



INSTRUCTOR MANUAL

HOW TO BE A TB INSTRUCTOR | 2016

TB INSTRUCTOR COURSE CONTENT & OBJECTIVES

I. Introduction to the Tuberculosis Instructor Course

- A. Trainer/Instructor Introductions
- B. Discussion of Measurement Outcomes
- C. Signing of Instructor Agreements

OBJECTIVE ONE

The Instructor Candidate will be able to state the components of the American Lung Association in Indiana (ALAIN) Tuberculosis Education Program.

II. Components of the ALAIN Tuberculosis Education Program

- A. Three Courses in the ALAIN TB Education Program
- B. Two-Step Basic Tuberculosis and Skin Test Validation Process
 - 1. Indiana State Department of Health (ISDH) IN-TRAIN Online Program
 - 2. ALAIN Mantoux Tuberculin Skin Test (TST) Competency Validation

OBJECTIVE TWO

The Instructor Candidate will be able to apply planning tools for the ALAIN Basic Tuberculosis Competency Validation.

OBJECTIVE THREE

The Instructor Candidate will be able to appropriately complete and submit all ALAIN forms.

III. Planning the Basic Tuberculosis Competency Validation

- A. List of Site Equipment & Supplies
- B. Basic TB Competency Validation Outline and Objectives
- C. Completing and Submitting ALAIN Basic TB Competency Validation Paperwork
 - 1. Scheduling a “Public” TB Event
 - 2. Check-offs for Tuberculosis TST Administration, Reading, & Recording
 - 3. Categories of Risk Factors for TB Infection
 - 4. Case Studies
 - 5. Basic TB Competency Validation Roster Form
 - 6. Basic TB Competency Validation Order Form
 - 7. Distributing Basic TB Validation Cards
- D. Facility TST and Health Screen Forms
- E. Anonymous Participant Evaluation for Basic TB Competency Validation

OBJECTIVE FOUR

The Instructor Candidate will be able to instruct Participants to successfully administer, read, and record Mantoux Tuberculin Skin Tests.

IV. Basic TB Competency Validation Components

- A. Reading Reactor Arms Using CDC Technique
- B. Placement of a Mantoux-type Intradermal Injection

OBJECTIVE FIVE

The Instructor Candidate will understand and appropriately use all ALAIN forms and comply with all ALAIN educational standards.

OBJECTIVE SIX

The Instructor Candidate will be able to identify all resources available to the ALAIN TB Education Program.

V. Reference Information

- A. Agencies Contributing to the Indiana TB Education Program
- B. TB Educational Information
- C. ALAIN TB Instructors Manual
- D. Indiana TB Statistics from the ISDH Annual Report
- E. TB Testing Supplies
- F. Websites Offering TB Information

OBJECTIVE SEVEN

The Instructor Candidate will be able to explain and comply with the policies outlined by the ALAIN Tuberculosis Education Program Policies.

VI. ALAIN Tuberculosis Education Program Policies

OBJECTIVE EIGHT

The Instructor Candidate will be able to demonstrate knowledge and skills required to successfully instruct the ALAIN Basic TB Competency Validations.

VII. Conclusion

- A. Written Examination (Instructor's Test) and Review of Essential TB Facts
- B. Evaluation and Validation Cards



Tuberculosis Education Program Information

SECTION 1

ALAIN TB EDUCATION PROGRAM

In conjunction with the ISDH IN-TRAIN Online Program, it is the goal of the ALAIN to ensure that each healthcare worker enrolled in any of the three courses has received:

1. The education necessary to understand the history, pathogenesis, epidemiology, diagnosis, treatment, and control of TB Infection and Disease; especially as it relates to each person's own professional and personal experience and needs;
2. The education necessary to administer, read, and record Mantoux Tuberculin Skin Tests (TSTs); and
3. Information about the current trends and concerns of TB Infection and Disease.

