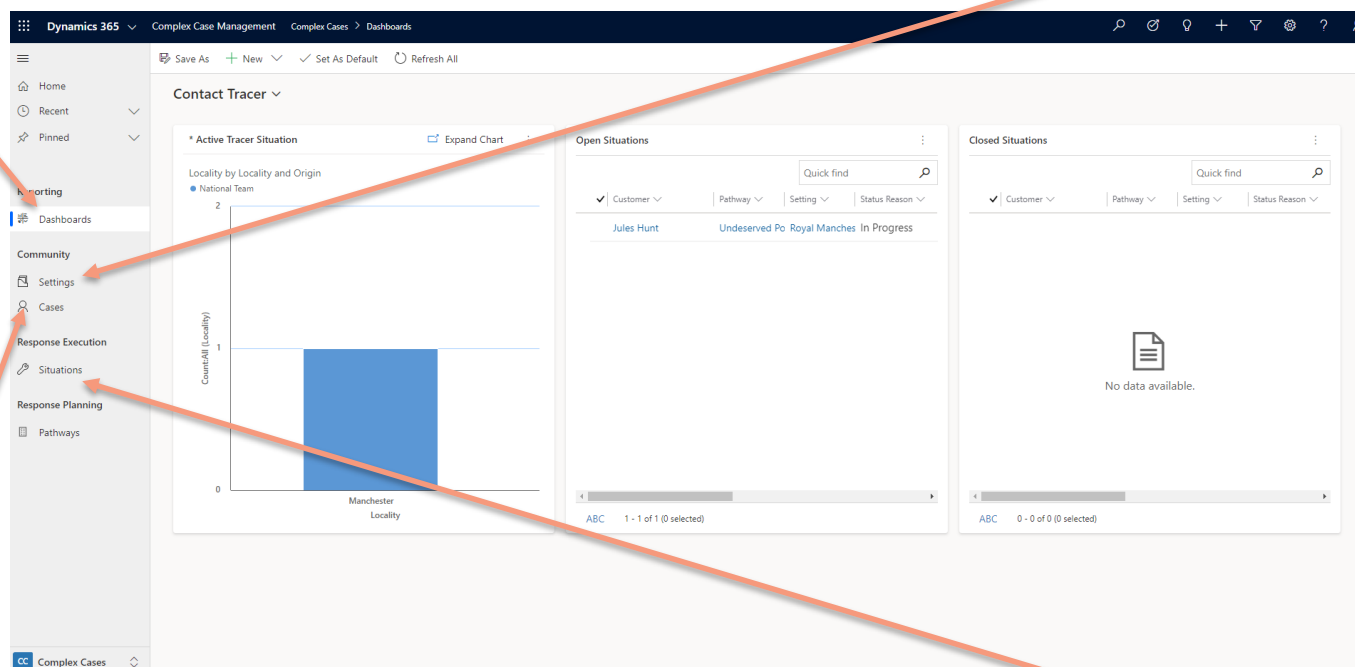
ANALYST - responsible for extracting data from the system and using as required for local reporting and analysis. This role will not have access to any records and the data extracted will be anonymised



NAVIGATION PANEL

DASHBOARDS - Depending on your user role you will have 1 or more dashboard views available, each providing collections of view lists and charts, that pull in key information pertinent to that role. For example, a Contact Tracer role will see situations open and closed, allocated to them

SETTINGS – contains a list of settings within GM. Initially this will include Hospitals, Care Homes, Schools and Primary Care Settings. If a setting does not exist it can also be added as a new record



CASES – contains a record of all individuals created within the system. Primarily this is used to record confirmed (and possible) index case details, but is also used to record details of managers within settings who are assisting with CT activities, plus as a way of recording 'Contacts' that require Level 3 follow up. See the next slide for further details

SITUATIONS – A 'situation' is created when a 'case' and 'setting' are linked. See slide 9 for further details

TERMINOLOGY

CASE = INDIVIDUAL

A case within the system is essentially a person or an individual record, these are categorised in three ways:

1. **INDEX** – An Index ‘case’ is used to record the details of the individual who has COVID symptoms (for possible cases) or the details of the individual who has a confirmed COVID test result (for confirmed cases). For example Priti Patel has tested positive for COVID, the case has been escalated to level 1 after confirmation that she had attended her local GP surgery (Kearsley Medical Centre) whilst symptomatic.
2. **SETTING** – A setting ‘case’ is used to record the details of a manager or individual who works within a setting who is assisting with Contact tracing activities. For example Derek Jones, Practice Manager at the Kearsley Medical Centre who is the main point of contact for the GM Hub who are undertaking contact tracing activities after a confirmed case in the surgery (Priti Patel)
3. **CONTACT** - A contact ‘case’ is used to record the details of a confirmed direct or proximity contact of an index case who requires follow up by contact tracers at Level 3. For example Ben Brown was identified as ‘contact’ of ‘Priti Patel’ as he was believed to be in the surgery waiting room in close proximity to her at the time of her visit

TERMINOLOGY

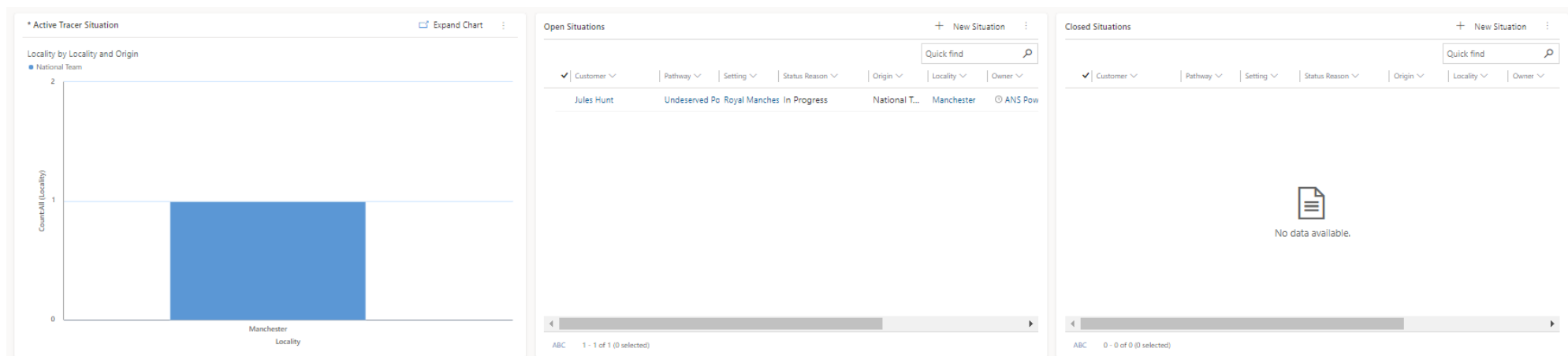
SETTINGS + CASE = SITUATION

A situation is created when a case and setting are linked by an event. There are 5 types of situations that can be recorded in the system, categorised by severity:

1. **ENQUIRY** – For use at a local level if an enquiry has been received, not related to a specific possible or confirmed COVID case. For example, from a local business asking for COVID advice and guidance
2. **SETTING WITH POSSIBLE CASE** – For use at a local level, if an enquiry has been received from a setting about a possible COVID case. For example, a school have been in contact about pupil x who is unwell with COVID symptoms, has been sent home to self isolate and is awaiting the outcomes of a test result. In this instance a situation can be created, and any advice given can be recorded. If later, a positive test result is confirmed for pupil x, the severity level can be upgraded to 'setting with a confirmed case' and if required the case can be escalated to the GM Hub for Contact Tracing.
3. **SETTING WITH ONE CONFIRMED CASE** - For use at both a GM and local level, if a) a positive case has been referred from level 2/3 to level 1 for contact tracing in the setting or b) at a local level confirmation has been received of a new confirmed case linked to a settings.
4. **CLUSTER (2 CASES; NO EVIDENCE OF TRANSMISSION)** – As per 3.
5. **OUTBREAK (2 OR MORE CASES LINKED TO TIME AND PLACE)** – As per 3.

