COVID-19 Contact Tracing Fundamentals

Training Schedule

Welcome Back!
- Unit 4: Contact Tracing
  - Interview Practice: Part One - Demographics
  - Interview Practice: Part Two - Needs and Resources
- Break: 10 minutes
  - Interview Practice: Part Three - Quarantine
  - Interview Practice: Part Four - REALD
- Materials Review
- Unit 5: Next Steps
- End 4:00-4:30 p.m.

Training Materials Overview

Contact Tracing
- Presentation Handout – for note-taking
- Contact Tracing Interview Guide
- Contact Tracing Interview Script
- Additional Training Materials
Contact Tracing

Topics
- Contact Tracing Steps
- The Interview
  - Part One - Demographics
  - Part Two – Needs and Resources
  - Part Three – Quarantine
  - Part Four – REALD
  - Part Five – Conclusion
- Interview Tips
- Materials Review

COVID “Close Contact” Definition

- Confirmed Case: Tested positive
- Presumptive Case: Contact with a confirmed case
  - Compatible symptoms
- Suspect Case: No contact with a confirmed case
  - Compatible symptoms
- Close Contact: Contact with a confirmed case
  - No symptoms
Contact Tracing: Step One
• Contact tracers inform people (Contacts) of their potential exposure as rapidly and sensitively as possible
• To protect patient privacy, people (Contacts) are only informed that they may have been exposed to a person who tested positive for COVID-19

Contact Tracing: Step Two
• Contacts are provided with:
  • Support to understand their risk
  • A referral to testing
  • Instructions to monitor themselves for symptoms
  • Information about the possibility they could spread the infection to others even if they don’t have symptoms - ‘asymptomatic’
  • Information about what they should do to separate themselves from others who are not exposed
Contact Tracing: Step Three

Contacts are asked to stay home and maintain distance from others, in case they become ill.

- Quarantine at home until 10-14 days after their last exposure (even with negative test), they should:
  - Check their temperature twice daily
  - Watch for cough, shortness of breath and other symptoms
  - Contact Tracers check-in with Contacts daily to assess if they have developed symptoms.**

** Presumptive Cases are guided to promptly isolate themselves and are assigned to their local public health authority for case investigation.

Review

- Call assigned list of contacts within 24 hours
  - If contact cannot be made, follow assigned workflow to send a letter
- Check-in daily to assess if contact has developed symptoms
- Connect contacts with testing, 211-Info or other resources, as needed

The Interview

Listen, Educate and Guide
What are some of the concerns you think people might have when you call them for contact tracing?

### Concerns
- May not understand how coronavirus is spread
- May feel blamed or judged because of being involved in spreading the disease
- May feel threatened by you (or any government representative)
- Worried about receiving health care—especially if they don't have health insurance or access to care
- Mental health status/issues
- Sick people and parents of ill children worry about loss of income if they take time off work
- Immigration proceedings or documentation status
- May have a legal record
- Penalty for not following the Governor’s orders

### When making calls, remember to:
- Be empathetic
- Practice bridging - you and the person you are talking to might have very different lived experiences
- Know when to refer to additional resources
- Do not provide medical advice
- Say THANK YOU! They are doing themselves and their community a huge service
Interview Preparation

- Find a quiet, private place to make your calls
- Open ARIAS data system and select assigned Contacts
- Practice Contact’s name(s)
- Have your call back number, schedule, and resources prepared and accessible
- Make 3 attempts: try different times of the day—if all 3 attempts to contact the individual are unsuccessful within the 24-hour period, a letter will be sent
- Be prepared to work with an interpreter service to complete calls
- Make sure the Contact is in a private place, or a place that feels comfortable for them to answer personal questions
- Be willing to call back if Contact is busy

ARIAS: Select Contact to Call

Group Practice

Leave a Message
Leave a Message

If you receive voicemail, leave the following message:

"Hi, this is interviewer name. I am calling on behalf of agency name. It is important that I talk with you. Please call me back at contact number. I will be in the office dates and times. If I don’t answer, please leave a voicemail with the days and times that are best to reach you. I will get back to you as soon as possible. Again, this is interviewer name and my number is contact number."

If there is no answer or the person’s voicemail is full:
Note this along with the day and time. After that, try again at different times. Please call three times.

