

Summary

This document describes how to record information in Merlin for confirmed COVID-19 cases and their contacts. For an introductory training on Merlin basics, including adding a new profile and case, visit the [Training Tuesday SharePoint site](#) and select Merlin Basics Training under the Merlin Resources dropdown. A copy of the Merlin Basics Training slides is available [here](#).

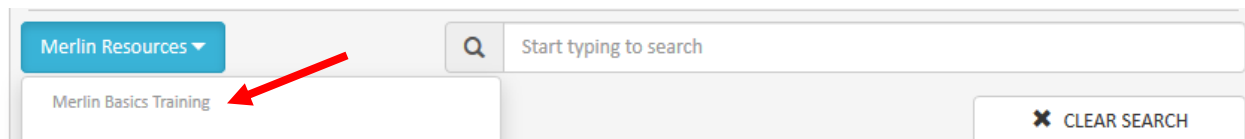


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Basic Data Standard Sections

- Upon creation of a COVID-19 case, Merlin will direct you to the Basic Data screen. Basic Data contains several sections, including both some that are standard across all diseases and some that are specific to COVID-19 cases. This section includes guidance for the sections that are standard across all diseases.
- The “Current Profile Information” section displays information from the person’s profile. To edit any of the fields, navigate to the “Profile Details” tab on the navigation menu on the left.

Profile

- Profile Details
- Summary
- History
- Vaccine History

Case

- Basic Data
- Extended Data
- Overview

Current Profile Information

Note: The fields labeled in blue in

Name: **CORONA, JOE**
 SSN: *****-**-3301**
 Address: **1897 SYNMAR DRIVE**
WEST PALM BEACH, FL, 33409
 County at Time of Diagnosis: **PALM BEACH**

Dx Statu

- The “Case Information at Time of Diagnosis” section sets the Jurisdiction and County fields based on the initial profile information. Once a case is created, updating the profile information on the “Profile Details” screen will **not** change the information in the “Case Information at Time of Diagnosis” section. Information in this section should be reflective of the person’s **residence at the time they were diagnosed with COVID-19**.
 - To change the fields in this section, edit the Zip field. Merlin will automatically update the other fields based on the Zip.

Case Information at Time of Diagnosis

Jurisdiction: Florida Case

Zip: 33612 - []

City: TAMPA State: FL

County: HILLSBOROUGH

County Currently Assigned: PALM BEACH

- **The County field represents the person’s county of residence at the time they were diagnosed with COVID-19** and is used to assign case counts for reports.
- The County Currently Assigned field allows users in another county to update and edit the case in Merlin. This field might be used, for example, if a person works in a long-term care facility in Broward County but lives in Palm Beach County. The County Currently Assigned field could then be changed to Broward County so that they could add information to the case. Of note, the case would still be counted as a Palm Beach County case.
- If the person was not a Florida resident at the time they were diagnosed with COVID-19, the “Case Information at Time of Diagnosis” section should be updated to reflect their state or country of residence. This information will be used to send the case to the appropriate jurisdiction for follow up. Guidance for determining residency for disease reporting is available [here](#).

- Entering a non-Florida Zip will automatically update the other fields to reflect the non-Florida jurisdiction.

Case Information at Time of Diagnosis

Do not delete out-of-jurisdiction cases. Please report this case as usual so that Central Office staff can notify the appropriate jurisdiction of the case.

Jurisdiction: US, Non-Florida Case

Zip: 30333 - []

City: ATLANTA State: GA

County: PALM BEACH

County Currently Assigned: PALM BEACH

- If the person lived outside of the United States, select “Out of the US” as the Jurisdiction and enter the city and country.

Case Information at Time of Diagnosis

Do not delete out-of-jurisdiction cases. Please report this case as usual so that Central Office staff can notify the appropriate jurisdiction of the case.

Jurisdiction: Out of the US

City: LONDON

Country: UNITED KINGDOM

County: HILLSBOROUGH

County Currently Assigned: HILLSBOROUGH

- In the “Case Information” section, ensure that the Survey field is set to Case. Enter the relevant dates in the appropriate fields.

Case Information

FL Disease Code: Coronavirus, Novel 2019 (nCoV-2019) - 00342

DX Status: [] Not a Case

Primary Reviewer(s): KATIE KENDRICK

Survey: Case

Date Onset: 05/04/2020

Lab Report Date: []

Date Event: 05/04/2020

Case #: 1437993

Status: Incomplete

Ext. Status: No CRF Needed

Under Investigation:

Reminder Date: []

Date Diagnosis: []

FDOH Notified Date: 05/09/2020

Event Type: DATE OF ONSET

- The “Exposure Location” section documents where a person was potentially exposed to SARS-CoV-2. In the Location(s) where exposed field, use the dropdown to select the states and/or countries a person visited **the 14 days before onset of COVID-19 symptoms**. If the person did not leave Florida, select “FL” from the dropdown. The Imported and Origin fields will automatically update based on the selected locations.

Exposure Location

Location(s) Where Exposed: FL x

Imported: Acquired in Florida

Origin: FL

- In the “Additional Case Information” section, use the dropdown in the Outbreak field to select whether a case is sporadic or outbreak-associated. A case should be marked as outbreak-associated if the case is epidemiologically linked to another COVID-19 case. If the case is part of a known outbreak, the case can be linked to the outbreak in Outbreak Module by entering the outbreak number in the Outbreak ID field.

Additional Case Information

Investigator:

CHD Reference #:

Outbreak:

Outbreak ID:

Case Classification:

- Complete the remaining fields in this section related to notification of the case.
- In the “Clinical Information” section, document whether the case was investigated and if so, the date the investigation began. Investigating a case includes gathering additional information beyond what was submitted in the initial case or lab report. All COVID-19 cases should be investigated. Document whether the person or their proxy was interviewed and if so, the date of first interview.