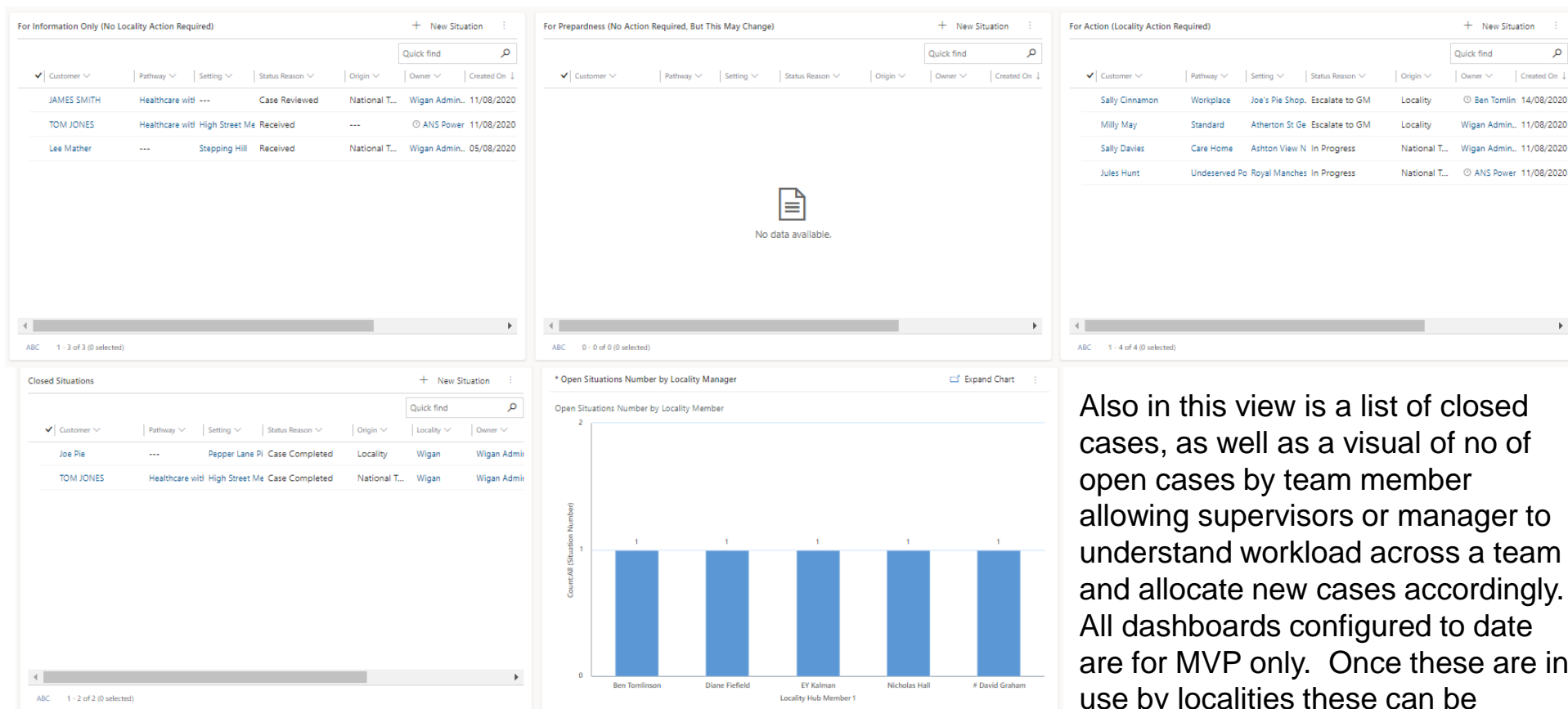
DASHBOARDS – Contact Tracer/Case Manager

Depending on your user role you will have 1 or more dashboard views available, each providing collections of view lists and charts, that pull in key information pertinent to that role. Below is the Contact Tracer dashboard where if you are involved in local or GM case management, you will see any situations that are allocated to you, whether open or closed.



DASHBOARDS – Locality Overview

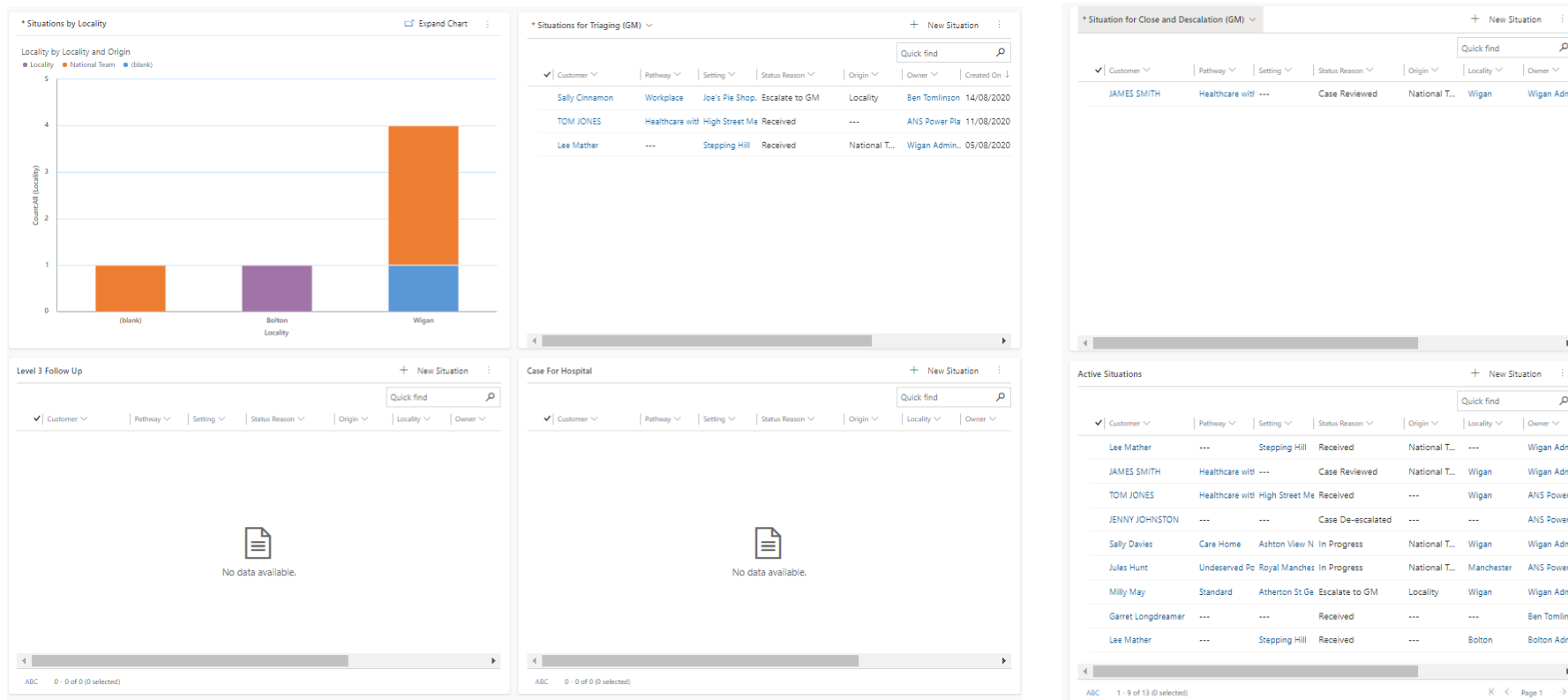
The Locality Dashboard is for those who are supervising or managing locality SPOCS. This view currently provides information on any open situations broken down by 1) for information 2) for preparedness and 3) for action as per the GM SOP categorisations.



Also in this view is a list of closed cases, as well as a visual of no of open cases by team member allowing supervisors or manager to understand workload across a team and allocate new cases accordingly. All dashboards configured to date are for MVP only. Once these are in use by localities these can be tailored depending on need in future iterations of the application release

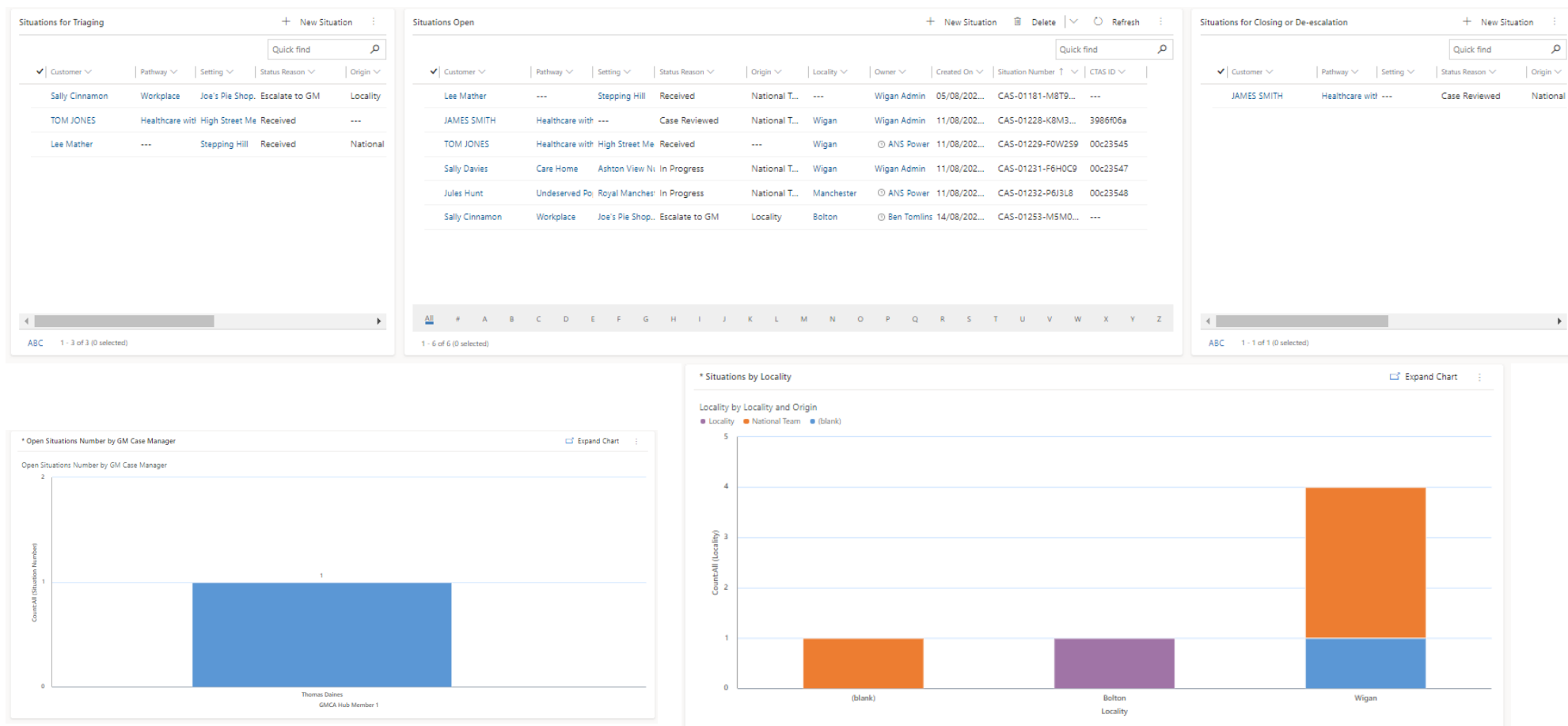
DASHBOARDS – GM Admin

The GM Admin Dashboard is to support Business Support Officers within the Hub to manage the upload, triaging and closure of confirmed cases. This view currently provides information on active situations, any open situations by locality, situations for triaging, for closing and de-escalation, those situation where there are contacts for level 3 follow



DASHBOARDS – GM Supervisor

The GM Supervisor Dashboard is to support managers within the GM Hub to manage the triaging, delegation and then review of closed confirmed cases.



