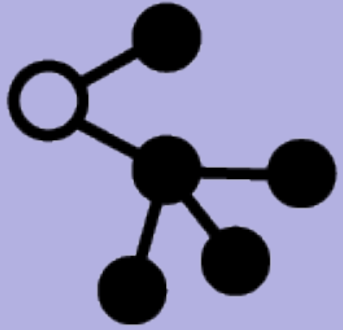


**COVID-19  
Virtual  
Training  
Academy**



# Overview of Contact Tracing

# Learning objectives

By the conclusion of the module, the learner will be able to:

1. Summarize the goals and activities of contact tracing
2. Explain the relationship between case investigation and contact tracing
3. Describe the responsibilities of members of the contact tracing team
4. Identify individuals who should be referred to the team lead/supervisor or clinician

# Poll Question

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How knowledgeable are you about case investigation and contact tracing?

- A) Very knowledgeable
- B) Somewhat knowledgeable
- C) This is completely new for me

# What is Case Investigation & Contact Tracing?

Communicating with persons who have infectious diseases (index case) such as COVID-19 to:

- Identify exposed persons (contacts)
- Recommend strategies to reduce further transmission
- Improve community and population health

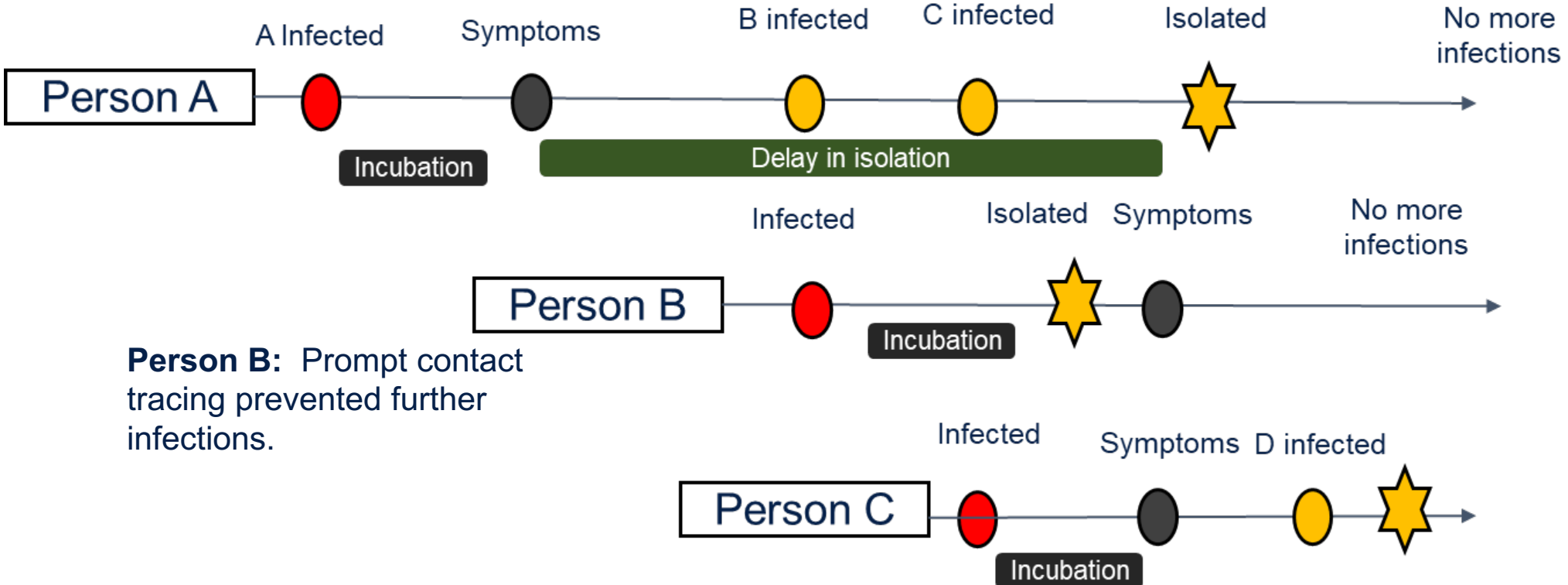
# Contact Tracing – A Core Public Health Strategy

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- A team of public health professionals work together to link individuals to appropriate support and medical services as needed to prevent further spread of COVID-19
- Communities must work together to **scale up and train a large contact tracer workforce** across public and private agencies to stop the transmission of COVID-19
- **YOU** are a part of this important workforce!