Clinical Information

Investigated: Date Investigated:

Interviewed: Date Interviewed:

Symptomatic at Interview:

Pregnant:

- Also in the “Clinical Information” section, document whether the person died, and if so, include the date of death. Updating the date of death on the basic data screen will also populate the date of death on the profile details screen.

Died: **Did the patient die from this illness:** **Date of Death:**

- **Deaths are counted in reports when all of the following criteria are met:**
 - **Died field on the basic data screen is marked as “yes.”**
 - **Date of death field on the basic data screen is complete.**
 - **State-level reviewer has not verified that the death was not related to COVID-19 on the extended data screen.** Deaths will be counted in reports unless a state-level reviewer determines the death was not related to COVID-19 and documents that in the Admin Only section of the extended data screen; therefore, death counts may change based on new information.

Admin Only

7. Repatriated case or case was outside FL when exposed and while infectious:

8. Verified death was not related to COVID:

- State-level epidemiologists regularly review deaths to evaluate whether they are or are not associated with COVID-19 based on the criteria outlined in Appendix A.

- If you are aware of a death that is not related to COVID-19 but is not marked as such, please contact your regional epidemiologist.
- In the “Sensitive Employment/Attendance Information” section, use the day care field to document whether the person attends or works at a daycare. Use the occupation field to document if the person is a health care worker, farm worker, or food handler. Also document information on the facility and the last date of attendance.

Sensitive Employment/Attendance Information			
Day Care:	<input type="text" value="No"/>	Occupation:	<input type="text" value="Health Care Worker"/>
Company:	<input type="text" value="Hospital A"/>		
Address:	<input type="text" value="3602 Spectrum Blvd"/>		
	<input type="text"/>		
Zip:	<input type="text" value="33612"/>		
City:	<input type="text" value="Tampa"/>	State:	<input type="text" value="FL"/>
Phone:	<input type="text"/>	Fax:	<input type="text"/>
Date Last Attended:	<input type="text" value="05/01/2020"/>		

Basic Data COVID-19-Specific Sections

- The “Investigation Type” section is used to document the status of the case at the beginning of the investigation. If the person is reported as a COVID-19 case, select “Investigated as a confirmed or probable case.” If the person is being monitored after a potential exposure to a COVID-19 case, select “Monitoring a person possibly exposed to 2019-nCoV.” **The initial investigation type should not change over the course of any investigation.** For example, if a person who is being monitoring develops symptoms and tests positive to become a confirmed case, the initial investigation type should remain as “Monitoring a person possibly exposed to 2019-nCoV.”

Investigation Type

The survey below should be completed for both COVID-19 cases and their contacts.

Initial investigation type: Investigated as confirmed or probable case ▼

- When a confirmed case reports they had contact with other people while infectious, it should be documented in the “People This Case Exposed” section on the Basic Data screen.
 - Select “Yes” from the dropdown.

People This Case Exposed

For confirmed cases only, person had close contact with other people while infectious: Yes ▼

- Each Florida resident the case identifies as a contact should be entered into the table. This will create a Merlin profile and COVID-19 case for the person. If a person has out of state contacts, do not enter them into the table. Send the out of state contact’s information to HSD00EpiMonitoring@flhealth.gov so the appropriate jurisdiction can follow up.
 - Save any data already entered, then select “Add Contact” at the bottom of the table.

People This Case Exposed

For confirmed cases only, person had close contact with other people while infectious: Yes ▼

People this case exposed:

Case ID	Dx	Last name	First name	Date of birth	Initial investigation type	Exposure date	Investigator
1438003		Jones	John		Investigated as confirmed or probable case	05/01/2020	hassan, agha(AGHA)
1438005		Smith	Fred			05/14/2020	
1438006		dude	the	01/01/1960		05/14/2020	
1438007		mary	covid	01/01/2000	Monitoring a person possible exposed to 2019-nCoV	05/14/2020	
1438009		DOG	MAD			05/15/2020	
1438010		contact	new		Monitoring a person possible exposed to	05/15/2020	DEMENT, JAMIE(DEME)

Add Contact
Save any data entered before selecting Add Contact.

- The “Create Contact” screen will appear. Enter as much information as you have about the person. The fields in blue are required (Last name, First name, and Exposure date).
 - If you do not have the contact’s name, do not put in placeholders (e.g. “case’s friend 1”). Wait to enter the contact until you are able to obtain the information.

- Merlin will automatically do a search of existing profiles to find matches. If a profile already exists for the person, select the radio button next to the profile. If not, select the radio button next to “Create new case and profile.” Continue completing the form.

Possible matches to the profile you are adding have been found.

Please select an existing case/profile to use, or confirm that a new contact should be added.

Case #	Profile#	Last name	First name	Date of birth	
<input type="radio"/>	1438008	8643036	PYTHON	MONTY	01/01/1960
<input type="radio"/>	Create new case and profile				

Last name

First name

- When finished, either select “Save and exit” or “Add Another” to enter another person.
- If needed, contacts can be edited directly from the “Contact List” table by selecting the pencil icon next to an entry. To delete a contact, select the “X” next to the entry.

Contact List				
	Case ID	Dx	Last name	First name
	1438003		Jones	John
	1438005		Smith	Fred
	1438006		dude	the
	1438007		mary	covid
	1438009		DOG	MAD
	1438010		contact	new

- Navigate back to the Basic Data screen using the link in the left-hand menu. The person(s) you entered should now appear in the “people this case exposed” table. Entries can also be edited from this table by clicking on the person’s last name to go to that person’s Profile Detail.

