JOHNS HOPKINS
BLOOMBERG SCHOOL
of PUBLIC HEALTH

Steps to Investigate Cases and Trace Their Contacts

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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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Six Steps to Investigate Cases and Trace Their Contacts

Introduce	Inquire	Identify contacts	Isolate	Initiate contact tracing	Implement regular check-ins
Introduce yourself to the case and get their basic information	Figure out the case's likely infectious period	Ask the case about contacts during their infectious period	Provide isolation instructions to the case, identify challenges, and provide support	Call case's contacts to inform about their exposure, ask about symptoms, and give quarantine instructions	Check in with the case and their contacts until their isolation or quarantine ends

Image source: Center for Teaching and Learning, Johns Hopkins Bloomberg School of Public Health.

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)**

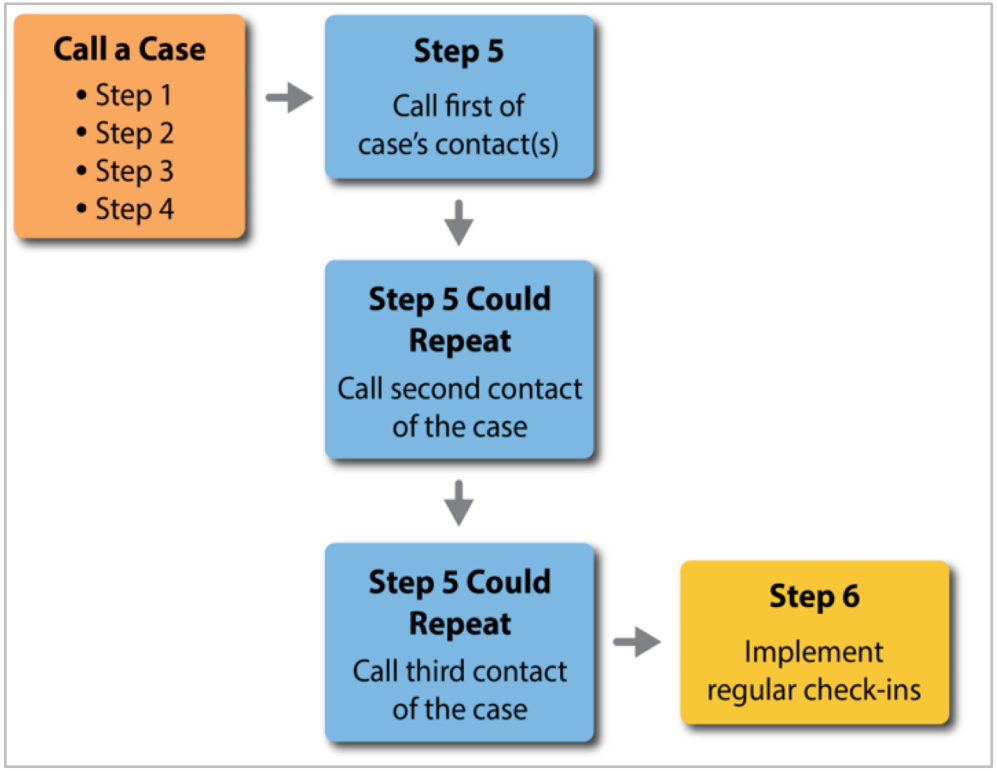

Image source: Center for Teaching and Learning, Johns Hopkins Bloomberg School of Public Health.

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

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Observing Basic Case and Contact Calls

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Example of a Basic ***Case*** Call

