

Annex 3: Policy categories and subcategories for public health and social measures

Revised edition, 2025



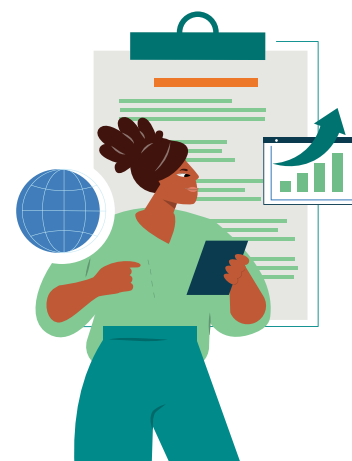
Global guidance on monitoring public health and
social measures policies during health emergencies
Revised edition, 2025

The revised version of Annex 3 replaces the version originally shared in August 2024. The revisions reflect minor adjustments to certain public health and social measures (PHSM) listed in Annex 3 of the revised edition of the *Global guidance on monitoring PHSM policies during health emergencies*, following reviews conducted in light of the amendments to the International Health Regulations (2005) adopted by the World Health Assembly (WHA) on 1 June 2024.



Classification matrix for monitoring public health and social measures

This classification matrix helps place public health and social measures (PHSM) policies into **cascaded categories**, starting from a **first-level PHSM category** and moving down to identify the **second-level PHSM category**, and its **associated high-level indicators**.



Why is a taxonomy for measuring public health and social measures important?

Categorizing PHSM policies using this taxonomy is a **critical step in the data collection process**, so it is important to ensure that the monitoring team works in a harmonized way to guarantee that the classification of measures is consistent and clear within the appropriate taxonomy category (1).

First-level categories for PHSM (1,2)

The table below presents an overview of the first-level categories in the PHSM classification matrix.

 Active case-finding and contact identification measures	These are systems and actions implemented to identify, track and manage potential and confirmed cases of disease. They may include case-finding, testing and contact-tracing, as well as isolation (i.e. to separate individuals with a confirmed or suspected infection) and quarantine (i.e. to separate individuals with an increased risk of infection from those at risk of becoming infected).
 Personal protection measures	These measures comprise personal protective equipment as well as personal hygiene behaviours that reduce the risk of individuals transmitting and/or becoming infected with a pathogen that has epidemic or pandemic potential.
 Environmental measures	These measures target the physical infrastructure and environment, including the human–animal interface, through modifying, repurposing and/or appropriately maintaining existing or newly set up structures to limit transmission of a pathogen with epidemic or pandemic potential.
 Social measures	These are measures implemented at the national and subnational levels comprising (i) modifying social interactions between individuals and groups of people, including gatherings; (ii) adapting, cancelling or modifying the timing of services or activities, or a combination of these; and (iii) adapting or restricting movement within and between specific settings and within or across national borders.
 International travel and trade measures	These measures follow a risk-based approach to reduce the travel- and trade-associated cross-border exportation, importation and onward transmission of a pathogen with epidemic or pandemic potential.

Classification matrix for monitoring public health and social measures

First-level PHSM category (1,2)	Second-level PHSM category and High-level indicators
 Active case-finding and contact identification measures	1. Active case-finding 1.1. Screening for symptoms 1.2. Test-based screening 1.3. Contact tracing 2. Case-specific measures 2.1. Isolation 3. Contact-specific measures 3.1. Quarantine
 Personal protection measures	4. Personal protective equipment 4.1. Masks 4.2. Gloves 4.3. Face shields 4.4. Bed nets 4.5. Long or other protective clothing 4.6. Barriers for safer sex 4.7. Repellents 5. Personal hygiene measures 5.1. Hand hygiene 5.2. Respiratory hygiene and cough etiquette 5.3. Food safety measures 5.4. Safe handling of personal equipment and supplies 5.5. Safe breastfeeding practices

First-level PHSM category (1,2)



Environmental measures

Second-level PHSM category and High-level indicators

6. Physical infrastructure

- 6.1. Physical barriers (e.g. Plexiglass or Perspex screens, room dividers)

7. Vector control

- 7.1. Building and housing modifications (e.g. using window screens, closing eaves)
- 7.2. Spraying (e.g. indoor residual or outdoor)
- 7.3. Reservoir control (e.g. draining stagnant and standing water, covering water containers)

8. Water and sanitation safety

- 8.1. Disinfecting drinking water
- 8.2. Modification of access to safe drinking water
- 8.3. Wastewater management
- 8.4. Solid waste management

9. Surface cleaning

- 9.1. Safe handling of equipment and supplies
- 9.2. Surface cleaning and disinfection
- 9.3. Surface decontamination

10. Indoor air quality

- 10.1. Ventilation
- 10.2. Air filtering
- 10.3. Humidity control

11. Animal-human interface

- 11.1. Culling
- 11.2. Avoidance or safe handling of carrion and infected livestock/animals
- 11.3. Regulation of animal movement and products
- 11.4. Livestock quarantine
- 11.5. Livestock isolation
- 11.6. Restriction of farming, fishing, hunting and/or selling of animals

First-level PHSM category (1,2)

