



TEXAS
Health and Human
Services

**Texas Department of State
Health Services**

**Tuberculosis and Hansen's Disease Unit
NEDSS Tuberculosis (TB) Training Course
for
Public Health Regions and Local Health
Departments (R/LHDs)**

February 2024

Course Number 6:
Contact Investigations

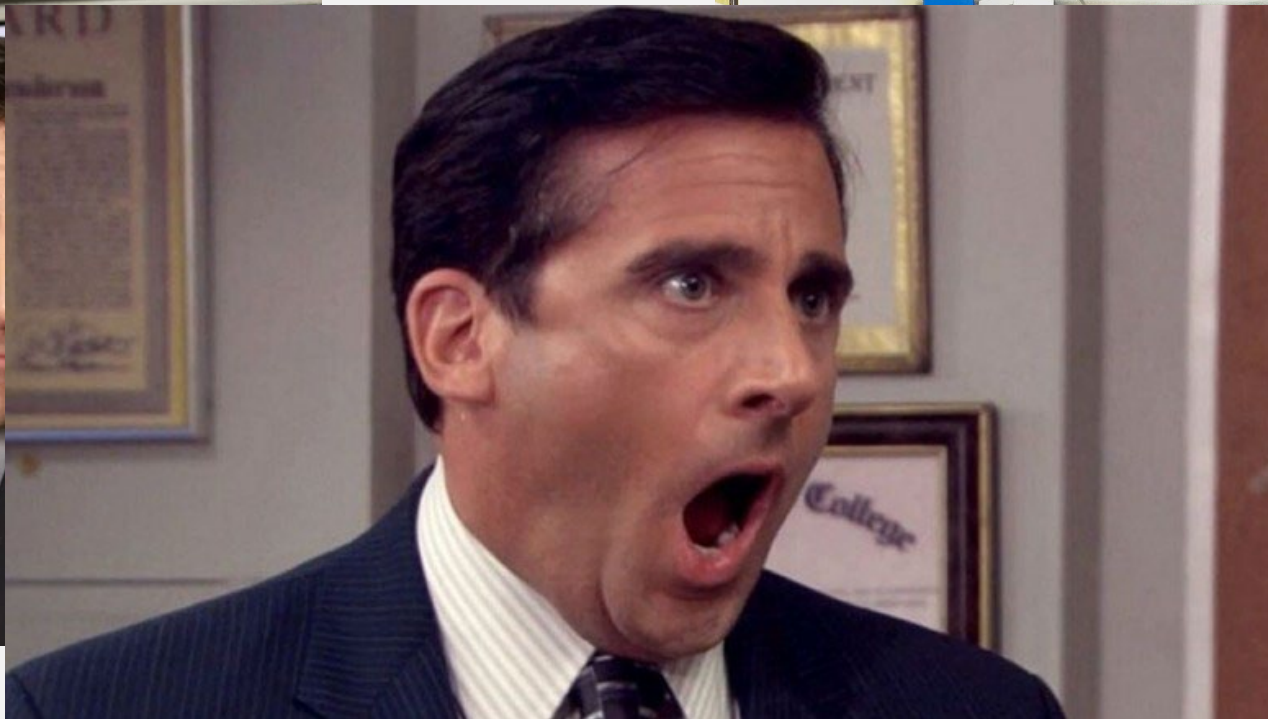
After completing this course, you should be able to:

- Enter TB contact investigations in NEDSS;
- Create investigations for TB contacts; and
- Link and update TB contacts to their source.

Entering a TB Contact Investigation

Example: Michaels Scott's CI

Michael Scott has active pulmonary TB and now a contact investigation must be conducted.



Entering Contact Investigation Details



Michael Gary Scott Male 03/15/1960 (63 Years)	
Investigation ID: CAS483805319TX01	Created: 12/06/2023
Investigation Status: Open	Last Updated: 12/06/2023
Investigator:	Case Status: Confirmed
Notification Status:	

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
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Go to: [Contact Investigation](#) | [TB Exposure Repeating Block](#) | [Hidden questions - Contact Investigation Tab](#)

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Contact Investigation

[Collapse Subsections](#)

Risk Assessment

★ Contact Investigation Type:

★ Is this a sentinel event?:

★ Infectious Period Start Date:

★ Infectious Period End Date:

For guidance on calculating infectious period dates review DSHS Form TB-425, Tuberculosis Infectious Period Calculation Sheet.

