

### BACKGROUND

Internet Partner Notification (IPN) is considered an innovative tool for partner notification and has more recently been designated as a standard of care. The increasing numbers of people seeking sex partners through virtual communities continues to pose a challenge for traditional field investigative efforts. Using new media and technology can augment traditional partner/cluster management and follow-up strategies, especially under circumstances where notification via this approach may be the only option. Our intention is to enhance IPN data collection and evaluation throughout the local health jurisdictions (LHJs) in California and strive for consistency with the National Coalition of STD Directors' (NCSDD's) national guidelines.

Although email addresses, screen names, instant and text messaging are all components of a comprehensive IPN protocol, the purpose here is to provide guidance on how to properly refer and document investigations initiated using screen names on private network websites only (i.e., Adam4Adam, Manhunt, and BarebackRT).

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### OVERVIEW

Unless your LHJ has been set-up to perform their own private network IPN activities, the State IPN Liaison assigned to your LHJ is available to contact partners on your behalf in compliance with all State and national protocols. However, in CalREDIE, the investigation will remain assigned to your local investigator.

All emails sent by the State IPN Liaison will include the name and contact information for the local investigator assigned to the case, and, as a result, all incoming calls from the client will be made directly to the local investigator and not the State IPN Liaison.

Liaisons will document their IPN efforts directly in CalREDIE and keep the local investigator updated via email. Local investigators should contact the State IPN Liaison immediately after being contacted by a client to ensure no additional IPN emails are sent.

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### INITIATION & DOCUMENTATION PROCESS

Initiate the contact/client in CalREDIE

1. On the *Patient* Tab:
  - a. If the client's name is not known, the last name should be entered as "Unknown – " followed by the original patient's (OP) incident number.

The screenshot shows the 'Patient' tab in the CalREDIE system. The 'Disease Being Reported' dropdown menu is set to 'Contact to Syphilis'. Below this, the 'Last Name' field is populated with 'Unknown-333025' and the 'First Name' field is populated with 'Unknown'. The 'Middle Name' and 'Name Suffix' fields are empty. A red box highlights the 'Last Name' and 'First Name' fields.

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## IPN Referral Process & CalREDIE Documentation Procedures for LHJs

**INITIATION &  
DOCUMENTATION  
PROCESS**  
(continued)

- b. Enter the contact's screen name and website in the "Other Electronic Contact Information" field.

Home Telephone <input type="text"/>	Cellular Phone / Pager <input type="text"/>	Work/School Telephone <input type="text"/>
E-mail Address <input type="text"/>	Other Electronic Contact Information <input type="text" value="GuessWhoU@a4a"/>	

- c. Enter the screen name as a "Multiple Identity" to allow for searching by screen name in the *Patient Index*
- i. Refer to the [Making Screen Names Searchable in CalREDIE](#) document.

2. On the *Hlth Dpt. Follow-Up* Tab:

- a. Complete all necessary and applicable fields
- b. Ensure "Investigator name" is the local investigator who will be receiving the incoming telephone call from the client, **not** the State IPN Liaison.

**INVESTIGATION INITIATED**

<p><b>Date investigation initiated</b> <input type="text" value="08/26/2015"/></p> <p><b>Initiating agency</b> <input type="text" value="80 - SAN DIEGO"/></p>	<p><b>Date assigned to investigator</b> <input type="text" value="08/26/2015"/></p> <p><b>Investigating agency</b> <input type="text" value="80 - SAN DIEGO"/></p> <p><b>Investigator name (if not NPJ or Out of State)</b> <input type="text" value="Egan, Jeffrey"/></p>
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**REFERRAL TO HEALTH DEPARTMENT**

- c. Select "Yes" for "Was this client originally initiated as an internet investigation (i.e., screen name and/or email address only provided by the original patient)?"

**Note:** This is the only way CalREDIE is able to distinguish between IPN-initiated investigations and traditional investigations

Re-interview

**Original patient interviewer name (if not from NPJ or Out of State)**

**Was this client originally initiated as an internet investigation (i.e., screen name and/or email address only provided by the original patient)?**

**patient**

**patient**

**Frequency of exposure**

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## IPN Referral Process & CalREDIE Documentation Procedures for LHJs

### INITIATION & DOCUMENTATION PROCESS (continued)

3. On the *Case Investigation* Tab:
  - a. \**Jurisdiction* should be your jurisdiction
  - b. *Investigator* should be the local investigator who will be receiving the incoming telephone call from the client, ***not*** the State IPN Liaison.

The screenshot shows the 'Case Investigation' tab in the CalREDIE system. The 'Case Information' section has three dropdown menus: '\* Jurisdiction' (set to 'San Diego'), 'Secondary Jurisdiction' (empty), and 'Investigator' (set to 'Egan, Jeffrey'). The 'Dates' section on the right has three date fields: 'Date of Onset', 'Lab Specimen Collection Date', and 'Lab Specimen Result Date'. The 'San Diego' and 'Egan, Jeffrey' dropdowns are highlighted with red boxes.

**Note:** This allows you to maintain access to the incident so the local investigator can continue with the investigation after the client makes contact.

4. Email the State IPN Liaison assigned to your LHJ requesting the initiation of IPN activity. (refer to [California Project Area State Internet Partner Notification Liaisons](#) document)

Be sure to include:

- a. CalREDIE Incident number
- b. Name, phone number, email, agency and physical address of the local investigator who will be receiving the incoming telephone call from the contact

### STATE IPN LIAISON INVESTIGATIVE RESPONSIBILITIES

1. The State IPN Liaison will review the CalREDIE Incident to ensure all the information has been entered as outlined above and provide TA as necessary.
2. The State IPN Liaison will initiate IPN for the contact according to IPN Protocols.
3. The State IPN Liaison will note each IPN-related action taken in CalREDIE, *Case Investigation Tab, Notes/Remarks* section.

**Note:** Entries made in this field are time stamped and permanent.

4. The State IPN Liaison will email the local investigator after each IPN-related action.
5. If IPN activity does not result in the client making contact with the local investigator, the State IPN Liaison will provide a dispo and date of closure on the *Hlth Dpt. Follow-Up* Tab and notify the local investigator to close the incident.

## IPN Referral Process & CalREDIE Documentation Procedures for LHJs

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### LHJ INVESTIGATIVE RESPONSIBILITIES

1. The local investigator will email the State IPN Liaison immediately if an IPN client has made contact so that no additional IPN notifications are sent.
  2. If/when contact is made with the client, the local investigator will assume all responsibilities for the remainder of the investigation, including disposing the field record, conducting the interview, offering Partner Services, and closing the incident.
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### QUESTIONS?

Please refer any questions related to IPN or CalREDIE-related IPN procedures to:

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