

Case Investigation Checklist for Mpox

High Suspect Case Notification (before lab is result available)

*Note: The following instructions are intended to be used *after* DPHHS CDEpi consult has already occurred and they concur that this is a high risk, priority individual. If DPHHS is not already involved, make sure to do so immediately.

- If you are taking initial call from provider to determine if testing is needed, use MT DPHHS CDEpi Patient Assessment form found here: [Mpox Healthcare Provider Information \(mt.gov\)](#) (under Mpox Resources tab). This is a short patient assessment that patients and providers can use to answer epi and clinical questions related to Mpox.
- TESTING INFORMATION: Make sure to review Mpox lab testing info from DPHHS CDEpi, found here under the Mpox Resource tab: [CDEpi Section Resources \(mt.gov\)](#).

**Note: It is a good idea for the healthcare provider to collect additional specimens to test for other infections. Co-infections can occur with Mpox.

Initiate communication to case

- Instruct them to isolate at home until a test result is available. Refer to CDC isolation guidance: [Isolation and Prevention Practices for People with Mpox | Mpox | Poxvirus | CDC](#). It is helpful to send this link to the case so they have all the instructions in a written format. Do not forget to educate client about distancing from animals, if they have pets in the home.
- Give them instructions for cleaning and disinfection in the home: [Disinfecting Home and Other Non-Healthcare Settings | Mpox | Poxvirus | CDC](#). It is also a good idea to send them the CDC instructions.
- Collect preliminary contact investigation information
 - Information needed includes:
 - Symptoms (make sure to collect dates of symptoms prior to lesion development. This is the prodromal period)
 - Dates of each of symptom onset, including prodromal symptoms
 - Travel history (if any)
 - Dates of travel history (if any)
 - Activities that were done while traveling (if traveled)
 - Activities that were done upon returning home (if traveling) and/or activities that were done up until the point of isolation
 - Note: If needed, instead of collecting all of the information over the phone at this time, you can instruct the case to start compiling the information and have it ready for when the test result is available.
 - A helpful instruction is to have them look at a calendar and write down each activity they did each day, who they were with during the activity and the duration of time. Make sure the timeframe is from three weeks (or from known exposure event) prior to onset of symptoms and then to the date they began isolating.
 - Also instruct them to add names and phone numbers of contacts.

- Give heads up to Health Department's Health Officer and Public Information Officer (PIO) of high suspect patient and continue to keep them apprised of information you receive through the investigation process.

- Work with Health Officer and PIO to prepare any press releases, notifications to BOH members, updated FAQs to rest of department staff, etc. Have this information at the ready for when the result is available.
- Once lab result is available, move to “Positive Lab Result Available” section below.

Positive Lab Result Available

- Initiate communication with case, if not already done.
- Instruct them to isolate if not already isolating. Even if they are already isolating, it is a good idea to reiterate isolation instruction. Refer to CDC isolation guidance: [Isolation and Prevention Practices for People with Mpox | Mpox | Poxvirus | CDC](#). It is helpful to send this link to the case so they have all the instructions in a written format. Do not forget to educate client about distancing from animals, if they have pets in the home.
 - Make sure to review the CDC’s guidance pertaining to “Preventing Spread to Others” which provides additional direction on isolation: [Preventing Spread to Others | Mpox | Poxvirus | CDC](#).
 - If there are concerns with the case refusing to isolate and potentially spreading the illness to others, discuss the matter with Health Officer, MT DPHHS and County Attorney and decide if an isolation order is needed. **See Isolation Order Template.**
- Give them instructions for cleaning and disinfection in the home, if not done already: [Disinfecting Home and Other Non-Healthcare Settings | Mpox | Poxvirus | CDC](#). It is also a good idea to send them the CDC instructions.
- Ensure Health Officer and PIO are notified of result. Continue to keep them updated as you progress through the investigation.
- **Perform case investigation**
 - Complete the CDC’s case investigation form: 2022 U.S. Mpox Outbreak Short Case Report Form [Case Reporting Recommendations for Health Departments | Mpox | Poxvirus | CDC](#). Since the “Notes” section on the short form is limited, you can use a Word document to record additional notes regarding case’s activities, symptoms, travel history, etc.
 - Send this form via ePass to appropriate DPHHS CDEpi immediately upon completion. Also include any additional notes you recorded on the Word document.
 - The CDC Short form asks for symptoms, travel, sexual history, etc. but does not encompass a thorough questionnaire to investigate close contacts and the case’s extracurricular activities. See next bullet point regarding calendar method.
 - Use a calendar to help collect day-to-day activities three weeks before the onset of symptoms (or from known exposure event). Also obtain day-to-day activities after onset of symptoms up until the case isolated.
 - To help collect contacts, have the case walk through day-by-day what they did from the time symptoms started until the point they isolated.
 - Make sure to ask about sexual encounters and who they were with, work schedule and what they do for work, extracurricular activities, gatherings, gyms, events, etc. Also include length of time of each activity.
 - Gather additional information such as work atmosphere, what PPE they wear while working (if any), etc. Obtaining this information may help paint a clearer picture of who may be identified as contacts, especially if respiratory symptoms are present.
 - Collect names, phone numbers, and duration of exposure time of all who the case lists they were with during all listed activities.

