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# Case Investigator COVID-19 Response Job Description Template

## Introduction:

**Case investigation and contact tracing** are the processes of working with a person (patient) who has been diagnosed with an infectious disease to identify and provide support to other people (contacts) who may have been infected through close contact with the patient. This process is a core disease control measure that has been employed by health department personnel for decades and is a key strategy for preventing the spread of COVID-19. Depending on the agency or jurisdiction, the case investigation and contact tracing roles may be carried out by separate cadres of personnel. **The Case Investigator position focuses on activities involving people with laboratory-confirmed, probable, and suspected diagnoses of COVID-19.**

## Position Summary:

A Case Investigator is a public health professional providing support to a health department in the fight against COVID-19. The case investigator is responsible for contacting people with laboratory-confirmed, probable, and suspected diagnoses of COVID-19 and providing health education and guidance in order to interrupt ongoing disease transmission. The case investigator will conduct interviews with patients to gather information including symptom history, source of illness, list of close contacts, and activity history while infectious. The case investigator will provide patients with instructions for isolation and make appropriate referrals to testing, clinical services, and other essential support services, as indicated. While dialogue can be guided by standard protocols, the interaction with the patient necessitates flexibility, cultural competence, and application of motivational interviewing techniques. A successful case interview allows for the collection of critical information about the case and potentially exposed contacts, while providing support, referrals, and answers to questions the patient may have.

Developing a warm, empathetic rapport with the patient is paramount to providing the most effective support and collecting accurate information to inform the next steps in the contact tracing investigation. This position will require prioritization, prompt action, and attention to detail in documentation and data management as multiple investigations will be conducted simultaneously. Case investigators are required to comply with policies and procedures provided by the health department regarding confidentiality and data security for the handling of sensitive client information and protected health information.

## Essential Functions:

- Obtain and review patient demographic, location, laboratory, clinical, and risk information available in health department surveillance systems or other data systems in order to determine investigation priorities, per local protocols. Depending upon local triage protocols, follow-up with healthcare providers to obtain additional medical and socio-demographic information and confirm patient receipt of test results and/or diagnosis of COVID-19.
- Initiate prompt communication with patients diagnosed with COVID-19 through text, phone calls, email, and other communication platforms as necessary. Every effort should be made to interview the patient by telephone or video conference instead of in-person. For in-person interviews, guidance on recommended infection prevention and control practices at a home or non-home residential setting can be found on [CDC's Interim Infection Control Guidance for Public Health Personnel](#).



- Employ dynamic communication and interpersonal skills, cultural competency/ sensitivity, tactful language, and empathetic interviewing skills to build rapport and maintain trust with patients of varied backgrounds.
- Verify patient’s identity during initial communications and prior to disclosing confidential information. Assure confidentiality and carry out efforts to locate and communicate with patients in a manner that preserves the confidentiality and privacy of all involved.
- Notify or verify receipt of a positive laboratory report or probable or suspected diagnosis of COVID-19. Provide patient with COVID-19 health education, per local protocols.
- Obtain and document detailed information regarding patient diagnosis, demographics, COVID-19 symptoms and their onset date(s), clinical course, underlying medical conditions, and other risk factors.
- Review clinically documented and patient’s self-reported COVID-19 symptom history to determine the time-frame when the patient was infectious and not under isolation (contact elicitation window). Work with the patient to identify close contacts during the contact elicitation window, including household members, co-workers, and others who might have been exposed. Document date, duration, and location of exposure along with name, locating information (e.g., home, phone, email, work), pre-existing conditions, and risk factors (if known) for each close contact, as defined by CDC or local jurisdiction protocols. Identify community settings (e.g., workplace, retail, travel) that may require further investigation. Identify inter-jurisdictional exposures (e.g., live in one county/state and work in another county/state, travel for work or leisure to another county/state/country).
- Identify most appropriate methods for notifying household contacts. Depending on the circumstance, the investigator may be coaching and supporting the client to notify contacts (e.g., parent, spouse/significant other, children) in the home.
- Provide guidance on COVID-19 control measures, per local protocols. This may include conveying information on situations requiring the exclusion of individuals from work, daycare, or specific activities within a group setting. Identify appropriate referrals to a healthcare provider when needed. Conduct all case investigation activities in a manner that maintains the confidentiality of the patient (or person who was diagnosed with COVID-19) and ensures that the identity of the patient is NOT disclosed.
- Provide approved information on self-isolation procedures, including what to do if symptoms worsen or new symptoms develop. Coordinate any needed referrals for testing or health care, per local protocols. As necessary, conduct specimen collection and transport, per local protocols, following required training in specimen collection procedures and personal protective equipment.
- Assess patient’s ability to safely and effectively self-isolate at home, with adequate water, food, prescription medicines, and other necessities. Identify barriers to necessary interventions and facilitate appropriate referrals, per local protocols. Collaborate with key service providers to ensure expedited initiation of appropriate medical or social support services, per local protocols.
- Ensure daily monitoring of patients during self-isolation—temperature check, signs/symptoms—via application or other designated method. Facilitate referrals for additional testing and medical evaluation as indicated (e.g., clinical assessment due to symptoms, medical clearance prior to return to work) per local protocols. As necessary, facilitate specimen collection and transport, per local protocols.