# How Does Contact Tracing Reduce Transmission?



**Person B:** Prompt contact tracing prevented further infections.

**Person C:** Delay in quarantining meant additional infections.

# How Are Contacts Identified?

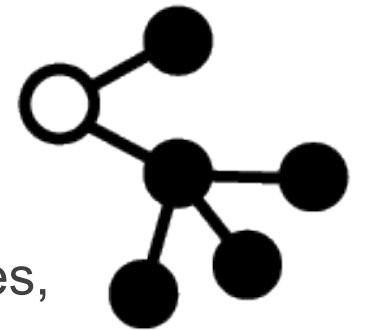
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## Case investigators talk to persons with COVID (index case):

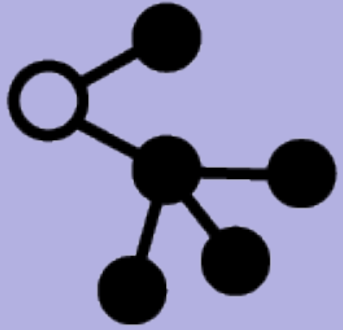
- Determines when they became contagious
- Elicits names and contact information of persons they were in close contact with
  - Household members or intimate partners
  - Anyone they may have coughed/sneezed on or kissed/shared utensils with

## Close contact for more than 15 minutes:

- Work
- Large gatherings (church, parties)
- Visits to congregate settings (long-term care or skilled nursing facilities, corrections, homeless shelters)
- Other close contact settings







# Contact Tracing Goals & Activities

# What Do Contact Tracers (CTs) Do?

## Communicate With Contacts to:

- Notify them of exposure
- Provide disease and transmission information
- Collect information about living arrangements and daily activities

## Inquire About Medical Status for:

- Signs and symptoms
- Underlying medical conditions
- Referrals for testing

## Provides Recommendations About

- Protocols to maintain their health and the health of others
- Following quarantine instructions
- Monitoring potential COVID-19 symptoms
- Referrals to other services

# What Questions Do Contact Tracers Ask During an Interview?



Date of birth



Preferred language



Living situation  
(# of persons living  
together)



Occupation  
(especially if they are  
a health care provider  
or essential worker)



Medical conditions



Other exposures



Recommendations for quarantine or isolation to limit further exposure



Resources for housing if isolation is required due to infection



Referrals for other social services that may assist the contact and their family



Follow-up communication to assess for symptoms and well being

# What Information Can Contact Tracers Provide?

# Poll Question

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Contact tracers should not ask about any underlying medical conditions of contacts because this is the role of the clinician

True

False

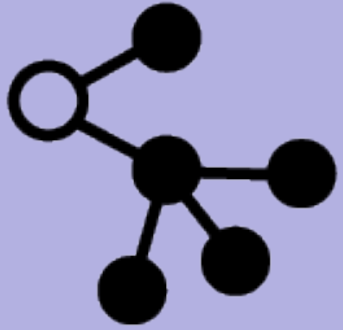
# Key Contact Tracing Activities

Contact tracers support persons with suspected or confirmed infection by



- Notifying exposed persons (contacts) about their potential exposure, rapidly and sensitively.
- Determining if they are at risk for getting COVID-19
- Providing education and support about their risk to themselves and others and how to monitor themselves for illness
- Referring them to testing, medical care and other services
- Advising them to quarantine and maintain social distancing until 14 days after last exposure.