- Continue to touch base with the case over the course of their isolation period. Work with Health Officer, DPHHS, and patient's healthcare provider to determine when the case is safe to be released from isolation.
- **Assess contacts and their exposures**
 - Put all close contacts into a line list with following information. **See Contact Line List Spreadsheet.**
 - Name (first and last name)
 - Phone number
 - Date of exposure
 - Type of exposure
 - Time sent with case
 - Any additional notes specific to the contact
 - Decide as to which contacts will need to be notified and/or which ones will be recommended for PEP.
 - May work with DPHHS CDEpi to help make this determination.
 - Also use CDC guidance when making these determinations: [Monitoring People Who Have Been Exposed | Mpox | Poxvirus | CDC.](#)
 - If any contacts reside outside of the jurisdiction, ePass the contact information to the appropriate DPHHS CDEpi. DPHHS will transfer the information to the proper jurisdiction for them to reach out to the contact.
 - For any healthcare-related exposures, **see DPHHS's Exposed Healthcare Monitoring Toolkit, which can be found here:** [CDEpi Section Resources \(mt.gov\)](#). Work with local healthcare agency's infection prevention (IP) team to assess healthcare exposures, if any. If exposures occurred, ensure education is provided to exposed staff on symptom monitoring. If the IPs identify any healthcare employees in need of PEP, they should work with health department to discuss the circumstance and help coordinate PEP administration.
- **Notifying Close Contacts**
 - When making calls to contacts, utilize drafted scripts:
 - **If PEP is NOT Recommended:** **See Notifying Close Contact Script – PEP NOT Recommended**
 - **If PEP is Recommended:** **See Notifying Close Contact Script – PEP Recommended**
 - Essentially, the following information needs to be discussed with contact:
 - Notification that they were exposed
 - Ask if they are currently experiencing any symptoms: [Signs and Symptoms | Mpox | Poxvirus | CDC](#)
 - Note: If they have symptoms of Mpox, instruct them to isolate immediately and to contact their healthcare provider for assessment and testing. Public health will want to help coordinate this testing to ensure a sample is collected and sent to MTPHL. Also make sure to notify DPHHS CDEpi so they are aware that a close contact became symptomatic and so they can approve of the specimen to be sent to MTPHL.
 - **DO NOT** give date(s) of exposure. In order to help protect the case's identity, only provide the time frame of how much longer they need to monitor for symptoms.
 - Instruct them to monitor for symptoms

- Instruct them that they will receive a symptom monitoring text message that will include a JotForm survey for them to complete. Also let them know how often this message will be sent to them.
 - Track incoming monitoring responses on the Mpox Contact Monitoring Spreadsheet. **See DPHHS's Contact Monitoring Sheet, which can be found here: [CDEpi Section Resources \(mt.gov\)](#)**
 - Educate on what symptoms to watch for
 - Educate on what to do if symptoms develop
 - **DO NOT** provide information on case's identity, location of exposure, city of exposure, or any information that would make the case identifiable. Stick to the script!
 - If any contacts require PEP, work with health department's immunization team to coordinate the vaccination. If there are any questions regarding whether PEP should be recommended or not, consult with DPHHS CDEpi.
- **Antiviral treatment**
- TPOXX is available from MT DPHHS in the event the case needs treatment. A healthcare provider is the only one who can order this and must work with MT DPHHS to get this ordered. The provider is also responsible for completing the TPOXX forms and performing the medication education with the patient. Health Department can help connect the provider with MT DPHHS, if necessary.
 - Providers can contact MT DPHHS CDEpi to discuss treatment: 406-444-0273.