The three courses in the ALAIN TB Education Program include:

1. **BASIC TB VALIDATION:** The Participant must **first** successfully complete the ISDH IN-TRAIN Online Course. He/she must **within 60 days**, then successfully complete the ALAIN TB Competency Validation. After the Class Roster has been submitted to the ALAIN at the end of this **two-step process**, the Participant will receive an ALAIN Validation Card (in approximately one month). This Validation Card is effective for three years.
2. **ALAIN TB INSTRUCTOR COURSE:** This course is designed to teach the Instructor Candidate (who must have either an Indiana Professional License or a four-year degree in a health-related major) how to instruct the ALAIN TB Competency Validation. All materials, procedures and policies for leading the skills demonstration of administration, reading, and recording of Mantoux TSTs will be covered. ALAIN forms, their submission, and resources available are carefully discussed. The need to carefully assess and meet the needs of each Basic Participant is stressed. This validation is good until December 31 of each year. At that time, if the Instructor is in good standing (see policies Number 1.1 and Number 2.2), a new **Instructor Validation Card will be issued directly by the ALAIN.**
3. **ALAIN TB TRAINER COURSE:** This course is designed to teach the Trainer Candidate (who must be an Instructor in good standing) how to teach the ALAIN TB Instructor Course. In addition to reviewing all subject matter contained in both the Basic and Instructor Courses, a discussion of Case Studies is done. This validation is good until December 31 of each year. At that time, if the Trainer is in good standing (see policies Number 1.2 and Number 2.3), a new Trainer Validation Card will be issued directly by the ALAIN.

BASIC TB SKIN TEST COURSE

(In conjunction with the ISDH IN-TRAIN online TB Education Course)

Description: This course is designed for healthcare workers who administer, read, and record Mantoux tuberculin skin tests. Persons who successfully complete first the ISDH IN-TRAIN online course and then the ALAIN live Competency Validation will receive a TB Validation Card. In agencies or facilities where training is mandated, copies of these cards should be available for survey review. **Basic TB Validation Cards will expire in three years. The two-part program (ISDH IN-TRAIN and ALAIN Competency Validation) will need to be completed every three years to maintain TB validation.**

Target Audience: Interested healthcare workers involved in tuberculosis-related activities.

Criteria to receive a three-year TB Validation Card involves TWO SEPARATE STEPS, which must be completed in order:

1. Complete the ISDH IN-TRAIN Basic online course. This course includes:
 - Viewing the entire online course material;
 - Viewing the most recent CDC TB video (included in the online program); and
 - Passing the quizzes at the end of each module and passing the final 30-question test with a score of 80% or better.
2. **And, under direct supervision of an ALAIN Instructor,** successfully complete the Competency Validation.
 - Demonstrate proficiency in reading the “Reactor Arm” indurations, using the proper CDC techniques, achieving a reading that is within 2mm of the correct answer; and
 - Demonstrate competency in the simulation a Mantoux-type intradermal injection, using sterile Normal Saline and a sterile TB syringe and needle on a live person’s arm.

PLEASE NOTE: To maintain a current TB Validation, Participants must complete the **two-part** Basic TB program (Online and Competency Validation) every three years.



Planning the Class

SECTION 2

LIST OF SITE EQUIPMENT AND SUPPLIES

SITE EQUIPMENT

- _____ Large table and chairs in a well-lit area for practicum
- _____ Appropriate handwashing facilities and materials
- _____ Clean gloves in several sizes
- _____ Available restrooms

PRACTICUM SUPPLIES

- _____ Sterile TB syringes and needles (1-mL plastic syringes; 27 gauge X ¼- to ½-inch short-bevel needles)
- _____ Alcohol wipes
- _____ Sterile Normal Saline
- _____ 2x2's or cotton balls
- _____ Biohazardous sharps container
- _____ See and Touch Reactor Arms
- _____ TB Skin Test Rulers marked in mm