Contacts are *not* told the identity of the patient who may have exposed them



# Relationship Between Case Investigation & Contact Tracing

# Relationship Between Case Investigators and Contact Tracers

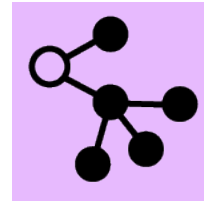
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## Case Investigators (CIs)

Interview persons who have tested positive for COVID-19

- ✓ Identify persons they have been in close contact with and exposed to determine whether they are at risk of transmission
- ✓ Refer 'contacts' to contact tracers for follow-up



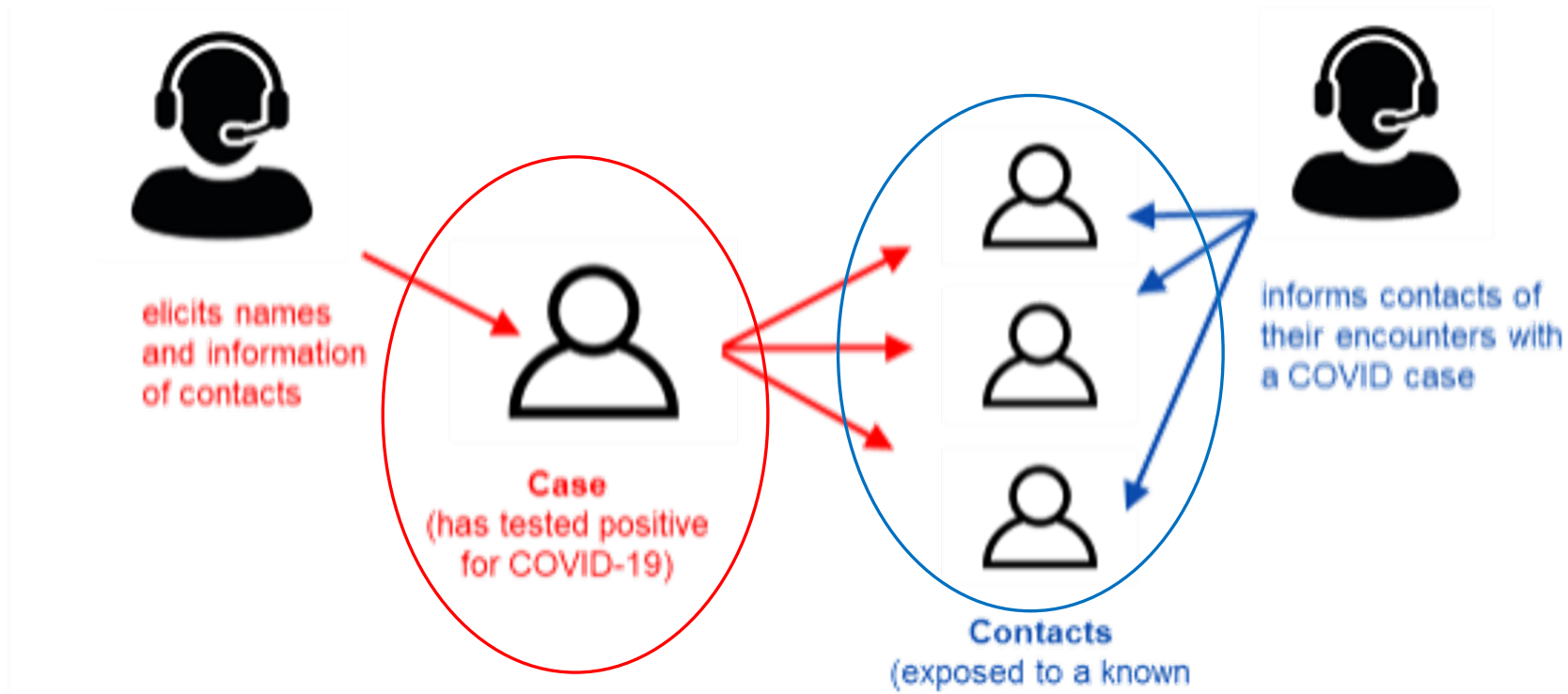
## Contact Tracers (CTs)