Interview Details

★ Patient Initial Interview Date:

★ Patient Interviewed By:

★ Was a second interview conducted?:

★ Second Interview Performed By:

★ Second Interview Date:

Locate the **Contact Investigation Tab** for the source case

Use the **Contact Investigation section** to enter details about the CI

In the **Risk Assessment** and **Interview Details** subsections users will enter information about the type CI, infectious periods, and CI interviews

Reminder:

- An initial interview for suspected or confirmed TB should be conducted within three working days of a patient being reported to the TB program.
- Patients who are AFB sputum smear positive and/or have chest imaging revealing cavitation must have the second interview seven days after the initial interview

Entering Index Case Epidemiologic History

Use the **Patient History** subsection to enter relevant information the index's history

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
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Risk Assessment

Interview Details

Patient History

Congregate Setting History (within past 2 years): Yes

(Use Ctrl to select more than one)

Congregate Setting Type:

Selected Values: Jail

Other Congregate Setting Type:

REMINDER: Submit DSHS Form 12-12104, Incident Report Form, to Central Office (TBEpi@dshs.texas.gov)

Has patient traveled while experiencing TB symptoms?: Yes

(Use Ctrl to select more than one)

Transportation Mode:

Selected Values: Airplane

Length of Trip (hours):

REMINDER: Contact Central Office (TBEpi@dshs.texas.gov) if Flight Investigation or Travel Restriction Indicated



Reminder:

- Contact the Tuberculosis and Hansen's Disease Unit's Epidemiology team at TBEpi@dshs.texas.gov if you have any questions about the contact investigation process

Entering Exposure Locations

Exposure Locations

Exposure Location Name	Exposure Location Type	Start Date At Location	End Date At Location	Is this a Congregate Setting?	Estimated Number Contacts Exposed
No Data has been entered.					
★ Exposure Location Name:	<input type="text" value="Dunder Mifflin HQ"/>				
★ Exposure Location Type:	<input type="text" value="Office/Workplace"/>				
★ Address of Exposure Location:	<input type="text"/>				
★ Start Date at This Location:	<input type="text" value="10/06/2023"/>				
★ End Date at This Location:	<input type="text" value="12/06/2023"/>				
★ Is this a Congregate Setting?:	<input type="text" value="No"/>				
★ Estimated Number Contacts Exposed:	<input type="text" value="20"/>				

Use the **Exposure Location** repeating block to report all locations where the index case might have exposed others to TB during their infectious period

Add details about each location including type, dates, and number or contacts identified

Once complete click **'Add'** to populate this information in the chart above. Users may enter multiple exposure locations

Demo Part 1

Entering TB Contact Investigations

<https://vimeo.com/901264831/8b26aa0064?share=copy>



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How to create a new user profile

- 1. Go to the user profile page
- 2. Click on the 'Add New User' button
- 3. Fill in the required fields
- 4. Click on the 'Save' button

Main content area with a table of user profiles.

ID	Name	Email	Role	Status
1	John Doe	john.doe@example.com	Admin	Active
2	Jane Smith	jane.smith@example.com	User	Active
3	Bob Johnson	bob.johnson@example.com	User	Inactive
4	Alice Brown	alice.brown@example.com	User	Active
5	Charlie White	charlie.white@example.com	User	Inactive

Create Investigations for TB Contacts

Creating Investigations for Contacts: Search for a Patient File

Patient Search

Search Demographics

(By default, search uses 'Starts With'. To search using 'Contains', enter % at start of text or use Advanced Search)

Last Name:

First Name:

DOB:

Current Sex:

Search Identifiers

Event ID Type:

Patient ID(s):

(Separate IDs by commas, semicolons, or spaces)

[Advanced Search](#)

Using the information collected during the contact investigation, search for a Patient File for the named contact.



Creating Investigations for Contacts

Creating TB or LTBI Investigation

Remove All Filters/Sorts

Patient ID	Name	Age/DOB/Sex	Address	Phone/Email	ID
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Nothing found to display.