For additional resources, [MT DPHHS](#) has various information available:

- For Providers and/or Locals:
 - **Patient Assessment Form [Mpox Healthcare Provider Information \(mt.gov\)](#):** A short patient assessment that patients and providers can use to answer epi and clinical questions related to Mpox.
 - **Provider Testing Algorithm for Testing [Mpox Healthcare Provider Information \(mt.gov\)](#):** An algorithm that providers (and epi staff) can use to determine testing and isolation recommendations for patients in high, medium, and low/no risk of exposure.
 - **Mpox Testing and Specimen Collection Guidance [Mpox Healthcare Provider Information \(mt.gov\)](#):** This guidance document is an overview of MTPHL and reference labs orthopoxvirus/mpox virus testing. This document includes testing methodology, cost, turnaround time, collection steps, and shipping information for each of the labs.
 - **Mpox Guidance for Healthcare Settings ([CDEpi Section Resources \(mt.gov\)](#)):** This guidance document is for facilities, providers, and local and tribal health jurisdictions that includes information that includes transmission-based precautions.
 - Transmission-Based Precautions - *The current Transmission-based Precaution categories do not completely align with the current recommendations. The current recommendation is Standard and Contact Precautions with the addition of an N95 and eye protection.*
 - *PPE includes: Gown, gloves, eye protection, and NIOSH-approved particulate respirator equipped with N95 filters or higher*
 - Link to HAN Archive: [HAN Messages \(mt.gov\)](#)
- For Locals:
 - **Isolation and Infection Control At-Home Guidance ([mpox \(mt.gov\)](#)):** This is an infographic providers and local and tribal health can send to community members. This infographic goes over 1) how to isolate while waiting for test results and if the results come back positive with orthopoxvirus/mpox and 2) Infection control in the home that includes: hand hygiene and personal protection as well as household disinfection.
 - **CDC Mpox Case Report Form** (under Mpox Resources tab - [CDEpi Section Resources \(mt.gov\)](#)): This is the Short Case Report Form from CDC that local or tribal health jurisdictions need to fill out and send back to CDEpi (i.e. via ePass) for us to report a positive case officially to CDC. If a high suspect case is still pending tests, it is recommended that locals start filling it out before getting results back.
 - If the local or tribal jurisdiction cannot get ahold of the case by phone, the JotForm Case Investigation form can be sent to the case to fill out.
 - **JotForm Case Investigation ([CDEpi Section Resources \(mt.gov\)](#), found under the Mpox resources tab):** This link is to the JotForm case investigation template that local and tribal jurisdictions can use (if already set up with JotForm). This investigation method can be if locals are not able to reach the case by a phone call.
 - **Determining Close Contacts:** Fillable PDF file used by local and tribal health departments for determining risks of exposure of close contacts and the appropriate recommendations for the high, intermediate, and low risk categories.

