

# Infection Preventionist (IP) Orientation Checklist



Name:

Date:

Departmental Organization (Provided by Administrator/Director of Nursing)

---

Click [here](#) to go to resources for this section.

- Review the infection prevention (IP) scope of responsibilities document
- Review the IP plan and goals
- OSHA
- Conduct an initial ICAR to establish a baseline and implement an action plan for findings that do not meet IPC expectations
- Review the emergency preparedness plan
- Review the annual tuberculosis risk assessment (work with local health department to determine prevalence)
- Review the Quality Assurance and Performance Improvement (QAPI) plan and your role within the QAA committee, including what data should be collected and shared during the QAPI meetings
- Establish a point of contact list:
  - Local health department
  - State health department
  - Regional epidemiologist
  - Corporate contacts
  - Local hospital contacts
  - Reporting systems and EHR help desk support
  - Lab contact
  - Who is reporting in NHSN (skilled nursing only) (establish account if needed)
  - Vaccine supplier (pharmacy)

## Infection Prevention Education

---

Click [here](#) to go to resources for this section.

- Understand state infection control training is available and/or required
- Introduce yourself to the team and identify what staff training has occurred in the past year
- Review and understand the annual plan and training requirements for training staff
  - Locate/develop a staff IP audit and observation schedule
- Is infection control included in orientation for new hires? (Yes/No): \_\_\_\_\_
- Understand how education is provided to residents and families

# Infection Preventionist (IP) Orientation Checklist



## Technological Skills

---

Click [here](#) to go to resources for this section.

Indicate level of familiarity (B = beginner, I = intermediate, E = expert):

- Computer literacy (use of Microsoft programs such as Outlook, Word, PowerPoint, Excel, etc.): \_\_\_\_\_
- Electronic medical record (including relevant IP areas): \_\_\_\_\_
- Sending/receiving secure messages: \_\_\_\_\_
- Surveillance software (if available): \_\_\_\_\_
- Ensure access and ability to report to the CDC database – National Healthcare Safety Network (NHSN) (skilled nursing only): \_\_\_\_\_
- Ensure access and ability to report point of contact (POC) test results to health department via their preferred method: \_\_\_\_\_
- Intranet/internet: \_\_\_\_\_

## IP Surveillance

---

Click [here](#) to go to resources for this section.

- Process to receive laboratory alerts/reports
- Process to review new admits for communicable disease to ensure preventative measures are in place
- Process for targeted surveillance (hand hygiene, isolation, etc.)
- Process to review/monitor central line-associated bloodstream infections (skilled nursing only)
- Process to review/monitor catheter-associated urinary tract infections
- Identify the process for contacting providers for IPC concerns
- Identify the process for State/Local reportable diseases/health department notifications
- Identify the process and cadence to conduct IP rounds/audits (frequency/forms)
  - Teachable moments, on-the-spot education
- Identify the process and cadence to conduct Environment of Care (EOC) rounds
- Identify the process and cadence to conduct construction/project rounds (as needed)

# Infection Preventionist (IP) Orientation Checklist



## Exposure/Outbreak Investigations

---

Click [here](#) to go to resources for this section.

Ensure updated policies and procedures are in place for the following areas:

- Understand the difference between exposure and outbreak verification (case definition), and the steps to follow for each
- Identify the process for notification for medical director, facility leadership, health department, residents and family
- Locate and understand your facility action plan (emergency preparedness plan, isolation protocols, access to PPE, etc.)
- Identify the process for disseminating education and resources
- Identify your facility process for performing inspections/department interviews
- Follow-up

## Infection Prevention and Control

---

- Identify if there is a notification system when a new infection is identified, or an antibiotic is ordered
- Identify process to review residents at high risk for infection
- Identify process to review resident vaccination history and vaccine program
- Identify process for how IP will conduct chart reviews of residents on antibiotics
- Familiarize yourself with sepsis and its risks
- Identify process to stay current with enhanced barrier precautions guidance and incorporate principles into the program
- Meet and review infection policies/processes with the medical director

## Microbiology/Laboratory

---

Click [here](#) to go to resources for this section.