Add New

Users may have to create a new Patient File and/or Investigation for the contacts

Kelly Kapoor | --- | --- Patient ID: 24387723

Summary | Events | Demographics

Go to: [Investigations](#) | [Lab Reports](#) | [Morbidity Reports](#) | [Vaccinations](#) | [Treatments](#) | [Documents](#) | [Contact Records](#) [Expand All](#) | [Collapse All](#)

Patient Events History

Investigations (0)	Add New	Back To Top
Lab Reports (0)	Add New	Back To Top
Morbidity Reports (0)		Back To Top
Vaccinations (0)		Back To Top
Treatments (0)		Back To Top
Documents (0)		Back To Top
Contact Records (0)		Back To Top

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Summary | Events | Demographics

Only create LTBI Investigations for contacts that are dispositioned as ATS-2 prior to the investigation being created in NEDSS.

Creating Investigations for Contacts

Entering Information About Exposure to TB



Kelly Kapoor | --- | 01/01/1982 (41 Years) Patient ID: 24387723

Investigation ID: CAS483805418TX01	Created: 12/19/2023	By: Marissa Ly
Investigation Status: Open	Last Updated: 12/19/2023	By: Marissa Ly
Investigator:	Case Status: Suspect	Notification Status:

* Indicates a Required Field

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
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Go to: [Contact Investigation](#) | [TB Exposure Repeating Block](#) | [Hidden questions - Contact Investigation Tab](#)

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Contact Investigation

TB Exposure Repeating Block

TB Exposure

	Source Case's Investigation ID	Contact's Relationship to Source Case	Contact Evaluation Priority Level	Date Identified As Contact	Date of Last Exposure to Source Case	Linked Case Infectious Period End Date	Contact Evaluated for TB	Contact's ATS Classification
	CAS4125369TX01	Girlfriend	High	05/08/2022		07/10/2023	Yes	1 - M. TB exposure, no evidence of infection

Source Case's Investigation ID:

Source Case's State Case Number:

Contact's Relationship to Source Case:

Other Contact's Relationship to Source Case:

Priority Level Of Contact Evaluation:

Date identified as a contact:

Exposure Location Name:

Exposure Length:

Exposure Setting:

Date of Last Exposure to Linked Case:

Linked Case Infectious Period End Date:

Contact Evaluated for TB:

Reason Not Evaluated:

Contact's ATS Classification:

Use the TB Exposure Repeating Block to enter information about the TB exposure

Locate the Contact Investigation Tab for the contact

Enter all information about this exposure that is relevant to determine if the contact was fully evaluated for TB

Once all information is entered, 'Add' to save the information.

Demo Part 2

Create Investigations for TB Contacts

<https://vimeo.com/901264842/18f72f24c7?share=copy>



Course Number 6, Demonstration Part 2: *Create Investigations for TB Contacts*

NIHSS Tuberculosis (TB) Training Course for
Public Health Regions and Local Health Departments (R/LHDs)
Texas Department of State Health Services

Linking Source Case and Contacts

Creating Contact Records

[Return to file Summary](#)

Manage Associations Create Notifications Transfer Ownership Change Condition Edit Print

Michael Gary Scott | Male | 03/15/1960 (63 Years) ID: 24387694

Investigation ID: CAS483805319TX01 Created: 12/06/2023

Investigation Status: Open Last Updated: 12/06/2023 By: Marissa

Investigator: Case Status: Confirmed Notification Status:

* Indicates a Required Field

Patient Case Info TB History Tuberculosis TB Disease Only MDR TB LTBI Only Comprehensive TB Treatment Details Contact Investigation **Contact Records** Supplemental Info

Contact Records [Back to top](#)

[Collapse Subsections](#)

Contacts Named By Patient

The following contacts were named within Michael Gary Scott's investigation:

Date Named	Contact Record ID	Name	Investigation
12/06/2023	CON10003008TX01	Halpert, Jim Relationship: Co-Worker	

Patient Named By Contacts

The following contacts named Michael Gary Scott within their investigation and have been associated to Michael Gary Scott's investigation:

Date Named	Contact Record ID	Name	Investigation
Nothing found to display.			

