



# COVID-19 Use Case

Cross-Border Traveler Follow-ups

# TRAVELER FOLLOW-UPS

## INTRODUCTION

Governments need to be able to follow up with all visitors entering their province or state to verify they are self-isolating as directed, but there are only so many personnel available who can perform this task and only so many hours in the day they are able to do so. This use case is designed to facilitate the mandatory follow-ups for travelers who have crossed a provincial or state border via land, air, or sea.

Making use of SimplyCast's 360 automation channel, in conjunction with its Form Builder technology as well as its mass alerts tool, two campaigns can be created to automate much of the follow-up process and reduce the workload of the personnel responsible for manually making hundreds or thousands of calls a day.

# TRAVELER FOLLOW-UPS

## KEY STEPS

1. Information Gathering
2. Notifying Travelers
3. Daily Follow-ups
4. Motivation & Encouragement



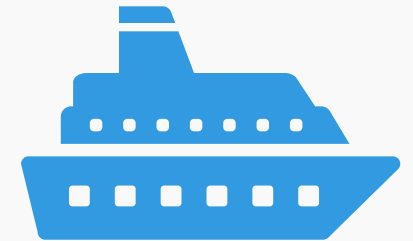
# STEP ONE

## TRAVELER INFORMATION INTAKE

When a traveler crosses a border into a new jurisdiction, their information needs to be collected and stored in a useful way.

**There are three ways in which this can be done:**

1. Online form accessed via QR code or short link
2. Text [KEYWORD] into a designated shortcode
3. Paper form



# STEP ONE

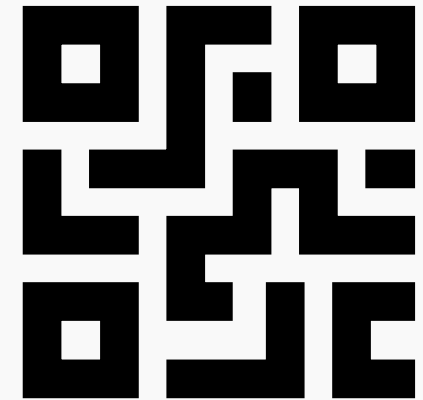
## TRAVELER INFORMATION INTAKE

### 1. Online form accessed via QR code or short link

Any form currently in use to collect required traveler information can be replicated in SimplyCast's Form Builder.

Travelers can access the form via their mobile devices through a **QR code** that can be posted on signage leading up to a border.

Alternatively, the form URL can be provided as a **short link** travelers can use to access it via their browser.



# STEP ONE

## TRAVELER INFORMATION INTAKE

Once travelers submit the form, they will receive a **verification email** they will be required to show the border personnel.

Information collected by the online form will be stored in SimplyCast's CRM and contacts will automatically be added to a **master list** that will be used when sending the appropriate information campaign.



# STEP ONE

## TRAVELER INFORMATION INTAKE

### 2. Text [keyword] into a shortcode

Travelers can text a keyword into a shortcode number to either receive a link to the online form.

The keyword and shortcode can be displayed on signage leading up to a border. Once travelers submit the form, they will receive a **verification email** they will be required to show the border personnel.



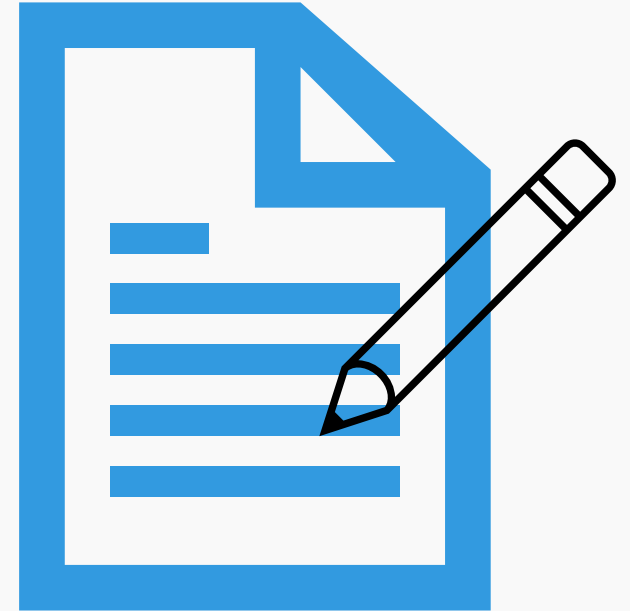
# STEP ONE

## TRAVELER INFORMATION INTAKE

### 3. Paper form

A government may also maintain a manual paper form option for those who may not have access to the Internet on their mobile devices.