FORMS AND EDUCATIONAL LITERATURE

- _____ ALAIN Forms (most current versions) and facility TST and Health Screen forms
- _____ Participant Evaluation (if the organization is subject to any type of survey)
- _____ Check-off forms for TST Risk Factor Cut-offs, Case Studies
- _____ Educational resources (books, videos, pamphlets, charts, posters, etc.)
- _____ Newspaper stories, journal articles, etc. regarding TB trends and developments
- _____ CDC video "Mantoux tuberculin skin test" (optional for Competency Validation)

ALAIN BASIC TB COMPETENCY VALIDATION OUTLINE AND OBJECTIVES

(This MUST FOLLOW the ISDH IN-TRAIN Basic TB Online Course)

The principles of adult education identify that adults want to learn by doing and not have wasted time. The expected outcome of the Competency Validation is that the Participant will become a team member who has the skill to administer, read, and record Mantoux TSTs. This Competency Validation is for skill checks only and should be done by appointment. Small groups will be best suited to work together and learn from each other. No routine presentation should be done. Each session should be customized to the unique clinical needs of the Participant.

OBJECTIVE ONE

The Participants and Instructor(s) will work together in an atmosphere that encourages an open exchange of information.

I. Introduction to the Tuberculosis Basic Competency Course

- A. Getting Started
 - 1. Introductions and Announcements
 - 2. Competency Check Agenda and Rationales
- B. Discussion of TB Knowledge Base
- C. Discussion of Measurement Outcomes

OBJECTIVE TWO

The Participant will be able to state the components of the Basic Tuberculosis Education Program in Indiana.

II. Components of the Two-Step Basic TB Validation Program

- A. Indiana State Department of Health (ISDH) IN-TRAIN Online TB Program
- B. American Lung Association in Indiana (ALAIN) TST Competency Validation

OBJECTIVE THREE

The Participant understands and incorporates into a skills demonstration the procedures of administration, reading and recording Mantoux type tests.

III. Basic TB Competency Validation Components

- A. Review of the CDC video/DVD (as needed for skills demonstration)
- B. Placement of a Mantoux-type Intradermal Injection
- C. Reading Reactor Arms
- D. Recording TST Results
- E. Case Study Review

OBJECTIVE FOUR

The Participant will be able to verbalize that completion of the two-part TB Education Program has provided knowledge and skills required to successfully deal with TB in the clinical setting.

IV. Conclusion

A. Participant Evaluation survey completion

B. ALAIN Validation Cards

1. Timeline: Will be received after the Class Roster has been submitted to the ALAIN
2. Duration: Validation good for three years

ALAIN TB EDUCATION PROGRAM FORMS

Only current, ALAIN forms may be used. These can be found on our website Lung.org. Please do not submit old forms or forms unique to your facility.

To Schedule an Upcoming “Public” Class (Competency Validation, Instructor Class, or Trainer Class):

1. “Public” events (i.e. open to the public, not limited to any one facility), must be scheduled online at least one week before the end of the previous month.
2. Go to the ALAIN website, Lung.org, go to “Tuberculous Education”, choose “Upcoming Classes”, then click on this form.
3. Complete and submit online.

ALAIN Rosters and Materials Order Forms

1. For courses taught by more than one instructor, **EACH** instructor’s printed name and signature must appear on the Roster. A ratio of 1:2 (Instructor to Participants) is the minimum that will be credited. The ratio of Instructor to Participants should not > 1:6.
2. All information must be legible.
3. Rosters and Order Forms must be received by the ALAIN within 20 days of the event.
4. Validation Cards **MUST** be ordered when submitting the Roster after each event. The ALAIN no longer issues TB Validation Cards prior to classes. **ALAIN Validation Cards may only be issued to Participants who successfully meet the ALAIN standards for each event.**
5. **An organization may not make their own version of ALAIN TB Validation Cards.** Duplication of ALAIN TB Validation Cards is prohibited.
6. Always visit the ALAIN’s website at Lung.org for copies of the most recent forms. Modification to these forms are made to meet the ever-changing needs of organizations. However, in order to insure continuity, forms will only be officially changed in January of each year. New forms will be made available to those Instructors and Trainers who have met all ALAIN requirements (including the annual administrative fee).
7. You may submit ALAIN forms by email, fax, or mail to the following:

Email: TB-IN@Lung.org

Fax: 317-819-1187

Address: American Lung Association in Indiana

TB Education Program

115 W Washington St, Ste 1180-S

Indianapolis, IN 46204




ALAIN CHECK-OFF FOR BASIC TB COMPETENCY VALIDATION TST ADMINISTRATION

CRITICAL STEPS	SUCCESSFULLY COMPLETED	COMMENTS
The Participant makes an accurate assessment to determine if Mantoux TST is appropriate at this time. (The CDC endorses only "Targeted Testing".)		
The Participant chooses a placement site on volar surface of forearm 2 inches below antecubital space or gives rationale for an alternate site.		
The Participant cleanses the site with an alcohol wipe and allows the site to dry appropriately.		
Following Universal Precautions and using aseptic technique, the Participant fills the TB syringe with sterile NS (in place of 0.1 mL of 5TU PPD antigen). He/she properly recaps sterile needle into sterile interior of cap.		
The Participant provides a taut surface for needle insertion by stretching the skin at the site. He/she Inserts needle bevel up at 5-15 degrees with skin surface, placing total bevel under skin at intradermal level.		
The Participant releases the skin stretch. Using both hands to steady syringe, he/she injects the dose to form a 6-10 mL wheal. Anything less is considered inadequate and MUST be repeated 2 inches or more from the original site.		
The Participant removes needle, initiates needle safety device. He/she places Used syringe and needle in a puncture-resistant sharps container without recapping the needle.		
The Participant uses a cotton ball or 2x2 gauze pad to dab any blood or fluid present. He/she discards cotton ball or gauze appropriately.		
The Participant instructs the patient about how to care for the site: No pressure or bandage; wash gently with soap and water only; avoid scratching; no lotions or other chemicals.		
The Participant instructs the patient to return within 48 to 72 hours to have TST read and recorded. Any time outside these parameters does not yield an accurate test.		
Correctly complete Facility Form which must include: site planted, signature of planter, time and date, antigen name, PPD expiration dates; manufacturer and lot number.		

ALAIN CHECK-OFF FOR BASIC TB COMPETENCY VALIDATION TST READ AND RECORD

CRITICAL STEPS	SUCCESSFULLY COMPLETED	COMMENTS
The Participant chooses a well-lit area. His/her fingernails should be shorter than the finger tips.		
The Participant inspects the site for evidence of injection and induration.		
If induration is present, the Participant finds right and left transverse margins by palpating with the subject's arm slightly bent at elbow. He/she lightly sweeps two inches from injection site in all four directions.		
The Participant measures the induration by using the CDC video technique of backing the front of the fingernail up to the outside edge of the induration and marking a dot in front of fingernail. He/she repeats on other edge.		
The Participant correctly record results in mm. Please note, most new "arms" have identical indurations of 0, 15, 10, and 5. The technique must be correct.		Participant _____ Instructor _____
The Participant records measurement on the appropriate form which must include: induration measurement; date and time of reading; description of any abnormalities within the site area; name of reader.		

