


# Overview of Contact Investigation Guidelines

Chelsea Hargrave, BS, CHES  
October 31, 2023

TB Contact Investigation (Pilot)  
October 31, 2023  
San Antonio, Texas


1



**Chelsea Hargrave, BS, CHES** has the following disclosures to make:

- No conflict of interests
- No relevant financial relationships with any commercial companies pertaining to this educational activity

2




# Overview of Contact Investigation Guidelines

Chelsea Hargrave, BS, CHES

TB Contact Investigation Pilot  
October 31, 2023  
San Antonio, Texas

3



## Objective

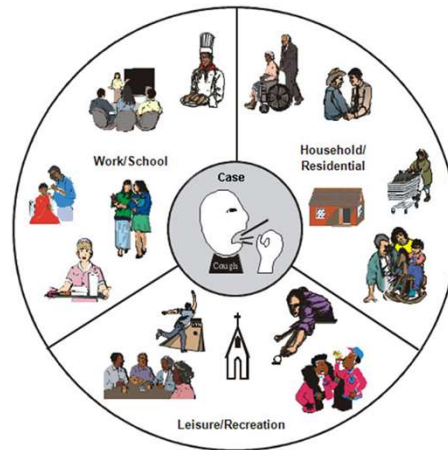
- Discuss the impact of the CDC guidelines on existing contact investigation procedures

4

## What is a Contact Investigation?

A systematic process to:

- Identify persons (contacts) exposed to someone with infectious TB disease
  - Household members
  - Friends
  - Co-workers
  - Others (cellmates, shelter residents, etc.)
- Assess contacts for infection with *M. tuberculosis* and TB disease
- Provide appropriate treatment for contacts with LTBI or TB disease



5

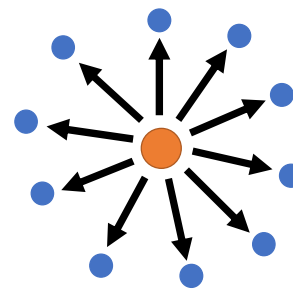
## Importance of Contact Investigation

Contact investigations allow TB programs to:

- Stop transmission
- Identify the source case
- Identify contacts
- Prevent future cases of TB disease
- Evaluate and treat recently exposed persons

\*On average, 10 contacts are identified for each case

- 20% to 30% of household contacts have LTBI
- 1% of contacts have TB disease



● Source  
● Contact

6



## Conducting Contact Investigations is one of the highest priorities within TB programs in the United States

- Only second to the detection and treatment of TB disease

7



## Systematic Approach to TB Contact Investigations

### Guidelines Content

- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

8

## Investigations and Interviews

- **Index case:** the initial TB case that prompts a contact investigation (identified).
- **Source case:** a person with TB disease who is responsible for transmitting M. tuberculosis to another person or persons (unidentified).
- **Source case investigation:** a method used to identify a source case; usually done when a young child is found to have TB disease
- **Pre-interview phase:** reviewing existing information about the TB case before the first interview; typically, this is the first step in the systematic approach to contact investigation
- **Proxy interview:** an interview with persons (proxies) who are familiar with the TB case's practices, habits, and behaviors

9

## Guidelines Content

- **Decision to Initiate Contact Investigation**
  - Investigating the Index Patient and Sites of Transmission
  - Assigning Priorities to Contacts
  - Diagnostic & Public Health Evaluation of Contacts
  - Treatment for Contacts
  - When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

10

## Guidelines Content



- Decision to Initiate Contact Investigation
- **Investigating the Index Patient and Sites of Transmission**
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

11

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- **Assigning Priorities to Contacts**
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

12

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- **Diagnostic & Public Health Evaluation of Contacts**
- **Treatment for Contacts**
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

13

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- **When to Expand a Contact Investigation**
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

14

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- **Communicating through Media**
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

15

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- **Data Management & Evaluation of Contact Investigations**
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

16



## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- **Confidentiality & Consent for Contact Investigation**
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- Source – Case Investigation

17

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- **Staffing & Training for Contact Investigations**
- Contact Investigations in Special Circumstances
- Source – Case Investigation

18

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- **Contact Investigations in Special Circumstances**
- Source – Case Investigation

19

## Guidelines Content



- Decision to Initiate Contact Investigation
- Investigating the Index Patient and Sites of Transmission
- Assigning Priorities to Contacts
- Diagnostic & Public Health Evaluation of Contacts
- Treatment for Contacts
- When to Expand a Contact Investigation
- Communicating through Media
- Data Management & Evaluation of Contact Investigations
- Confidentiality & Consent for Contact Investigation
- Staffing & Training for Contact Investigations
- Contact Investigations in Special Circumstances
- **Source – Case Investigation**

20