Information collected via the paper form will need to be entered into the SimplyCast platform manually. These travelers will also need to be added to the **master contact list**.





## STEP TWO

### INITIAL INFORMATION MESSAGE

Once travelers submit the online form, they will receive an introductory message with information regarding the jurisdiction's current COVID-19 requirements, based on the information they provided in the form.

If the traveler is somehow **exempt from having to self-isolate**, they will receive an email and/or SMS with information regarding restrictions and a list of resources for if they begin to exhibit symptoms.

These travelers will also be sent through an **Information & Reminders** automated workflow.

*"Hello %%NAME%%,*

*Welcome! Please ensure you remain aware and up to date on the latest COVID-19 restrictions while you are here. The most recent restrictions can be found here [LINK].*

*If at any point you begin to experience any symptoms related to COVID-19, call 811 for further assessment.*

*Enjoy your stay!"*

## STEP TWO

### INITIAL INFORMATION MESSAGE

If the traveler is required to self-isolate, they will receive an email and/or SMS with information on the self-isolation requirements and the daily automated follow-up process wherein they will receive an **automated phone call alert** every day asking them to confirm whether they are self-isolating as required.

The email message will also include the same resource information as the message sent to those exempt from self-isolation.

These travelers will also be sent through an **Information & Reminders** campaign automatically and must be included in the **Self-Isolation Daily Alerts** campaign.

*“Hello %%NAME%%,*

*Welcome! Based on the information you provided, you must self-isolate for 14 days upon entering this jurisdiction. During this period you will receive a daily automated phone call asking you to confirm you are self-isolating. Please follow the instructions in the call.*

*Please ensure you remain aware and up to date on the latest COVID-19 restrictions while you are here. The most recent restrictions can be found here [LINK].*

*If at any point you begin to experience any symptoms related to COVID-19, call 811 for further assessment.*

*Enjoy your stay!”*

## STEP THREE

### SELF-ISOLATION DAILY ALERTS

The **Self-Isolation Daily Alerts** campaign is a semi-automated **Alerts** campaign that will need to be sent daily to all travelers who must self-isolate for 14 days on arrival. It is up to the jurisdiction's personnel to **follow up with them** on a daily basis.

Right now, this means manually making hundreds or thousands of phone calls a day but with SimplyCast's Alerts application, the number of manual calls can be drastically reduced.



## STEP THREE

### SELF-ISOLATION DAILY ALERTS

#### How it works:

An alert is set up in SimplyCast's Alert application to be sent out over the **Voice** channel.

*"Hello, this is the Health Department calling to follow up on your mandatory 14-day self-isolation period. If you are experiencing any symptoms of COVID-19, call 811 for further assistance. Please press 1 to confirm you are self-isolating as directed. Thank you for your continued cooperation!"*

## STEP THREE

### SELF-ISOLATION DAILY ALERTS

The government user will use the **Select Contacts Using Filter** option to create a contact set.

The filter will look at the date the user was entered into the system (via the online form or texted into the shortcode) and send to contacts only if they are **currently in their 14-day self-isolation period**.

The filter could look like this:

Filter

Choose contacts from

☐ All Contacts ☒ Lists

Select your lists

Master Traveler List (1 Contacts) x

Name

Save Filter

Filter Contacts by

Column Type

Date

Column Name

Travel Date

is greater than o...

Value

2020/07/14

## STEP THREE

### SELF-ISOLATION DAILY ALERTS

Once the alert has been sent, the government user can refer to the report to identify any contacts who did not press 1 to confirm they have been self-isolating.