CREATING A NEW SITUATION

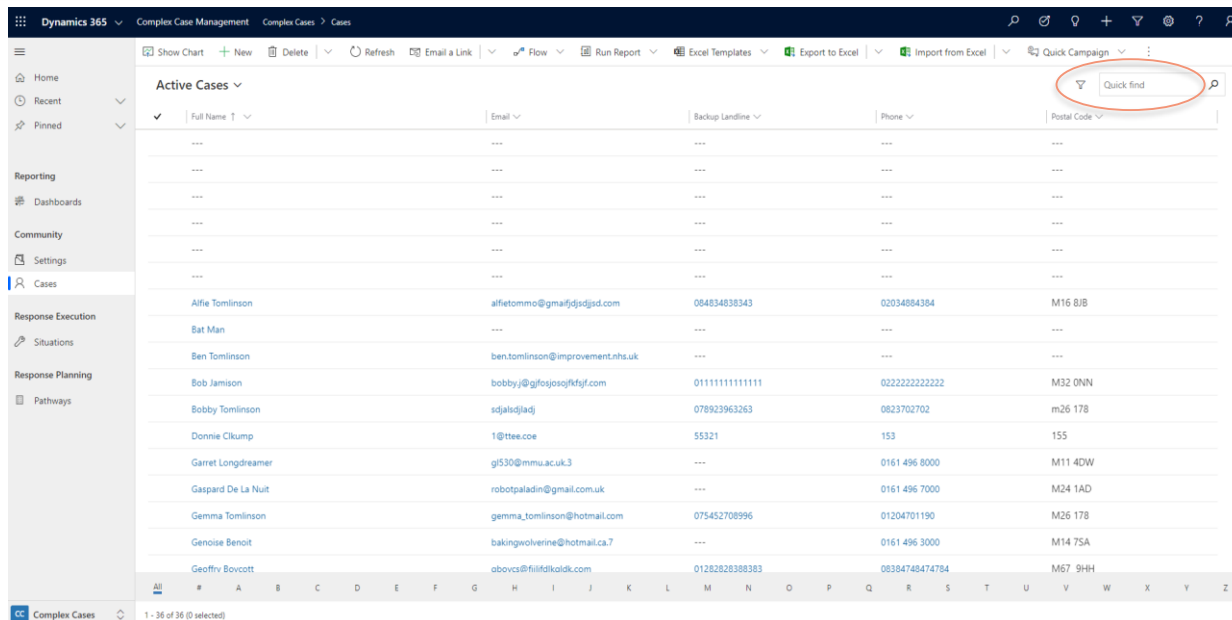
FINDING OR CREATING A CASE

Depending on the type of situation, the first step is to create one or more 'cases' if they do not already exist in the system.

1. **ENQUIRY** – For enquiries, a setting 'case' will be required for the person who has made the initial enquiry. For example Joe, the Manager of a local pie shop. For enquiries there will be no index or contact 'case'.
2. **SETTING WITH POSSIBLE CASE** – For possible cases, as index 'case' will be required for the person with COVID symptoms. For example Lucy Nunn, pupil at St Saviours School. In addition, depending on the source of the referral, an additional setting 'case' will need to be created if it does not already exist – this will be the manager/employee from the setting if they made the referral. For example Lucy's Headteacher, Joe Boulger from St Saviours School.
3. **SETTING WITH ONE CONFIRMED CASE** – For confirmed cases, the same as possible cases apply – the case i.e the person with a confirmed test is created as a index 'case', and then the Manager or employee at the setting where contact tracing is undertaken is created as a setting case
4. **CLUSTER (2 CASES; NO EVIDENCE OF TRANSMISSION)** – For clusters, the same as confirmed cases apply
5. **OUTBREAK (2 OR MORE CASES LINKED TO TIME AND PLACE)** – For outbreaks, the same as confirmed cases apply

FINDING OR CREATING A CASE - Enquiries

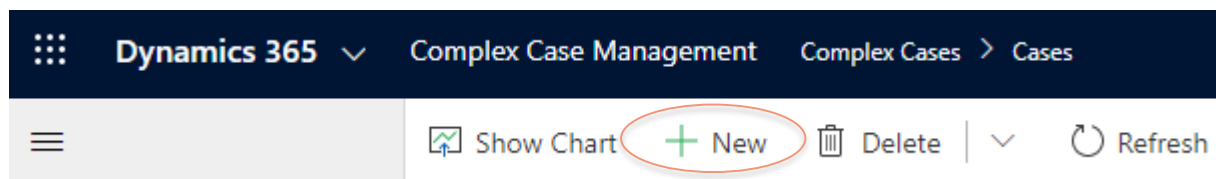
STEP 1 – In order to create a new situation the first task is to ascertain if the case already exists in the system. Once within ‘Cases’, navigate to the quick find option in the far right hand corner and search for the person in mind. If the person is found, please go to ‘Finding or creating a setting’ on slide 18



The screenshot shows the Dynamics 365 interface for 'Complex Case Management' > 'Complex Cases' > 'Cases'. The left sidebar contains navigation options: Home, Recent, Pinned, Reporting (Dashboards, Community, Settings), Cases (selected), Response Execution (Situations), and Response Planning (Pathways). The main area displays a table of 'Active Cases' with columns: Full Name, Email, Backup Landline, Phone, and Postal Code. A 'Quick find' search bar is circled in red in the top right corner of the table area.

Full Name	Email	Backup Landline	Phone	Postal Code
Alfie Tomlinson	alfietommo@gmailfjdjsd.com	084834838343	02034884384	M16 8JB
Ben Tomlinson	ben.tomlinson@improvement.nhs.uk			
Bob Jamison	bobby.j@qfsgosjfkfj.com	011111111111111	0222222222222	M32 0NN
Bobby Tomlinson	sdjalidjladj	078923963263	0623702702	m26 178
Donnie Clump	1@tee.coe	55321	153	155
Garret Longdreamer	gl530@mmu.ac.uk.3		0161 496 8000	M11 4DW
Gaspard De La Nuit	robotpaladin@gmail.com.uk		0161 496 7000	M24 1AD
Gemma Tomlinson	gemma_tomlinson@hotmail.com	075452708996	01204701190	M26 178
Genoise Benoit	bakingwolverine@hotmail.ca.7		0161 496 3000	M14 7SA
Geoffry Bovcott	abovcs@fiiifdkldk.com	01282828388383	06384748474784	M67 9HH

STEP 2 - If you cannot find the person, you will need to add them by clicking on the ‘+New’ button at the top of the page



FINDING OR CREATING A CASE - Enquiries

STEP 3 – When creating a new case, if the situation type is an enquiry, the ‘case’ in this instance will be the person from the setting who has made the initial enquiry.

Please click on the drop down in the top right hand corner of the page and select ‘Setting’ as ‘Relationship Type’

New Case Name

Summary - Index Address Social Pane Access Team (Hidden)

CONTACT INFORMATION

GMCA ID	---
CTAS ID	---
Forename	---
Surname	---
Email	---
Postal Code	---
Phone	---
Backup Landline	---

RELATED SITUATIONS

Index Relationship Type Owner Status Reason

Ben Tomlinson

Active

New Case Name

Summary - Setting Address Social Pane Access Team (Hidden)

Forename	---
Surname	---
Job Title	---
Phone	---
Backup Landline	---
Email	---

Setting

Relationship Type

Ben Tomlinson

Owner

Active

Status Reason

Relationship Type

Setting

More Header Fields

Owner

Ben Tomlinson

Status Reason

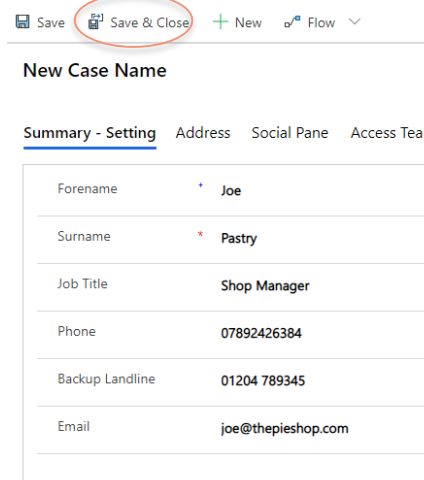
Active

Activate Windows

FINDING OR CREATING A CASE - Enquiries

STEP 4 – Complete as many fields as possible on the 'Summary – setting' tab, then save and close.