CATEGORIES OF RISK FACTORS FOR TUBERCULOSIS TO DETERMINE SIGNIFICANCE OF TST INDURATION SIZE

 5 OR MORE MILLIMETERS	 10 OR MORE MILLIMETERS	 15 OR MORE MILLIMETERS
<p>An induration of 5 mm or more is considered reactive for:</p> <ul style="list-style-type: none"> • People with HIV infection • Recent contacts of persons with infectious TB • People who have had TB Disease before • People with fibrotic changes on a chest x-ray • People who inject illicit drugs and whose HIV status is unknown • Patients with organ transplants and other immunosuppressed patients (including patients taking a prolonged course of oral or IV corticosteroids or TNF-antagonist) 	<p>An induration of 10 mm or more is considered reactive for:</p> <ul style="list-style-type: none"> • Recent immigrants (i.e., within 5 years) from high-prevalence countries • HIV-negative persons who inject illicit drugs • Microbacteriology lab personnel • Low-income groups • People in congregate living • People with certain medical conditions (silicosis, diabetes mellitus, severe kidney disease, certain types of cancer, some hematological disorders, weight loss of >10% of ideal body weight, gastrectomy, and jejunioileal bypass) • Children younger than 5 years • People in groups identified by local public health officials • Healthcare workers in moderate to high-risk facilities • Infants, children, and adolescents exposed to adults in high-risk categories 	<p>An induration of 15 mm more is considered reactive for:</p> <ul style="list-style-type: none"> • People with NO risk factors for TB

CASE STUDIES TO ENCHANCE SKIN TEST ADMINISTRATION VERIFICATIONS

Decide if the following cases are “Reactive” or “Non-reactive” and give rationale for your decisions. On the last three, generate some of your own case studies.

#	CASE STUDY FACTS	INDURATION	EVALUATION and RATIONALE
1.	Mr. West, 36 years old, HIV infected	08 mm	
2.	Ms. Hernandez, 26 years old, recent immigrant from Mexico	07 mm	
3.	Ms. Jones, 56 years old, has diabetes	12 mm	
4.	Mr. Sung, 79 years old, resident of a nursing home	11 mm	
5.	Ms. Marcos, 42 years old, chest x-ray findings suggestive of previous TB	06 mm	
6.	Ms. Rayle, 50 years old, husband has infectious pulmonary TB Disease	09 mm	
7.	Mr. Williams, 21 years old, no risk factors	13 mm	
8.	Ms. Ramirez, 26 years old, emigrated from Mexico 2 years ago, lives in a congregate setting with other recent immigrants from Mexico	09 mm	
9.	Mr. Grant, 87 years old, lives in a congregate facility, has a history of silicosis, reports cough X6 weeks and recent 15-pound weight loss	13 mm	
10.	Mary Star, 8½ years old, has congenital HIV, father died of AIDS, complicated by TB. Mother is heroin IV drug user and HIV positive. Mary has been severely ill for six months	08 mm	
11.	Mr. McKinney, 43 years old, homosexual with multiple partners, some of whom are known to have active TB, reports weight loss, low-grade fever, nausea, vomiting, severe pain after “fatty” meal and pasty, floating stool	0 mm	
12.	Sally O’Reilly, 61 years old, emigrated two weeks ago from Ireland. She reports general malaise, recent weight loss, night sweats, hemoptysis. Her chest x-ray suggests previous TB Disease.	12 mm	
13.			
14.			
15.			

PARTICIPANT EVALUATION

This form must be used (and saved for 3 years) IF you will be surveyed by any agency (e.g. ISDH, Joint Commission).

The following content objectives were met:

	Disagree		to		Agree
1. The Participants and Instructor(s) will work together in an atmosphere that encourages an open exchange of information.	1	2	3	4	5
2. The Participant will be able to state the components of the ALAIN Basic Tuberculosis Education Program in Indiana.	1	2	3	4	5
3. The Participant will be able to successfully demonstrate the procedures for administering, reading, and recording a Mantoux TST.	1	2	3	4	5
4. The Participant will be able to verbalize that completion of the two-part TB Education Program has provided knowledge and skills required to successfully deal with TB in the clinical setting.	1	2	3	4	5

The following presentation objectives were met:

	Disagree		to		Agree
1. Content was related to the objective.	1	2	3	4	5
2. Program was well organized.	1	2	3	4	5
3. Teaching methods were effective.	1	2	3	4	5
4. Handout materials were helpful.	1	2	3	4	5
5. The content of this offering will benefit me in the clinical setting.	1	2	3	4	5
6. The Instructor provided an environment of interest and learning.	1	2	3	4	5
7. Overall, I would positively rate the program.	1	2	3	4	5

Please include any additional comments on the back; DO NOT include your name or the date.