The **Not Confirmed Receipt Report** can be downloaded and used as a reference from which personnel can reach out manually.

The number of manual calls necessary will be significantly less than the current manual process.

Not Confirmed Receipt Report					
1 Total No-Responses					
Search...					
Contact Id	Name	Email	Phone	Mobile	Fax
14	JoJo	jojo@example.ca	+19025555423	+19025555423	
Displaying 1 - 1 of 1   Showing 25   Prev 1 Next   Enter page Go					

# STEP THREE

## SELF-ISOLATION DAILY ALERTS

This alert will need to be copied from the main dashboard and sent manually every day, with users modifying the contact set filter to capture contacts created **only within the previous 14 days**.

Alerts

Create New Alert

Filter

Search...

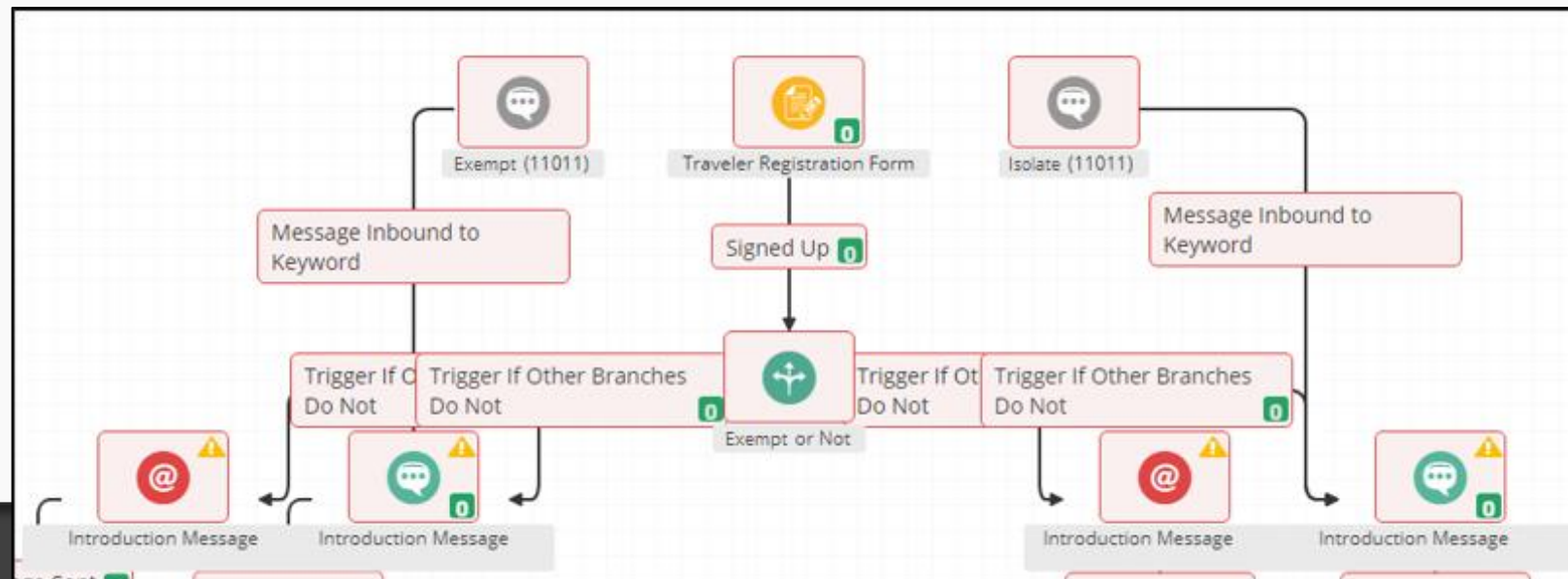
<input type="checkbox"/>	<div><div></div><div><b>Self-Isolation Confirmation 2020-07-25</b> Created by Training Manager Not scheduled yet</div></div>	<div>Edit</div>
<input type="checkbox"/>	<div><div></div><div><b>Self-Isolation Confirmation 2020-07-24</b> Created by Training Manager Not scheduled yet</div></div>	<div>Edit</div>
<input type="checkbox"/>	<div><div></div><div><b>Self-Isolation Confirmation</b> Created by Training Manager Jul 23rd, 2020 3:53 PM</div></div>	<div>View Reports</div>

# STEP FOUR

## AUTOMATED INFORMATION & REMINDERS

The **Information & Reminders** campaign is a completely automated SimplyCast 360 workflow with **two separate branches**: one for those who are exempt from self-isolation and one for those who are required to self-isolate for 14 days.