- Document pertinent information in COVID-19 case investigation forms, entering data into health department data/surveillance systems. Document detailed information on close contacts and initiate contact investigations to be assigned to appropriate staff per local protocols. Facilitate inter-jurisdictional referral of patient or contact information as relevant.
- Use a computer, tablet, and/or cell phone with appropriate access to required applications, databases, and/or web-based platforms, daily. Document pertinent information in COVID-19 contact tracing forms, and conduct data entry into health department data/surveillance systems while adhering to protocols for completeness, timeliness, and frequency.
- Collaborate and coordinate with a team of public health professionals (e.g., surveillance coordinators, surveillance triage and support staff, contact tracers, care resource managers, epidemiologists, clinicians) to efficiently obtain clinical and sociodemographic information, provide necessary supportive services during for isolation, and notify close contacts of exposure to COVID-19. Inform the team and supervisor when communication attempts with patients are unsuccessful, and practice problem solving to find alternate methods for outreach. Elevate complex situations to supervisor for further guidance.
- As needed and relevant, refer selected patients and contacts (e.g., clinically complex, living or working in congregate settings) to appropriate health department infection control or clinical personnel for further investigation or case management.
- Participate in requisite trainings, regular program meetings, and quality monitoring improvement activities in order to ensure and enhance the quality of case investigation activities and program outcomes.
- Maintain patient confidentiality and ensure that all information is collected in concordance with local

data privacy and confidentiality standards.

## Work Environment and Physical Requirements

The position will require responding to public health emergencies with rapid turnaround times for communication, initiation and completion of assignments. The position will require daily use of a computer, telephone or cell phone, and access to a secure internet connection. This position may require moderate physical effort including lifting materials and equipment of less than 50 pounds and involves viewing a computer screen 50 to 75 percent of the time. The position may require both on-site and telework activities, while complying with all requirements for client confidentiality, records, and data security. The position may require appropriate training on specimen collection, infection prevention and control practices, and the provision of any necessary personal protective equipment prior to conducting in-person activities. The position may require working non-standard hours (i.e., evenings, weekends). The position may require some travel and occasional participation in off-site functions.

## Required Qualifications:

- Strong verbal and written communication skills, including active listening, emotional intelligence
- Ability to interact in an empathetic and non-judgmental manner with culturally diverse populations and persons experiencing a wide range of social conditions
- Critical thinking and problem-solving skills, and the ability to use sound judgment in responding to client issues and concerns
- Ability to read and write in English
- Ability to adapt to changing environments and receive constructive feedback
- Ability to use discretion, maintain confidentiality, and practice ethical conduct
- Ability to work effectively with all levels of staff,

- establishing and maintaining collaborative professional relationships
- Strong time management skills (organization, prioritization, multitasking)
- Ability to work independently and as part of a multidisciplinary team
- Proficiency with MS Office 365 (i.e., Outlook, Word)
- Proficiency with use of computers (desktop, laptop, tablet)
- Proficiency with use of mobile devices (smartphones, mobile apps)

### **Preferred Qualifications:**

- Experience conducting telephone-based or in-person interviews and collecting and entering data
- Experience with health education, community outreach, linkage to care, social services

- Experience in customer service industry
- Experience in public health
- Valid driver's license and car insurance
- Bilingual skills —fluency in the primary language(s) of the geographic area and communities assigned to support

### **Minimum Educational Qualifications**

- High school diploma or General Education Development (GED) equivalent with up to three years of applicable community experience

### **Preferred Educational Qualifications**

- Associate degree or equivalent with up to two year of applicable community experience
- Bachelor's degree or higher from an accredited college or university, with no experience