- Found on secret site, under Mpox resource tab - <https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi>
 - **Contact Monitoring Sheet for Close Contacts:** Fillable Excel file used by local and tribal health departments for active symptom monitoring of identified close contacts.
 - Found on secret site, under Mpox resource tab - <https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi>
 - **JotForm – Mpox Contact Monitoring Form:** JotForm template local and tribal health departments use for active symptom monitoring of identified close contacts.
 - Found on secret site, under Mpox resource tab - <https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi>
 - **JotForm – Mpox Vaccine Waitlist:** JotForm template local and tribal health departments use for gathering a waitlist for JYNNEOS Mpox vaccine.
 - Vaccine - PEP, PEP++, and PrEP eligibility can be found under the vaccination section here: [mpox \(mt.gov\)](https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi)
 - *CDEpi can recommend after hours and during case investigation. If one off/non-urgent question, forward to IZ.
 - Waitlist Jotform can be found on secret site, under Mpox resource tab - <https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi>
- For Locals – Special situation information
- If HCW or long-term care facility has a case/was exposed, loop in Erika Baldry with MT DPHHS.
 - Resources to Use are found here [CDEpi Section Resources \(mt.gov\)](https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi)
 - **Exposure Risk Assessment for Healthcare Workers:** This document can be used by facilities and local and tribal health jurisdictions to assess the exposure risk for healthcare workers to Mpox.
 - **Mpox Guidance for Healthcare Settings:** This guidance document is for facilities, providers, and local and tribal health jurisdictions that includes information that includes transmission-based precautions.
 - **Exposed Healthcare Monitoring Tool:** This tool is used by facilities, providers, and local and tribal health jurisdictions to monitor healthcare staff that have been exposed to Mpox.
 - For cases in congregate settings (i.e. schools, prisons, homeless shelters)
 - **Congregate Setting Guidance (Non-healthcare)** ([CDEpi Section Resources \(mt.gov\)](https://dphhs.mt.gov/publichealth/cdepi/CDCPBResources/CDEpi)): This guidance document can be used by facilities and local and tribal health jurisdictions for Mpox concerns in congregate settings that are not healthcare settings.
 - If the case is planning to fly or has flown: MTDPHHS has a fillable PDF to report to CDEpi (contact CDEpi for this file).

HEALTH DEPARTMENT LOGO HERE

ORDER FOR ISOLATION

To: _____ Address: _____ City/State/Zip: _____

THIS ORDER IS EFFECTIVE IMMEDIATELY UPON NOTIFICATION OF THE PERSON(S) IDENTIFIED ABOVE, AND WILL REMAIN IN EFFECT THROUGH ____ / ____ / 2022 OR THE ORDER IS VACATED BY THE HEALTH OFFICER OR BY ORDER OF THE COURT. (Issued under the Authority Granted by Montana Code Annotated 50-2-116 and 50-2-118 and related Administrative Rules of Montana)

You have tested positive for Mpox a contagious or infectious disease. This disease may present a health threat to you and others and you are to isolate yourself as instructed by the Health Officer.

You will need to be isolated, or separated, for the period of communicability, in a location and under conditions that will prevent the possible transmission of the disease to others.

The Health Officer orders that you go and remain in isolation at the following location under the conditions described through ____ / ____ / 2022 or the order is vacated by the Health Officer or by order of the court:

ADDRESS

If you object to this order you may request a hearing in court in accordance with Montana Statutes. **You are still required to comply with the order until and unless the court rules otherwise.**

Any questions regarding this order may be directed to Health Officer Name, _____ City-County Health Officer, at phone number.

I hereby certify that this order was served in hand to the above-named individual on ____ at ____ a.m./p.m.

Health Officer Name
_____ City-County Health Department

Date



Notifying Close Contacts Script – PEP NOT Recommended

Hello contact's name, this is staff member's calling with the health department's name. The reason I am calling is because our department received notification that you were exposed to an individual infected with Mpox, which is the illness formally known as monkeypox. We are wanting to let you know of that exposure and just checking in with you to see how you're feeling and to provide additional instructions.

How are you feeling?

- **If no symptoms**, skip to next paragraph
- **If they indicate symptoms consistent with mpox**, instruct them to isolate and contact their healthcare provide. Instruct them to notify their healthcare provider that they were exposed to a Mpox case and they are experiencing symptoms.
 - Note: If you are unsure whether or not the symptoms may be truly be attributed to the exposure, consult with supervisor or DPHHS CDEpi. You can also review CDC's exclusion criteria: [Case Definitions† for Use in the 2022 Mpox Response | Mpox | Poxvirus | CDC](#)

We were notified that your exposure was considered low risk, so we are not asking you to quarantine, but we are asking that you monitor yourself for signs and symptoms. You will want to watch for any signs/symptoms for another ____ days. Some of the symptoms to watch for include:

- Fever
- Chills
- Swollen lymph nodes
- Exhaustion
- Muscle aches and backache
- Headache
- Respiratory symptoms (sore throat, nasal congestion or cough)
- Rash

Sometimes people will have flu-like symptoms before the rash

Some people get the rash first, followed by other symptoms

Others only experience the rash.