Once you have created your setting manager, go to 'Finding or creating a setting' on slide 18

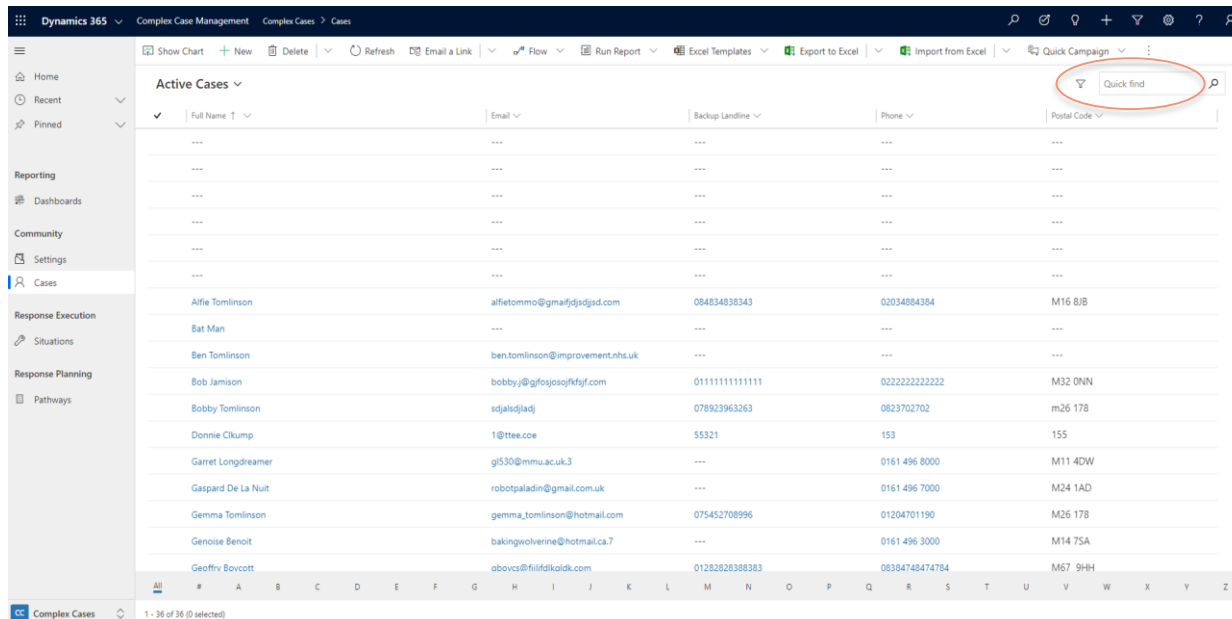


The screenshot shows a web interface for creating a new case. At the top, there is a toolbar with buttons: 'Save', 'Save & Close' (highlighted with a red circle), 'New', and 'Flow'. Below the toolbar is the title 'New Case Name'. Underneath, there are four tabs: 'Summary - Setting' (selected), 'Address', 'Social Pane', and 'Access Team'. The 'Summary - Setting' tab contains a form with the following fields:

Forename	Joe
Surname	Pastry
Job Title	Shop Manager
Phone	07892426384
Backup Landline	01204 789345
Email	joe@thepieshop.com

FINDING OR CREATING A CASE - possible/confirmed case, cluster or

STEP 1 – In order to create a new situation the first task is to ascertain if the case already exists in the system. Once within 'Cases', navigate to the quick find option in the far right hand corner and search for the person in mind. If the person is found, please go to 'Finding or creating a setting' on slide 18



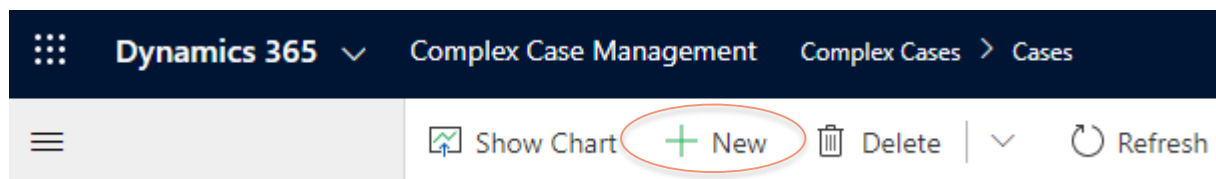
Dynamics 365 | Complex Case Management | Complex Cases > Cases

Active Cases

Full Name	Email	Backup Landline	Phone	Postal Code
Alfie Tomlinson	alfietommo@gmailfjdjsd.com	084834838343	02034884384	M16 8JB
Ben Tomlinson	ben.tomlinson@improvement.nhs.uk			
Bob Jamison	bobby.j@qfosjofkfj.com	0111111111111111	02222222222222	M32 0NN
Bobby Tomlinson	sdjalid@ad	078923963263	0823702702	m26 178
Donnie Clump	1@tee.coe	55321	153	155
Garret Longdreamer	gl530@mmu.ac.uk.3		0161 496 8000	M11 4DW
Gaspard De La Nuit	robotpaladin@gmail.com.uk		0161 496 7000	M24 1AD
Gemma Tomlinson	gemma_tomlinson@hotmail.com	075452708996	01204701190	M26 178
Genoise Benoit	bakingwolverine@hotmail.ca.7		0161 496 3000	M14 7SA
Geoffry Bovcott	abovcs@fiiidkldk.com	01282828388383	08384748474784	M67 9HH

Complex Cases | 1 - 36 of 36 (0 selected)

STEP 2 - If you cannot find the person, you will need to add them by clicking on the '+New' button at the top of the page



FINDING OR CREATING A CASE - possible/confirmed case, cluster or

STEP 3 – When creating a new case, if the situation type is anything other than an enquiry, the 'case' in these instances will be the person with COVID symptoms or with a confirmed positive test.

Please click on the drop down in the top right hand corner of the page and select 'Index Case' as 'Relationship Type'

New Case Name

Index Relationship Type Ben Tomlinson Owner Active Status Reason

Summary - Index Address Social Pane Access Team (Hidden)

CONTACT INFORMATION	
GMCA ID	---
CTAS ID	+ ---
Forename	+ Joe
Surname	+ Pastry
Email	joe@thepieshop.com
Postal Code	---
Phone	07892426384
Backup Landline	01204 789345

RELATED SITUATIONS

Index

Ben Tomlinson

Active

Relationship Type

Owner

Status Reason

Relationship Type

Index

Owner

* ? Ben Tomlinson

Status Reason

Active

FINDING OR CREATING A CASE – possible/confirmed case, cluster or

STEP 3 – Complete the fields within the ‘summary’ and ‘address’ tabs.

Once you have created your index case, go to slide 12 to find or create a setting manager.

New Case Name

Summary - Index Address Social Pane Access Team

CONTACT INFORMATION

GMCA ID	---
CTAS ID	+ ---
Forename	+ Sally
Surname	* Cinnamon
Email	sallycinnamon@hotmail.com
Postal Code	BL4 8pp
Phone	07892426384
Backup Landline	01204 789345

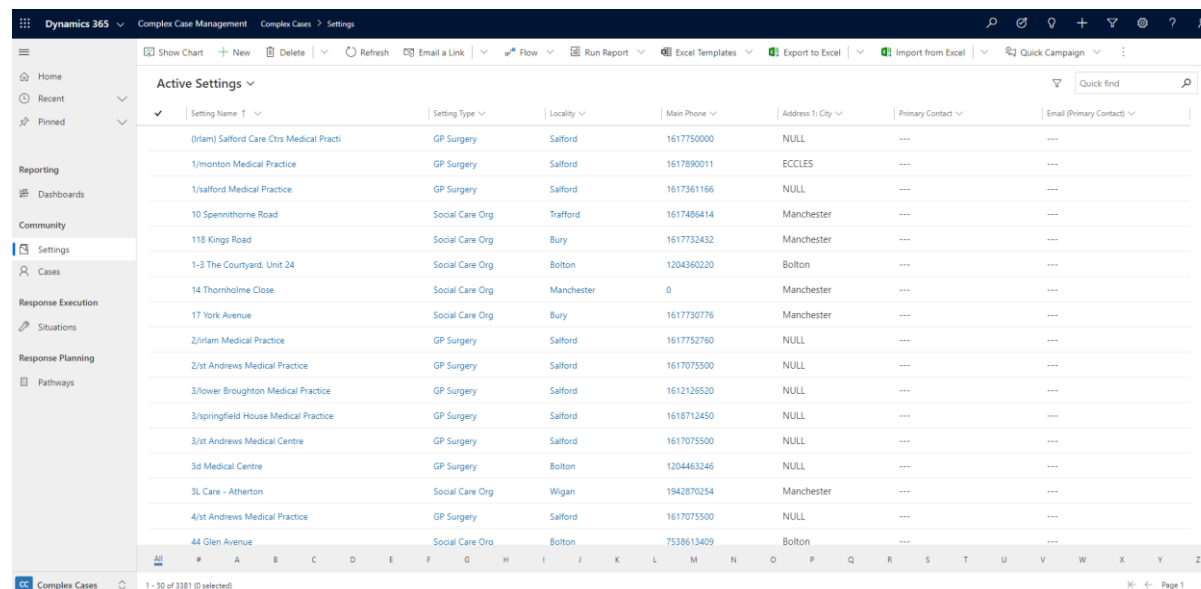
New Case Name

Summary - Index Address Social Pane Access Team

House Number	21 Derwent Drive
Address 1: Street 2	Kearsley
Address 1: Street 3	---
Address 1: City	Bolton
Address 1: State/Province	---
Postal Code	BL4 8pp
Address 1: Country/Region	---
Locality	---

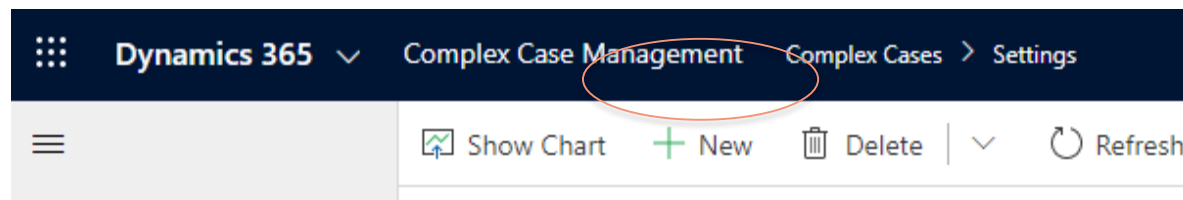
FINDING OR CREATING A SETTING

STEP 1 – Once a case has been created, whether that's an index case, Setting Manager or both, before creating a situation you will need to ascertain if the setting it exists in the system already. Once within settings, navigate to the quick find option in the far right hand corner and search for the setting in mind. If the setting is found, please go to 'creating the situation' on slide 21 (for enquiries) or 24 (for possible/confirmed/cluster/outbreak)