- Understand the risk factors that facilitate the transmission of infectious agents
- Understand microbial virulence, pathogenicity and infectivity
- Understand microbiology basics: clinical microbiology, common and proper specimen collection, methods to identify bacteria, fungi and viruses
- Understand laboratory testing and diagnostics (Gram stain, antibody, chest x-ray, WBC, urinalysis, culture reports)

# Infection Preventionist (IP) Orientation Checklist



- Understand antimicrobials and resistance (commonly used drugs, indications for antimicrobial use, susceptibility pattern interpretation, antimicrobial stewardship)

## Environmental Services (EVS)

---

Click [here](#) to go to resources for this section.

- Are appropriate/ recommended cleaning products accessible and utilized according to the EPA Product List pertaining to your outbreak
- Ensure staff understand product dwell times
- Work with EVS management team to review policies and procedures as it relates to IP
- Work with dietary department to review policies and procedures as it relates to IP
- Ensure staff are knowledgeable on facility policies and procedures for cleaning and disinfection
- Ensure staff are appropriately using personal protective equipment

## Policies/Guidelines/Regulatory

---

Click [here](#) to go to resources for this section.

- Review and update department policies and procedures
- Review corporate policies (if applicable)
- Review EOC manual
- Review Occupational Safety and Health Administration (OSHA): Including blood-borne pathogens standard, airborne protection
  - Respiratory Protection Program
- Review the Centers for Medicare & Medicaid Services (CMS) Conditions of Participation (CoPs)
- Review Environmental Protection Agency (EPA) waste management
- Review APIC guidelines/practice standards/text
- Review Society for Healthcare Epidemiology of America/Infectious Diseases Society of America (SHEA/IDSA) guidelines
- Review American Society of Healthcare Environmental Services (ASHES) guidance documents
- Review American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE)/American Institute of Architects (AIA) guidelines/standards
- Review CDC guidelines

# Infection Preventionist (IP) Orientation Checklist



## Resources and Tools

---

### Departmental Organization

- [Infection Control Assessment Tools - Centers for Disease Control and Prevention \(CDC\)](#)
- [Infection Control Assessment and Response \(ICAR\) Tool for General Infection Prevention and Control \(IPC\) Across Settings - CDC](#)
- [Nursing Home Emergency Preparedness Assessment - Telligen QI Connect™](#) (takes less than 15 minutes)
- [Nursing Homes and Assisted Living \(Long-term Care Facilities\): Clinical Staff Information - CDC](#)
- [Audit Tracking Tool Workbook - Telligen QI Connect™](#)

### Infection Prevention Education

- [Infection Prevention Training - CDC](#)
- [Association for Professionals in Infection Control and Epidemiology \(APIC\)](#) - self-study following core curriculum (requires membership, due to COVID-19 APIC has offered limited resources without membership requirement)
- [Healthcare-Associated Infections \(HAIs\) - CDC](#)
- [Project Firstline - CDC](#)
- [Patient Resources and Education - CDC](#)
- [QAPI Description and Background - Centers for Medicare & Medicaid Services \(CMS\)](#)
- [Infection Prevention and Control Resources - Telligen QI Connect™](#)
- [Vax Hub - Telligen QI Connect™](#)

### Technological Skills

- [National Healthcare Safety Network \(NHSN\) - CDC](#)

### IP Surveillance

- [COVID Data Tracker - CDC](#)
- [RESP-NET Interactive Dashboard - CDC](#)

### Exposure/Outbreak Investigations

- [Serious Infections and Outbreaks Occurring in LTCFs - CDC](#)

### Microbiology/Laboratory

- [Healthcare-Associated Infections \(HAIs\): Laboratory Resources - CDC](#)
- [Clinical Microbiology and Infection Prevention - Journal of Clinical Microbiology](#)

### Environmental Services (EVS)

- [Environmental Cleaning Spreadsheet - CDC](#)
- [Environmental Cleaning Procedures - CDC](#)
- [Implementation of Personal Protective Equipment \(PPE\) Use in Nursing Homes to Prevent Spread of Multidrug-resistant Organisms \(MDROs\) - CDC](#)
- [About List N: Disinfectants for Coronavirus \(COVID-19\) - Environmental Protection Agency \(EPA\)](#)
- [How to Read a Disinfectant Label - CDC](#)

### Policies/Guidelines/Regulatory

- [State Operations Manual: Appendix PP - Guidance to Surveyors for Long Term Care Facilities - CMS](#)