Interview persons who have come in close contact with those who tested positive for COVID-19

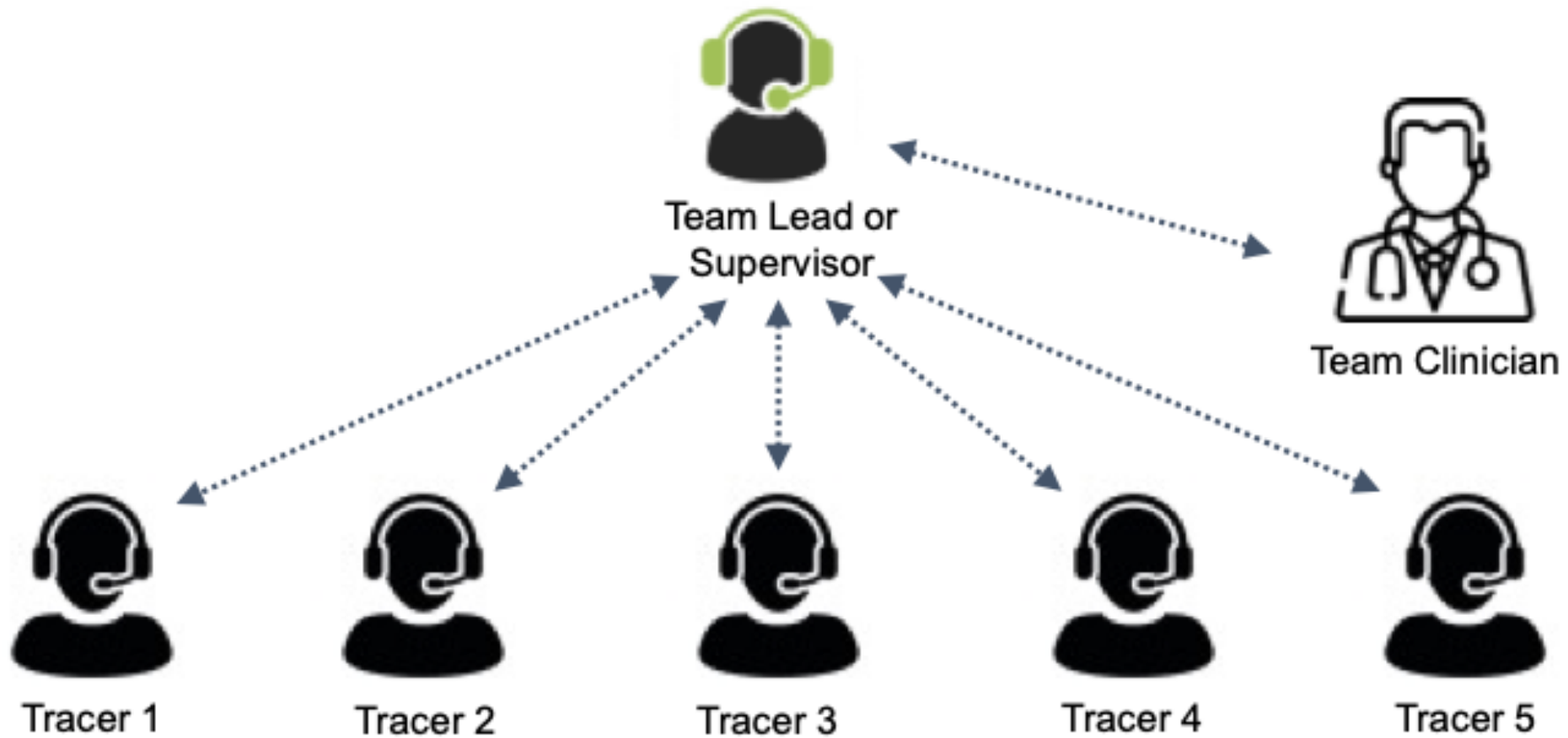
- ✓ Assess their health status
- ✓ Provide recommendations for keeping themselves healthy and prevent transmission