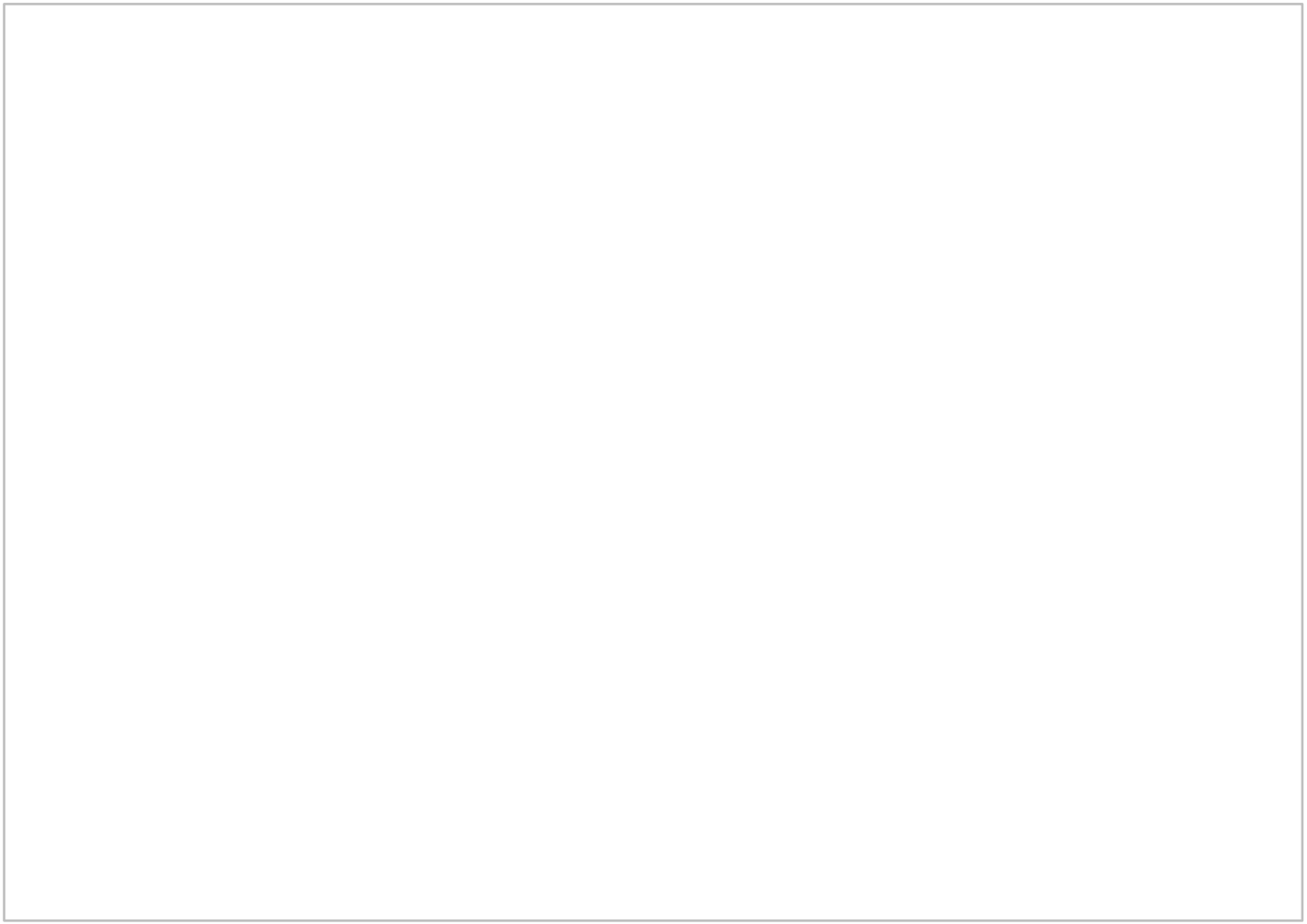
- The following video is an example of a basic case call
- Jurisdictions may choose to ask additional questions about preexisting health conditions, whether the case has had contact with another known COVID-19 case, about their travel, or whether they're a health care worker

Video: *Short, Easy Call With a* ***Case***

Example of a Basic ***Contact*** Call

- The following video is an example of a basic contact call

Video: *Short, Easy Call With a* ***Contact***



Summary

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Summary of the Six Steps of Case Investigation and Contact Tracing

- Introduce yourself to the case
- Inquire about the case's infectious period
- Identify contacts
- Issue isolation instructions to the case (includes identifying challenges to isolation and providing resources)
- Initiate contact tracing (includes informing contacts that they were around someone with COVID-19, checking on their symptoms, issuing quarantine instructions, and identifying challenges to and providing resources for effective quarantine)
- Implement regular check-ins with cases and contacts