TOOLKIT
CASE INVESTIGATION & CONTACT TRACING
OVERVIEW & TOOLS
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What is CICT?

Case Investigation and Contact Tracing (CICT) is a high-value safety strategy that effectively limits the spread of the virus in schools by quickly identifying and isolating confirmed positive cases and any close contacts.

When confirmed positive cases are identified and isolated, the CICT team works with schools and the parents/guardians of the positive individual (or staff member themselves) to generate a list of potential close contacts of this individual during their infectious period. If these close contacts meet the criteria for quarantine, they will be asked to do so and be provided information for getting tested.

Close contacts are notified and asked to quarantine in alignment with district policies. The statewide guidance provides that close contacts should quarantine for ten days but can return to school after seven days pending a negative test result on day five following known exposure.

For Test-to-Stay districts, asymptomatic close contacts can remain in school if no symptoms arise, and the student receives two negative tests within seven days following exposure. Fully vaccinated students who are not experiencing symptoms do not need to quarantine.

A few definitions:
- **A confirmed case** is anyone who receives a positive laboratory test for COVID-19.
- **A close contact** is anyone who was within six feet of a person with COVID-19 for at least 15 cumulative minutes during the period when the person with COVID-19 was infectious. However, for K-12 students, there are the following exclusions to this definition:
  - Students seated at least three feet apart and consistently and correctly wearing masks in an indoor/outdoor classroom are NOT considered close contacts (regardless of vaccination status).
  - Anyone seated at least six feet apart with or without a mask is NOT considered a close contact (regardless of vaccination status).
- **The infectious period** begins two days before a sample was collected for the positive test result or two days before symptom onset.
- **A person is considered fully vaccinated** two weeks after receiving their second dose of the Pfizer or Moderna vaccine or two weeks after receiving their first and only dose of the Johnson & Johnson vaccine. As of November 2021, only the Pfizer vaccine is approved for school-aged kids (ages 5 and up).

Timely CICT is essential to curbing the spread of the virus and keeping our schools safe and open.

Learn more about CICT guidance from the Washington State Department of Health by reviewing its updated *K-12 Requirements for the 2021-2022 School Year*. 
CICT Example Workflow

Below is an example of the workflows and collaboration between case investigation teams and contact notification teams to close the loop for each positive case. Each case will generate a range of close contacts who need to be notified. It is essential that these close contacts are identified and passed along to the contact notification team as quickly as possible so that these individuals can quarantine if necessary and help limit the spread.

Most positive cases are reported by parents notifying the school about a positive test their kid received. At this point, the school nurse or COVID-19 Supervisor works with the district CICT team (Case Investigation Lead) to complete intake information for this positive case and identify a list of teachers, coaches, specialists that case investigators will interview to determine close contacts amongst students and staff. The Case Investigation Lead may also monitor the testing database (e.g., Curative, Everlywell, etc.) to identify positive test results and enter intake data for that individual and begin case investigation.

Case investigators speak to parents, teachers, coaches, etc. of the student who tested positive to determine the infectious period, any days spent at school during this period, and to narrow down the list of student and staff contacts who may have been exposed and need to be notified.

Case investigators develop a list of these close contacts and populate the Operational Tracker with their names, contact information, and other details that contact notifiers will need to complete notification.

Contact notifiers then reach out via phone, email, and text to notify the parents of close contacts (or staff themselves) about their potential exposure and provide guidance on quarantine and testing. A close contact is “notified” once this information is communicated via phone to the correct parent/guardian (or staff member).
**Staff Leads**

If possible, districts and/or local health departments should employ/designate at least two full-time staff: one to lead Case Investigation efforts, another to lead Contact Notification efforts. Based on district size, more than two leads may be necessary. Below is a breakdown of duties that fall to these respective roles to organize efficient CICT.

