

FIELD INVESTIGATION CHECKLIST

I. Before going into the field

- ✓ Prioritize investigations by considering:
 - Diagnosis
 - Infectiousness
 - History of non-adherence
 - Medical risk factors
 - Existing assignments
 - Availability of other required staff
- ✓ Complete a thorough medical record review or, for contacts, look at the index patient's interview form
 - Take prompt action
 - Initial action (within 24 hours)
 - Second action, if initial action does not result in locating or bringing in patient/contact to medical supervision
- ✓ Select appropriate investigation strategy
 - Preserve confidentiality while promoting urgency
 - Make face-to-face notifications whenever possible
- ✓ Canvass locating resources such as:
 - Telephone directory/directory assistance
 - Phone trace/caller ID
 - Previous medical/clinic records and assignments
 - Government/private agencies
 - Maps/cross directory
 - Internet
 - Post office
 - Knowledgeable staff
 - Police department

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II. In the field

- ✓ Speak with third parties
 - Promote confidentiality and professionalism
 - Obtain information about a patient/contact's whereabouts
 - Evade inquiries by unrelated third parties
- ✓ Be persistent in moving a stalled investigation by:
 - Checking neighborhood mailboxes/homes
 - Transposing address numbers and prefixes
 - Talking with next of kin or the index patient (if locating a contact)
 - Asking assistance of people in the neighborhood (e.g., neighbors, postal worker, apartment managers, local business employees, etc.)
 - Consulting patient/contact's employer, coworkers, or school personnel
- ✓ Determine the identity of the person located by using:
 - Address
 - Physical identifiers
 - Date of birth
 - Open-ended questions
- ✓ Discuss reasons for visit with patient/contact and listen to any concerns expressed
- ✓ Motivate the patient/contact to take prompt action by:
 - Providing education
 - Answering any questions
 - Resolving any barriers
- ✓ Maintain safety through cautiousness and use of respiratory protection, if needed
- ✓ Use the telephone when other alternatives are not available
- ✓ Document your actions completely and accurately by including:
 - Date/time
 - Specific action(s) taken
 - What occurred in the field
 - Plans for future action
 - Your name/initials
- ✓ Consult with other staff and/or your supervisor when unsure or overwhelmed



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