Travelers are sent down either path depending on the information submitted through the online form or the SMS keyword they texted into the designated shortcode.





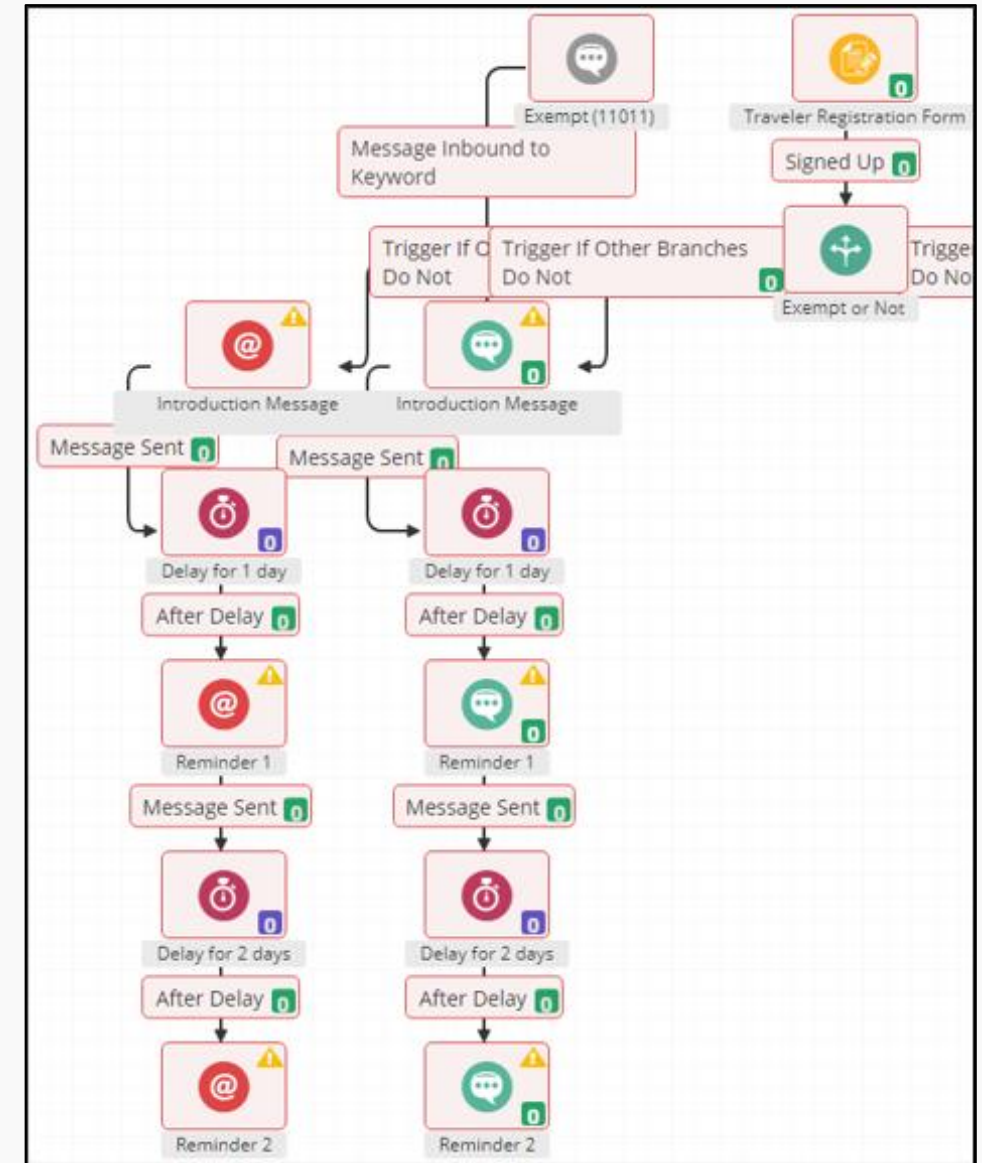
# STEP FOUR

## AUTOMATED INFORMATION & REMINDERS

The first branch reflects the path taken by exempt travelers.