Setting Name	Setting Type	Locality	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
(Irlam) Salford Care Ctrs Medical Practi	GP Surgery	Salford	1617759000	NULL	---	---
1/morton Medical Practice	GP Surgery	Salford	1617890011	ECCLES	---	---
1/salford Medical Practice	GP Surgery	Salford	1617361166	NULL	---	---
10 Spennithorne Road	Social Care Org	Trafford	1617486414	Manchester	---	---
118 Kings Road	Social Care Org	Bury	1617732432	Manchester	---	---
1-3 The Courtyard, Unit 24	Social Care Org	Bolton	1204360220	Bolton	---	---
14 Thornholme Close	Social Care Org	Manchester	0	Manchester	---	---
17 York Avenue	Social Care Org	Bury	1617730776	Manchester	---	---
2/Irlam Medical Practice	GP Surgery	Salford	1617752760	NULL	---	---
2/st Andrews Medical Practice	GP Surgery	Salford	1617075500	NULL	---	---
3/flower Broughton Medical Practice	GP Surgery	Salford	1612126520	NULL	---	---
3/springfield House Medical Practice	GP Surgery	Salford	1618712450	NULL	---	---
3/st Andrews Medical Centre	GP Surgery	Salford	1617075500	NULL	---	---
3d Medical Centre	GP Surgery	Bolton	1204463246	NULL	---	---
3L Care - Atherton	Social Care Org	Wigan	1942870254	Manchester	---	---
4/st Andrews Medical Practice	GP Surgery	Salford	1617075500	NULL	---	---
44 Glen Avenue	Social Care Org	Bolton	7538613409	Bolton	---	---

STEP 2 - If you cannot find the setting, you will need to add a new setting by clicking on the '+New' button



FINDING OR CREATING A SETTING

STEP 3 – Complete the following fields as a minimum on the Summary page;

- Setting Name
- Locality
- Setting Type



New Setting

Summary

Child Settings

Contacts

Social Pane

Address

Access Team

Account Information

Setting Name * Joe's Pie Shop

Locality  Bolton

Setting Type *  Restaurant/Food Outlet

STEP 4 – Click on the Address tab to add the setting address details



Joe's Pie Shop
Setting

Summary

Child Settings

Contacts

Social Pane

Address

ADDRESS

Address 1: Street 1 434 Bolton Rd

Address 1: Street 2 Kearsley

Address 1: Street 3 ---

Address 1: City Bolton

Address 1: State/Province ---

Address 1: ZIP/Postal Code BL4 8NJ

Address 1: Country/Region ---

FINDING OR CREATING A SETTING

STEP 5 – Finally
click on the
Contacts tab to
add the setting
address details.
Go to add existing
case name,
search for
manager and then
add. Once saved,
please go to
'creating the
situation' on slide
21 (for enquiries)
or 24 (for
possible/confirmed/
cluster/outbreak
)

Joe's Pie Shop
Setting

Ben Tor
Owner

Summary Child Settings **Contacts** Social Pane Address Access Team (Hidden) Related

+ New Case Name Add Existing Case Na...

✓ Full Name ↑	Email
Joe Boulger	headteacher@school.com

CREATING THE SITUATION - enquiries

STEP 1 – In order to create a new situation (enquiry) navigate to the situations screen from the navigation panel and click ‘+New Situation’

The screenshot displays the Dynamics 365 interface for 'Complex Case Management'. The breadcrumb navigation at the top shows 'Complex Cases' > 'Situations', with 'Situations' circled in red. The left-hand navigation panel lists various options, with 'Situations' circled in red. The main content area, titled 'My Active Situations', features a table with the following data:

Customer	Pathway	Setting	Status Reason	Origin	Locality	Owner	Created On	Situation Number	CTAS ID
Garret Longdreamer	---	---	Received	---	---	Ben Tomlinson	12/08/2020 09:46	CAS-01244-WZZ455	---

CREATING THE SITUATION - enquiries

STEP 2 – Once the new situation screen is open, navigate to the top right-hand corner and click on the drop down next to status and set the Origin to 'Locality' and the severity to 'Enquiry (No confirmed or possible case)'

The screenshot shows the 'New Situation' form in Dynamics 365. The 'Origin' dropdown is set to 'Locality' and the 'Severity' dropdown is set to 'Enquiry (No confirmed or possible case)'. The 'Status' dropdown is set to 'Received'. The 'Owner' is 'Ben Tomlinson'. The 'Complex Case' tab is active, showing a timeline with 'Triage (< 1 Min)' and 'Action'. The 'Summary' tab is selected, showing fields for 'Customer', 'SETTING DETAILS', and 'LOCALITY REQUIREMENT'.

STEP 3 – Next search for the setting manager under the customer field, then move to the setting details section underneath and populate accordingly. Finally add into the collaboration panel the individual who will be allocated this situation to manage

The screenshot shows the 'New Situation' form in Dynamics 365. The 'Customer' field is populated with 'Joe Boulger'. The 'SETTING DETAILS' section is expanded, showing 'Locality' as 'Bolton', 'Locality Requirement' as 'For Action (Locality Action Re)', 'Locality Notified' as 'No', 'Setting Type' as 'Restaurant/F...', 'Setting' as 'Joe's Pie Shop', and 'Setting Manager' as 'Ben Tomlinson'. The 'COLLABORATION' panel shows 'GMCA Hub Member 1' and 'Locality Hub Member 1'.

CREATING THE SITUATION - enquiries

STEP 4 – Finally click save at the top and then once the page has reloaded press the assign button, click on 'Me' and then in the 'User or team' field look for your locality admin name and click assign

The screenshot shows a web application interface for managing a situation. At the top, a toolbar contains buttons for 'Save & Close', 'Save & Route', 'New', 'Save', 'Create Child Case', 'Resolve Case', 'Cancel Case', 'Add to Queue', 'Queue Item Details', 'Assign', 'Do Not Decrement En...', 'Delete', and 'Refresh'. The 'Save' button is circled in red. Below the toolbar, the page title is 'Joe Boulger Situation'. A progress bar shows stages: 'Complex Case Active for 1 minute', 'Triage (1 Min)', 'Action', 'Monitor', and 'Complete'. The 'Triage' stage is currently active. On the right, there are tabs for 'Locality Origin' and 'Enquiry (No confirmed or possible case)', and a user selection dropdown showing 'Ben Tomlinson Owner'. The main content area has tabs for 'Summary', 'Contact Tracing', 'Social Pane', 'Collaboration (Hidden)', and 'Related'. The 'Summary' tab is selected, showing a 'Customer' field with 'Joe Boulger' and a 'SETTING DETAILS' section with fields for 'Locality' (Bolton), 'Locality Requirement' (For Action (Locality Action Re...)), 'Locality Notified' (No), 'Setting Type' (Restaurant/Food Outlet), and 'Setting' (Joe's Pie Shop). An 'INITIAL MANAGEMENT SUMMARY' table is partially visible. A modal dialog titled 'Assign to Team or User' is open in the center, asking 'You have selected 1 item. To whom would you like to assign it?'. It has an 'Assign To' section with a 'User or team' dropdown menu showing 'Bolton Admin' and a search icon. At the bottom of the modal are 'Assign' and 'Cancel' buttons. The modal is circled in red.

CREATING THE SITUATION - possible/confirmed case, cluster or

STEP 1 – In order to create a new situation (possible/confirmed case, cluster or outbreak) navigate to the situations screen from the navigation panel and click ‘+New Situation’

The screenshot displays the Dynamics 365 interface for Complex Case Management. The top navigation bar shows 'Dynamics 365' and 'Complex Case Management'. The left-hand navigation pane includes sections for Home, Recent, Pinned, Reporting, Community, Response Execution, and Response Planning. The 'Situations' option under 'Response Execution' is highlighted with a red circle. The main content area shows a toolbar with a '+ New Situation' button, also circled in red. Below the toolbar is a table titled 'My Active Situations' with columns for Customer, Pathway, Setting, Status Reason, Origin, Locality, Owner, Created On, Situation Number, and CTAS ID. A single row is visible for 'Garret Longdreamer'.

Customer	Pathway	Setting	Status Reason	Origin	Locality	Owner	Created On	Situation Number	CTAS ID
Garret Longdreamer	---	---	Received	---	---	Ben Tomlinson	12/08/2020 09:46	CAS-01244-WZZ455	---

CREATING THE SITUATION - possible/confirmed case, cluster or

STEP 2 – Once the new situation screen is open, navigate to the top right-hand corner and click on the drop down next to status and set the Origin to 'Locality' and the severity to either 'setting possible', 'setting confirmed', 'cluster' or 'outbreak'

The screenshot shows the Dynamics 365 interface for 'Complex Case Management'. The main view is for a situation named 'Joe Boulger'. The 'Status' dropdown menu is open, showing the following options:

- Origin: Locality
- Severity: Setting with one confirmed case
- Owner: Ben Tomlinson
- Status: Received

STEP 3 – Next search for the index case under the customer field, then move to the case details section underneath and populate accordingly, followed by the setting details.

The screenshot shows the 'Case Details' and 'Setting Details' sections for a customer named Sally Cinnamon.