ARIAS: Document Attempted Calls

A Person Answers

Begin with the script:

"Hi, this is interviewer name calling on behalf of agency name. May I speak with contact name?" (Or, "Am I speaking with contact name?"")

If the contact is not the person who answered the phone: Repeat above introductory info when contact is on the phone. Do not continue the conversation or provide information to someone other than the contact without permission directly from the contact. Exceptions include parents of children under 15 and adult guardians.

If you know contact is a child (less than 15 years old): "May I speak to the parent or guardian of contact name?"

"Is there something you need for us to communicate better (an interpreter or other accommodation)?"

If the person prefers a language other than English: "I will call you back with an interpreter." After you have an interpreter on the line, proceed with interview.
Close Contact Status
Inform of Close Contact with a Case
“I am calling you because you have come in close contact with a person with COVID-19. I am calling to talk about what that means for you and to check on your health. Are you available to talk with me right now? Our call will take about 30 minutes.”

If yes: Continue with the next portion.
If no: “I understand you are busy. It is important that I speak with you; is there a better time today that I could call you back?”

Note: Do not name the COVID case the person was exposed to. If the contact is insistent, tell them that “public health investigations are confidential, and we will also keep private any information you give us.”

Privacy and Confidentiality Disclosure
“Before I begin our call, I want you to know that I will not be asking for any financial information or your social security number. I will ask you questions about how you are feeling and whether you have symptoms of COVID-19. I will also ask you to verify your contact information and your date of birth.

Any information you share with me is private. It will be used by public health officials and will not be made public. I will not ask you about your immigration status and your information will not be shared with immigration authorities or with law enforcement. Getting tested or getting treatment for COVID-19 will not affect your ability to get permanent residency in the United States.

I am sure you have questions, and I will do my best to answer them. First, I need to gather some information from you to help stop the spread of the virus. I am also going to share some information about COVID-19 with you.”

“Is there anything you need to help you remember or understand what we talk about?” (For example, written information will be provided, a partner or friend can participate on the call.)

ARIA: Demographics
Demographics
Verify Contact's Identity
[Yes, No (update the information), Declined]
A. “Will you please verify your first and last name for me? How is that spelled??
B. “Date of birth?”
C. “What county do you live in?”
“Thank you. Now, I am going to ask you some questions about how you have been feeling.”

ARIAS: Assessments
Assessments
Symptom Check:
D. “Will you tell me if you’ve noticed any of these specific symptoms since date of contact with case?
☐ Fever (100.4° or above is a fever): temp?
☐ Cough
☐ Shortness of breath
☐ Loss of sense of taste or smell ☐ Other:
  If sick: “When did you first start feeling sick? If you need to check a calendar, that’s fine. Are you currently sick?”
  “Have you been tested for COVID-19 and received a positive test result?”
  If yes: Finish the call, then notify your supervisor or a case investigator to follow-up.
Contact Info and Address
Verify Reported Information/Collect Missing Information

[Yes, No (update the information), Declined]

"Before I continue, I just need to verify we have all the contact information needed to reach you."

E. "Is this the best phone number to reach you at or is there another number to call?"

F. "Do you have an email address that you check regularly?"

G. "Would you feel comfortable sharing your address?"
   a. "If we need to send information or materials to you is this an address where you can receive mail?"

H. "What is your preferred method of contact?" ☐ phone ☐ email ☐ text

I. "Are you working right now?"

L. "Do you have a working thermometer?"

"Thank you. I want to pause to check in. Are you feeling comfortable for me to continue? Do you have any questions that I can answer before I move on to the next piece of information?"

ARIAS: Symptomatic Assessment

PART TWO - Symptomatic
Contact has TWO or MORE of the listed symptoms:

1. "Thank you for sharing this information. I am sorry to hear that you are not feeling well. Since you have symptoms, I am going to contact someone else from your local health department to let them know.

2. I also suggest that you notify your healthcare provider. The health department will call you back and ask you some detailed questions, provide you with guidance and answer any questions you have.