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**Case Investigation Lead**

- Monitors results databases daily for positives
- Completes intake form for each positive case
- Assigns cases via Operational Tracker & monitors for quality
- Conducts case investigation calls with staff, parents, older students
- Leads daily sync meetings with Case Investigators

**Contact Notification Lead**

- Assigns cases via Operational Tracker & monitors for quality
- Leads daily sync meetings with Contact Notifiers
- Makes contact notification calls with staff, parents, older students
- Trains & onboards additional contact notifiers
- Reports positives from contact list to Case Investigation Lead

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Regular meetings between these two leads to ensure quality and report any additional positive cases identified during contact notification is essential.
**The L2R CICT Toolkit**

These tools provide links in the CICT workflow chain to help you streamline your current processes minimize onboarding/training timelines for new or surge CICT staff.

**Operational Tracker**

The Operational Tracker is the centralized tool used by the CICT team to:

- Track intake data for positive cases in the school district
- Assign cases to Case Investigators to elicit close contacts
- Organize list of close contacts and their information
- Assign close contacts to contact notification team
- Track cases & contacts through completion & quarantine if necessary
- Provide templates for voicemail, email, & text notifications

The Operational Tracker includes six tabs for different members of the CICT team to use:

**Tab 1:** Instructions on using the tool and setting up an automated case intake form.

**Tab 2:** Case intake information for positive individuals. Used by case investigators to derive close contacts list.

**Tab 3:** Close contacts and their information listed for use by contact notifiers. As much information should be completed in this tab as possible by each contact notifier.

**Tab 4:** The return calculator automatically calculates the date that kids can return to school by date of exposure or positive test.
Tab 5: An “End-of-Day” report to capture close contacts who were not reached during the day/shift.

Tab 6: Notification templates that contact notifiers can use for email, text, or voicemail messages.

**Download the Operational Tracker:**
Note that the Safari browser (Mac) is not recommended for this download and may cause complications.

- **To download as a google form and configure for multiple team members to use, click here.**
  1. (This version requires that the central user has or has created a gmail account).
  2. When clicking the template link, you will be asked to sign into your google (gmail) account or, if already signed in, it will ask if you want to make a copy of the template.
  3. Sign into and/or create a google account and click "Make a copy" to add this template to your google drive.
  4. To add users to the shared document, open the Operational Tracker and click on the green “Share” button on the top right-hand corner.
  5. From here, you can add the email addresses of your CICT team to give them permission to access the document via the “Share with people and groups” prompt OR create a link to send to these users via the “Get link” prompt. When creating a link, it is recommended to first add user information then share as a “restricted” link so only those users can access the document.

- **When you download the Operational Tracker, the COVID-19 Case Intake Form will auto-populate in your Google drive since it is connected to the tracker template. If this does not occur, see next page for further instructions.**

- **To download as a local excel file, click here.**
  1. This version will not automatically update when users are accessing it. We recommend using a shared file to help streamline the activities of the CICT members but have provided this version as a direct download so you can configure it for other sharing platforms if google is not preferred.
COVID-19 Case Intake Form
It is important that positive cases are brought to the attention of the CICT team leads as soon as they are identified. Most positive cases are reported by parents notifying the school about a positive test their kid received. At this point, the school nurse or COVID-19 Supervisor works with the district CICT team (Case Investigation Lead) to complete intake information for this positive case and identify a list of teachers, coaches, specialists that case investigators will interview to determine close contacts amongst students and staff.

Using a live intake form, such as the template you can download here, and sharing this with school building to use when a positive case is identified, can significantly help streamline the process and allow case investigation to quickly commence. This intake form can be easily configured to auto-populate tab 2 of the Operational Tracker with intake information so that case investigators can start conducting interviews to verify close contacts as soon as possible.

The Case Investigation Lead may also monitor the testing database (e.g., Curative, Everlywell, etc.) to identify positive test results and enter intake data for that individual to begin case investigation.

GIF sample of live form:
Download the COVID-19 Case Intake Form:

- When you download the Operational Tracker (see above), the COVID-19 Case Intake Form will auto-populate in your Google drive since it is connected to the tracker template. If this does not occur, follow the instructions below to manually download and connect the form.