[Add New Contact Record](#)

[Manage Contact Associations](#)

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Patient Case Info TB History Tuberculosis TB Disease Only MDR TB LTBI Only Comprehensive TB Treatment Details Contact Investigation **Contact Records** Supplemental Info

Manage Associations Create Notifications Transfer Ownership Change Condition Edit Print

Return to the index case's investigation and locate the **Contact Records** tab

Without entering Edit Mode, click '**Add New Contact Record**' in the Contacts Named by Patient subsection

Creating Contact Records

Searching for the Named Contact

Michael Gary Scott Male 03/15/1960 (63 Years)	
Investigation ID: CAS483805319TX01	Created: 12/06/2023
Investigation Status: Open	Last Updated: 12/06/2023
Investigator:	Case Status: Confirmed

Search by: Demographics Event

Last Name:

First Name:

Date of Birth:

Current Sex:

ID:

Search Cancel

Search Cancel

Disposition

Contact Records

Contact Records

The user should search for the named contact they are trying to link.

Creating Contact Records

Finding Contact's Patient File

Review search results and determine if you are which event you are trying to add. Pay attention to details such as DOB, Address, and Investigation(s) to ensure that you are linking the right contact

Click on the green checkmark to the left when you are ready to create a contact record for the contact

Contact Search Results

[Add New](#) [Cancel](#)

Search Results [New Search](#) | [Refine Search](#)

Your Search Criteria: *Last Name starts with 'kap', First Name starts with 'kelly'* resulted in 3 possible matches.
Select an existing person below to add as a contact, or [Add New](#)

	Name	Age/DOB/Sex	Address	Telephone	Investigation(s)
<input checked="" type="checkbox"/>	Legal Kapoor, Kelly	01/01/1982 Female	Home 3 Scranton Lane Austin, Texas 73301		Condition: Latent Tuberculosis Infection (2020 TBLISS) Start Date: 12/21/2023(Open) Case Status: Notification: Condition: Tuberculosis (2020 RVCT) Start Date: 12/19/2023(Open) Case Status: Suspect Notification:
<input checked="" type="checkbox"/>	Legal Kappor, Kelly	01/01/2021 Female	Home 123 Side Street Happy Town, Texas 77022		Condition: Tuberculosis (2020 RVCT) Start Date: 03/16/2023(Open) Case Status: Suspect Notification:

[Add New](#) [Cancel](#)

Creating Contact Records

Linking the Contact's Existing Investigation

In the **Contact Record Tab** the *Jurisdiction*, *Date Named*, *Relationship*, and *Exposure Type* (all marked with a red asterisk) are required to save the record.

Contact Contact Record Contact Follow Up Supplemental Info

Contact Record [Back to top](#)
[Collapse Subsections](#)

Contact Record Security

* **Jurisdiction:** Austin HHS Division (City of)
Program Area: Tuberculosis
* **Shared Indicator:**

Administrative Information

Status: Open
Priority:
Group/Lot ID:
Date Assigned:
Disposition:
Disposition Date:

Processing Decision initiates the action of linking an investigation to the contact record.
If Processing Decision is blank, no action will be initiated.

Processing Decision: Link to Existing Investigation

Contact Information

* **Date Named:** 12/05/2023
* **Relationship:** Co-Worker
Health Status:

Exposure Information

* **Exposure Type:** Common Space
Exposure Site Type:
First Exposure Date:
Last Exposure Date:

Contact Record Comments

General Comments:

[Previous](#) [Next](#)

Contact Contact Record Contact Follow Up Supplemental Info **Submit** Cancel

Under Processing Decision select '**Link to Existing Investigation**'

Once all information is entered, click **Submit** to save the Contact Record.

Verifying Contact Record Links

Index's Investigation



Michael Gary Scott | Male | 03/15/1960 (63 Years)

Investigation ID: CAS483805319TX01

Created: 12/06/2023

Investigation Status: Open

Last Updated: 12/06/2023

Investigator:

Case Status:

By: [redacted]

For: [redacted]

* Indicates a Required Field

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	Contact Records	Supplemental Info
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Congratulations! You have successfully created a new Contact Record and linked the contact's investigation.