People This Case Exposed			
For confirmed cases only, person had c while infectious:			
People this case exposed:			
Case #	Last name	First name	
1434047	COLA	COLA	C
1438003	Jones	Jones	J
1438005	Smith	Smith	F
1438006	dude	dude	t
1438007	mary	mary	c
1438008	PYTHON	PYTHON	M

- If the case reports they had close contact with another confirmed COVID-19 case who may have infected them, it should be documented in the “Potential Source Cases” section on the basic data screen.
 - Select “Yes” from the dropdown.

Potential Source Cases	
Person had close contact with a confirmed COVID-19 case:	Yes ▼

- Each person the case reports as a potential source case should be linked to the case. To link to the potential source case, navigate to their Merlin COVID-19 case and enter the initial case as a contact in the “People This Case Exposed” section as described above. When you return to the initial case, the source case should now appear in the “People who may have infected this case” table.

Potential Source Cases						
Person had close contact with a confirmed COVID-19 case:						Yes ▼
People who may have infected this case:						
Case #	Last name	First name	Date of birth	Exposure date	Race	E
1438011	GRUMBY	JONAS	03/08/1922		White	F
1438428	BARKER	MA	01/01/1990			

- Attempts to contact the person should be documented in the “Follow-Up” section.
 - Each person’s follow up attempts should be documented on their own cases. Double check the name in the “Current Profile Information” section to make sure you are on the correct case.

- For each follow-up attempt, record the date, time, outcome, whether the person was symptomatic, and method of contact. To add a new row to the table, select the green circle at the top left corner. To delete a row, select the red circle on the left of the row.

Follow-Up

Contact the person and document whether they are symptomatic. If the person is symptomatic, complete symptoms.

Follow-up attempts:

	Date	Time	Outcome	Symptomatic	Method
	05/01/2020	9:00 AM	Contacted	No	Phone
	05/04/2020	10:45 AM	Left voicemail/message	Unknown	Phone
	05/07/2020	12:15 PM	Contacted	No	In person

- In the “Additional Clinical Information” section, document any diagnoses the person received. Multisystem inflammatory syndrome only needs to be completed for persons <21 years old; the field will be deactivated for persons 21 years and older.

Clinical Information

Pneumonia: Yes Diagnosis date: 05/20/2020

ARDS: No Diagnosis date:

Multisystem inflammatory syndrome: Diagnosis date:

Person had a more likely diagnosis: No Specify:

- Symptoms can be documented either in the “Clinical Information” section on the Basic Case screen or on the Symptoms screen, accessed via the “Symptoms” tab on the navigation menu on the left. The fields are linked so that any symptom information entered on one screen will automatically appear on the other.
 - If a person is asymptomatic, no other symptoms should be marked as “Yes” and there should not be an onset date recorded for the asymptomatic field.

Complete case symptoms:

	Symptom	Other	Onset Date	Time
Yes	Fever		05/01/2020	
No	Dry cough			
Yes	Productive cough		05/03/2020	
Yes	Chills		05/01/2020	
Yes	Sore throat		05/02/2020	
Yes	Headache		05/01/2020	
Unknown	Muscle aches			
Yes	Dyspnea/shortness of breath		05/04/2020	
No	Vomiting			
No	Abdominal pain			
No	Diarrhea			
No	Other			
No	Asymptomatic			

Group Settings Section

- The “Group Settings” section captures information on the group settings where a person lives, attends, or works such as a long-term care facility, jail, or school. If a person lives, attends, or works in a group setting, select “Yes” from the dropdown for the first question.

Person lives, attends, or works in a group setting: Yes ▾

- The table captures additional information on the setting. A separate row should be completed for each setting where the person lives or works. To add additional rows, select the green circle in the top left. To delete a row, select the red circle to the left of the row. If a person is associated with multiple facilities, **the facility in the first row of the table should be the facility of likely exposure.**

	Role at facility	Setting type	Setting sub type
+	Resident/attendee ▾	Long-term care facility (ALF, nursing home, ICF/IID) ▾	Long-term care facility (ALF, nursing home, ICF/IID) ▾

- Document the person’s role at the group setting, either resident/attendee or staff/employee, in the first column, “Role at facility.”

+	Role at facility
-	Resident/attendee ▾

- Document the type of group setting in the second column, “Setting type.”
 - The setting type “Long-Term Care Facility” (LTCF) is based on criteria used by the Agency for Health Care Administration (AHCA). Facilities that meet the LTCF setting type criteria are registered with AHCA and include:
 - Assisted living facilities (ALFs)
 - Nursing homes (NHs)
 - Intermediate care facilities for the developmentally disabled (ICFs/IIDs)
 - If the facility is not an ALF, NH, or ICF/IID, do not select the “Long-Term Care Facility” setting type.** Additional information about a facility can be found using AHCA’s Facility/Provider Locator: <https://www.floridahealthfinder.gov/facilitylocator/FacilitySearch.aspx>.
 - Do not select a setting type of “Other” if a facility meets the LTCF criteria.
 - The setting type **“Correctional Facility/Juvenile Detention Center”** includes prisons, jails, ICE detention centers, juvenile detention centers, juvenile residential detention facilities, and forensic health care facilities (secure mental/behavioral health facilities). The following tool can be used as an inmate search for department of corrections facilities: <http://www.dc.state.fl.us/OffenderSearch/Search.aspx?TypeSearch=AI>.

- Selecting a setting type from the drop down will automatically set the sub type in the third column, “Setting sub type.” Note the setting sub type may change when additional information is added.

Setting type	Setting sub type
Long-Term Care Facility (ALF, Nursing Home, ICF/IID) ▼	Long-Term Care Facility (ALF, Nursing Home, ICF/IID) ▼

- Use the scroll bar at the bottom of the section to navigate to the fourth column, “Long term facility name.”
 - This field will only activate if “Long-Term Care Facility” is selected as the setting type.
 - This field contains a dropdown list of all ACHA registered ALFs, NHs, and ICFs/IIDs as of April 17, 2020. Note that the AHCA registered facility name may differ from the colloquial name of a facility. To find the AHCA registered facility name, use the AHCA Facility/Provider Locator.
 - Select the facility name from the dropdown list by either scrolling through the list or typing the first few letters of the name to jump down the list.
 - If after **ensuring that the facility is classified as an ALF, NH, or ICF/IID by AHCA**, and it is **not present in the dropdown list**, select “OTHER.”