Reference Information

SECTIONS 3

ALAIN TB EDUCATION PROGRAM REFERENCES

Agencies with TB Programs	<p>American Lung Association in Indiana 115 W Washington St, Se 1180-S Indianapolis, IN 46204 Ph: 317-819-1181 F: 317-819-1187 Lung.org</p> <p>Indiana State Department of Health 2 N Meridian St, Section 6-D Indianapolis, IN 46204 Ph: 317-233-7434 F: 317-233-7747 tb.in.gov</p> <p>Centers for Disease Control and Prevention (CDC) National Center for Prevention Services 1600 Clifton Road NE Atlanta, GA 30333 Ph: 800-232-4636 cdc.gov/tb</p>
DVD	<p>Free TB DVD kit and supplemental class information from the CDC (Centers for Disease Control) http://www.cdc.gov/tb/publications/videodvdcroms.htm You need to order the Mantoux Tuberculin Skin Testing DVD kit, which includes DVD, facilitator guide, and ruler.</p>
Educational Information	<p>TB rulers, poster, wall chart, DVD kit and supplemental class information. All items are free from CDC (Centers for Disease Control). http://wwwn.cdc.gov/pubs/cdcinfoondemand.aspx</p> <p>Free TB Self-Study online TB Course, <i>Interactive Core Curriculum on Tuberculosis</i> www.cdc.gov/tb/webcourses/course/main_menu/index.html</p> <p>TB Resource Database for Training and Educational Resources https://findtbresources.cdc.gov</p> <p>TB Education and Training Network www.cdc.gov/tb/education/tbetn/default.htm</p>
Instruction Manual	<p>Tuberculosis Instructor Manual from the American Lung Association in Indiana will be made available by electronic copy to all TB Instructors in good standing.</p>
Indiana Statistics	<p>Indiana State Department of Health Annual Tuberculosis Report http://www.in.gov/isdh/19668.htm</p>
TB Testing Supplies	<p>TB Testing Arms: TB Testing arms can be purchased from Health EDCO or other distributors. Approximate cost for a set of two is \$80. www.healthedco.com 800-299-3366</p> <p>Intradermal Injection Simulator (made by NASCO and others): Listed in the Pocket Nurse Medical Education, 2015 catalogue for \$20. Great for practice using syringes before students show their ability to perform an intradermal on a human. http://www.pocketnurse.com</p> <p>Rulers (skin testing): One skin testing ruler is sent with each Basic Validation Card purchased from the ALAIN (as supply allows). Free rulers can also be ordered from the CDC at no charge. Quantities are limited. http://wwwn.cdc.gov/pubs/cdcinfoondemand.aspx</p> <p>Sterile Normal Saline, TB Syringes and Needles: From your organization (hospital, facility). You may need a prescription for Normal Saline and needles. HOWEVER, do not allow the pharmacist to put these supplies through your personal insurance plan. The American Lung Association does not provide these supplies.</p>
Websites	<p>For forms, upcoming classes, and general TB information Lung.org (click on Programs and Materials and then click on the Tuberculosis link)</p> <p>For IN-TRAIN Basic TB Online Course, Indiana Statistics, and general TB information www.tb.in.gov Indiana State Department of Health, TB Department</p> <p>For forms from the Indiana State Department of Health to report suspected and active cases, and for the Treatment of LTBI: http://www.in.gov/isdh/19042.htm</p> <p>For educational materials and general TB information: Center for Disease Control, TB section: www.cdc.gov/tb</p> <p>For TB educational information, Mayo Clinic Center for Tuberculosis:* www.mayo.edu/tuberculosis-center</p>

*The ALAIN has been assigned to the Mayo Clinic Center for Tuberculosis for additional educational information.