*The focus of this module is on **contact tracing***





# Case Investigators and Contact Tracers Work Together



# Members of the Contact Tracing Team

# Team Lead or Supervisor

(1 per team)



## Role & Responsibilities



Manages the Contact Tracing team and assigns contacts to each Contact Tracer



Liaises with team clinicians, isolation & quarantine unit, and social services teams



May refer contacts needing housing, mental health & social services to available resources



Communicates updates to procedures or workflow to the Contact Tracing team



Provides reports and feedback to project managers, including updates to procedures/workflow



## Role & Responsibilities



Offers medical guidance to Contact Tracers or directly to contacts



Refer contacts to applicable isolation & quarantine services



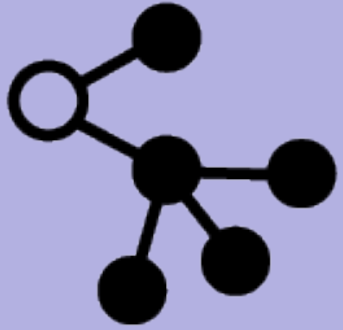
Conducts follow-up calls with high-risk contacts on days following exposure



Conducts follow-up calls with contacts who request a call or report symptoms

# Team Clinician

(1 per team)



# Contact Tracing Responsibilities

# Contact Tracers

(~5 per team)



## Role & Responsibilities



Calls and interviews contacts assigned to them



Provides education, information and support to contacts about how to monitor themselves for illness



Encourages contacts to quarantine or isolate and maintain social distancing



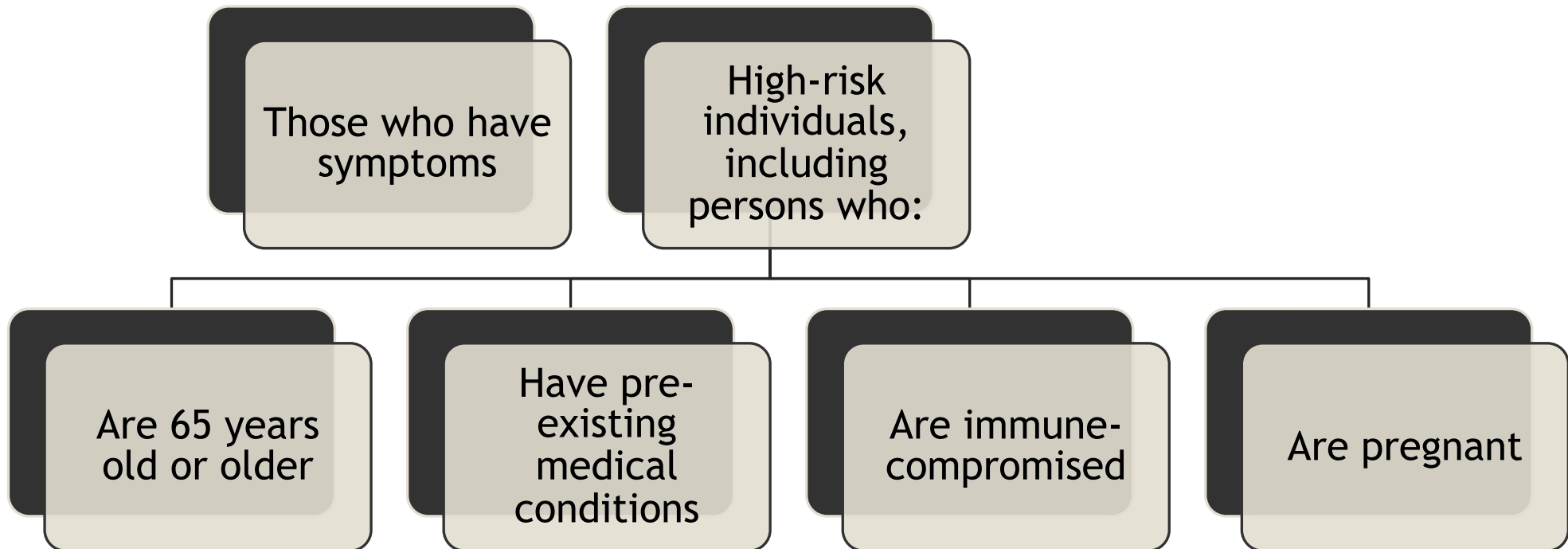
Refers contacts needing support to Team Lead or Team Clinician