1. To download as a Google form and configure for multiple team members/school buildings to use, click here.
2. (This version requires that the central user has or has created a gmail account. Note that the Operational Tracker must be saved in a Google drive account as a google sheets document to connect to the intake form. Follow the steps on the previous page to create this template in your own Google drive).
3. When clicking the COVID-19 Case Intake Form template link, you will be asked to sign into your Google (gmail) account or, if already signed in, it will ask if you want to make a copy of the template.
4. Sign into and/or create a Google account and click "Make a copy" to add this template to your Google drive.
5. After you click "Make a copy," you will be brought to the administrator’s view of the Google form which you now own.
6. To connect the form to your Operational Tracker document, click on the "Responses" tab at the top of the form.
7. Now click the three dots at the top right-hand corner of the form and click the option "Select response destination."
8. Click on "Select existing spreadsheet," and choose the file "Operational Tracker CICT" that you have already downloaded from the toolkit (see instructions above).
9. A "Form Responses" tab will now appear in your Operation Tracker document. Remove the existing tab named "Case Investigation" and rename the "Form Responses" tab to "Case Investigation." Now anytime a live form is completed by a building administrator, this tab of the spreadsheet will auto-populate with the intake information. Any time you make edits to the form, the corresponding tab will include these changes.

- To download as a local word file, click here.
1. This version will not automatically pull responses to a centralized location. We recommend using a shared file to help streamline the activities of the CICT team members but have provided this version as a direct download so you can configure it for other sharing platforms if Google is not preferred.
Email template to building COVID-19 Supervisor and school nurse
Notification of student case & request of information

SUBJECT LINE: COVID-19 Positive Case Identified

Dear (building nurse, COVID-19 Supervisor and/or principal),

I am reaching out on behalf of the (school district) COVID-19 contact tracing team to gather more information about a positive case identified at your school to support our contact tracing efforts. We appreciate your feedback as soon as possible so we can identify any close contacts who may need quarantine and help limit the spread of the virus.

Student (first, last name) with school ID (#######) attended (school name) while infectious with COVID-19 between the dates (date range). We request the names and contact information for the student’s teacher/s, coaches, and any specialists to investigate which classmates and/or teammates might be considered close contacts during this period.

A close contact is someone who was within six feet of a person with COVID-19 for at least 15 cumulative minutes during the period when the person with COVID-19 was infectious. However, for K-12 students, there are the following exclusions to this definition:

- Students seated at least three feet apart and consistently and correctly wearing masks in an indoor/outdoor classroom are NOT considered close contacts (regardless of vaccination status).
- Anyone seated at least six feet apart with or without a mask is NOT considered a close contact (regardless of vaccination status).

I will wait to hear back from you regarding the student’s teacher, coach, and/or specialist information. Please call me at (contact number) if you prefer to speak over telephone.

Many thanks for your attention to this matter.

Best regards,

(Case Investigator/Contact Tracer name)
Contact Tracing Team (School district name)
Voicemail or text template
To send if no one answers the phone

Hello, this is [First Name of contact notifier], and I am reaching out on behalf of [school district]. We are calling to speak with the parents/guardians of [Student Name]. We have some important information to share with you before your child returns to school. Please call us at [call back number] at the earliest opportunity to discuss.

We hope to speak with you soon. Many thanks!

[Case Investigator/Contact Tracer name]
Contact Tracing Team [school district name]

Email template
To send if no one answers the phone

Subject: Important Message from [school district]

We are emailing on behalf of [school district]. We would like to speak with the parents/guardians of [Student Name] to share some important information before your child returns to school. Please call us at [call back number] at the earliest opportunity to discuss.

We hope to speak with you soon. Many thanks!

[Case Investigator/Contact Tracer name]
Contact Tracing Team [school district name]
Close Contact Quarantine Decision Tree
This infographic can help you determine quarantine timelines and procedures for close contacts depending on several factors including vaccination status, previous infections, and current district policies (i.e., Test-to-Stay). Incorporate this tool into your contact notification process to help guide these conversations.

Click on the image below to download a high-definition PDF file.
Toolkit Updates & Announcements

L2R will work to update this document with additional helpful tools and guidance. We will announce updates via the L2R website and/or newsletter. To stay informed of the latest updates, please subscribe to the L2R Newsletter via the form on our website.

Please email schools@healthcommonsproject.org with any questions, concerns, or suggestions on how to improve these tools.

Thank you to all the amazing staff working hard to keep Washington schools safe and open this year!