Contact Records

[Collapse Subsections](#)

Contacts Named By Patient

The following contacts were named within Michael Gary Scott's investigation:

Date Named	Contact Record ID	Name	Priority	Disposition	Investigation
12/06/2023	CON10003008TX01	Halpert, Jim Relationship: Co-Worker			CAS483805320TX01 Condition: Tuberculosis (2020 RVCT) Case Status: Suspect
12/06/2023	CON10003009TX01	Halpert, Pam Relationship: Co-Worker			CAS483805321TX01 Condition: Tuberculosis (2020 RVCT) Case Status: Suspect
12/01/2023	CON10003021TX01	Kapoor, Kelly Relationship: Co-Worker			CAS483805416TX01 Condition: Tuberculosis (2020 RVCT) Case Status: Suspect

[Back to top](#)

[Add New Contact Record](#)

The named contact has been successfully linked! The user should now see the named contact's Contact Record ID, Name, and Investigation ID in the **Contacts Named by Patient** subsection of the Index Case's investigation .

Verifying Contact Record Links

Contact's Investigation



Kelly Kapoor | --- | 01/01/1982 (41 Years) P 23

Investigation ID: CAS483805416TX01	Created: 12/19/2023	By: Marissa Ly
Investigation Status: Open	Last Updated: 12/19/2023	By: Marissa Ly
Investigator:	Case Status: Suspect	Notification Status:

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
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Contact Records [Back to top](#)

[Collapse Subsections](#)

Contacts Named By Patient

The following contacts were named within Kelly Kapoor's investigation:

Date Named	Contact Record ID	Name	Priority	Disposition	Investigation
Nothing found to display.					

[Add New Contact Record](#)

Patient Named By Contacts

The following contacts named Kelly Kapoor within their investigation, and have been associated to Kelly Kapoor's investigation:

Date Named	Contact Record ID	Name	Priority	Disposition	Investigation
12/01/2023	CON10003021TX01	Scott, Michael Relationship: Co-Worker			CAS483805319TX01 Condition: Tuberculosis (2020 RVCT) Case Status: Confirmed

[Manage Contact Associations](#)

In the named contact's investigation, the user will now see the index/source case linked in the **Patient Named by Contacts** subsection of the named contact's investigation

Demo Part 3

Linking Contact Records

<https://vimeo.com/901264857/4d85d766db?share=copy>



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Course Number 6, Demonstration Part 3: *Linking Contact Records*

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Texas Department of State Health Services

Update Contact Records

Update Contact Investigation Information



Information that will be updated throughout the contact investigation period include:

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
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Case Info Tab

ATS Classification

Tuberculosis Tab

TST and laboratory testing results

Chest Imaging Results

LTBI Only

LTBI treatment information (as needed)

Comprehensive Treatment Details

Medication start and stop dates

Contact Investigation

Source case's Infectious period end date

Date of last exposure

Evaluation Status

Contact's ATS classification

Reason contact not evaluated for TB

TB Exposure Repeating Block

Users can add multiple source/index cases to the TB Exposure Repeating Block.

Repeat the steps outline in the previous slides to link each source/index case.

Patient	Case Info	TB History	Tuberculosis	TB Disease Only	MDR TB	LTBI Only	Comprehensive TB Treatment Details	Contact Investigation	Contact Records	Supplemental Info
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Go to: [Contact Investigation](#) | [TB Exposure Repeating Block](#) | [Hidden questions - Contact Investigation Tab](#)

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TB Exposure Repeating Block [Back to top](#)

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TB Exposure

	Source Case's Investigation ID	Contact's Relationship to Source Case	Contact Evaluation Priority Level	Date Identified As Contact	Date of Last Exposure to Source Case	Linked Case Infectious Period End Date	Contact Evaluated for TB	Contact's ATS Classification
	CAS4125369TC01	Girlfriend	High	05/01/2022		07/12/2022	Yes	2 - M. TB infection, no TB disease
	CAS483805319TX01	Co-worker	High	12/15/2023	11/23/2023		No	

Source Case's Investigation ID:

Source Case's State Case Number:

Contact's Relationship to Source Case:

Other Contact's Relationship to Source Case:

Priority Level Of Contact Evaluation:

Date identified as a contact:

Exposure Location Name:

Exposure Length:

Exposure Setting:

Date of Last Exposure to Linked Case:

Linked Case Infectious Period End Date:

Contact Evaluated for TB:

Reason Not Evaluated:

Contact's ATS Classification:

