

# Steps to Investigate Cases and Trace Their Contacts

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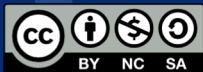
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# Learning Objectives

- ▶ Identify all of the steps to investigate cases and trace their contacts
- ▶ Provide examples of the kinds of questions you might ask at each step
- ▶ Describe the kinds of social support that cases and contacts may need to carry out isolation and quarantine
- ▶ Present an example of a simple case investigation and contact tracing call

# The Basic Steps



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Johns Hopkins Bloomberg School of Public Health

# Six Steps to Investigate Cases and Trace Their Contacts

## Introduce



Introduce yourself to the case and get their basic information

## Inquire



Figure out the case's likely infectious period

## Identify contacts



Ask the case about contacts during their infectious period

## Isolate



Provide isolation instructions to the case, identify challenges, and provide support

## Initiate contact tracing



Call case's contacts to inform about their exposure, ask about symptoms, and give quarantine instructions

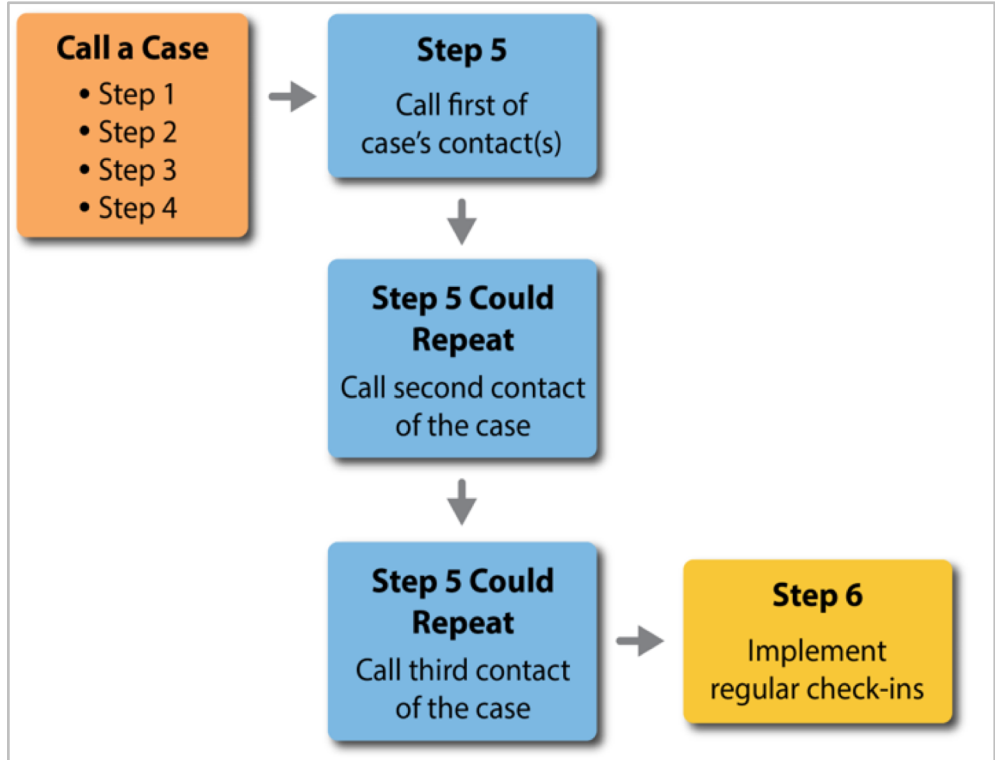
## Implement regular check-ins



Check in with the case and their contacts until their isolation or quarantine ends

# Fitting the Steps Together

- ▶ **Steps 1–4: Calling the case**
  - ▶ Step 1: Introductions
  - ▶ Step 2: Inquire about infectious period
  - ▶ Step 3: Identify contacts
  - ▶ Step 4: Instruct on how to isolate
- ▶ **Step 5: Call contact(s)**
  - ▶ Inform about exposure, ask about symptoms, instruct on quarantine
- ▶ **Step 6: Implement regular check-ins with the case and contact(s)**



## Step 1: Introduce Yourself and the Situation to the Case

- ▶ **Identify your organization**

- ▶ *“Hi, this is Julie from the health department. Is this Swetha?”*

- ▶ **Confirm their identity and residence**

- ▶ *“Nice to meet you, Swetha. I need to discuss some sensitive information with you. Before we keep talking, can you please tell me your birthday and address?”*

- ▶ **Discuss the positive test**

- ▶ *“I’m calling about your coronavirus test. Have you talked with your provider yet?”*

- ▶ **Describe the importance and benefits of the call**

- ▶ *“I’m calling to see how you are and to help keep you, your family, and your community safe.”*