If you begin to notice symptoms, we ask that you isolate yourself and contact your healthcare provider. Please also give us a call so that we can help coordinate with your healthcare provider. When calling your healthcare provider, please let them know that you had exposure to a Mpox case and are now showing signs and symptoms.

We will also text you a link to complete a health monitoring questionnaire periodically throughout this monitoring period. The questionnaire is very short and should only take less than one minute to complete.

Do you have any additional questions for me?

POTENTIAL QUESTIONS/RESPONSES:

If they ask about the exposure:

Because of HIPAA rules and regulations, I am unable to provide that information. Additionally, I was not given any specific details on the exposure other than it was low risk.

If they ask about vaccine/post exposure prophylaxis: Because we were informed that your exposure was very low risk, it does not meet the criteria to receive the PEP vaccine.

If having to a leave a voicemail: This message is for contact's name this is staff member calling with the health department's name. Please give me a call back when you get a chance. You can call me back at phone number. Thank you.

DO NOT provide information on case's identity, location of exposure, city of exposure, or any information that would make the case identifiable.

Notifying Close Contacts Script – PEP Recommended

Hello contact's name, this is staff member's calling with the health department's name. The reason I am calling is because our department received notification that you were exposed to an individual infected with Mpox, which is the illness formally known as monkeypox. We are wanting to let you know of that exposure and just checking in with you to see how you're feeling and to provide additional instructions.

How are you feeling?

- **If no symptoms**, skip to next paragraph
- **If they indicate symptoms consistent with Mpox**, instruct them to isolate and contact their healthcare provider. Instruct them to notify their healthcare provider that they were exposed to a Mpox case and they are experiencing symptoms.
 - Note: If you are unsure whether or not the symptoms may be truly attributed to the exposure, consult with supervisor or DPHHS CDEpi. You can also review CDC's exclusion criteria: [Case Definitions† for Use in the 2022 Mpox Response | Mpox | Poxvirus | CDC](#)

We were notified that your exposure was _____ risk, so we are not asking you to quarantine, but we are asking that you monitor yourself for signs and symptoms. You will want to watch for any signs/symptoms for roughly another _____ days. Some of the symptoms to watch for include:

- Fever
- Chills
- Swollen lymph nodes
- Exhaustion
- Muscle aches and backache
- Headache
- Respiratory symptoms (sore throat, nasal congestion or cough)
- Rash

Sometimes people will have flu-like symptoms before the rash

Some people get the rash first, followed by other symptoms

Others only experience the rash.

If you begin to notice symptoms, we ask that you isolate yourself and contact your healthcare provider. Please also give us a call as well, so that we can help coordinate with your healthcare provider. When calling your healthcare provider, please let them know that you had exposure to a Mpox case and are now showing signs and symptoms.

We will also text you a link to complete a health monitoring questionnaire periodically throughout this monitoring period. The questionnaire is very short and should only take less than one minute to complete.

Additionally, because you are not exhibiting symptoms and because of your exposure, we also recommend that you receive the post-exposure prophylaxis. This entails receiving a vaccine called Jynneos as soon as possible and then follow-up with another dose of the same vaccine in 28 days after the first dose. Receiving the vaccine will help protect you and may help prevent you from getting sick with Mpox or it will help lessen severity of symptoms. Is this something you would be willing to do?

- *If the contact has in-depth questions about the vaccine, say to the contact:* Because you have questions regarding the vaccine, I will get in touch with one of the immunization nurses and have them call you back. Can they call you on this number?
- *If they want to get the vaccine, say to the contact:* OK, I will get this coordinated with our immunization department. They will give you a call to get you scheduled. Can they call you on this number?
- *If they do not want the vaccine:* OK, if you change your mind, please call me back and we will gladly get you scheduled. In the meantime, please continue to monitor for symptoms and isolation as well as notify your healthcare provider immediately if symptoms develop.

Do you have any additional questions for me?

POTENTIAL QUESTIONS/RESPONSES:

If they ask about the exposure:

Because of HIPAA rules and regulations, I am unable to provide that information. Additionally, I was not given any specific details on the exposure.

If having to a leave a voicemail: This message is for contact's name this is staff member calling with the health department's name. Please give me a call back when you get a chance. You can call me back at phone number. Thank you.

DO NOT provide information on case's identity, location of exposure, city of exposure, or any information that would make the case identifiable.