

Capabilities Assessment Tool

Core Competencies: TB Specific

Criteria:

Aware: Basic level of mastery of the competency. Individuals may be able to identify the concept or skill, but have limited ability to perform the skill.

Knowledgeable: Intermediate level of mastery of the competency. Individuals are able to apply and describe the skill.

Proficient: Advanced level of mastery of the competency. Individuals are able to integrate, critique, and teach the skill.

1. Interview and re-interview tuberculosis (TB) patients¹ and other key persons to elicit information needed to control and prevent TB

1A. Analytic/Assessment Skills	Able to:	Entry	Journey
Conduct interviews of TB patients and other key persons to elicit information about contacts, places/settings of potential disease transmission, potential sources of infection and/or disease and other relevant information	<ul style="list-style-type: none"> • Clearly explain the need for timely and thorough contact investigations • Conduct effective interviews that elicit necessary information regarding contacts • Conduct patient activities in a confidential and safe manner • Tailor questions and explore patient lifestyles to gain information • Ensure all required information has been gathered and recorded 	Aware	Proficient

¹ For purposes of this document, the term “TB patients” is meant to be broadly defined and may include persons with TB disease, suspected TB disease, latent TB infection, as well as persons who are TB contacts, associates, or otherwise at risk for TB.

As part of the TB Team, analyze case and contact investigation information to determine re-interview and investigative priorities and strategies	<ul style="list-style-type: none"> Analyze and review case and contact investigation records to determine quality and completeness of interviews and investigations Determine re-interview priorities and objectives Determine when interview objectives were not met and formulate follow-up approaches 	Aware	Proficient
Identify and address inconsistencies in information	<ul style="list-style-type: none"> Review and analyze case investigations to determine any inconsistencies Determine the best approach to confronting case inconsistencies 	Aware	Proficient
1B. Planning Skills	Able to:	Entry	Journey
Participate in developing and carrying out plans to locate and refer TB patients for appropriate services	<ul style="list-style-type: none"> Identify best methods for locating and referring identified persons for evaluation Work with appropriate agencies to gather information for locating and referring identified persons Prioritize patient referrals and workload 	Aware	Proficient
Communicate to patients and others information regarding the role of public health and the importance of TB control	<ul style="list-style-type: none"> Communicate and provide TB information in an appropriate educational level and culturally sensitive manner Recognize and address misconceptions about TB disease, treatment, and prevention 	Aware	Proficient
Work with community-based organizations for service and delivery to targeted communities	<ul style="list-style-type: none"> Establish working relationships with community based organization Utilize community organizations to promote public health and TB program goals 	Aware	Proficient

1C. TB Control Skills/Methods	Able to:	Entry	Journey
Understand and apply the concepts of TB transmission to the contact investigation process, including proper use of	<ul style="list-style-type: none"> Provide information to the TB Team to establish priorities for contact investigations Carry out contact investigation duties assigned by the TB Team 	Aware	Proficient

1C. TB Control Skills/Methods	Able to:	Entry	Journey
respiratory protection	<ul style="list-style-type: none"> Utilize personal respiratory protection when appropriate 		

2. Conduct and manage field investigations to locate and refer identified TB patients for appropriate services

2A. Analytic/Assessment Skills	Able to:	Entry	Journey
Collect and analyze information to determine TB risk, need for evaluation, and investigative priorities	<ul style="list-style-type: none"> Prioritize individuals in greatest need of prompt medical follow-up by utilizing available tools to determine TB risk 	Aware	Proficient
Conduct field visits to assess environments where TB exposure may have occurred to determine risk of TB transmission	<ul style="list-style-type: none"> Gather information about specific environments patients may inhabit or frequent Evaluate the potential for TB transmission in each environment by assessing factors identified as increasing transmission risk Perform on-site environmental assessments as necessary 	Aware	Knowledgeable
Document all investigations and interviews, and apply data collection processes as appropriate	<ul style="list-style-type: none"> Apply ethical principles and local, state, and national guidelines to the collection, maintenance, use, and dissemination of data and information Perform documentation tasks in a conscientious, thorough, and timely manner 	Aware	Proficient
2B. Planning Skills	Able to:	Entry	Journey
Develop a plan for monitoring and evaluating “plan of action” for field investigations	<ul style="list-style-type: none"> Work in conjunction with the TB Team to develop and monitor “plan of action” Determine plan based on principles of infectivity that takes into account patient risk factors Prioritize field investigation activities Incorporate culturally appropriate strategies for 	Aware	Knowledgeable

