Infectious Disease Case Management

Facilitator’s Guide

Subject Matter Experts

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Guide Overview

This is an online learning tool that can be accessed anytime for independent learning at [http://sites.bu.edu/masslocalinsitute/](http://sites.bu.edu/masslocalinsitute/). However, in order to meet the training needs of a variety of audiences across Massachusetts, this Facilitator's Guide (Guide) has been designed to assist with a group-based delivery in flexible time segments. Please note that the Guide provides suggestions and guidelines for how to conduct the training. Each facilitator can adapt the guidelines and/or incorporate his or her own training methods to best meet the needs of any given group who will partake in this training.

Two options for a facilitator-led training are available.

1. Access via high-speed internet: [http://sites.bu.edu/masslocalinsitute/](http://sites.bu.edu/masslocalinsitute/)

2. Access via CD. A CD is available if you do not have high speed internet access to the online training. To request a copy of this training on CD, please contact the Local Public Health Institute of MA at lphi@bu.edu.

For either option, move through the training by following the Table of Contents. Use the scroll bar on the right-hand side to move up and down the page. Click on ‘next page’ or a page number to move between pages.

The course contains multiple webpages with subject content, links to other websites, activities and exercises, and video clips. You should discuss all of the content, play the videos, and conduct the activities and exercises. You should also illustrate some of the links and resources, as time allows. Be sure participants understand that this training is the equivalent of an online Resource Manual so they should be encouraged to access it frequently.

The Guide also provides teaching tips, estimated times for completion, facilitator notes, and supplemental activities or discussion topics. Please note that the online training serves as a valuable resource to all classroom facilitators because it has dozens of links to:

- statutes and regulations that explicitly outline roles, responsibilities, and authority
- carefully selected online resources that provide valuable information for dealing with public health issues

We hope that you find the content and suggestions provided in this Guide useful. We invite you to submit your comments – your opinions and suggestions help to improve our Guides.

November 2017
Kathleen MacVarish
Seth Eckhouse
Before You Begin

✓ Plan approximately 1 hour to complete this online training. For a classroom setting, plan an additional 30 minutes to an hour to allow time for group discussion and activities.
✓ Complete the online training on your own.
✓ Read this Facilitator’s Guide to become familiar with the content and flow. We suggest you print this Guide before you start the online training, so you can take notes as you complete the training.
✓ As you complete the training and review the Facilitator’s Guide, look for segments to include examples specific to your audience and your own experience.
✓ Decide if you want to print out any of the webpages, links, or resources for activities or discussion. You can find all answers to the discussion questions in their related webpages.
✓ Determine what equipment you want to incorporate into delivering the training.
✓ Think about other tools you might wish to supplement the training with, such as flipcharts, diagrams, icebreakers, or activities.
✓ If your participants are seeking contact hours, tell them to complete the pre-test online before attending your training and remind them to complete the post-test and evaluation online at the end of the training.

Participants must register to establish a learner profile and complete the pre-test, post-test, and the evaluation for a certificate of completion with contact hours.

Teaching Tips – Alternatives to “Are there any questions?”

Often asking “Are there any questions?” only elicits response from the same few people who are willing to speak up.

The alternatives suggested below are designed to involve learners more actively.

<table>
<thead>
<tr>
<th>Identify expectations</th>
<th>Make diagrams</th>
<th>Identify unanswered questions</th>
<th>Create potential exam questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants can write down 1-2 questions they believe the session will answer.</td>
<td>Ask individuals or small groups to draw a diagram that illustrates the material.</td>
<td>Ask individuals/groups to write down 1-2 questions they still have.</td>
<td>Ask participants to generate potential exam questions and answer them.</td>
</tr>
</tbody>
</table>
Working with Small Groups

Having learners work in small groups is a good way to increase involvement. When making small group assignments:

- Groups should be no larger than seven people.
- Assign a group leader or reporter.
- Give specific and simple directions.
- Ask for specific and concrete products - list, diagram, summary, illustration, etc.
- Set a time limit.
- Let the learners do the work. Facilitate discussions rather than lead them.
Introduction (Page 2)

Introduce yourself and provide some background information on your public health experience. Have participants introduce themselves and describe where they work, what they do, and what their backgrounds are. Participants should also state what they hope to learn from the course.