Records and submits data in applicable data tracking app

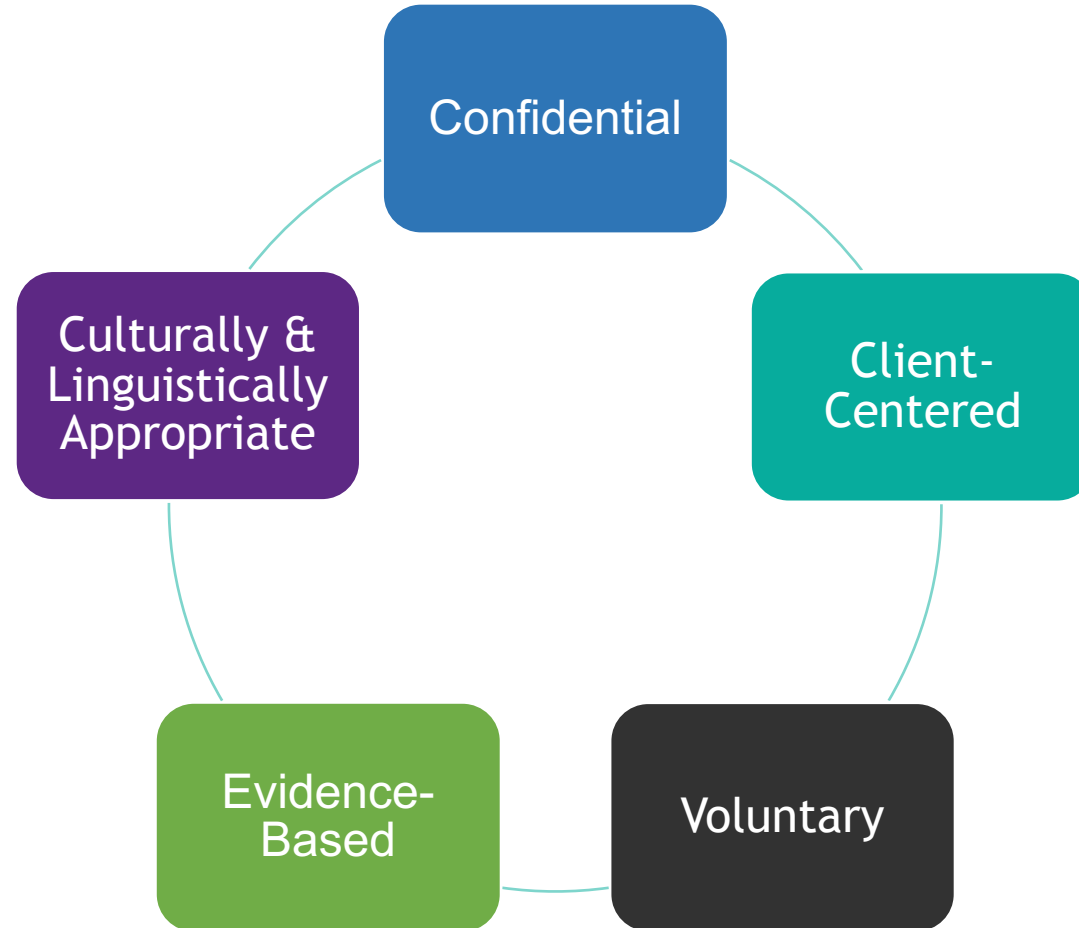
# Which Contacts are Prioritized?