	addressing patient barriers to that hinder prompt evaluation and treatment		
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2C. TB Control Skills/Methods	Able to:	Entry	Journey
Conduct field investigation activities in a safe and attentive manner	<ul style="list-style-type: none"> • Make decisions with regard to safe field practices • Apply both individual and environmental safety measures and skill when conducting field investigation 	Aware	Knowledgeable
Utilize investigative tools to locate persons in need of TB follow-up	<ul style="list-style-type: none"> • Utilize various information sources to locate persons (e.g. family members, work place contacts, community members, other agencies) • Use available tools to locate persons (e.g. prison locator, DMV, post office, cross directories, etc..) • Apply safety measures and skills when conducting field investigations 	Aware	Proficient
Complete field investigation tasks within the pre-determined timeframes and maximize the use of available and appropriate resources	<ul style="list-style-type: none"> • Conduct initial interview within specified timeframes • Secure information that is needed to evaluate contacts for signs and symptoms of active TB • Refer contacts for medical evaluations within specified timeframes • Maintain appropriate documentation • Evaluate places of potential TB transmission within specified timeframes • Place and measure TB skin tests, if certified • Consult supervisor as needed if timeframes can't be met and/or if other problems are encountered 	Aware	Proficient
Motivate TB patients to follow-up on recommendations	<ul style="list-style-type: none"> • Identify a convenient place and time for patients to be evaluated • Provide resources and support to address the barriers for patients following through on recommendations 	Aware	Proficient

3. Perform critical analysis of TB cases and field investigation

3A. Analytic/Assessment Skills	Able to:	Entry	Journey
Identify and access relevant and appropriate information sources	<ul style="list-style-type: none"> • Utilize all available resources to identify information about a patient that can be gained in a lawful and ethical manner • Consider and include records, such as: medical interviews, physical exam information, historical records, and results of diagnostic tests 	Aware	Proficient
Evaluate the integrity, quality, completeness, and results of information collected through contact investigations	<ul style="list-style-type: none"> • Analyze investigation information for potential conflicts or inconsistencies • Identify and address information gaps in a timely manner 	Aware	Proficient
Establish investigation priorities and determine “plan of action” that takes into account the role of economic, cultural, social, and behavioral factors	<ul style="list-style-type: none"> • Compile and analyze all information collected during patient interviews and investigations • Determine next steps of investigations based on findings and prioritization 	Aware	Proficient
Utilize data as a resource when conducting investigations	<ul style="list-style-type: none"> • Recognize the use of data when determining contact investigation next steps • Use data and contact investigation findings to expand, limit, and/or cease investigation efforts 	Aware	Knowledgeable
3B. Planning Skills	Able to:	Entry	Journey
Monitor and evaluate the effectiveness and quality of interventions	<ul style="list-style-type: none"> • Monitor and document success of interventions to address barriers to care/adherence 	Aware	Proficient
Identifies organizational and infrastructure factors that may impact delivery of services or desired outcomes	<ul style="list-style-type: none"> • Consider program’s organizational resources and restrictions when conducting investigation 	Aware	Proficient

Collects information needed for data analysis	<ul style="list-style-type: none"> • Work with program epidemiologists and other staff to collect identified information • Collect identified information needed for data analysis in an effective manner 	Aware	Proficient
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4. Monitor TB patients' diagnostic workup and treatment adherence and intervene appropriately (within the scope of non-licensed practice)

4A. Analytic/Assessment Skills	Able to:	Entry	Journey
Monitor and assess TB patients' adherence to diagnostic work-up and treatment plan	<ul style="list-style-type: none"> • Recognize patient, provider, and system factors that are barriers to adherence • Monitor and document success of interventions for addressing barriers to care/ adherence • Follow-up on measures to prevent acquired drug resistance and help ensure completion of therapy 	Aware	Proficient
Determine an appropriate "plan of action" to facilitate adherence or address non-adherence	<ul style="list-style-type: none"> • Identify challenges and behavior patterns that may impede treatment adherence • Apply strategies for overcoming barriers and increasing adherence to treatment 	Aware	Proficient
Facilitate collaboration with locally identified health and other service providers	<ul style="list-style-type: none"> • Work with providers to monitor and identify treatment adherence concerns • Work with providers to address treatment adherence concerns 	Aware	Knowledgeable
Participate in preparing and serving legal orders	<ul style="list-style-type: none"> • Maintain and provide the Health Officer or TB Program Manager the information and documentation required to complete legal orders • Serve legal orders when requested 	Aware	Proficient
4B. Planning Skills	Able to:	Entry	Journey

<p>Identify and implement interventions that support treatment adherence and overcome barriers</p>	<ul style="list-style-type: none"> • Identify resources for low-cost treatment, monitoring, and follow-up • Identify and utilize incentives and enablers • Develop relationships with community programs that provide services and support • Respect patient's stated preferences and tailor interventions to fit patient's needs, circumstances, and health or cultural beliefs 	<p>Aware</p>	<p>Proficient</p>
<p>Apply knowledge of community and public health resources to facilitate meaningful patient referrals</p>	<ul style="list-style-type: none"> • Consider and utilize community resources as an aid for patient adherence 	<p>Aware</p>	<p>Proficient</p>
<p>Maintain awareness of local and community providers and share information with program management</p>	<ul style="list-style-type: none"> • Establish and maintain working relationships with community providers to subsequently be informed of organizational changes • Update staff and management of community provider changes 	<p>Aware</p>	<p>Proficient</p>