The exempt traveler submits the online form and are automatically sent the appropriate introduction email and/or SMS message.

Then, they will receive **two** automated reminder messages within the next several days via email and/or SMS with the current restrictions and resources.



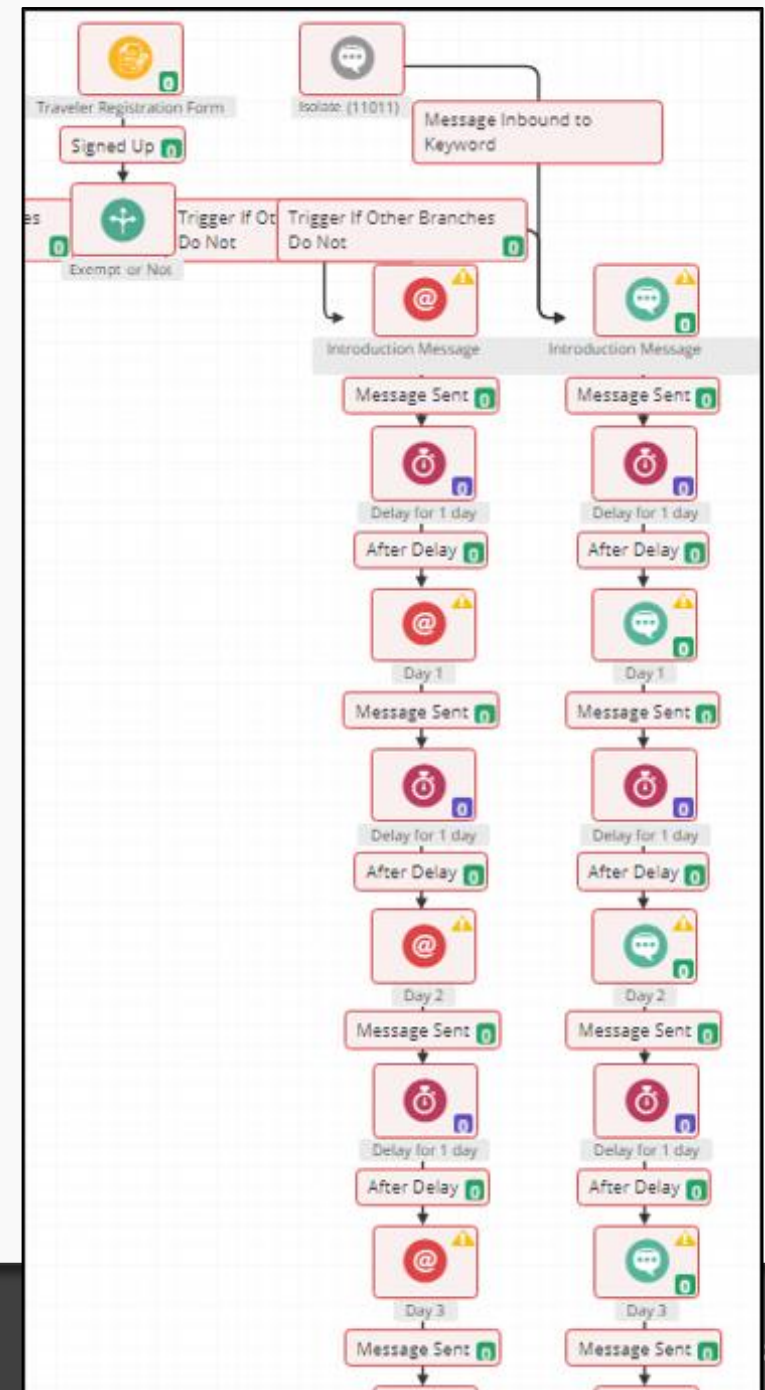
# STEP FOUR

## AUTOMATED INFORMATION & REMINDERS

The second branch reflects the path taken by travelers who must self-isolate for 14 days when they arrive.