Second-level PHSM category and High-level indicators



Social measures

12. Social interactions and gatherings

- 12.1. Physical distancing
- 12.2. Restrictions or modifications of private gatherings/mass gatherings
- 12.3. Restrictions or modifications of public gatherings/mass gatherings

13. Domestic mobility

- 13.1. Stay-at-home order or curfew
- 13.2. Restrictions on public transport
- 13.3. Restrictions on movements (e.g. maximum distance people can be away from their home)
- 13.4. Entry restrictions (e.g. for districts, zones, settlements)
- 13.5. Exit restrictions (e.g. for districts, zones, settlements)

14. Modifications to activities and services

- 14.1. Modifications to access (e.g. closures of schools or businesses, restricting access to individuals with a vaccination certificate or individuals who test negative, extending holidays for schools)
- 14.2. Modifications to types of activities (e.g. implementing distance or online learning or teleworking; providing services online or remotely; cancelling school meals)
- 14.3. Safe burial practices

First-level PHSM category (1,2)



International travel and trade measures

Second-level PHSM category and High-level indicators

15. Trade measures for importation

- 15.1. Restriction
- 15.2. Ban
- 15.3. Inspection

16. Trade measures for exportation

- 16.1. Restriction
- 16.2. Ban
- 16.3. Inspection

17. Screening or testing for travellers

- 17.1. Exit or entry screening for symptoms, or both
- 17.2. Exit or entry screening for vaccination or immunity, or both
- 17.3. Exit or entry screening for travel or contact history, or both
- 17.4. Exit or entry screening for negative test, or both
- 17.5. Exit or entry testing for infection at PoE (for suspected cases), or both

18. International border measures

- 18.1. Ban on entry
- 18.2. Ban on exit
- 18.3. Entry restriction
- 18.4. Exit restriction

19. Quarantine upon arrival

- 19.1. Home quarantine
- 19.2. Hotel/non-health care-facility/institutional quarantine
- 19.3. Health care facility quarantine

20. Travel advice or warning

- 20.1. Travel advice
- 20.2. Travel warning



Settings: attributes of the physical environment where the policy is enacted

Setting	Description
Unspecified	Setting or location to which the measure applies or where it is to be implemented is not specified or it targets the general population
Businesses and services	Commercial establishments and enterprises, including offices, retail stores, markets, restaurants, gyms and manufacturing facilities where trade is conducted or services are offered; includes workplaces and professional environments other than health care facilities
Homes	Places of residence of individuals, families or households, such as houses, apartments or other shelters
Nursing and care homes	Public or private residential facilities providing long-term personal and nursing care, for example for older people or people living with disabilities
Educational settings	Educational institutions ranging from early day care and kindergarten to primary and secondary schools to institutes of higher education, such as universities
Domestic public transportation	Mass transportation settings (buses, trains, trams, boats, ferries etc) and related infrastructure (bus or tram stops, train stations, docks, ports etc)
Points of entry for transportation by land	Ground-based transportation settings and infrastructure, such as land crossings, roads and railways, and public transport, including trains, trams and buses
Points of entry for transportation by water	Water-based transportation settings, such as shipping vessels, ferries, cruise ships and ports
Points of entry for transportation by air	Air travel-and aviation-related settings, such as airports, airplanes and helicopters

Setting	Description
Health care settings for the general public	Health care facilities, such as hospitals, clinics and centres for outpatient care, that are accessible to the public (i.e. this category does not include measures directed at health care workers); the category does not include long-term care facilities
Leisure, social, cultural or faith-based settings	Facilities and spaces for leisure, social, cultural and faithbased activities, such as cinemas, theatres, museums and places of worship
Prisons	The term prison covers all institutions where a state holds people deprived of their liberty
Camps and settlements for refugees or internally displaced persons	Places providing protection and assistance to people who have been forced to flee their homes due to war, persecution or violence
Informal settlements and slums	Residential areas where inhabitants have no security of tenure vis-à-vis the land or dwellings they inhabit, such as squats or informal rental housing; neighbourhoods that lack, or are cut off from, basic services and city infrastructure; and areas where housing may not comply with current planning and building regulations; informal settlements and slums are often situated in geographically and environmentally hazardous areas
Outdoor public spaces	Outdoor spaces, such as beaches, parks and playgrounds, that are accessible to the public
Other	Specify

PHSM policy categories and subcategories for PHSM were developed under the umbrella of the [WHO Initiative on public health and social measures during health emergencies](#).

References

- 1 Global guidance on monitoring public health and social measures policies during health emergencies: revised edition, 2025. Geneva: World Health Organization; 2025. Licence: CC BY-NC-SA 3.0 IGO.
- 2 Annex 3. An updated version of the conceptual framework for public health and social measures in the context of infectious disease transmission is available in: Building coalitions for strengthening public health and social measures during health emergencies: meeting report, Cascais, Portugal, 14–15 June 2023. Geneva: World Health Organization; 2023 (<https://www.who.int/publications/i/item/9789240084438>, accessed 19 March 2024)



Learn more:

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monitoring PHSM



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