CASE DETAILS

ID	CAS-01252-Y4B7V4
CTAS ID	---
Pathway	Workplace
Care Home	No
Covid Status	Confirmed - POSITIVE TEST
Onset Date	10/08/2020
Activity Date	09/08/2020
Activity Postcode	BL4 89R
Able to identify all Contacts?	No
Activity Details and Comments	Received call today from Joe's Pie Shop in Bolton regarding a member of staff who tested positive for COVID earlier today. Staff member (Sally Cinnamon) worked in the shop the day prior to testing positive.

SETTING DETAILS

Locality	Bolton
Locality Requirement	For Action (Locality Action Required)
Locality Notified	No
Setting Type	Restaurant/Food Outlet
Setting	Joe's Pie Shop
Setting Manager	Joe Boulger

CREATING THE SITUATION - possible/confirmed case, cluster or

STEP 4 – Next add into the collaboration panel the individual who will be allocated this situation to manage

COLLABORATION		
GMCA Hub Member 1	---	Locality Hub Member 1
GMCA Hub Member 2	---	Locality Hub Member 2
GMCA Hub Member 3	---	Locality Hub Member 3
GMCA Hub Member 4	---	Locality Hub Member 4
GMCA Hub Member 5	---	Locality Hub Member 5
GMCA Hub Member 6	---	Locality Hub Member 6

 Aidan Richmond

STEP 5 – Next save at the top and then once the page has reloaded press the assign button, click on 'Me' and then in the 'User or team' field look for your locality admin name and click assign

Save & Close Save & Route New Save Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign Do Not Decrement En... Delete Refresh Process

Sally Cinnamon Situation

Complete Case Active for 25 minutes Triage (25 Min) Action Monitor Complete

Summary Contact Tracing Social Pane Collaboration (Hidden) Related

Customer Sally Cinnamon

CASE DETAILS

ID CAS-01252-Y4B7V4

CTAS ID

Pathway Workplace

Care Home No

Covid Status Confirmed - POSITIVE TEST

Onset Date 10/08/2020

INITIAL MANAGEMENT SUMMARY

Initial Management

Subject 1. Provide Infection Control Advice 2. Advise about Self Isolation 3. Advise Regarding Testing

Assign to Team or User

You have selected 1 item. To whom would you like to assign it?

Assign To

User or team

User or team Bolton Admin

Assign Cancel

CREATING THE SITUATION - possible/confirmed case, cluster or

STEP 5 – For situations on creation that are ‘setting confirmed’, ‘cluster’ or ‘outbreak’, that require escalation to the GM Hub, navigate to the top right-hand corner and click on the drop down next to status and set ‘status’ to ‘Escalate to GM’ and then save and close

Complex Case Management | Complex Cases > Situations > Sally Cinnamon

Save & Close | Save & Route | New | Save | Create Child Case | Resolve Case | Cancel Case | Add to Queue | Queue Item Details

Sally Cinnamon Situation

Locality: Origin | Setting with one confirmed case: Severity | Bolton Admin Owner | Escalate to GM Status

Complex Case Active for 32 minutes

Triage (32 Min) | Action

Summary | Contact Tracing | Social Pane | Collaboration (Hidden) | Related

Customer* Sally Cinnamon

INITIAL MANAGEMENT SUMMARY

CASE DETAILS

ID CAS-01252-Y487V4

CTAS ID*

Pathway*

Activate Windows
Go to Settings to activate Windows.

MANAGING & CLOSING A SITUATION

OVERVIEW

Once a situation has been created, it should of been assigned to an individual to undertake contact tracing, co-ordination of consequence management activities or both. The following slides highlight for each type of situation the key functionality when managing and then closing a situation

ENQUIRIES

SUMMARY – A free text box is available to record both the nature of the enquiry and the advice given

STATUS – Once the enquiry is being dealt with, the status should be changed to 'In Progress', then once complete, should be changed to 'Case Completed'

Joe Boulger
Situation

Complex Case
Active for 33 minutes

Triage (33 Min)

Action

Monitor

Complete

Summary | Contact Tracing | Social Pane | Collaboration (Hidden) | Related

Customer: Joe Boulger

SETTING DETAILS

- Locality: Bolton
- Locality Requirement: For Action (Locality Action Required)
- Locality Notified: No
- Setting Type: Restaurant/Food Outlet
- Setting: Joe's Pie Shop
- Setting Manager: ---

INITIAL MANAGEMENT SUMMARY

13/08/2020
- Joe Boulger the manager of Joe's Pie Shop contacted the hub for advice about reopening his premises

14/08/2020
- Made contact with Mr Boulger and advised him about new COVID Secure guidelines and how to promote social distancing within the factory part of the premises where the pies were made.

Initial Management

Activity Status	Subject	Description
No data available.		

COLLABORATION

GMCA Hub Member 1

Locality Hub Member 1

Ben Tomlinson

ACTIONS – Actions can be recorded by the case manger depending on the nature and complexity of the enquiry

ENQUIRIES

LOCALITY DASHBOARD –

Once an enquiry is closed it will appear in the locality dashboard 'closed situations' list

Save As + New ✓ Set As Default Refresh All

Locality ▾

For Information Only (No Locality Action Required) + New Situation ⋮

Quick find 🔍

✓ Customer ▾	Pathway ▾	Setting ▾	Status Reason ▾	Origin ▾	Ow
JAMES SMITH	Healthcare with	---	Case Reviewed	National T...	Wi
TOM JONES	Healthcare with	High Street Me	Received	---	○
Lee Mather	---	Stepping Hill	Received	National T...	Wi

ABC 1 - 3 of 3 (0 selected)

For Preparedness (No Action Required, But This May Change) + New Situation ⋮

Quick find 🔍

No data available.

ABC 0 - 0 of 0 (0 selected)

Closed Situations

+ New Situation ⋮

Quick find 🔍

✓ Customer ▾	Pathway ▾	Setting ▾	Status Reason ▾	Origin ▾	Loc
Joe Pie	---	Pepper Lane Pi	Case Completed	Locality	Wi
TOM JONES	Healthcare with	High Street Me	Case Completed	National T...	Wi
Joe Boulger	Workplace	Joe's Pie Shop.	Case Completed	Locality	Bo

Situations (Cases) Expand Chart ⋮

Situations By Status

Status	Count
Completed	2
Other	2

ENQUIRIES

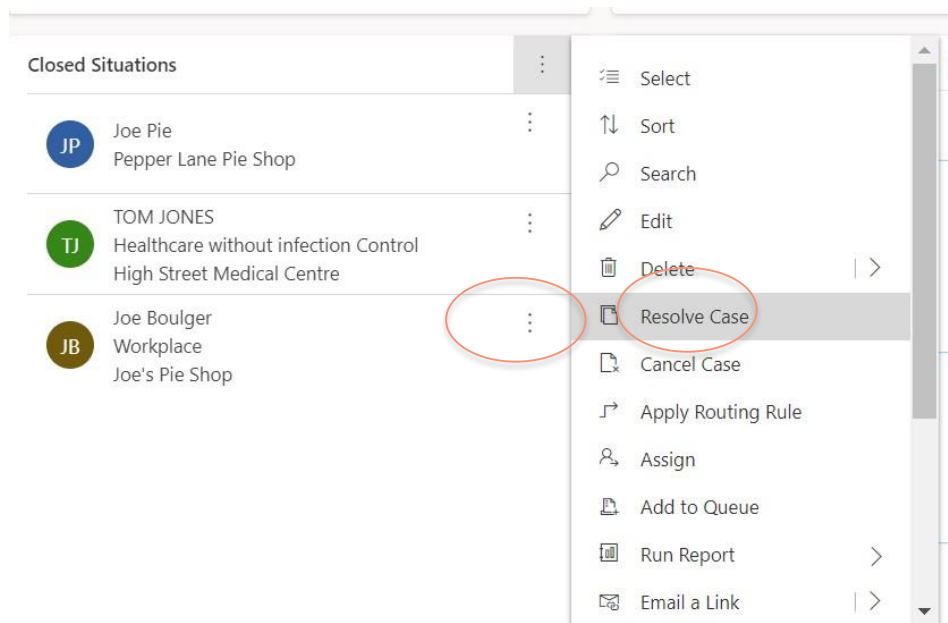
RESOLVING A SITUATION –

Resolving a situation should be done by the locality administrator who would be alerted to this from their locality dashboard

To resolve the situation, click on the three dots next to the case and then click resolve case, and then confirm.

Finally set the resolution type to 'Case Completed' and click save and close.

The situation should then disappear from the dashboard.



Quick Create: Case Resolution

Resolution Type * Case Completed

Remarks

SETTING WITH A POSSIBLE CASE

SUMMARY – A free text box is available to record both the nature of the possible case and the advice given

STATUS – Once the possible case is being dealt with, the status should be changed to 'In Progress', then once complete, should be changed to 'Case Completed'

Customer Sally Cinnamon

CASE DETAILS

ID: CAS-01253-MSM0X6

CTAS ID: ---

Pathway: Workplace

Care Home: ☐ No

Covid Status: **Awaiting Test Result**

Onset Date: 13/08/2020

Activity Date: 12/08/2020

Activity Postcode: **B14 8ZR**

Able to identify all Contacts? ☐ No

Activity Details and Comments: Received call today from Joe's Pie Shop in Bolton regarding a member of staff who tested positive for COVID earlier today. Staff member (Sally Cinnamon) worked in the shop the day prior to testing positive.