Explain that this training will also serve as a valuable resource to all LBOH members and health department staff because it has links to:
- statutes and regulations that explicitly outline roles, responsibilities and authority
- carefully selected online resources that provide valuable information for dealing with public health issues

Discuss the purpose of the course. The purpose of this course is to present a brief introduction to infectious disease case management principles. The primary goal of local public health officials, as infectious disease case managers, is to ensure individuals complete an appropriate and effective course of treatment in the shortest time possible with the least restrictive measures indicated, and to identify all high-risk contacts and refer them to evaluation and treatment.

Review Learning Objectives.

After completing this training, you will be able to:
- List the goals of case management for infectious diseases
- Name the components of the case management process
- Explain the difference between case identification, case investigation, and case management
Overview (Page 3)

**Play** the introductory video on infectious disease case management.

**Explain** that case management is a collaborative process, following public health principles, that coordinates an individual’s medical needs over an entire episode of illness or response process; and that case management includes a range of activities specific to the needs of the individual and the needs of the community.

**Describe** the two levels of case management – direct and indirect.

**Use** the Q&A activity to show that the case manager has two patients – the community in which they serve, and the person whose infectious disease they are managing.

**Detail** the role of health departments in infectious disease case management.

**Emphasize** that if performed in a timely manner, case management provides an effective framework for the public health nurse to ensure timely disease identification, case investigation, treatment initiation (if applicable), adherence and retention in care, as well as stopping disease transmission.

**Use** the roll over tab activity to provide more information about what infectious diseases are and the importance of case management.

**Note** that, although the type and frequency of necessary interventions are disease-specific, case management (regardless of which disease) includes steps such as assessment, assurance, and planning.

**Explain** that throughout this training, tuberculosis (TB) and perinatal Hepatitis B will be used as examples to illustrate case management in action.
Case Identification (Page 4)

**Note** that timely disease notification is an essential first step in initiating infectious disease case management.

**Describe** the process that happens once a person is diagnosed with certain infectious diseases.

**Explain** that LBOH may be responsible for investigating AND managing cases.

**Conduct** the quiz group with participants.

**Use** the roll over tab activity to detail the standard practices the case manager would engage in at the time of case identification.
Case Investigation (Page 5)

**Emphasize** that case investigation happens after case identification and is an integral part of infectious disease case management.

**Note** that although this training will not go into much detail about case investigation, thorough investigation is required to develop an effective individual plan of care.

**List** the goals of the investigation process.

**Name** some things that should be considered in developing an individual plan of care using the Q&A activity.

**Conduct** the self check activity with participants.

**Detail** case investigation in action using the TB and perinatal Hepatitis B examples.

**Explain** interruption of disease transmission.

**Use** the roll over tab activity to detail the standard practices for interruption of disease transmission.

**Detail** interruption of disease transmission in action using the TB and perinatal Hepatitis B examples.
Case Management-Engagement & Retention of Care (Page 6)

**Explain** that one of the most important roles for the infectious disease case manager is to ensure the patient is linked to care.

**Conduct** the self check activity with participants.

**Note** that an effective case manager builds a relationship with the patient and actively works to ensure the patient is engaged in the plan.

**Name** some issues that case managers should consider beyond the patient’s illness.

**Use** the photo album activity to illustrate what case management looks like when done correctly.

**Detail** case management in action using the TB and perinatal Hepatitis B examples.

**Emphasize** the importance of education in case management.
Case Management Completion (Page 7)

**Explain** how to know when case management is complete.

**Detail** case management completion in action using the TB and perinatal Hepatitis B examples.

**Summarize** by noting that infectious disease case management is a collaborative process with many partners, components, and activities; and keeping the patient central in the process, viewing them in a holistic way, ensuring their medical and psycho-social needs are met, and preserving autonomy are the keys to successful case management.
Conclusion and Additional Resources (Page 8)

Encourage participants to use the Job Aid that summarizes key points from the training for future reference.

Review the Learning Objectives.

- List the goals of case management for infectious diseases
- Name the components of the case management process
- Explain the difference between case identification, case investigation, and case management

Offer additional resources for further information.

Certificate of Completion

At the conclusion, remind participants that if they would like a certificate of completion with contact hours, they must log in to the Institute’s website and complete the pre-test, the post-test and the evaluation.