3. For now, to avoid spreading the disease to others, please plan to stay home and self-isolate. Do not go to work, school, or public areas. As much as possible, stay in a specific room and away from other people in your home. If you do need to be in shared spaces with other people, please put on a cloth or disposable face covering. Also, limit contact with pets and other animals."
Needs and Resources

“Do you have what you need to stay at home for now?”
(For example, do you have friends or family who can drop off groceries or medication, or can you or they order those things online or get groceries delivered? Do you have other concerns related to accessing supplies and services, safety, mental health, or family member supports?)

If unmet needs: “I’m hearing that you need some help with a few things. 211 Info may be able to help you find resources. You can call them at 2-1-1 or find them online.”

If over 60 years, or younger person with a disability: “Your local Aging and Disability Resource Connection may be able to help you find resources. You can find them online at ADRC.info@dhsoha.state.or.us or you can call 1-855-673-2372.”

Needs and Resources

If county resources available: “I’m hearing that you need help with a few things. You can call health department warmline or other resources for assistance with that. 211 Info may be able to provide resources. You can call them at 2-1-1 or find them online.”

- “If you do need medical care, call your healthcare provider before you go in. Tell them you have been in contact with someone with COVID-19 and you know have symptoms.
- If you need help finding a medical provider, call your local health department or 2-1-1.
- If you have a medical emergency, call 911. Tell them you may have been exposed to COVID-19. If possible, put on a cloth or disposable face covering before emergency medical services arrive.”

“Someone will be in touch with you soon. Do you have any questions for me?”

Note (all asymptomatic contacts): Hang up and notify a case investigator or LPHA.

ARIAS: Presumptive Case
PART TWO - Asymptomatic

Contact has NONE or ONLY ONE Symptom:

1. "Since you have come in contact with someone who has tested positive for COVID-19, there are some steps you can take to avoid spreading the disease to others. We will email or mail you a letter with this information as well.

2. "Do you need written materials in an alternate format (braille, large print, audio file, etc.)?"

3. "Please stay home until last date of recommended quarantine. This means you should not go to work or school, and someone else should complete your errands, like grocery shopping. You should not leave your home unless you need medical care. However, you can go outside by yourself to get some exercise."

Needs and Resources

“Do you have what you need to stay at home until last date of recommended quarantine?”

(For example, do you have friends or family who can drop off groceries or medication, or can you or they order those things online or get groceries delivered? Do you have other concerns related to accessing supplies and services, safety, mental health, or family member supports?)

If unmet needs: "I’m hearing that you need some help with a few things. 211 Info may be able to help you find resources. You can call them at 2-1-1 or find them online.

If over age 60 years, or younger person with a disability: "Your local Aging and Disability Resource Connection may be able to help you find resources. You can find them online at ADRC.info@dhsoha.state.or.us or you can call 1-855-673-2372."
**Needs and Resources**

If contact insists that they must work: Refer contact to the health department warmline. If county resources available: “I'm hearing that you need help with a few things. You can call health department warmline or other resource for assistance with that. 211 Info may also be able to provide resources. You can call them at 2-1-1 or find them online.”

“If you do need to leave your home to get medical care, please wear a cloth or disposable face covering. At home, please try to stay away from other people in your home by staying in a specific part or room of your home. Limit contact with pets and other animals.”

“If you do need to leave your home to get medical care, please wear a cloth or disposable face covering. At home, please try to stay away from other people in your home by staying in a specific part or room of your home. Limit contact with pets and other animals.”

*Note (language): Daily check-in by text and email are only available in the following languages: English, Spanish, Chinese (Cantonese), Chinese (Mandarin), Korean, Russian, Vietnamese.*

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**ARIAS: Monitoring Status**

**Part Three**

**Monitoring**

- “Between now and last date of recommended quarantine, please check yourself closely for symptoms.
  - Take your temperature twice a day: once in the morning and once in the evening. If you don’t have a thermometer, please buy or borrow one. If you can’t get one, please make a note everyday of whether you feel feverish.
  - Keep track of whether you notice any other symptoms.
  - I, or another person from public health, will contact you once a day to check in on you and record your temperatures and whether you’ve had symptoms.”
ARIAS: Monitoring Preferences

We can call you each day, or we can set up a daily survey that is sent by text or email. Which would you prefer?

☐ phone
☐ email
☐ text

Symptom Check-in via Email

“Okay, you’ll receive an email from noreply.arias@dhsoha.state.or.us each morning until last date of recommended quarantine. It will include a link to a survey where you can enter your symptoms. I’m going to send you an email right now to verify that it works. Can you check to make sure you received it?”