The traveler submits the online form and are automatically sent the appropriate introduction email and/or SMS message.

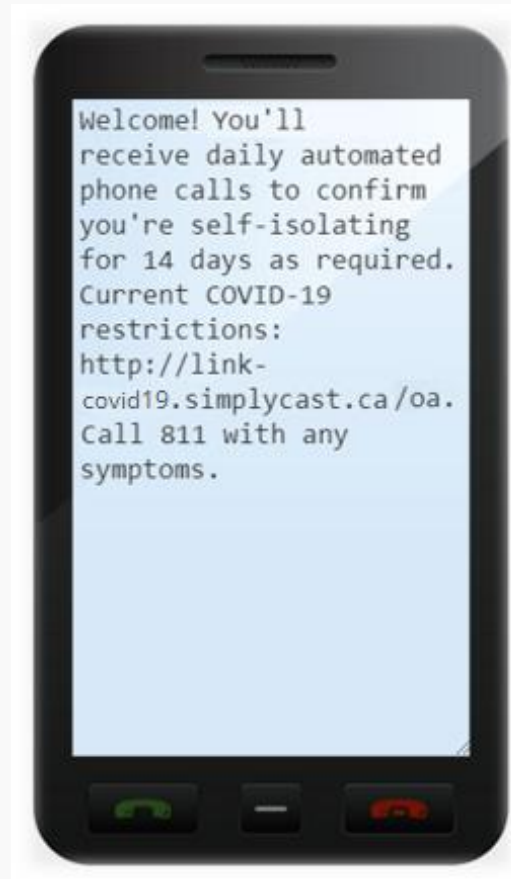
Then, every day for the **next 14 days** these travelers will receive an email and/or SMS with a countdown until their self-isolation is complete. These messages serve as both a motivational boost for the traveler as well as a reminder of how many days they have remaining in their self-isolation period.