- ▶ **Confirm that the call is confidential**

- ▶ *“What we talk about is between you and me.”*

- ▶ **Check in about length and safety of call**

- ▶ *“This call should take about 20 minutes. Is now a good time? Are you in a safe space to talk?”*

## Step 1: Introduce Yourself and the Situation to the Case—Assess Need for Medical Care

- ▶ **During the call, pause and assess the need for medical care if:**
  - ▶ The person has trouble breathing, chest pain that doesn't go away, confusion, or trouble talking

## Step 2: Inquire About the Infectious Period

### Ask questions to determine the infectious period

- ▶ If they had symptoms:
  - ▶ *What date did your symptoms start?*
  - ▶ *Did you feel like you had a fever?*
  - ▶ *Has your fever improved without medication?*
  - ▶ *How are you feeling now?*
- ▶ If they did not have symptoms:
  - ▶ *What date did you get tested?*

### Use answers to:

- ▶ Calculate the period of time that the case may have spread SARS-CoV-2 to others (i.e., contacts)
- ▶ Figure out who was close to the case during that period of time



## Step 3: Identify Contact(s)

### Ask questions to list the case's contacts

- ▶ Anyone considered a **contact** of the case during their infectious period will be quarantined, which includes *but is not limited to* people who:
  - ▶ Live with the case
  - ▶ Were face-to-face within 6 feet of the case for 15+ minutes
  - ▶ Had direct contact with the case (e.g., kissing) or with their secretions (e.g., used tissues)

### Helpful questions

- ▶ *Do you have any caretakers or housemates?*
- ▶ *Would you be willing to look at your calendar (or phone or social media) to help jog your memory about what you did this past week?*
- ▶ *Where have you traveled?*

## Step 4: Issue Isolation Instructions (Four Components)

- ▶ **Four components of isolation instructions**
  - ▶ Explain isolation in simple terms
  - ▶ Ask questions to check that they understand completely and help them plan
  - ▶ Identify challenges that may stop them from following your isolation instructions
  - ▶ Offer resources to improve their chances of following your isolation instructions

## Step 4: Description of Four Components of Isolation Instructions— Explain Isolation Simply

### **Explain isolation simply**

*Isolation means that you should try to eliminate your contact with other people, except if you need to see a doctor. If you live with others, you might try and find a different place to stay. Or, you might use your own bedroom and bathroom. If you need to be around other people, you should wear a mask.*

## Step 4: Description of Four Components of Isolation Instructions— Check Understanding and Help Make a Plan

### **Check understanding and help make a plan**

*Do you have a safe place to stay?*

*Will you need food soon? If so, how could you get it?*

*Do you take any medications, and will you need a refill soon?*

*Do you have a mask?*

## Step 4: Description of Four Components of Isolation Instructions— Identify Challenges

### **Identify challenges**

*What concerns do you have about your responsibilities and mental health?*

- ▶ Examples include:
  - ▶ Taking care of parents or kids
  - ▶ The only employed person in their home
  - ▶ In a domestic violence situation

## Step 4: Description of Four Components of Isolation Instructions— Offer Resources

- ▶ **Offer resources**
  - ▶ 211 (available in most—but not all—parts of the US)
  - ▶ Food banks
  - ▶ Local social services
  - ▶ Neighborhood and various community support groups

## Wrapping Up the Call With a Case

- ▶ Answer their questions
- ▶ Make a plan to follow up

*“Thank you for your time. We’ve talked a lot today, and I’ve given you tons to think about. You’ll probably have more questions over the next few days. If you think of something, here’s our phone number. Either way, I’ll be calling you soon to check in. Chat with you then—bye!”*

## Step 5: Initiate Contact Tracing

- ▶ Inform them that they were in close contact with someone who has COVID-19
- ▶ Check if they have symptoms (e.g., fever)
- ▶ Provide instructions to quarantine, identify challenges, and offer resources to overcome those challenges
- ▶ Answer their questions
- ▶ Make a plan to follow up

### Frequently asked questions from contacts

- ▶ *What happens if I get sick?*
- ▶ *How do I get tested?*
- ▶ *Do I need a mask?*
- ▶ *Can you give me a letter for my job or landlord?*



## Step 6: Implement Regular Check-Ins

**You may regularly check with cases and contacts *to determine when they can end their isolation or quarantine***

- ▶ Cases
  - ▶ Have their symptoms (if present) improved or worsened?
  - ▶ Have they had new contacts?
  - ▶ Offer support for continued isolation
- ▶ Contacts
  - ▶ Have they had any symptoms?
  - ▶ Offer support for continued quarantine

