**Appendix B: Asking about and documenting exposure source**

**Definition:**

Exposure source: the people, locations, or events in the 14 days prior to the case testing positive or developing symptoms where the case was exposed to COVID, either by a known positive case or in a setting where exposure would have been likely.

**Purpose:**

Investigating the likely exposure source of confirmed cases is critical to begin retrospective contact tracing and discover potential outbreaks for further response.

**Investigation:**

An investigation best practice is to tell the case you are interested in the 14 days prior to them testing positive or developing symptoms and ask them if they have any record of their activities in that period such as a calendar, text/email records, receipts, or anything that may be helpful in them walking through their activities day by day.

Cases will often report exactly when and by whom they think they were exposed. Even then, it is best practice to conduct a thorough exposure investigation to look for other possible and likely exposure sources.

Having specific questions that are aimed towards investigating a certain sector of exposure can be helpful to ensure the interview is complete. Examples of these questions are given below with each suggested sector of investigation. These sectors should serve as a general guide but should remain flexible to the local trends of cases and outbreaks.

**Documentation:**

When documenting likely exposure sources, there are several key pieces of information that are ideally independently collected to make further outbreak investigation simpler, such as:

* The date of the likely exposure source
* The type, or sector, of exposure source
* Names (or case IDs where possible) of other known positive cases that may have been the source of the exposure
* Qualitative details of the exposure such as information about masking, distancing, duration, behaviors, etc.

A key part of course investigation documentation is to be a specific as possible – the more detail available in each case means that patterns and trends are more likely to be detected and outbreaks more likely to be actionable.

Depending on the sector (suggestions outlined below) more or less detail may be required. For instance, household transmission is common, however, it is an important step to then investigate where the household was first exposed.

When cases are unsure of their exposure source and report many possible options, it is important to evaluate them with epidemiological principles in mind – not all possible exposures are equally likely. It is best practice to record the most detail for the most likely exposure sources and record them in order from most to least likely.

**Proposed sectors of transmission:**

* Athletics
	+ Does the case play any sports or regularly attend a gym?
	+ Is the case on any sports team that they see regularly?
	+ Does the case carpool with anyone to these events?
* Daycare/Child Care Setting
	+ Does the case have children that attend daycare? Does the case attend daycare?
	+ Is the case employed in a child care facility?
* Healthcare/Congregate Care Setting
	+ Is the case employed at a healthcare facility or congregate setting? Or a resident?
	+ Has the case visited anyone in a healthcare or congregate setting recently?
* Higher Education Setting
	+ Does the case attend college or university in person?
	+ Has the case gone to any lectures, sporting events, organized activities at a college or university recently?
* Household/Family Setting
	+ Does the case know any family that are sick?
	+ Has anyone in their household tested positive recently?
	+ Who was the first person in the household to have symptoms, and where may they have been exposed?
* K-12 Education Setting
	+ Does the case have children that attend school in person? Does the case attend school?
	+ Is the case employed in a school or education setting?
	+ Does the case (or their guardian) participate in any after school activities?
	+ How does the case get to school?
* Private Event
	+ Has the case been to any weddings, parties, other events lately? How did the case get there?
	+ When is the case’s birthday?
	+ Have there been any holidays or large events lately?
* Retail Store
	+ Where does the case usually go to get groceries?
	+ Has the case done any in person shopping recently?
* Restaurant/Bar/Club
	+ Has the case eaten outside their house lately?
	+ Does the case go to any bars or clubs?
* Travel/Importation
	+ Has the case been on any trips recently?
	+ Have they recently come back from out of the state or out of the country?
	+ How does the case get around usually? Have they been on any flights?
* Workplace
	+ What does the case do for work? Do they work in person?
	+ Have they heard of any sick coworkers lately?
	+ What kinds of prevention does the workplace have?
	+ How does the case get to work? Do they carpool with anyone? Take public tranist?
* Other
	+ Are there any other activities or people the case may have interacted with that are not covered on this list?