Summary

This document describes how to record information in Merlin on persons under investigation (PUI) and persons being monitored for COVID-19. For guidance on determining if a person meets PUI or monitoring criteria, please see “Interim Enhanced Surveillance Guidance for County Health Departments” and “Implementation of Interim US Guidance for Risk Assessment and Public Health Management of Persons with Potential COVID-2019 Exposure in Travel-associated or Community Settings for Asymptomatic Persons.”

Monitored Persons

- Persons meeting risk criteria for monitoring should be entered into Merlin under the COVID-19 disease code (00342) within 24 hours of County Health Department (CHD) notification.
- Persons can be entered as a COVID-19 case in three ways:
  - The traditional way through the create profile and/or create case options.
  - Through Outbreak Module.
    - County-specific COVID-19 monitoring outbreaks to manage persons being monitored have been created for all counties in Outbreak Module. If you are not sure what your county-specific COVID-19 monitoring outbreak ID is, please email hsd00epimonitoring@flhealth.gov.
    - Monitoring data are being managed through the outbreak roster, which can be accessed by either navigating to the roster tab within an outbreak or by typing “OR” followed by the county-specific COVID-19 monitoring outbreak ID in the search bar.
    - A profile and case under the COVID-19 disease code (00342) can be created for a person directly in the roster by entering the person’s name and date of birth.
  - Through an automated process. For certain asymptomatic travelers arriving in Florida from impacted countries, COVID-19 cases are being auto-created in Merlin. These cases are generated using the information DOH receives via Epi-X notifications. CHDs will receive an automated email each time one of these cases is created.
    - The automated email will contain the Merlin case ID, the individual’s first and last name, address, phone number, and email (as available).
    - The information included in Merlin for these individuals reflects all the information that DOH received from CDC via Epi-X. DOH will not be able to provide any additional or clarifying information on these individuals.
- Regardless of how the case was created, the monitoring survey questions will appear on both the outbreak roster and basic case screen. Data entered will appear in both places.
- Select “Monitoring” as the survey type.
  - For cases created through the automated process, “Monitoring” will already be selected.
COVID-19 Merlin Data Management Guidance (continued)

- Enter the person’s phone numbers and date that DOH was notified of the person.
- Select “Monitoring a person possibly exposed to COVID-19” as the initial investigation type.
  - For cases created through the automated process, “Monitoring a person possibly exposed to COVID-19” will already be selected.

<table>
<thead>
<tr>
<th>Date FDOH notified</th>
<th>Initial investigation type</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/04/2020</td>
<td>Monitoring a person possible</td>
</tr>
</tbody>
</table>

- Select the appropriate type of contact the person had.
  - “Travel exposure” is for individuals whose risk is primarily dependent on exposure while he or she was in an impacted country. These are individuals who are not known to have had contact with confirmed cases, which is why “airline/vessel contact” or “close contact of a case” should not be used in these circumstances.
    - For cases created through the automated process, “Travel exposure” will already be selected.
  - “Airline/vessel contact” is for individuals who had contact with a COVID-19 case on an airline, cruise ship, or other vessel.
  - “Close contact of a case” is for individuals who had close contact with a COVID-19 case that did not occur on an airline, cruise ship, or other vessel. This would include household contacts and health care workers.

- For persons identified via an EpiX notification, enter the DGMQ ID.
  - For cases created through the automated process, the DGMQ ID will already be entered.

- Select the appropriate exposure risk category for the person. For guidance on exposure risk categories, see “Implementation of Interim US Guidance for Risk Assessment and Public Health Management of Persons with Potential COVID-2019 Exposure in Travel-associated or Community Settings for Asymptomatic Persons.”
  - For cases created through the automated process, “Medium risk category 2” will already be selected, but can be updated if needed. The exposure risk category should not change for these auto-created cases until the CHD has made contact with the individual and gathered enough information to determine that he or she should be assigned a different risk category.
  - If, after making contact with the individual, you are unsure of what exposure risk category they should be assigned, email hsd00epimonitoring@flhealth.gov. Do not select “unknown.”

- Enter the last date potentially exposed and arrival date to the U.S.
  - For cases created through the automated process, these date will already be entered if available.

- Save the record.
• Upon save, the date fields will be populated for each of the 14 days since the last potentially exposed date. This table should be updated each day during the 14-day period, even if you do not attempt contact.

• If the CHD was not notified of the individual on day 1 of his or her monitoring, please select, “contact not attempted” for the day (or days) where the individual was not being monitored by the CHD. Leave “contact method” blank for days where contact was not attempted. **This is the only circumstance where it is acceptable to leave “contact method” blank.**

<table>
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<tr>
<th>Days since last exposure</th>
<th>Outcome of follow-up</th>
<th>Contact method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 1: Feb 05, 2020</td>
<td>Contact not attempted</td>
<td></td>
</tr>
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• If you attempt to contact the individual but are not able to reach him or her, select “contact attempted: no response” and a **contact method** (either “phone” or “in person”).

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<td></td>
</tr>
<tr>
<td>Day 2: Feb 06, 2020</td>
<td>Contact attempted: no response</td>
<td>Phone</td>
</tr>
</tbody>
</table>

• When you do successfully contact the individual, you should determine if the individual is:
  o **Asymptomatic or has unrelated symptoms** (select, “contacted: healthy/unrelated symptoms”). Make sure you also select a contact method (“in person” or “phone”). **If you successfully contacted the individual both on the phone and in person that day, select “in person” for the contact method.**

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<td>Contact attempted: no response</td>
<td>Phone</td>
</tr>
<tr>
<td>Day 3: Feb 07, 2020</td>
<td>Contacted: healthy/unrelated symptoms</td>
<td>In person</td>
</tr>
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  o **Symptomatic, but does not meet the criteria of a PUI** because he or she has not been hospitalized (select, “contacted: symptomatic – not a PUI”). Make sure you also select a contact method (“in person” or “phone”).

