


1

What is the purpose of household reporting? What is the significance of the Head of Household (HoH)?

- Household reporting improves reporting efficiency by allowing monitorees to report on symptoms as a group. The system sends one daily report message to the designated HoH to report on behalf of all defined household members in the system.
- The HoH will continue to receive messages if at least one household member is eligible to receive messages.
- HoHs report on behalf of **all** reporting household members, regardless of the HoH's workflow, case status, or monitoring status. Heads of Households on the Closed line list will continue to receive daily reports for eligible household members.
- **HoH** icon in the "Monitoree" column on the dashboard identifies Heads of Households.
-  monitoring status icon indicates a monitoree is a non-Head of Household member.

2

Can multiple monitorees that are not in a household have the same contact information?

- **No.** All monitorees with the same contact information and Preferred Contact Method **MUST** be linked in a Household to avoid reporting errors.

3

How does pausing notifications work for households?

- Pausing notifications for the HoH will stop daily report messages for all household members.
- Pausing notifications on records of household members who are not the Head of Household has no effect since household members do not receive messages. As a result, the "Pause Notifications" button is not available on these records.

4

What if household members are in a different jurisdiction from the HoH?

- A public health user can only view records within their assigned jurisdiction hierarchy. If a household member is not in an assigned jurisdiction that a user has access to, a user will not be able to see any reports submitted on that household member's behalf.

5

When are records automatically linked as a reporting household?

- On import when the preferred reporting contact information is an exact match
- On enrollment when the preferred reporting contact information is an exact match

When are records NOT automatically linked as a reporting household?

- If a record is *updated* with new contact information *after enrollment*, that monitoree will not be automatically added to an existing household. A user **must** use the "Add to Household" button to make this linkage to avoid reporting errors.
- Advanced Filters can be used to find records that are using the same phone number or email. These records either need to be in or added to the same reporting household or the contact info must be updated so that it is different for each record not in a household.

6

Where can I see which monitorees are linked as a reporting household?

Household records are near the top of each monitoree's record

- If a HoH record, links are provided to each monitoree they are reporting on behalf of
- If a household member record, a link to the HoH reporter is provided
- If record is not part of a reporting household (self-reporter), a message specifies this



7

How do I enroll a new reporting household?

1. Click “Enroll New Monitoree” to enroll Head of Household (by default the first record created).
2. On the enrollment review screen, select “Finish and add a Household Member.”
3. Enter information on the first enrollment screen and review remaining information.
4. Select “Finish and add a Household Member” to continue adding new household members.
5. Once all household members have been enrolled, click “Finish” at the bottom of the enrollment review screen to complete household enrollment.

8

How do I change the HoH reporter?

1. Open the HoH record. Click “Change Head of Household”.
2. Select the member of the Household you would like to make HoH from the drop-down list and Click “Update”. The system will now send messages according to the Preferred Contact Method in that record.

9

How does the HoH report for household members?

- **E-mailed Web Link:** Receives a single daily email with a weblink for each household member (indicated by the household member’s initials and age). Clicks on daily report link to submit report for each eligible household member, including self.
- **SMS Texted Web Link:** Receives one daily text for each household member with the household member’s initials, age, and symptom report weblink. Clicks on daily report link to submit report for each household member, including self.
- **SMS Text Message:** Replies “yes” or “no” to a single daily text message asking about the presence of ANY symptoms in ANY actively monitored household members (initials and ages are listed to identify household members).
- **Telephone Call:** Replies “yes” or “no” to a single daily automated phone call asking about the presence of ANY symptoms in ANY actively monitored household member (initials and ages are listed to identify household members).

10

How do I add or remove records from a household?

To move monitoree record into a reporting household:

1. Open record of interest and click the “Move To Household” button.
2. Search for the monitoree who should report on behalf of the original monitoree.
3. Click “Select” to make that monitoree the Head of Household for the original monitoree.

To remove monitoree from a reporting household:

1. Open record of interest and select “edit” for the “Contact Information” section.
2. Update email and primary telephone number (must be different from HoH record).
3. Select “Next” then “Finish” to save the changes. Then click “Remove from Household.”

A new monitoree can be enrolled directly into an existing monitoree’s household by using the “Enroll Household Member” button on that monitoree’s record.

11

What if contacts in a reporting household are being exposed to a case that is still infectious?

Option 1: By setting Continuous Exposure

- Open record of reporting household member who has ongoing exposure
- Click “Continuous Exposure” and select appropriate option
- Close reporting household case when appropriate. If needed, select toggle to update Last Date of Exposure for reporting household members with continuous exposure.

Option 2: By future-dating Last Date of Exposure

- Open record of reporting household member who has ongoing exposure
- Set the Last Date of Exposure to match the case’s expected end of Isolation and select appropriate toggle option.