Long term facility name
ATRIA WILLOW WOOD ▼

- Use the scroll bar at the bottom of the section to navigate to the fifth column, “Correction facility name.”
 - This field will only activate if “Correctional Facility/Juvenile Detention Center” is selected as the setting type.
 - This field contains a dropdown list of all Department of Corrections facilities. Select the correctional facility name from the dropdown list by either scrolling through the list or typing the first few letters of the name to jump down the list.
 - If after ensuring that the facility is **not present in the dropdown list**, select “OTHER.” Note that “OTHER” should be selected for all non-Department of Corrections facilities such as jails.

Correction facility name
Bay Correctional Facility ▼

- Use the scroll bar at the bottom of the section to navigate to the sixth column, “Setting name.”

- This field will automatically set to the LTCF or correctional facility setting name if a LTCF name or correctional facility name is selected from the dropdown list in the fourth or fifth columns.

Setting name
ATRIA WILLOW WOOD

- This field will be activated if anything other than “Long-Term Care Facility” or “Correctional Facility/Juvenile Detention Center” is selected as the setting type in the second column or if “OTHER” is selected as the LTCF name in the fourth column or the correctional facility name in the fifth column.
- If the field is activated, enter the name of the facility. If you are entering the same facility name for multiple cases, be sure to enter the name in the exact same way.

Setting name
Independent living facility A

- Use the scroll bar at the bottom of the section to navigate to the seventh through eleventh columns for address.
 - These fields will automatically set to the LTCF or correctional facility address if a LTCF name or correctional facility name is selected from the dropdown list in the fourth or fifth columns.

Setting address	Setting address city	Setting address state	Setting address zip	Setting address county
2855 WEST COMMERCIAL	FORT LAUDERDALE	FL	33309	BROWARD

- These fields will be activated if anything other than “Long-Term Care Facility” or “Correctional Facility/Juvenile Detention Center” is selected as the setting type in the second column or if “OTHER” is selected as the LTCF name in the fourth column or the correctional facility name in the fifth column.
- If the fields are activated, enter the address of the facility.

Setting address	Setting address city	Setting address state	Setting address zip	Setting address county
3602 Spectrum Blvd	Tampa	FL	33612	HILLSBOROUGH

- Before saving, **double check the facility information to ensure you are selecting the correct facility**. Some facilities have similar names while others have the same name but different setting subtypes or addresses.
- If the person is associated with multiple facilities, repeat this process in the next row of the table.

- Keep these tips in mind when completing this section:
 - A person does not have to officially work for a LTCF to be considered a worker if they have had significant contact with residents at the facility.
 - Persons employed by a LTCF that don't enter the facility that houses residents or interact with staff that care for residents would not be considered a worker at the LTCF. Examples may include administrative staff in separate buildings or support staff working solely in the independent living side of a complex.
 - Only workers who could have been exposed at the facility (14 days prior to onset) or who were at the facility while infectious should be associated with a facility. If an individual visited a facility outside of this timeframe, do not associate them with the facility.
 - If a person did not originate in a LTCF and was only transferred to a LTCF after being hospitalized, do not associate them with a facility in the table.
 - Do not wait to interview a case to fill out the group settings section if you have already verified with the facility or through medical records that the case is linked to a facility.
 - A person should not be associated with a facility if they never went to the facility. For example, if an employee of a facility exposed other household members, those persons should not be linked to the facility in the group settings section or in outbreak module.
 - For some LTCFs, the AHCA licensed facility may be in a complex of multiple facility types (i.e. nursing home, assisted living facility, or independent living). Verify which specific facility the case lives or works in and complete the group settings table accordingly. Independent living facilities should not be listed as LTCFs. Some nursing homes and assisted living facilities have the same name or address, so it may be helpful to verify the correct facility information using the facility's AHCA license number.

Extended Data

- The Extended Data screen is optional but encouraged to be completed for confirmed and probable cases if resources allow. Navigate to the screen by selecting the “Extended Data” tab on the navigation menu on the left.

- Question 1 is linked to the fever symptom and can be updated on either the Symptoms or Basic Data screen. If fever was not subjective, document the person’s highest temperature in degrees Fahrenheit.

- Document the person’s height and weight in question 2. **These fields are particularly important for persons age 20-65 years.** If body mass index (BMI) is included in a person’s medical record, also document that in question 2.
 - Height, weight, and BMI reported in medical records will often be more reliable than reported through individual interviews, so **use of data from medical records, when available, is encouraged.**
 - Pay close attention to the units; height should be documented in **centimeters** and weight in **kilograms**. Merlin will automatically covert height entered in feet/inches to centimeters and weight entered in pounds to kilograms.

- Document all diagnoses the person received from a health care provider in question 3 along with the diagnosis date. The fields for pneumonia, ARDS, and multisystem inflammatory syndrome are linked to the respective fields on the Basic Data screen and can be completed in either place.

3. Diagnoses the person received:		Diagnosis date:
Abnormal chest X-ray:	Yes <input type="button" value="v"/>	05/20/2020
Abnormal chest CT:	Unknown <input type="button" value="v"/>	
Pneumonia:	Yes <input type="button" value="v"/>	05/20/2020
ARDS:	No <input type="button" value="v"/>	
Renal failure:	No <input type="button" value="v"/>	
Multisystem inflammatory syndrome:	<input type="button" value="v"/>	
Other:	No <input type="button" value="v"/>	

- Document all underlying health conditions of the person in question 4.