4C. TB Control Skills/Methods	Able to:	Entry	Journey
<p>Knowledgeable about TB modes of transmission, diagnostic tests, recommended treatments, and control procedures</p>	<ul style="list-style-type: none"> • Recognize and communicate modes of transmission • Understand, explain, and reference diagnostic tests TB cases undergo • Understand general treatment recommendations and methods used to control TB 	<p>Aware</p>	<p>Knowledgeable</p>
<p>Obtain and transport specimens for laboratory examination</p>	<ul style="list-style-type: none"> • Follow CA and Federal guidelines for safe and appropriate collection procedures • Transport specimens in a consistent and safe manner using universal precautions 	<p>Aware</p>	<p>Proficient</p>

Place and measure tuberculin skin tests (if certified and/or in accordance with local regulation or policy)	<ul style="list-style-type: none"> • Place and measure tuberculin skin tests in clinic settings and/or field settings according to local policy and within the scope of non licensed staff • Recognize the usefulness of placing and measuring field tuberculin skin tests and utilize when needed according to local policy 	Aware	Knowledgeable
Refer patients for TST interpretation and follow-up per local protocols	<ul style="list-style-type: none"> • Understand local protocols regarding TST interpretation and follow-up • Refer and provide follow-up services to patients based on protocols 	Aware	Knowledgeable
Conduct directly observed therapy and monitor efficacy and side effects of treatment	<ul style="list-style-type: none"> • Come to mutual agreement with patient about when and where DOT will take place; consider privacy, convenience, and accessibility • Understand signs of adverse reactions to medications • Consult with health care providers or other licensed staff when adverse reactions to medications are identified 	Aware	Knowledgeable
Perform routine phlebotomy as ordered (if certified and/or in accordance with local regulation or policy)	<ul style="list-style-type: none"> • Conduct phlebotomy, if certified 	Aware	Knowledgeable
Perform HIV pre and post-test counseling (if certified and/or in accordance with local regulation or policy)	<ul style="list-style-type: none"> • Educate TB patients about HIV and how it relates to TB • Explain and offer TB patients HIV testing and counseling • Provide pre and post-test HIV test results and counseling 	Aware	Proficient
Perform HIV testing using approved tests and procedures (if certified and/or in accordance with local regulation or policy)	<ul style="list-style-type: none"> • Obtain specimens for testing, if certified 	Aware	Knowledgeable

5. Interact with health care and other community providers and laboratory staff to support TB control efforts

5A. TB Control Skills/Methods	Able to:		
Communicate public health's role, history, and structure to health care and other community providers and laboratory staff	<ul style="list-style-type: none"> • Explain to providers and community organizations the function and role of TB control and public health 	Aware	Proficient
Support health care and other community providers' and laboratory staffs' understanding of public health laws and regulations	<ul style="list-style-type: none"> • Provide consultation to private health care providers in accordance with TB control program policies • Provide information and answer provider questions about TB laws and guidelines 	Aware	Proficient
Act as an agent of the Health Officer while securing TB patients' personal medical information from health care providers and laboratories	<ul style="list-style-type: none"> • Understand and convey TB Control reporting requirements • Apply confidentiality laws and guidelines when working with health care providers, labs, and when storing personal medical information • Obtain patient information from providers and labs 	Aware	Proficient

6. Conduct health education presentations to the public

6A. Planning Skills	Able to:	Entry	Journey
Communicate TB information to different target audiences	<ul style="list-style-type: none"> • Incorporate language and ideas that are culturally sensitive and non-judgmental • Secure and utilize language interpreters when necessary • Tailor information so it can be received and understood by individuals affected by TB 	Aware	Knowledgeable
Make clear and effective presentations to individuals and	<ul style="list-style-type: none"> • Incorporate interactive exercises and discussions, and encourage questions 	Aware	Knowledgeable

groups	<ul style="list-style-type: none"> • Gauge audience composition and learning ability, and pace presentations accordingly • Use inclusive language and provide examples from diverse populations 		
Use effective platform presentation skills supported by appropriate visual aids	<ul style="list-style-type: none"> • Present information in different forms and formats, using pictures or visual aids 	Aware	Knowledgeable

7. Complete appropriate documentation

7A. Analytic/Assessment Skills	Able to:	Entry	Journey
Maintain data entry records and use the TB Information Management System and/or other locally developed electronic information system for case and/or contact data management and reporting	<ul style="list-style-type: none"> • Document collected information in a timely and thorough manner • Utilize information systems to input accurate and complete data on case/contact activities 	Aware	Knowledgeable
Prepare reports for program evaluation using documentation from investigations and interviews	<ul style="list-style-type: none"> • Prepare clear and accurate reports on field investigations, interviews, or other required reports within established time frames 	Aware	Knowledgeable
Recognize how data collection and use guides program performance and actions	<ul style="list-style-type: none"> • Collect accurate information for data analysis 	Aware	Knowledgeable
7B. TB Control Skills/Methods	Able to:		
Record information on patient	<ul style="list-style-type: none"> • Identify key patient information which should be 	Aware	Proficient

7A. Analytic/Assessment Skills	Able to:	Entry	Journey
record according to accepted medical/legal documentation recommendations and guidelines	clearly documented <ul style="list-style-type: none"> • Document important patient information in medical records and other places of record 		