# STEP FOUR

## AUTOMATED INFORMATION & REMINDERS

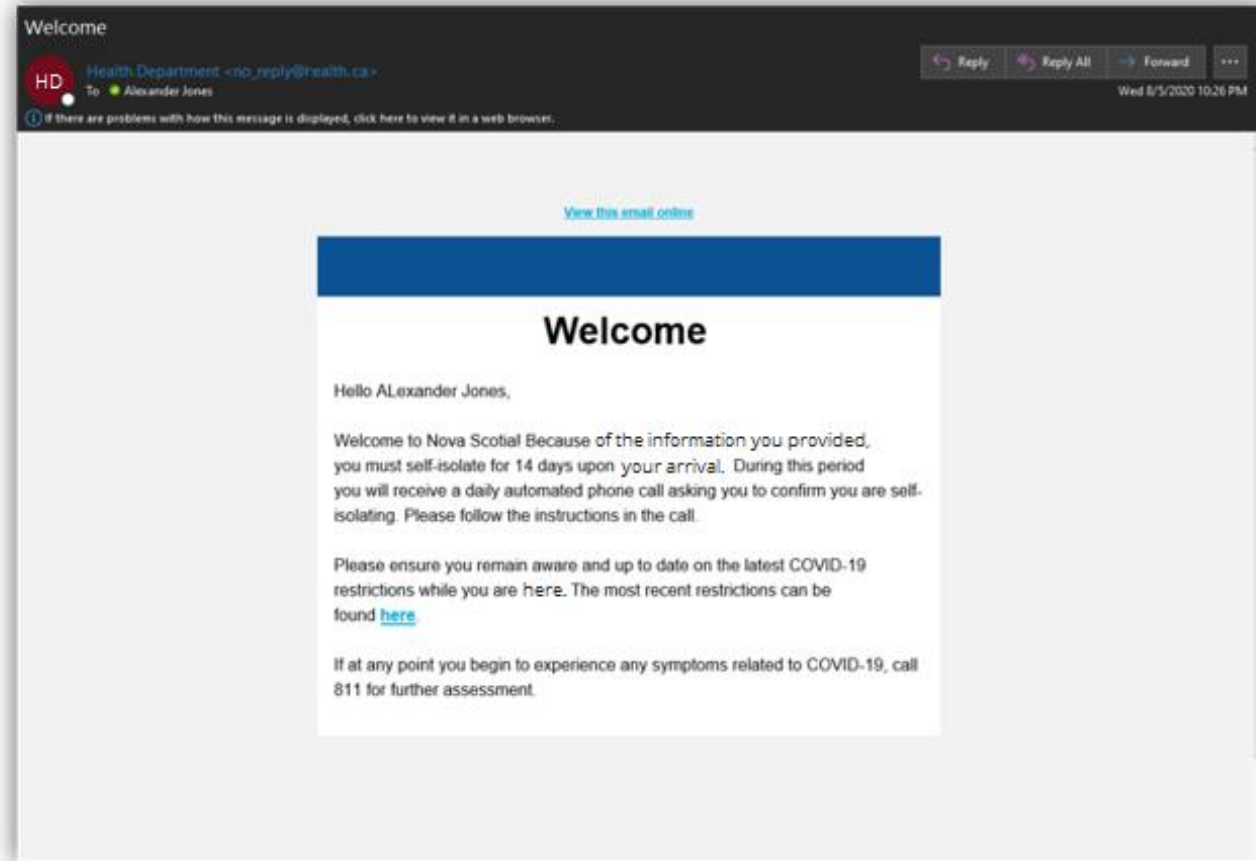
### Example of introduction SMS :



# STEP FOUR

## AUTOMATED INFORMATION & REMINDERS

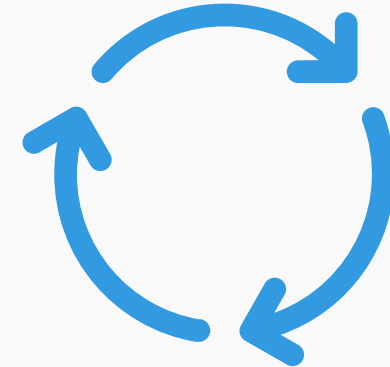
### Example of introduction email:



## STEP FOUR

### AUTOMATED INFORMATION & REMINDERS

This campaign can be run automatically in the background for all travelers crossing the border. Contacts progress through this campaign automatically and platform users can review the reports for all sent messages in the reporting interface.



# STEP FIVE

## CONTACT INFORMATION REMOVAL

Contact data should be removed from the CRM once they have completed all relevant campaigns, or after a period of 60 days.

Users can use the **CRM Search Contacts** tool to filter out contacts added to system before a certain day and delete them from the CRM using the “Show me Results” option.

Search From: **All contacts**

Travel Date *greater or equal to* '2020/07/10'

Search Type ☐ Contacts must appear on all lists

What do we do with results?

Show me results **Go!**

Results: 4 contacts found

Actions	id	name	email	phone	fax	mobile	source
	1	Erin					manual: 2020-03-16T14:31:52+00:00
	2	Alissa					manual: 2020-03-16T14:35:01+00:00
	3	Alex J					manual: 2020-03-16T14:37:57+00:00
	4	Evan M					manual: 2020-03-16T14:39:09+00:00

Showing 1 - 4 of 4

# CONCLUSION

Since 2009, SimplyCast has built an engagement and communication technology stack completely in house, which means the solution is not reliant on third-party providers and can be deployed at a moment's notice.

With this technology, SimplyCast has developed an emergency technology and critical engagement solution to support national governments, provincial and state administrators, and municipal health providers. The technology can be used for mass notifications, teleconferencing, live polling, first responder recall, and more.

SimplyCast created this COVID-19 template within the existing solution with no technological modification or additional development. This solution is 100% customizable and can be adjusted to meet your organization's specific needs.