4. Underlying health conditions:	
Current smoker:	No <input type="button" value="v"/>
Former smoker:	No <input type="button" value="v"/>
Obesity:	No <input type="button" value="v"/>
Diabetes:	Yes <input type="button" value="v"/>
Chronic lung disease:	Yes <input type="button" value="v"/>
Asthma:	Yes <input type="button" value="v"/>
Chronic obstructive pulmonary disease (COPD):	No <input type="button" value="v"/>
Chronic kidney disease:	No <input type="button" value="v"/>
Chronic liver disease:	No <input type="button" value="v"/>
Cardiac disease:	No <input type="button" value="v"/>
Hypertension:	No <input type="button" value="v"/>
Neurological/neurodevelopmental:	No <input type="button" value="v"/>
Immunocompromised:	No <input type="button" value="v"/>
Other:	No <input type="button" value="v"/>

- Question 5 is related to hospitalization. The inpatient hospitalization field is linked to the inpatient hospitalization field on the Basic Data screen and can be completed in either place.

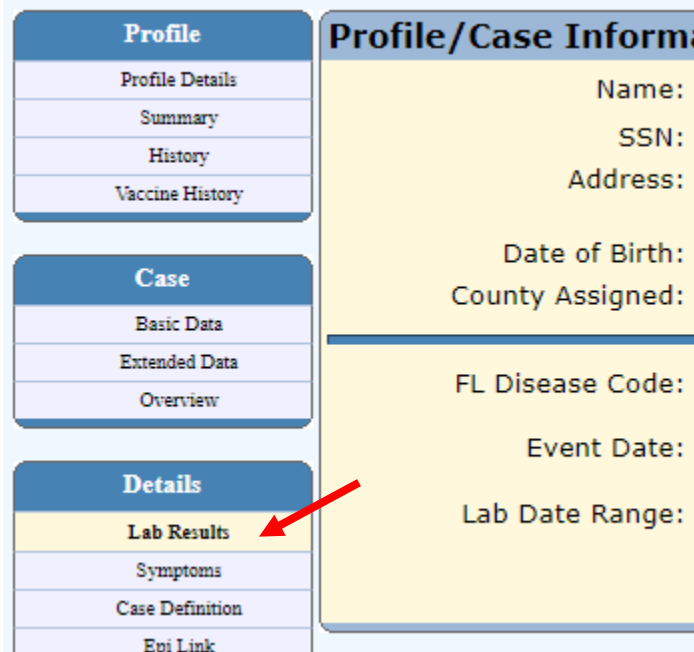
5. Inpatient hospitalization:	<input type="text" value="Yes"/>	
Patient admitted to ICU:	<input type="text" value="No"/>	
Patient received mechanical ventilation (MV)/intubation:	<input type="text" value="No"/>	Total days on MV: <input type="text"/>
Patient was on ECMO:	<input type="text" value="No"/>	

- Document any positive, non-SARS-CoV-2 test results the person had in question 6. All SARS-CoV-2 test results should be documented on the Laboratory Results screen; see the Laboratory Results section of this document for additional guidance.

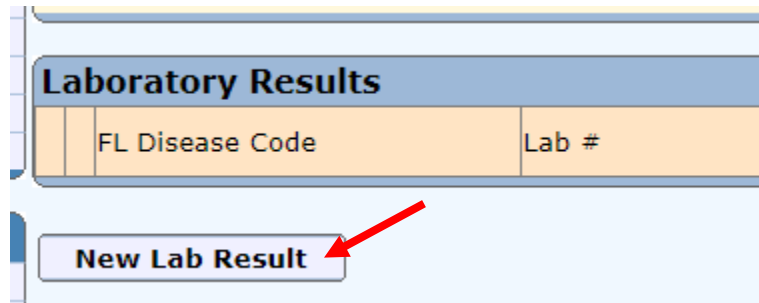
6. Patient had a positive non-SARS-CoV-2 test result:	<input type="text" value="Yes"/>
Specify positive result(s):	
Influenza A rapid test:	<input type="text" value="Yes"/>
Influenza B rapid test:	<input type="text" value="No"/>
Influenza A PCR:	<input type="text" value="Yes"/>
Influenza B PCR:	<input type="text" value="No"/>
Respiratory syncytial virus (RSV):	<input type="text" value="Unknown"/>
Human metapneumovirus (hMPV):	<input type="text" value="No"/>
Adenovirus:	<input type="text" value="No"/>
Parainfluenza 1-4:	<input type="text" value="No"/>
Rhinovirus:	<input type="text" value="No"/>

Laboratory Results

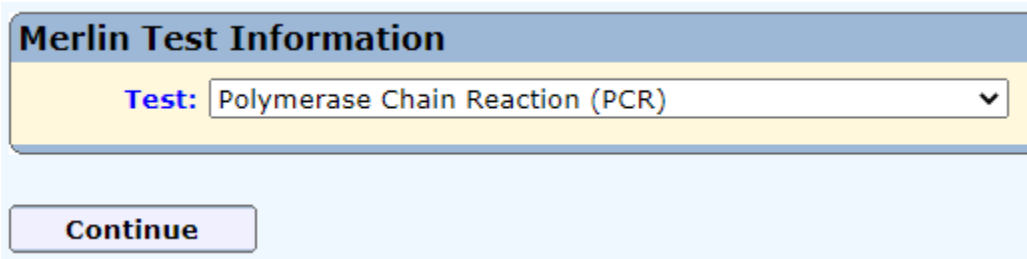
- If a paper SARS-CoV-2 laboratory result needs to be added to a case, navigate to the Laboratory Results screen by selecting the “Lab Results” tab on the navigation menu on the left.



- Select “New Lab Result.”



- Select the appropriate test type from the dropdown, and then select “Continue.”



- Document as much information as you have in the “Merlin Test Information” section. The fields in blue are required.