Program Policies

SECTION 4

Section 1.0 Agreements

Number 1.1 Instructor

Purpose Statement: To identify the requirements to receive and maintain the status of ALAIN TB Instructor

Criteria:

1. Fill out and turn in to your trainer, a TB Instructor Course Registration Form and Statement of Financial and Resource Support for TB Education Course. These forms are available from your Trainer or on our website at Lung.org.
2. Complete the TB Instructor Course and achieve a score of 90% on the 50-question test.
3. Notify the ALAIN at least 30 days in advance of scheduled PUBLIC Competency Validation.
4. Instruct at least one Basic TB Competency Validation (including placement of an intradermal injection on a live person using Normal Saline, reading "Reactor Arms", and discussing Case Studies).
5. Submit a completed Competency Validation Roster and Order Form within 20 days of the class; always use the most current ALAIN forms found on the ALAIN website.
6. Distribute only ALAIN TB Validation Cards after both the ISHD IN-TRAIN Online Course and the ALAIN Competency Validation have been successfully completed.

Note: The ALAIN no longer issues TB Validation Cards prior to classes. An organization may NOT make their own version of TB Validation Cards. Duplication of ALAIN TB Validation Cards is prohibited.

7. Maintain appropriate class documentation and record keeping for a minimum of three years.
8. Attend updates, educational opportunities or ALAIN symposia when scheduled, as needed.
9. Remit an Administrative Fee to the American Lung Association in Indiana between November 1 and December 31 each year.
10. Use Instructor Manual content to prepare for ALA Competency Validations.
11. Use only current ALAIN forms.
12. Complete and file a New Instructor Information Form with the ALAIN.

I agree to meet the above criteria:

Signature of applicant

Date

Daytime phone number

Email

Section 1.0 Agreements

Number 1.2 Trainer

Purpose Statement: To identify the requirements to receive and maintain the status of ALAIN TB Trainer

Criteria:

1. Provide proof of validation as an ALAIN TB Instructor.
2. Be an Instructor in good standing for at least one year who has instructed at least six Basic TB Competency Validations prior to becoming a Trainer and has been an active member of an Indiana TB Task Force or committee during the year prior to application.
3. Successfully complete the TB Trainer Course, discussing case studies presented and passing the 100-question test with a score of 90% or better.
4. Notify the ALAIN at least 30 days in advance of scheduled PUBLIC classes.
5. Produce evidence of having instructed at least one Competency Validation and one Instructor Course each year by submitting completed ALAIN Rosters within 20 days of each event.
6. Distribute only ALAIN Validation Cards (Basic & Instructor) in compliance with ISDH and ALAIN policies.
7. Maintain appropriate class documentation and record keeping for a minimum of three years.
8. Attend updates, educational opportunities or ALAIN symposia when scheduled, as needed .
9. Continue to serve as an active member of an Indiana TB Task Force or committee.
10. Remit an Administrative Fee to the American Lung Association in Indiana prior to December 31st each year.
11. Complete and file a New Trainer Information Form with the ALAIN.

I agree to meet the above criteria:

Signature of applicant

Date

Daytime phone number

Email

Section 2.0 Documentation and Recordkeeping

Number 2.1 Basic Validation Cards

Purpose Statement: To clarify the process of issuing Validation Cards for Basic TB Competency Validation

Policy Statements:

1. Upon completion of all requirements, an ALAIN Validation Card will be issued.
2. Basic Validation is **mandatory** every three years. Instructors and Trainers must renew their status with the ALAIN every year.
3. The ALAIN will keep records for up to three years.
4. Instructors must use original Validation Cards for TB Education issued only by the ALAIN.
5. Each Validation Card issued by an Instructor must contain the Instructor's original signature and date.
6. ALAIN Validation Cards should be ordered when submitting the Roster after each Competency Validation has been successfully completed. The ALAIN no longer issues TB Validation Cards prior to receiving the Roster.
7. An Instructor cannot provide ALAIN Validation Cards to another Instructor.
8. Validation Cards cannot be altered in any way; they must be used as issued only by the ALAIN.
9. **Duplication of ALAIN TB Validation Cards is prohibited.**

Section 2.0 Documentation and Recordkeeping

Number 2.2 Instructor Validation Cards

Purpose Statement: To clarify the process of issuing ALAIN Validation Cards for Instructors.

