Guidelines for Writing a Final Outbreak Investigation Report

(This outline should be adapted as needed for the purpose of clear, concise communication)

Cover page should include the following:

Date Written:

Release Date:

To:

From:

Report Co-authors:

Peer Reviewers:

Date Reported:

Reported By:

Person Contacted:

Also Contacted:
First page of report:

1. Introduction
   a. Date and time notification was received by your agency
   b. Describe the context of the outbreak:
      • Who → population affected
      • Where → location / place / setting
      • When → Time of onset
      • What → describe clinical findings
      • Why → suspected or known etiology or risk factors
   c. Date and time investigation was initiated by the agency
   d. Describe the primary objective(s) of the investigation

2. Background
   a. Brief scientific background on the disease and/or suspected etiologic agent

3. Investigation Methods
   a. Epidemiologic:
      • Initial investigation methods including interviews, site visits, conference calls, etc.
      • Case definition
      • Data collection (case-finding and line listing, medical record reviews)
      • Data analysis methods (e.g., descriptive epi, hypothesis generating interviews, cohort or case-control studies, other epidemiological data collection and analysis)
   b. Microbiological/toxicological
      • Laboratories involved.
      • Type of clinical specimens and sources
      • Laboratory methods
   c. Environmental
      • Review reports developed by environmental responders
      • Describe any trace back investigations that were done (e.g. food products, etc.)
      • Describe any environmental specimens collected

4. Results
   a. Epidemiological- descriptive epidemiology results including:
      • Cases
        1. Demographic data
        2. Clinical data (symptoms, signs, duration of illness, incubation period.
        3. Outcome of illness (hospitalization, death, chronic effects)
      • Location of cases (facility, county, city, etc.)
      • Epidemic curve and other graphs
      • Compare characteristics of cases and controls, if applicable
      • Describe exposed population, if applicable
      • Describe the results of analytical studies
   b. Microbiological/toxicological
      • Number and nature of specimens submitted for testing and results of laboratory testing
   c. Environmental
      • Describe observations and pertinent findings from environmental investigation(s)
      • Describe the results of trace-back investigations
      • Results of environmental testing (if any)

5. Limitations of the study
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a. Discuss any factors that limited the investigation such as (small number of cases, poor information, late reporting, limited resources to conduct investigation, etc.)

6. **Conclusion / Discussion**: Analysis and interpretation of the investigation results and any conclusions drawn as a result of this investigation
   a. Discuss the main hypothesis
   b. Describe the likely causative agent and mode of transmission.
   c. Describe the risk factors
   d. Explain what was done to control the outbreak.
   e. Describe the conclusions and actions taken

7. **Discuss lessons learned and recommendations for controlling disease and/or preventing/mitigating exposure**:  
   a. Recommendations to improve investigation and management of such outbreaks in the future
   b. Measures to prevent similar outbreaks in the future
   c. Educational message to the public, public health professionals and policy makers.

**Additional instructions:**
- Outbreak report should be completed within one month of outbreak closure.
- A final outbreak report is required for all outbreaks. Outbreak report templates may be used for most outbreaks. A more detailed report written following these guidelines should be used in the following situations:
  - Complex outbreaks for which the template cannot effectively describe the outbreak
  - Any outbreak in which an analytical study was done
  - Outbreaks that required a site visit
  - The decision to write a detailed outbreak report in any outbreak should be made on a case-by-case basis
- Please be careful not to mention any personal or entity identifying information
- Refrain from attributing any specific info to a specific individual
- Reports should be written objectively based on scientific data
- Cite references used