If yes: “Can you open it up to make sure it’s working? Thank you for checking. You’ll receive an email like this each morning.”

If no: “That’s okay. Next time you check your email you should see the survey. Please fill it out to test that it works. If you don’t see it, or it isn’t working, please call LPHA phone number or other resource. You’ll receive a new survey link each day and it’s important to fill it out every day.”

Note: If the survey link does not arrive, double check that the email number is correct. If it still doesn’t arrive or it doesn’t work, suggest another method of daily contact.

Symptom Check-in via Text

“Okay, you’ll receive a text from 884-902-3260 each morning until last date of recommended quarantine. It will include a link to a survey where you can enter your symptoms. I’m going to send you a text right now to verify that it works. Are you able to look at your texts while you’re on the phone with me?”

If yes: “Okay, please let me know when you receive it. Can you click on the link to make sure it is working correctly? Thank you for checking. You’ll receive a text like this each morning.”

If no: “That’s okay. Next time you check your texts you should see the survey. Please fill it out to test that it works. If you don’t see it, or it isn’t working, please call LPHA phone number or other resource. You’ll receive a new survey link each day, and it’s important to fill it out every day.”

Note: If the survey link does not arrive, double check that the text number is correct. If it still doesn’t arrive or it doesn’t work, suggest another method of daily contact.
Symptom Check-In via Phone
We will give you a phone call each day until last day of recommended quarantine. We will ask a few simple questions about your symptoms and your temperature. It should take less than 15 minutes each day.

Quarantine Guidance
"If you need medical care, call your health care provider or clinic before you go in. Tell them you were in contact with someone who tested positive for COVID-19 and now have symptoms."

"If you have a medical emergency or are seriously ill, call 9-1-1. Tell them you were in contact with someone who tested positive for COVID-19 and now have symptoms. Put on a cloth or disposable face covering before medical personnel arrive, if possible."

Quarantine Guidance
"Here are some other ways you can keep others in your home from getting sick:
• Wash your hands regularly:
  – Use soap and water for at least 20 seconds.
  – If soap and water are not available, use an alcohol-based hand sanitizer.
• Avoid sharing personal items:
  – Don’t share plates, utensils, towels, or bedding without washing them thoroughly first.
• Clean all “high-touch” surfaces every day:
  – This includes counters, tabletops, doorknobs, bathroom fixtures, and phones."
Quarantine Guidance

“I will send you more information on these strategies. You can also Google Oregon Public Health COVID-19.”

“As we discussed, you need to stay home from now through last date of recommended quarantine.”

“If you do not have any symptoms by last date of recommended quarantine, you can go back to your normal activities.”

“If your employer or school has questions about you having to stay home, we will send you a letter that you can share with them. There is more information about COVID-19 on the Oregon Health Authority’s website.”

Note (safety concerns): If you have concerns about the safety of this person, or other people in the home, contact your supervisor after the call to discuss your concerns. This call is about contact tracing. Please don’t begin to investigate issues of safety. You and your supervisor can talk through next steps.

ARIAS: Persons Under Monitoring

Part Four

REALD and SOGI Disclosure

“The Oregon Health Authority is committed to delivering the highest quality of care to all Oregonians. We ask everyone about their race, ethnicity, preferred language, interpreter needs, and disability. Your answers will be used to support our response to the coronavirus pandemic, improve health programs and services, and prevent further spread of the virus in every community.”

DO NOT make assumptions!

• Don’t try to interpret or guess the Contact’s meaning.
• Ask follow-up questions to clarify responses.
REALD Race and Ethnicity

**Race/Ethnicity**

“How do you identify your race, ethnicity, tribal affiliation, country of origin or ancestry”

OR

“Which of the following describes your racial or ethnic identity?”

- American Indian and Alaska Native
- Asian
- Black and African American
- Hispanic and Latino/a/x
- Middle Eastern/North African
- White
- Native Hawaiian and Pacific Islander
- Other Categories
  - Other (please list)
  - Don’t know
  - Don’t want to answer

See Training Guide for detailed categories…

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**Follow-up Questions**

“If you selected more than one category, is there one you think of as your primary racial or ethnic identity?”

