



Community Health Worker (CHW) Initiative Tracker Cheat Sheet



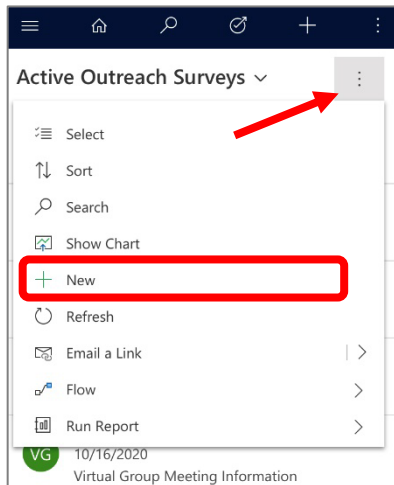
How to Log In

1. Go to: <https://ladphcallcenter.crm9.dynamics.com/>
2. Sign into the County of Los Angeles Microsoft Verification System with your credentials:
 - County Public Health Email address (email@ph.lacounty.gov)
 - Hosted Password (Computer Login Password)
3. You may receive a call to approve your sign in attempt.
 - Answer the call, press “#” and wait for the approval to go through

How to Create a New Outreach Record

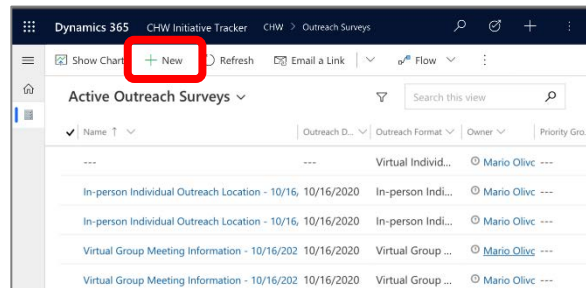
Mobile Device in Portrait Mode

At the top-right, click on the 3 Vertical Ellipses and select **+ New**.



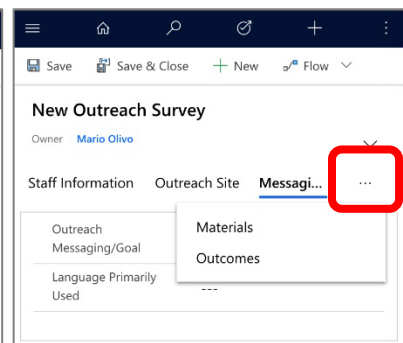
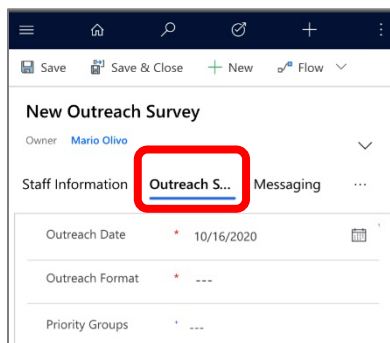
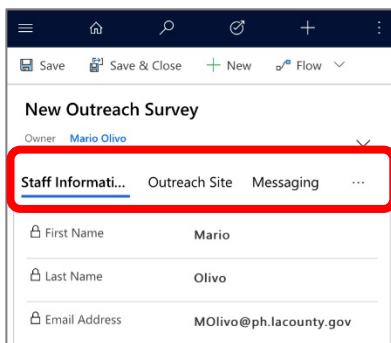
Mobile Device in Landscape Mode

At the top of the homepage, click on the **+ New** button.



Navigating through the Categories

Click/tap on the categories near the top (e.g. Staff Information, Outreach Site, Messaging, Materials, and Outcomes) to jump between sections. Click/tap on the 3 Ellipses to see additional categories.



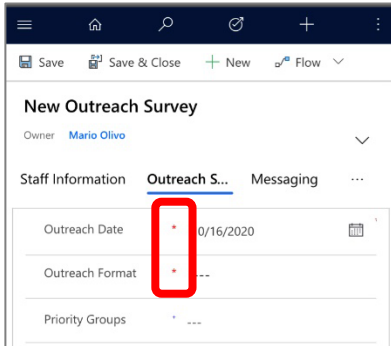


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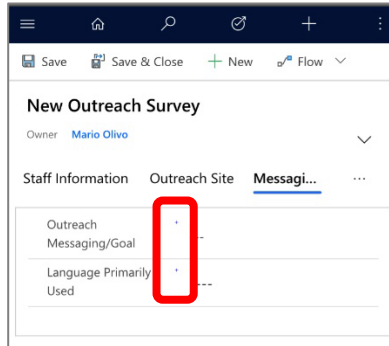


