



Onsite Infection Prevention and Control (IPC) Assessment Competency

IP Name:	Date:
Evaluator Name:	Title:

Planning Phase	Met/ Reviewed	Not Met/ Reviewed	Comments	Evaluator Initials
Able to determine the reason for visit and able to triage visit (urgent versus non-urgent onsite)				
Understands/Verbalizes how to coordinate an assessment and includes the necessary details below:				
a. Date and time of the assessment				
b. Discuss expectations of an onsite IPC assessment (i.e., length of visit)				
c. Determine whether the facility has any needs or concerns that should be addressed during the assessment				
d. Identify specific practices or areas that must be observed (i.e., observing wound care)				
e. Review relevant presentations, reports, and/or documents				
f. Determine/recruit Healthcare Facility (HCF) staff member(s) who should be participating during the assessment (if possible)				
g. Explain to HCF staff the importance of arriving at the facility prior to room cleaning to conduct fluorescent marking (if applicable)				
h. Exchange contact information with HCF staff for future communication				
i. Gather necessary forms applicable to the type of assessment				
j. Request that HCF staff prepare daily schedules of care practices that will be observed (see phase 2)				
Demonstrates knowledge and understanding of the recommended IPC practices associated with the visit and can identify the relevant resources associated with the practices				
Has reviewed and demonstrates knowledge of the assessment and adherence monitoring tools				
Confirms a scheduled assessment via written communication (email)				
Introduction Phase	Met/ Reviewed	Not Met/ Reviewed	Comments	Evaluator Initials
Completes meet-and-greet with IP, leadership, the Environmental Services (EVS) manager, and/or other key facility stakeholders				
Verbalizes the goal of the visit and provides a brief overview of what will occur				



Requests a daily schedule for specific care practices relevant to the type of assessment				
Creates a tentative and flexible agenda to share with HCF staff (include an interview time and an exit meeting):				
a. Determines whether the standardized interview will occur at the beginning of the assessment or at the end of the assessment				
b. Completes standardized interview per flexible agenda				
Observation Phase	Met/ Reviewed	Not Met/ Reviewed	Comments	Evaluator Initials
Completes rounds throughout the HCF and includes areas pertinent to the reason for the visit				
Introduces herself/himself to HCF staff whenever applicable				
Asks HCF staff appropriate questions to complete assessment, when necessary				
Takes notes while walking throughout the facility				
Understands the need to observe as many different staff members, patient/resident rooms, and departments as possible				
Adherence Monitoring Phase	Met/ Reviewed	Not Met/ Reviewed	Comments	Evaluator Initials
Able to complete Adherence Monitoring throughout the facility:				
a. Observes as many different staff members, patient/resident rooms, and departments as possible				
Verbalizes/Compares Adherence Monitoring rates with those obtained by the facility				
Lists missed opportunities found during CDPH HAI Adherence Monitoring phase				
Feedback Phase	Met/ Reviewed	Not Met/ Reviewed	Comments	Evaluator Initials
Completes exit meeting with IP, leadership, the EVS manager, and/or other key facility stakeholders				
Is able to report the following:				
a. Goals of the assessment				
b. Findings and Recommendations (should be presented in a standardized manner allotting time for discussion and questions)				
c. The facility has been advised that a written report summarizing Findings and Recommendations will be provided within a specific timeframe				
Sends assessment report to HCF within a specific timeframe				
Determine if follow up visits are needed				

IP Signature: _____ Date: _____

Evaluator Signature: _____ Date: _____