Merlin Test Information

County Assigned: HILLSBOROUGH ?

Accession #: 12345 ?

Investigator: ?

Test: Polymerase Chain Reaction (PCR) ?

Merlin Specimen Code: UNKNOWN ?

Date Collected: 05/01/2020 Received: ?

Lab Report Date: 05/03/2020 ?

Lab Event Date:

Result: POSITIVE ? Disqualified Lab

- In the “Facility and Provider Information” section, the sending facility is required. To select a sending facility, select “Get Lab.”

Facility and Provider Information

Sending Facility Information

Sending Facility:

Address:

City: State: Zip:

Phone: Fax:

Email:

Get Lab

- In the “Resource Search” section, search for the laboratory that reported the paper laboratory result.
 - If you find the correct laboratory, select “LINK” next to the laboratory to return to the Lab Results screen.
 - If you do not find the correct laboratory, contact the Merlin Helpdesk at Merlin.Helpdesk@flhealth.gov.

Resource Search

Type:

Name:
(or Company Name)

City:

State:

County:

OR

State Labs:

Resource Results - 4 row(s)

	ID	Type	Name
LINK	90520	LABORATORY	ORLANDO REGIONAL HEALTH SERVICES
LINK	59497	LABORATORY	ORLANDO REGIONAL HEALTHCARE SYSTEM
LINK	33129	LABORATORY	ORLANDO REGIONAL HOSP
LINK	57028	LABORATORY	ORLANDO REGIONAL MEDICAL CENTER

- Repeat this process for the ordering provider and ordering facility by selecting “Get Provider” and “Get Facility,” respectively.

Merlin Matched Ordering Provider

Ordering Provider:
Address:
City:
Phone:
Email:

Merlin Matched Ordering Facility



Ordering Facility:
Address:
City:
Phone:
Email:

- When ready, select “Save.” You should get a notification that the record was saved successfully. If you have another laboratory result to enter, select “Yes” to repeat this process; otherwise, select “No” to return to the Lab Results screen.

The record was saved successfully.

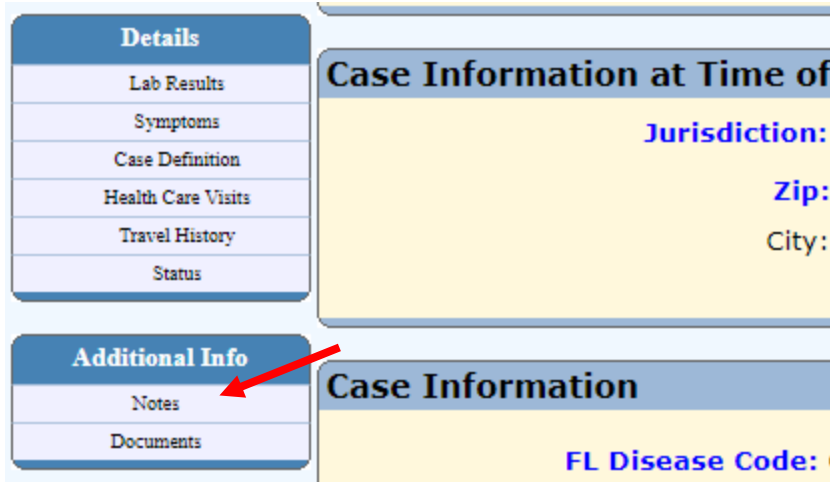
Would you like to enter another lab result for **CORONA, JOE**?

- The laboratory result just entered should now appear in the “Laboratory Results” section.

Laboratory Results					
	FL Disease Code	Lab #	Accession #	Event Date	Reported
 	Coronavirus, Novel 2019 (nCoV-2019) - 00342	<u>8191894</u>	12345	05/01/2020	05/03/2020

Notes and Documents

- Document any additional information not captured elsewhere on the Notes screen.
 - Navigate to the “Notes” tab on the navigation menu on the left.



- Select “New” to create a new note.
- In the “Note Information” section, select the type of note, then write your text in the Notes field. Select “Save” when finished. Your note will then appear in the “Existing Notes” section.

Note Information

Type:

Addtl Type:

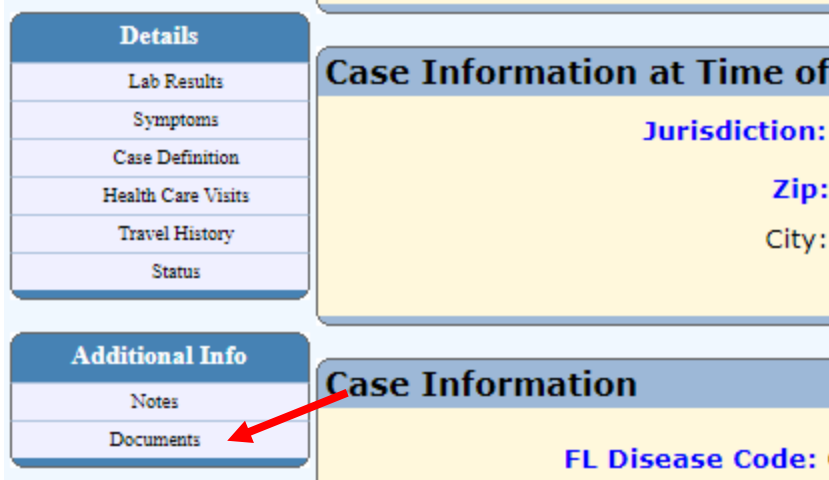
Date:

Notes:

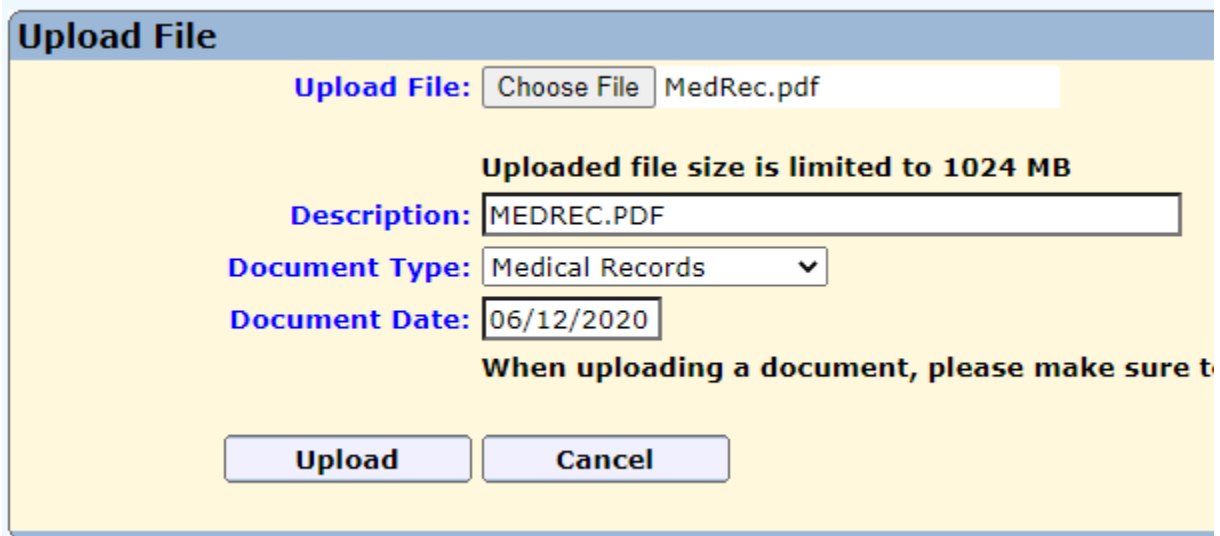
Author: **KATHERINE KENDRICK**

Date/Time Added: **06/12/2020**

- Upload any relevant documents to the case on the Documents screen. Relevant documents may include medical records, case report forms, death certificates, etc.
 - Navigate to the “Documents” tab on the navigation menu on the left.



- Select “Upload” to show the “Upload File” section.
- In the “Upload File” section, choose the file to upload in the Upload File field. Type a description for the document in the Description field, and select the document type. Select “Upload” to upload the document.



- The document will then appear in the “Merlin Documents” section.

Contact Follow-Up Task List

- A new task list is available to keep track of contacts needing follow up. To navigate to the task list, select the “Task” tab at the top, then the “All Task Lists” tab from the navigation menu on the left, then “**Contact Follow-Up**” under Cases.



- The task list can be filtered by county, disease, task type, investigator, and day limit. These fields can also be left blank to see the full task list.
 - Currently, the only option for **Disease** is COVID-19.
 - There are two options for **Task Type**, first follow up and final follow up. First follow up indicates cases that need to be contacted for the first time. Final follow up indicates cases that need to be contacted for the final time after their monitoring period has ended.
 - Investigator** is based on the investigator assigned to a case in the “Additional Case Information” section on the Basic Data screen.
 - Day Limit** indicates how many days in the future you would like to see when cases need follow up. For example, a day limit of 2 would show cases that are due for follow up today or tomorrow. To only see cases are due for follow up today, set the Day Limit to 1.

- Select “Search” to see the resulting task list based on the filters. Selecting any of the column names will sort the list by that column. Selecting the Case ID for a given row will take you directly to the case to edit. The task list includes several key variables:
 - **Task** indicates the type of task, first or final follow-up, and the due date.
 - **Last date potentially exposed** determines the dates of the monitoring period. This field is based on the exposure date field that is required when adding a contact through the “People This Case Exposed” section on the Basic Data screen. Please see the section above in this document for guidance on how to add a contact.
 - **Day** indicates the number of days since the last date potentially exposed.
 - **End of monitoring period** indicates the date monitoring can be stopped for a person, which is 14 days after the last date potentially exposed.
 - **Last date of follow-up** indicates the last documented follow-up attempt for a case. Please see the Basic Data COVID-19-Specific Sections section in this document for guidance on how to document a follow-up attempt.

Search Results				
Go to Page <input type="text"/> <input type="button" value="GO"/>				
Case ID	DX status	Name	Date of birth	Task
1438786	Confirmed	HELLO, THERE		Final follow-up is due 06/11/2020
Last date potentially exposed	Day	End of monitoring period	FDOH notified date	Date of last follow-up
05/28/2020	5	06/11/2020	05/29/2020	05/30/2020

- **Cases will appear on the task list until a documented follow-up attempt has been made.**
 - Follow-up attempts should be documented in the “Follow-Up” section on the Basic Data screen. Please see the Basic Data COVID-19-Specific Sections section in this document for guidance on how to document a follow-up attempt.
 - The follow-up attempt must have an outcome of **contacted, no phone number available, or refused/don’t call back** in the appropriate timeframe for a case to be removed from the task list.
 - For a first follow-up task to be removed, a follow-up attempt must be made on or after the last date potentially exposed.
 - For a final follow-up task to be removed, a follow-up attempt must be made on or after the end of the monitoring period.
- The Contact Follow-Up task list is intended to replace the county-specific monitoring outbreaks previously used to keep track of persons being monitored. Therefore, **it is no longer necessary to attach cases to a county’s monitoring outbreak.**

Release of Cases to the Call Center

- The Department has contracted surge staff to support counties in case investigations and contact tracing. A county must be activated in Merlin to release cases to the Call Center staff. Contact the Merlin Helpdesk at Merlin.Helpdesk@flhealth.gov to activate your county.
- Only **confirmed cases with a lab report date within the last 14 days that have a valid phone number** should be released to the Call Center. If possible, do not send cases known to be associated with correctional facilities, nursing homes, or other congregate/group settings.
- There are two places to transfer a case: **basic data** and the **call center task list**.
 - Basic data
 - Navigate to the case’s basic data screen.
 - In the “Case Information at Time of Diagnosis” section, change the “**County Currently Assigned**” field to “State-Call Center” and save.