Required Fields and Business Recommended Fields

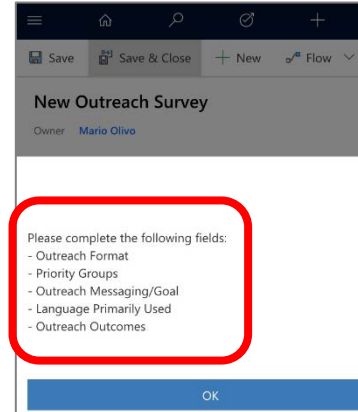
Required Fields are marked by a red asterisk.



Business Recommended Fields are marked by a blue + plus.



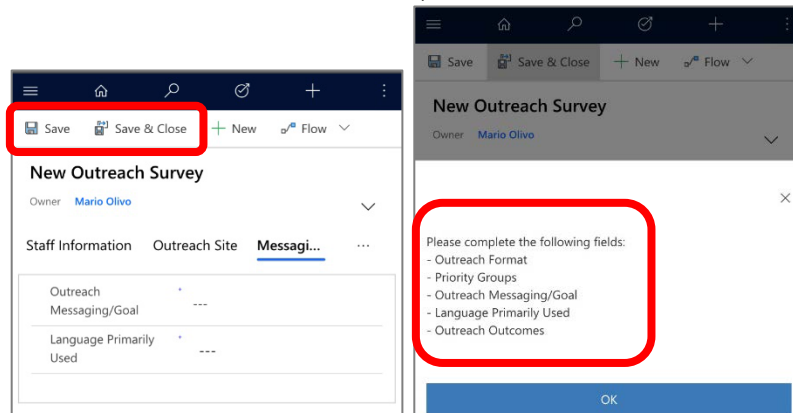
A **Pop-Up Field Reminder** will list all **Business Recommended Fields** that are not complete.



How to Save a Record

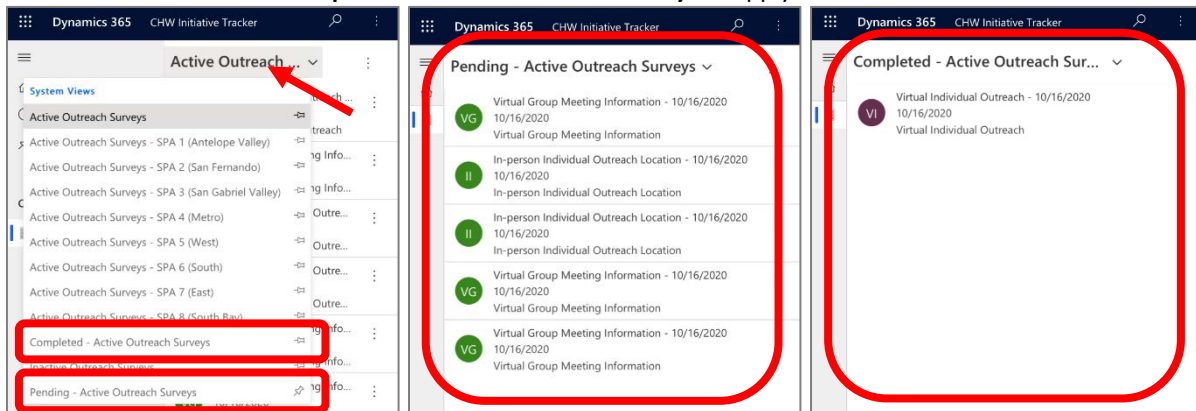
Click/tap on the **Save** or **Save & Close** button near the top. **Save** will save your work, display a pop-up of any incomplete **Business Recommended Fields**, and allow you to keep working on the outreach record.

Save & Close will do the same as **Save**, but will close the outreach record.



How to View a List of Pending (Incomplete) or Completed Records

From the homepage, click/tap on the **drop-down field** near the top. Select **Pending – Active Outreach Surveys** or **Completed – Active Outreach Surveys** to apply the view filter.





How to Adjust the Page Zoom on the Mobile Browser

To adjust the page zoom percentage on the mobile device browser (Safari), click/tap on the **AA** icon located at the top-left. Tap on the **A** on the left or right to zoom in or out.