Users must enter exposure and evaluation details for each contact investigation where the person was named as a contact. Remember to include the contact's ATS classification at the end of evaluation for each CI or the reason they were not evaluated for TB

Demo Part 4

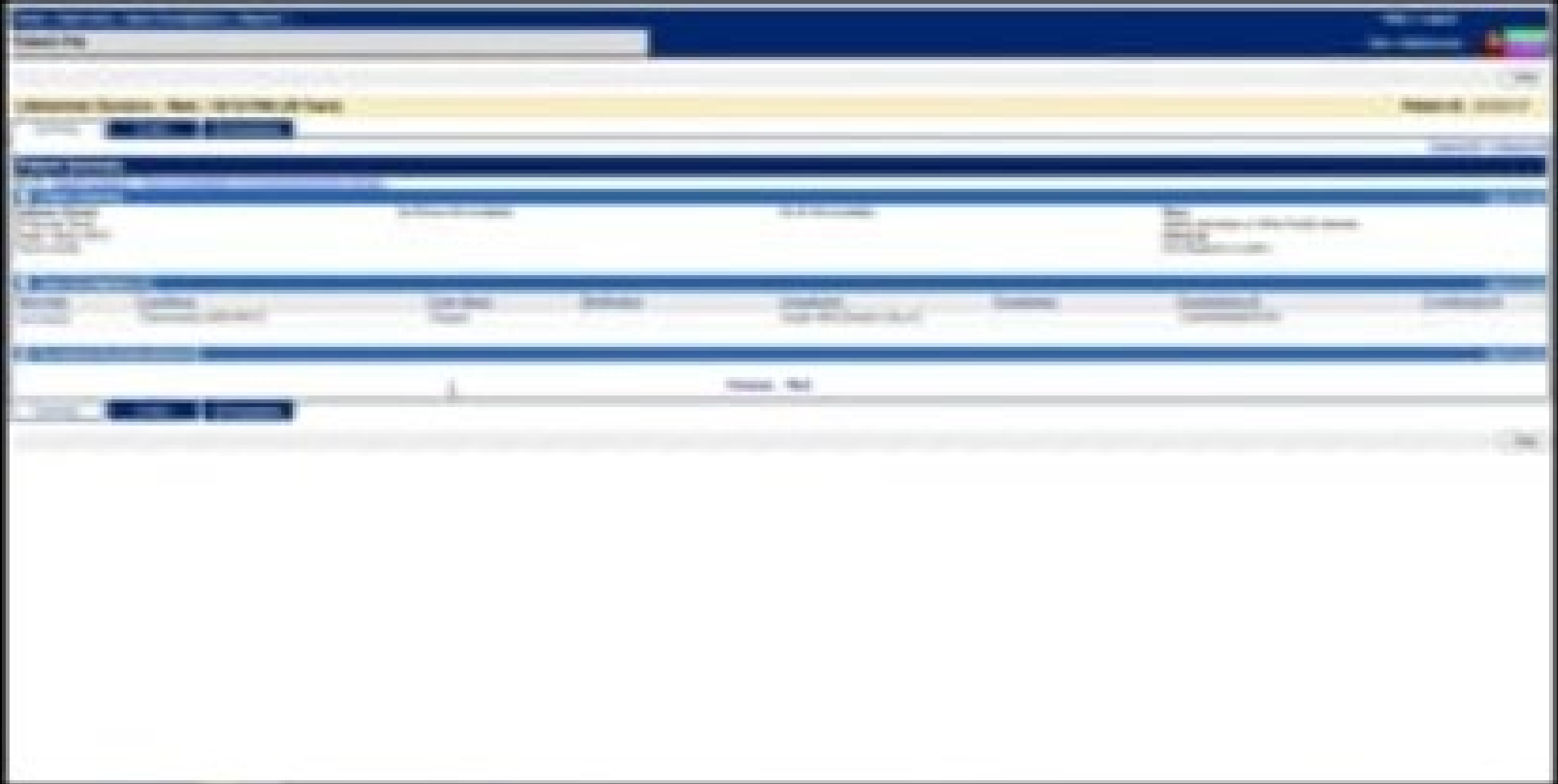
Updating Contact Investigation Information

<https://vimeo.com/901264880?share=copy>



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Questions?

End of NEDSS TB Training, Course 6