- Call center task list
 - To navigate to the call center task list, select the “Task” tab at the top, then the “Call Center” tab under the Follow-Up section from the navigation menu on the left.



- The task list can be filtered by county currently assigned, disease, investigator, date, and type. Fields can also be left blank to see all options.

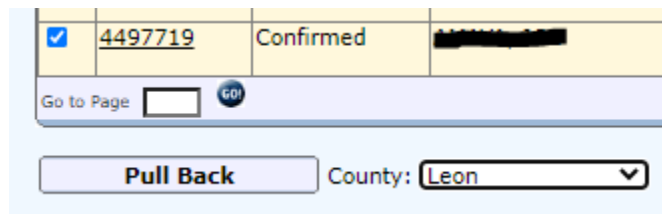
- **County currently assigned** is based on the county assigned to a case in the “Case Information at Time of Diagnosis” section on the basic data screen.
 - Currently, the only option for **disease** is COVID-19.
 - **Investigator** is based on the investigator assigned to a case in the “Additional Case Information” section on the basic data screen.
 - **Date** is the date the Florida Department of Health was notified of the case. This is based on the “FDOH Notified Date” on the basic data screen.
 - The “Candidates to assign” **type** are cases that can be assigned to the Call Center. The “Assigned to Call Center” type are cases that are currently assigned to the Call Center.
- Using the desired filters, search for cases using the type “Candidates to assign.”
 - Select the box next to the case(s) you’d like to release to the Call Center, and then select “Assign to Call Center” at the bottom. To quickly select all cases on the page, check the box in the header.

<input type="checkbox"/>	4499571	Confirmed
<input checked="" type="checkbox"/>	4499567	Confirmed
<input checked="" type="checkbox"/>	4499565	Confirmed

Go to Page

- Once a case is released to the Call Center, the “County Currently Assigned” field will be changed to “State-Call Center,” but the “County” field will not change. The “County” field is used to assign case counts for reports.
- The Call Center will handle all cases released to them as well as those cases’ associated contacts.
- Released cases will be sent to the Call Center at 7:00 AM, 11:00 AM, and 3:00 PM each day. Updates will be returned to Merlin each night around 11:30 PM.

- Cases assigned to the Call Center will be auto-reported in Merlin when the following criteria are met:
 - A case is successfully interviewed.
 - Fourteen days have elapsed since the Call Center was assigned a case and no successful contact was made.
 - A contact’s monitoring follow-up period has elapsed, with or without successful contact.
 - No phone number, a phone number in an incorrect format (e.g. not 10 digits), or a wrong phone number was provided for the case.
- The Call Center will return cases to counties for the following reasons:
 - Further follow up is needed by the county because:
 - The case is associated with a long-term care facility, correctional facility, child daycare, primary or secondary school, or college or university.
 - The case is a health care worker.
 - The case has died.
 - The county elects to pull the case back from the Call Center.
- Counties will receive an email alert when cases are returned because further follow up is needed. This email will be sent before the case is officially returned in Merlin around 11:30 PM that night. Further follow up by the county may include linking the case to an outbreak, contacting the case’s place of employment to confirm contacts, and confirming that the death meets the COVID-19-associated death case definition. Please note that the county will then need to report the case.
- Similar to assigning cases to the Call Center, there are two places to pull cases back from the Call Center to the county: **basic data** and the **call center task list**.
 - Basic data
 - Navigate to the case’s basic data screen.
 - In the “Case Information at Time of Diagnosis” section, change the “**County Currently Assigned**” field to the desired county and save.
 - Call center task list
 - Navigate to the call center task list.
 - Using the desired filters, search for cases using the type “Assigned to Call Center.”
 - Select the box next to the case(s) you’d like to pull back from the Call Center and choose the county you’d like to reassign them to at the bottom. Then select “Pull Back.”



- Helpful tips:
 - On the call center task list, filter by the investigator “Auto, Created Case” and sort the task list by the “FDOH notified date” column to generate a list of the most/least recent auto-created cases.

Appendix A: COVID-19 Associated Death Classification

Deaths are classified based on the following criteria.

Inclusion criteria:

A death after January 19, 2020 in a PCR- or antigen-positive case of COVID-19 where exclusion criteria are not met and:

1. COVID-19/coronavirus is listed as the immediate or underlying causes of death or listed as one of the significant conditions contributing to death

OR

2. Decedent has PCR- or antigen-positive results within 30 days of death (based on lab report date)

Exclusion criteria:

A death should be excluded if an alternative cause of death can fully explain their cause of death (e.g., trauma, suicide, homicide, overdose, motor-vehicle accident, etc.).

Examples:

	Meets inclusion criteria	Meets exclusion criteria
Immediate/underlying causes of death: COVID-19 pneumonia Significant conditions contributing to death: dementia, hypertensive cardiovascular disease, closed head injury with intracranial hemorrhage sustained in a ground level fall	COVID-19 pneumonia was listed as the cause of death.	
Immediate/underlying causes of death: Complications of traumatic brain injury, Alzheimer's dementia Significant conditions contributing to death: COVID-19	COVID-19 is listed as a significant condition contributing to death.	
Immediate/underlying causes of death: hanging Significant conditions contributing to death: none		The ultimate cause of death was suicide, which fully accounts for the death and is unrelated to COVID-19.
Immediate/underlying causes of death: Acute respiratory distress syndrome, pneumonia Significant conditions contributing to death: Diabetes mellitus	If date of death is <30 days from diagnosis.	If date of death is >30 days from diagnosis.