Policy Statements:

1. TB Trainers are the only people who should order Instructor Validation Cards.
2. Upon completion of all requirements, each Instructor will be given a New Instructor Validation Card to carry during their first year.
3. Each January, provided all the criteria for renewing Instructor status are met, each Instructor will be issued an Instructor Renewal Validation Card to carry for that calendar year.
4. Trainers must use original cards for TB Education issued only by the ALAIN office.
5. Each new ALAIN Validation Card issued, must contain the Trainer's original signature and date.
6. Validation Cards should be ordered when submitting the Roster after the class has been taught.
7. A Trainer cannot provide ALAIN Validation Cards to another Trainer.
8. ALAIN Validation Cards cannot be altered in any way; they must be used as issued only by the ALAIN.
9. **Duplication of ALAIN TB Validation Cards is prohibited.**

Section 2.0 Documentation and Recordkeeping

Number 2.3 Trainer Validation Cards

Purpose Statement: To clarify the process of issuing validation cards for Trainers. The ALAIN issues Trainer Validation Cards.

Policy Statements:

1. Upon completion of all requirements, each Trainer candidate will be issued a New Trainer Validation Card to carry for the first year.
2. The person leading the Trainer course must use original Validation Cards for TB Education issued only by the ALAIN office for an Administrative Fee.
3. Each January, provided all the criteria for Trainer status are met, each Trainer will be issued a new Trainer Validation Card to carry for that calendar year.
4. Validation Cards cannot be altered in any way; they must be used as issued only by the ALAIN.
5. **Duplication of ALAIN TB Validation Cards is prohibited.**

Documentation and Recordkeeping

Number 2.4 Roster Recordkeeping

Purpose Statement: To identify the required record keeping practices for the TB Education Program.

Responsibilities of the American Lung Association in Indiana Office:

1. Maintain copies of Rosters on file for all courses held for three years and then delete them.
2. Process orders for Validation Cards.
3. Maintain computer records of current Instructors and Trainers, scheduled courses, and date, location, and number of Participants for completed Competency Checks.

Responsibilities of the Instructors:

1. Maintain Competency Check Rosters for a minimum of three years and then may delete them.
2. Send copies of these forms to the ALAIN Office. (For complete instructions for these forms, refer to the ALAIN website.)
3. Submit Rosters and Order Forms within 20 days of every Competency Check. (If more than one Instructor teaches a course, each Instructor must sign the Roster to receive credit.)

Responsibilities of the Trainers:

1. Maintain their Rosters for three years and then may delete them. Copies of these forms should be sent to ALAIN. For complete instructions for these forms, see Trainer Manual.
2. Maintain copies of Instructor Agreements on file for three years and then delete them.

Documentation and Recordkeeping

Number 2.5 Quality Control by the ALAIN

Purpose Statement: To identify measures taken to maintain quality through documentation and record keeping.

Responsibilities of ALAIN:

1. The ALAIN will keep a current data base of the following:
 - TB Education Program Instructors
 - TB Education Program Trainers
2. Database will include:
 - Name
 - Address
 - Phone number/Fax number (if applicable)
 - Email address
 - Date of attendance of most recent Instructor/Trainer classes
 - Date of all updates or educational opportunities completed in the calendar year.
 - Payment of Annual Instructor/Trainer Administrative fee
3. A list of all the Instructors and Trainers will be compiled and reviewed for renewal of their Validation Cards as Instructors or Trainers the first week of December each year. All those who meet the requirements will be issued a renewal Validation Card upon receipt of the Administrative Instructor/Trainer Fee.
4. Any Instructor/Trainer who does not meet the renewal requirements, will be considered inactive and not eligible to teach in the ALAIN TB Education Program.
5. All course records will be deleted after three years.