SETTING DETAILS

Locality: Bolton

Locality Requirement: For Action (Locality Action Required)

Locality Notified: **No**

Setting Type: Restaurant/Food Outlet

Setting: Joe's Pie Shop

INITIAL MANAGEMENT SUMMARY

14/08/2020

- Spoke to Manager (Mr Boulger) and advised member of staff to self-isolate and book for a test
- All staff to be advised of social distancing guidelines and reminded of use of PPE
- Mr Boulger to call back once outcome of test confirmed

Initial Management

Activity Status	Subject	Description
Completed	1. Provide Infection Control Advice	Yes
Completed	2. Advise about Self Isolation	Yes
Completed	3. Advise Regarding Testing	Yes

COLLABORATION

GMCA Hub Member	Locality Hub Member
1	1
2	2
3	3
4	4
5	5
6	6

ACTIONS – Actions can be recorded by the case manager depending on the nature and complexity of the enquiry

SETTING WITH A POSSIBLE CASE

LOCALITY
DASHBOARD –

Once an enquiry is closed it will appear in the locality dashboard 'closed situations' list

Save As + New ✓ Set As Default Refresh All

Locality ▾

For Information Only (No Locality Action Required)

+ New Situation ⋮

Quick find 🔍

✓	Customer ▾	Pathway ▾	Setting ▾	Status Reason ▾	Origin ▾	Ow
	JAMES SMITH	Healthcare with	---	Case Reviewed	National T...	Wi
	TOM JONES	Healthcare with	High Street Me	Received	---	○
	Lee Mather	---	Stepping Hill	Received	National T...	Wi

ABC 1 - 3 of 3 (0 selected)

Closed Situations

+ New Situation ⋮

Quick find 🔍

✓	Customer ▾	Pathway ▾	Setting ▾	Status Reason ▾	Origin ▾	Loc
	Joe Pie	---	Pepper Lane Pi	Case Completed	Locality	Wi
	TOM JONES	Healthcare with	High Street Me	Case Completed	National T...	Wi
	Joe Boulger	Workplace	Joe's Pie Shop.	Case Completed	Locality	Bo

For Preparedness (No Action Required, But This May Change)

+ New Situation ⋮

Quick find 🔍



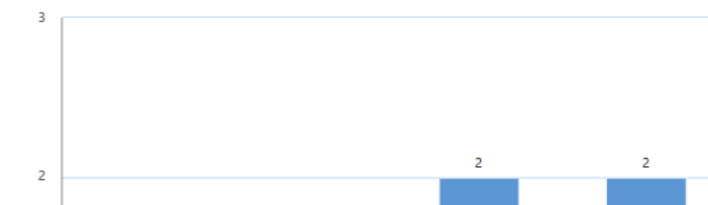
No data available.

ABC 0 - 0 of 0 (0 selected)

Situations (Cases)

Expand Chart ⋮

Situations By Status



SETTING WITH A POSSIBLE CASE

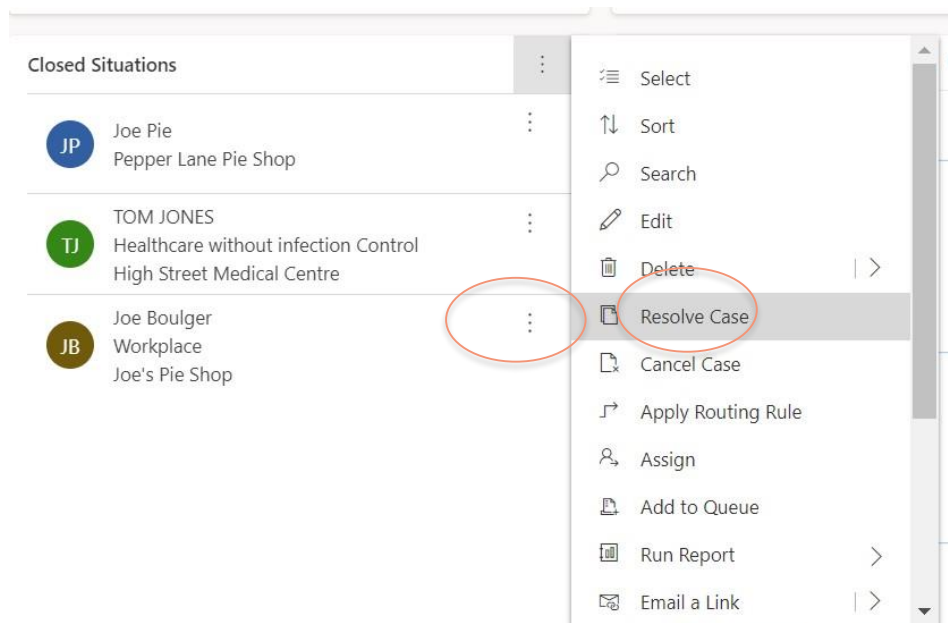
RESOLVING A SITUATION –

Resolving a situation should be done by the locality administrator who would be alerted to this from their locality dashboard

To resolve the situation, click on the three dots next to the case and then click resolve case, and then confirm.

Finally set the resolution type to 'Case Completed' and click save and close.

The situation should then disappear from the dashboard.



Quick Create: Case Resolution

Resolution Type * Case Completed

Remarks

SETTING WITH A POSSIBLE CASE TURNS INTO A CONFIRMED CASE

SUMMARY – Within the same summary box any further update for the case can be added

STATUS & SEVERITY – The severity should now be upgraded to a 'setting with a confirmed case'. If contact tracing is required of the GM Hub, the status should be changed to 'Escalate to GM'. For contact tracing and consequence management please refer to slide

Sally Cinnamon
Situation

Complex Case
Active for 2 minutes

Timeline: Triage (2 Min) → Action → Monitor → Complete

Summary | Contact Tracing | Social Panel | Collaboration (Hidden) | Related

Customer: Sally Cinnamon

CASE DETAILS

ID: CAS-01253-MSM0X6

CTAS ID: ---

Pathway: Workplace

Care Home: No

Covid Status: Awaiting Test Result

Onset Date: 13/08/2020

Activity Date: 12/08/2020

Activity Postcode: BL4 8ZR

Able to identify all Contacts? No

Activity Details and Comments: Received call today from Joe's Pie Shop in Bolton regarding a member of staff who tested positive for COVID earlier today. Staff member (Sally Cinnamon) worked in the shop the day prior to testing positive.

SETTING DETAILS

Locality: Bolton

Locality Requirement: For Action (Locality Action Required)

Locality Notified: No

Setting Type: Restaurant/Food Outlet

Setting: Joe's Pie Shop

INITIAL MANAGEMENT SUMMARY

14/08/2020

- Spoke to Manager (Mr Boulger) and advised member of staff to self-isolate and book for a test
- All staff to be advised of social distancing guidelines and reminded of use of PPE
- Mr Boulger to call back once outcome of test confirmed

16/08

- Manager called back today to confirm positive test result.
- All staff who were on shift with index case have been sent home to self-isolate and have been advised to book a test
- Shop shut whilst deep clean is undertaken
- Advised Manager GM Hub will be in touch to follow up on contact tracing

Initial Management

Activity Status	Subject	Description
Completed	1. Provide Infection Control Advice	Yes
Completed	2. Advise about Self Isolation	Yes
Completed	3. Advise Regarding Testing	Yes

CONTACT TRACING METRICS, ACTIONS & SUMMARY

Activity Status	Subject	Description
Open	1. Initial contact made with the setting	---
Open	2. Setting checklist complete	---

Contact Tracing Complete: No

CONSEQUENT MANAGEMENT AND DIRECT SUPPORT METRICS, ACTIONS AND SUMMARY

Activity Status	Subject	Description
Open	1. Have any consequence management issues been identified?	---
Open	2. Have these issues been resolved?	---

SETTING WITH A CONFIRMED CASE, CLUSTER OR OUTBREAK

CONTACT TRACING AND CONSEQUENCE MANAGEMENT – Two free text boxes are available to summarise contact tracing activities whether carried out at a GM or Locality level, and a separate box underneath for localities to specifically record any consequence management activities that have taken place. Similarly, there are some set actions for each that need completing as they are undertaken – please click on the action, add ‘Yes’ to the description, mark complete and the close.

Customer * Sally Cinnamon

CASE DETAILS

ID CAS-01253-M5M0X6

CTAS ID ---

Pathway * Workplace

Care Home ☐ No

Covid Status Awaiting Test Result

Onset Date 13/08/2020

Activity Date 12/08/2020

Activity Postcode BL4 82R

Able to identify all Contacts? ☐ No

Activity Details and Comments Received call today from Joe's Pie Shop in Bolton regarding a member of staff who tested positive for COVID earlier today. Staff member (Sally Cinnamon) worked in the shop the day prior to testing positive.