If responses don’t match existing categories or subcategories, probe for more details:

“Would you say [racial category(ies)] is/are the best description of your race or ethnicity?”

OR

“You’ve described your race or ethnicity as [racial category(ies)], which of the following [sub-categories] would you say best describes your race or ethnicity?”

Thank you.
REALD Language and Communication

Language Preference (if not covered previously):
1. “In what language do you want us to speak with you?”
2. “In what language do you want us to write to you?”
3. “How well do you speak English?”
   If other language is indicated AND not already requested during the pre-interview:
   “Would you prefer an interpreter to continue this conversation?”
   OR
   If no interpreter is requested, or resuming interview once interpreter is on the phone.

Thank you.

REALD Disability

Functional Abilities:
[Yes, No, Unknown/Declined]

“Are you deaf or do you have serious difficulty hearing?
If yes: “At what age did this condition begin?”

“Are you blind or do you have serious difficulty seeing, even when wearing glasses?
If yes: “At what age did this condition begin?”

“Does a physical, mental or emotional condition limit your activities in any way?
If yes, continue with the questions below, but stop now for persons under age 5.

REALD Disability

“Do you have serious difficulty walking or climbing stairs?”
If Yes: At what age did this condition begin?

“Do you have difficulty dressing or bathing?
If Yes: At what age did this condition begin?

“Because of a physical, mental or emotional condition, do you have serious difficulty concentrating, remembering or making decisions?”
If Yes: At what age did this condition begin?

Stop Now for persons under age 15.

“Because of a physical, mental or emotional condition, do you have serious difficulty doing errands alone such as visiting a doctor’s office or shopping?”
If Yes: At what age did this condition begin?
Part Five
Conclusion

“As I said earlier, public health investigations are private. Please do not share names or other information you may know about people who are being asked to stay home or other people who may have been in contact with them. We appreciate your help keeping others safe.”

“Do you have any questions for me?”

“Thank you for your time. Someone from the health department will contact you every day. It might be me or one of my co-workers. If you think of any questions, you can call the county health department at LPHA contact number, or you can ask whoever contacts you.

Note (safety concerns): If you have concerns about the safety of this person, or other people in the home, contact your supervisor after the call to discuss your concerns. This call is about contact tracing. Please don’t begin to investigate issues of safety. You and your supervisor can talk through next steps.

What are some of the opportunities you think your call provides when you call someone for contact tracing?

- Build rapport and trust with empathy
- Inform and educate
- Correct or dispel myths/harmful information about COVID-19
- Connect people to vital resources and services resources
Interview Tips

Wrong number:
"Do you know how I can reach contact's first name?"

If No: "Thank for your time. I will note in our records that this isn't the correct phone number."

If Yes: The correct phone number and try to reach Contact there.

Person with a disability who cannot self-report:
Verify the person speaking has power of attorney.

Interview Tips

Contact Requests Interpreter:
Ask if Contact would prefer to speak in a language other than English.

If Yes: "I will call you back with an interpreter. Which language do you speak?"
Follow agency/organization instructions for engaging an interpreter.
After you have an interpreter on the line, proceed with the interview.

Interview Tips

Contact Is Less than 15 Years Old:
"May I speak to the parent or guardian of contact's first name?"
Contacts age 15-17 may opt for parent interview OR self-report.
Interview Tips

Too sick to speak, or hospitalized and cannot complete the interview:

If sick: “May I ask what symptoms you are having?” note on assessment record.

OR say:

“If you have chest pain that doesn’t go away, trouble breathing, disorientation or trouble talking, or bluish lips or face, please call 911 or go to the nearest emergency room immediately!”

If hospitalized: Find out name of the hospital and the date of admission. See if spouse or family member can be interviewed if the Contact cannot speak. Comment in the notes section: name and relationship with the client; ask if person has power of attorney if they are able to complete the interview on their behalf.

Materials Review

Let’s walk through the training materials together…

Question? Concerns?
Next Steps

Additional Training
- ARIAS data system
- Workflow and processes that are unique to your work setting

Evaluation
Please complete the evaluation!
We can only improve with your feedback!
THANK YOU!

• This would not be possible without you!
• Your dedication and commitment to keeping our community’s health is what we need to get folks well and reduce the spread of the virus.