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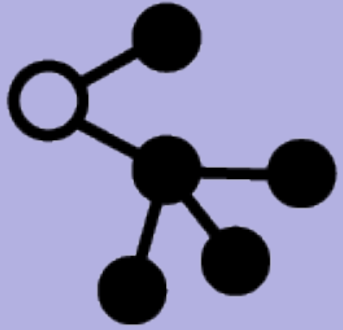


# Contact Tracing Principles

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# Situations to Refer Contacts to Other Members of the Team

# Referring Contacts to Other Members of the Team

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In some circumstances, contact tracers should refer situations that arise with contacts including:

- Clinical issues
- Isolation and Quarantine
- Language or interpreter needs
- Social support and other services

# Which Contacts Should be Referred to the Clinician?

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Those who:

- Have symptoms
- Need housing for isolation or quarantine
- Need mental health or substance use services
- Have medical questions

By the conclusion of the module, the learner will be able to:

1. Summarize the goals and activities of contact tracing
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# Objectives Review



# Confidentiality

# Learning Objectives

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- Define the case investigator and contact tracer role in protecting patient rights and Protected Health Information (PHI) under Health Insurance Portability and Accountability Act (HIPAA) regulations.
- Demonstrate communication techniques that maintain patient confidentiality.
- Respond to four possible concerns contacts may have regarding PHI.

# Confidentiality

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The right of an individual to have personal, identifiable medical information kept private



Federal and State laws prohibit sharing of any personal or medical information

# HIPAA and confidentiality

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HD staff are required to comply with Health Insurance Portability and Accountability Act (HIPAA) with regards to client confidentiality



Staff must secure patient health records or Protected Health Information (PHI) at all times



Staff should understand HIPAA obligations to ensure compliance

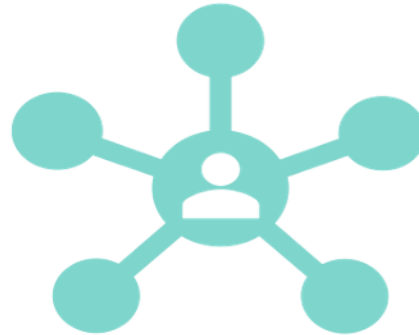


# Considerations for case investigators & contact tracers

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We are not to share case or contact information with anyone outside of health care team



If you recognize or know the case or contact, consider handing off to another colleague



Be prepared to address case or contact concerns regarding private information

# Interviewer response

Contact Concerns	Interview Response
Who gave you my name?	Someone who you came in contact with who tested positive for the coronavirus gave us your information. I cannot release that information.
Who else has my information?	Only members of the health department and contact tracing team.
What are you going to do with my information?	All your information will be kept confidential and only health department staff will have access to it. We are trying to help people stay healthy and safe, while helping control the spread of the coronavirus.
Do I have to talk with you?	No, our services are voluntary, but I hope you will. I would like to discuss some important health information with you, about your contact to the coronavirus, talk about symptoms, where you can get tested and how to you can stay safe and keep others safe.

# Learning Objectives Review

---

- Define the case investigator and contact tracer role in protecting patient rights and Protected Health Information (PHI) under Health Insurance Portability and Accountability Act (HIPAA) regulations.
- Demonstrate communication techniques that maintain patient confidentiality.
- Respond to four possible concerns contacts may have regarding PHI.

# Quiz questions

Case investigators and contact tracers are required to (check all that apply):

- Protect all personal, identifiable medical information of contacts
- Share information with health care team as necessary
- Explain to contacts how information will be protected and the legal circumstances in which it can be shared (i.e. referrals to clinical team)
- **All of the above**

# Quiz questions

The Health Insurance Portability and Accountability Act (HIPAA) is a local policy that protects individuals' health information (e.g., medical or health records, personal health information).

- True
- **False**

# Quiz questions

Which of the following is *not* the contact tracer's role in protecting confidentiality?

- Not sharing information beyond the health care (COVID) team
- Explaining to contact how personal information will be protected and secured, and asking and responding to their concerns
- **Providing the name of the index case to the contact if asked**
- Handing known case/contact over to colleague



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