SETTING DETAILS

Locality Bolton

Locality Requirement For Action (Locality Action Required)

Locality Notified No

Setting Type Restaurant/Food Outlet

Setting Joe's Pie Shop

INITIAL MANAGEMENT SUMMARY

14/08/2020

- Spoke to Manager (Mr Boulger) and advised member of staff to self-isolate and book for a test
- All staff to be advised of social distancing guidelines and reminded of use of PPE
- Mr Boulger to call back once outcome of test confirmed

16/08

- Manager called back today to confirm positive test result.
- All staff who were on shift with index case have been sent home to self-isolate and have been advised to book a test
- Shop shut whilst deep clean is undertaken
- Advised Manager GM Hub will be in touch to follow up on contact tracing

Initial Management

Activity Status	Subject	Description
Completed	1. Provide Infection Control Advice	Yes
Completed	2. Advise about Self Isolation	Yes
Completed	3. Advise Regarding Testing	Yes

CONTACT TRACING METRICS, ACTIONS & SUMMARY

Activity Status	Subject	Description
Open	1. Initial contact made with the setting	---
Open	2. Setting checklist completed	---

Contact Tracing Complete ☐ No

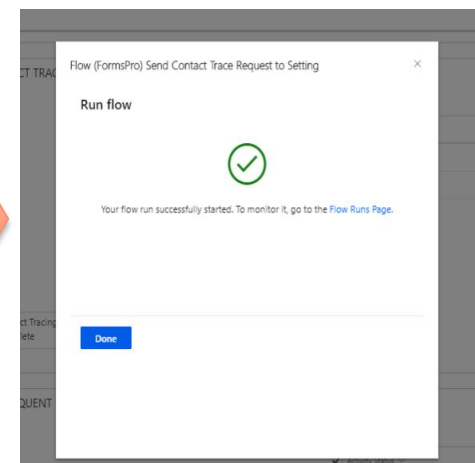
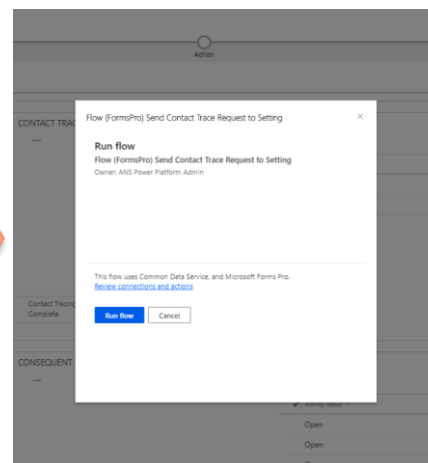
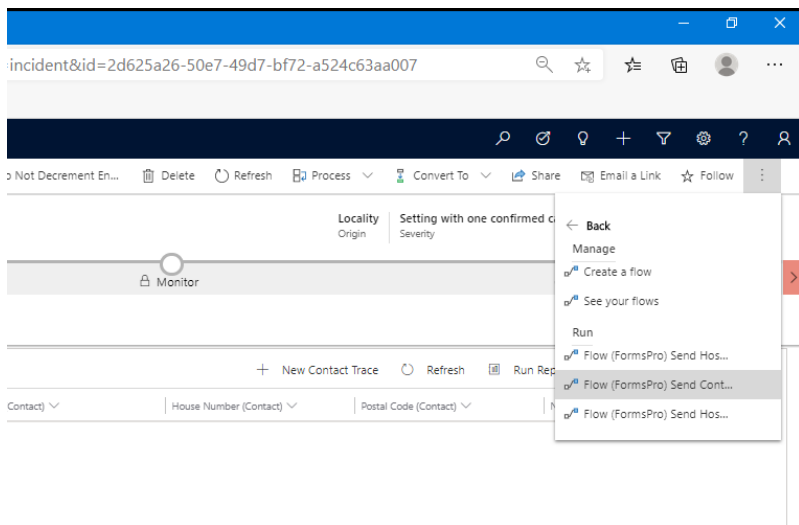
CONSEQUENCE MANAGEMENT AND DIRECT SUPPORT METRICS, ACTIONS AND SUMMARY

Activity Status	Subject	Description
Open	1. Have any consequence management issues been identified?	---
Open	2. Have these issues been resolved?	---

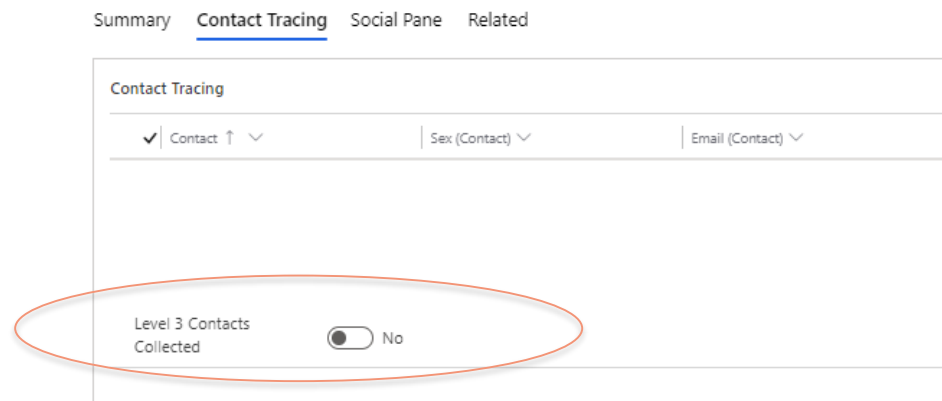
JOINT MANAGEMENT – When jointly working on a case at a GM and local level, the Contact tracing and Consequence management toggle buttons are used to indicate these these separate activities have been completed

SETTING WITH A CONFIRMED CASE, CLUSTER OR OUTBREAK

SETTINGS WHERE LEVEL 3 CONTACT FOLLOW UP IS REQUIRED – In some cases, particularly where a large number of contacts have been identified in a setting, these can be passed back to the national team for follow up. In order to this using the system, please 1) navigate to the three dots in the top right hand corner of the screen, click flow, then click on 'Flow (FormsPro) send contact tracing request to setting' 2) Click run flow and finally 3) click done



Once the flow process has run, the setting manager will receive an e-mail with a link to an online form for them to complete for each contact. Once complete they can submit and the information will then appear back in the CMS in the contact tracing tab. Once all contacts have been identified please click on the 'Level 3 Contacts Collected' toggle.



SETTING WITH A CONFIRMED CASE, CLUSTER OR OUTBREAK

CONTACT TRACING METRICS – For all confirmed situations, all contact tracing metrics should be recorded in the contact tracing tab, next to the summary tab. As displayed below

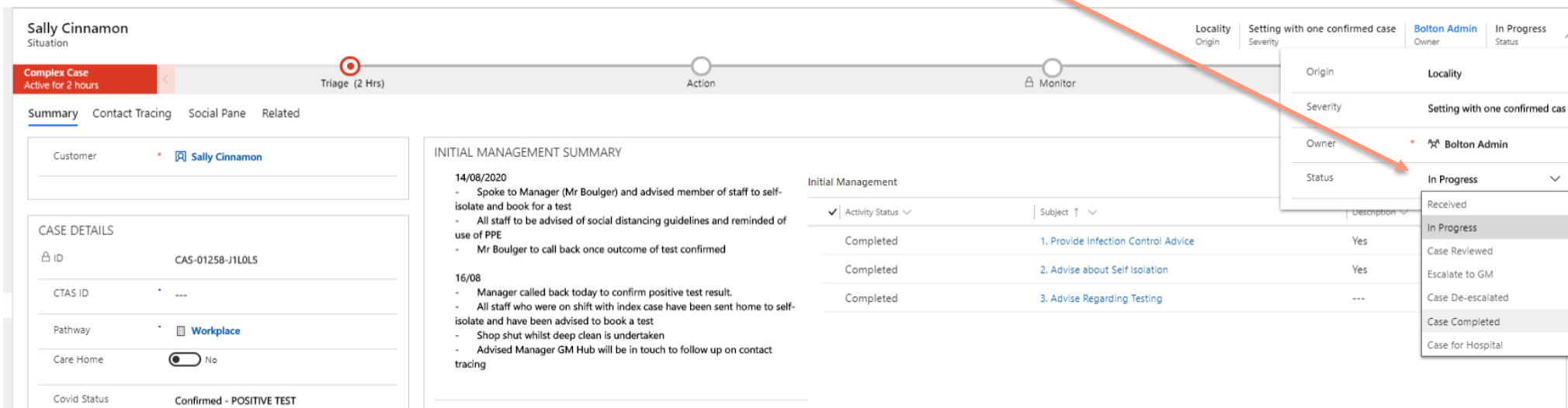
Contact Tracing Metrics			
Numbers Potentially at Risk	---	Number of Symptomatic Contacts	---
Number of Cases	---	Number Hospitalised	---
Number of Contacts	---	Number Fatalities	---

For care home situations (if the care home pathway has been selected when the situation was created), you should see within the same contact tracing tab a slightly different set of metrics and fields to complete

Care Home Metrics			
Total number of residents	---	Total number of staff	---
Number of confirmed cases	---	Number of suspected cases	---
Number of hospitalised	---	Number deceased	---
First Case	---	Onset of last case	---
Appropriate IPC measures	---	Contact tracing been undertaken	---
Summary Notes	---		

SETTING WITH A CONFIRMED CASE, CLUSTER OR OUTBREAK

STATUS – Once the situation has been completed, the status should be changed to 'Case Completed'. All confirmed cases/outbreaks/clusters will automatically be reviewed by the GM Supervisors before being resolved



Sally Cinnamon
Situation

Complex Case Active for 2 hours

Triage (2 Hrs) Action Monitor

Summary Contact Tracing Social Pane Related

Customer * [Sally Cinnamon](#)

CASE DETAILS

ID CAS-01258-J1L0L5

CTAS ID ---

Pathway [Workplace](#)

Care Home ☐ No

Covid Status Confirmed - POSITIVE TEST

INITIAL MANAGEMENT SUMMARY

14/08/2020

- Spoke to Manager (Mr Boulger) and advised member of staff to self-isolate and book for a test
- All staff to be advised of social distancing guidelines and reminded of use of PPE
- Mr Boulger to call back once outcome of test confirmed

16/08

- Manager called back today to confirm positive test result.
- All staff who were on shift with index case have been sent home to self-isolate and have been advised to book a test
- Shop shut whilst deep clean is undertaken
- Advised Manager GM Hub will be in touch to follow up on contact tracing

Initial Management

Activity Status	Subject	Description
Completed	1. Provide Infection Control Advice	Yes
Completed	2. Advise about Self Isolation	Yes
Completed	3. Advise Regarding Testing	---

Status Dropdown:

- Received
- In Progress**
- Case Reviewed
- Escalate to GM
- Case De-escalated
- Case Completed
- Case for Hospital

THANK YOU

Contact us

If you have any queries about these guidelines,
contact the GMHSC communications team:
gm.hsccomms@nhs.net

www.gmhsc.org.uk
[@GM_HSC](#)