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<td>Day 3: Feb 07, 2020</td>
<td>Contacted: healthy/unrelated symptoms</td>
<td>In person</td>
</tr>
<tr>
<td>Day 4: Feb 08, 2020</td>
<td>Contacted: symptomatic - not a PUI</td>
<td>Phone</td>
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  • If you contact the individual and you believe they meet PUI criteria, or the individual is symptomatic and you aren’t sure if they meet PUI criteria, contact your Regional Epidemiologist and Laboratory Liaison before recording, “contacted: symptomatic – PUI” and a contact method. When you make this
selection and save, the survey will automatically switch from “monitoring” to “case.” See “Interim Enhanced Surveillance Guidance for County Health Departments” for further instructions. You won’t be able to see the “contact monitoring” section, but that information is still stored in Merlin. To access or edit that information, simply switch the survey from “case” back to “monitoring” and click save.

![Case Information](image)

- When you’ve reached the end of the 14-day monitoring period, you should have an outcome selected for each of the 14 days. You will also need to select a “final outcome” for the individual. **What you select as the “final outcome” should be reflective of the outcome of your follow-up on day 14.**
  - If you select “contacted: health/unrelated symptoms” for the outcome of follow-up on day 14, you should select **monitoring completed: healthy/unrelated symptoms** for your final outcome.
  - If you select, “contacted: symptomatic – not a PUI” for the outcome of follow-up on day 14, you should select, **monitoring completed: symptomatic – not a PUI** for your final outcome.

- If, after speaking with the individual, you’ve identified that he or she did not have travel to an impacted country or have contact with a confirmed COVID-19 case on an airline or vessel, update the exposure risk category to “no identifiable risk.”
  - Record “contacted: healthy/unrelated symptoms” and the appropriate contact method for the day you made contact with the individual. For the final outcome, select **no monitoring needed.** You may leave the rest of the table blank.
If, during the 14-day monitoring period, the individual needs to be transferred to another state, an interstate notification will need to be sent. Email HSD00EpiMonitoring@flhealth.gov and include the individual’s Merlin case ID in your email. There is no need to copy your regional epidemiologist. In Merlin, select a final outcome of “out of jurisdiction.”

If during the 14-day monitoring period the individual needs to be transferred to another county within Florida, transfer the case to the appropriate county and notify the county’s primary epidemiologists by email.

When the 14-day monitoring period has ended and you have determined the individual does not meet the criteria for a PUI, or the individual has moved outside of Florida’s jurisdiction, review for common errors:

- **Common Error 1: Final outcome doesn’t match exposure risk category.**
  - A final outcome of “no monitoring needed” is only appropriate for the exposure risk category of “no identifiable risk.” If, after speaking with the individual, you’ve identified that he or she did not have travel to an impacted country, make sure to update the exposure risk category to “no identifiable risk” before selecting the final outcome “no monitoring needed.” Individuals who have low, medium, or high-risk exposure must have a more specific final outcome to explain why they do not required additional monitoring such as:
    - Monitoring completed: healthy/unrelated symptoms
    - Monitoring completed: symptomatic – not a PUI
    - Lost to follow-up
    - Out of jurisdiction

- **Common Error 2: Unknown is selected for the individual’s exposure risk category.**
  - For auto-created cases for asymptomatic travelers returning from impacted countries, the exposure risk category is assumed to be “medium risk category.”
2.” The exposure risk category should not change until the CHD has made contact with the individual and gathered enough information to determine that he or she should be assigned a different risk category. If you are unable to make contact with the individual, leave the exposure risk category as “medium risk category 2,” do not select “unknown.”

- If you have made contact with the individual but are not what risk category to assign, contact your Regional Epidemiologist and Laboratory Liaison.
  - **Common Error 3: Selecting a final outcome before the monitoring period has ended.** For individuals requiring monitoring, the final outcome should not be completed until the end of the 14-day monitoring period, **unless an individual was transferred to another jurisdiction.**
  - Once you’ve reviewed for common errors, report the case to remove it from your task list.

**Persons Under Investigation**

- Persons meeting the confirmed, probable, or suspect (PUI) case definition for COVID-19 should be entered into Merlin under the COVID-19 disease code (00342) **immediately.**
- On the basic data screen, select “**Case**” as the survey type.
- Complete the Additional Case Information and Clinical Information sections.
- Select “**Potential person under investigation (PUI)**” as the initial investigation type.
  - Note: if a person being monitored becomes a PUI during the monitoring period, the initial investigation type should not change from “**Monitoring a person possibly exposed to COVID-19.**”
  - This field is required to save the record.
- Complete the Determining case classification section.
  - If a person traveled to or from a geographic area with sustained community transmission, enter the countries in the location where exposed field. This will create a new entry in the travel history section for each country. Record additional details of travel including travel dates in the travel history section.
  - The questions in this section, including the first 4 symptoms, are required to submit the case.
- Complete the Extended Data.
- Complete the Health Care Visits, Epi Link, and Travel History sections if applicable.
- Test results from the Bureau of Public Health Laboratories will be sent to your electronic laboratory result (ELR) task list. Check your task list daily for results. When received, import and attach each ELR to the case.
- Report the case once test results have been added.