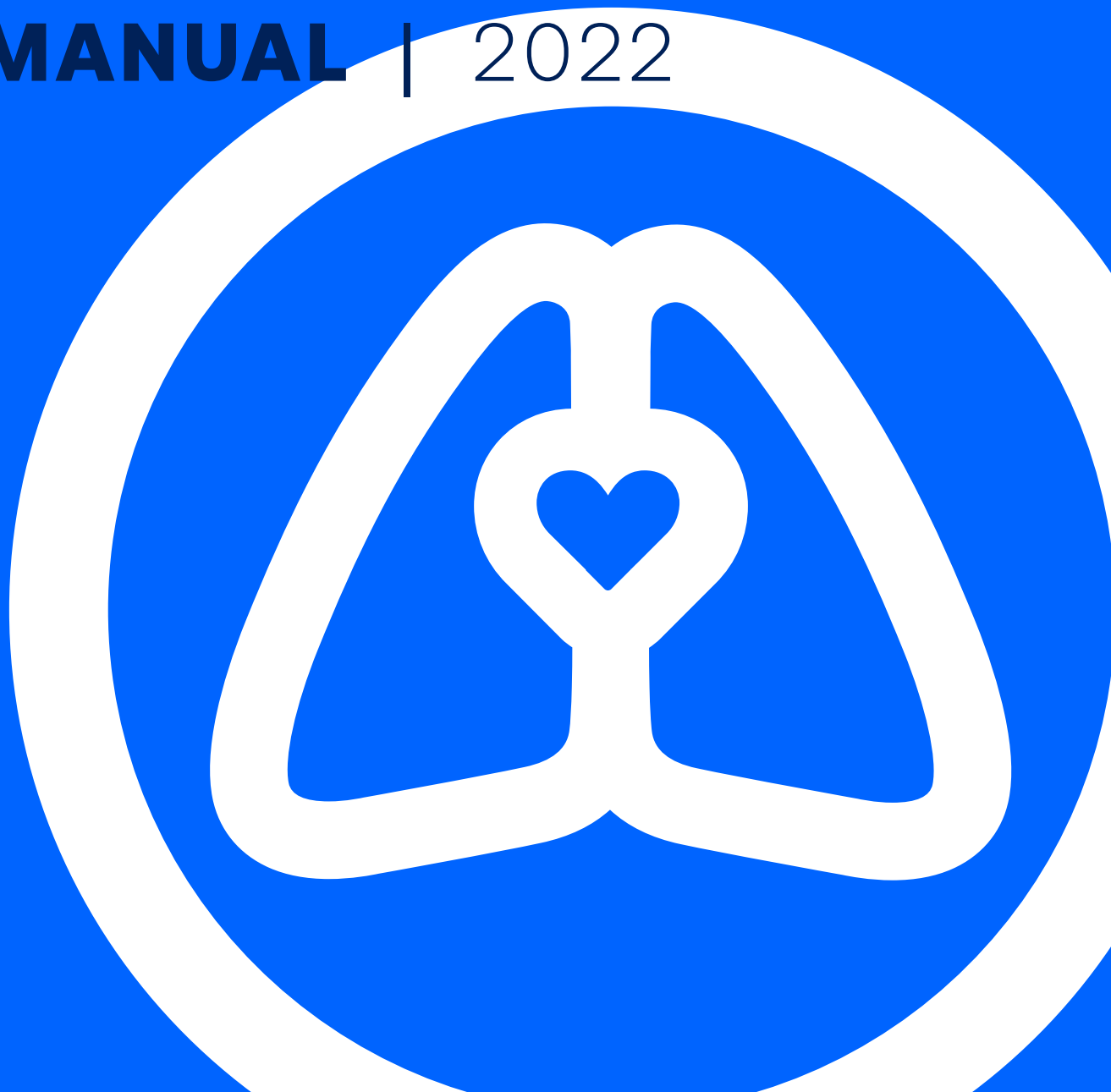


# **TB INSTRUCTOR MANUAL | 2022**



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# TB Instructor Course

## Content and Objectives

### I. Introduction to the TB Instructor Course

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

### Objective #1

The TB Instructor Candidate will be able to state the components of the American Lung Association TB Education Program.

### II. Components of the American Lung Association TB Education Program

- A. Three courses in the American Lung Association TB Education Program are Trainer, Instructor, and Basic
- B. The two-step Basic TB Validation Course includes:
  - 1. Indiana State Department of Health (IDOH) *TB Basics and TB Tests Used to Identify TB Infection* online course (formerly known as IN-TRAIN)
  - 2. American Lung Association Basic TB Validation Course (ie, Mantoux tuberculin skin test [TST] competency validation)

### Objective #2

The TB Instructor Candidate will be able to apply planning tools for the American Lung Association Basic TB Validation Course.

### Objective #3

The TB Instructor Candidate will be able complete and submit all American Lung Association forms.

### III. Planning the Basic TB Validation Course

- A. List of site equipment and supplies
- B. Basic TB Validation Course outline and objectives
- C. Completing and submitting American Lung Association Basic TB Validation Course paperwork
  - 1. Scheduling a TB course that is open to all healthcare professionals
  - 2. Competency check-offs for TB Tuberculin Skin Test administration, reading, recording, and interpreting
  - 3. Categories of risk factors for TB infection
  - 4. Case studies
  - 5. Basic TB Validation Course Roster Form
  - 6. Basic TB Validation Course Product Order Form
  - 7. Anonymous participant evaluation for Basic TB Validation Course Participant Evaluation Form
- D. Facility TST and health screen forms

### Objective #4

The TB Instructor Candidate will be able to instruct participants to successfully administer, read, record, and interpret Mantoux Tuberculin Skin Tests (TST).

### IV. Basic TB Validation Course Components

- A. Reading reactor arms using CDC technique
- B. Placement of a Mantoux-type intradermal injection

## Objective #5

The TB Instructor Candidate will be able to identify resources available to the American Lung Association TB Education Program.

### V. Reference Information

- A. TB educational information
- B. Indiana TB statistics
- C. TB testing supplies
- D. Websites available for additional information

## Objective #6

The TB Instructor Candidate will be able to explain and adhere to the policies outlined by the American Lung Association TB Education Program (TB Instructor Agreement).

### VI. TB Education Program Policies

## Objective #7

The TB Instructor Candidate will be able to demonstrate knowledge and skills required to successfully instruct the American Lung Association Basic TB Validation Course.

### VII. Conclusion

- A. Written examination (Instructor's test) and review of essential TB facts
- B. Evaluation and validation cards



Tuberculosis Education



# Information

# SECTION 1

# American Lung Association TB Education Program

The goal of the American Lung Association is to ensure that healthcare personnel enrolled in any of the three courses has received:

- 1| The education necessary to understand the *basic* history, pathogenesis, epidemiology, and diagnosis 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, record, and interpret Mantoux Tuberculin Skin Tests (TSTs)
- 3| Information about the current trends and concerns of TB infection and disease

**The three courses in the American Lung Association TB Education Program include:**

## Basic TB Validation Course

The goals of the Basic TB Validation Course are to provide the:

- 1| **Basic** history, epidemiology, pathogenesis, and diagnosis of TB infection and disease; especially as it relates to each person's own professional and personal experience and needs;
- 2| Training to administer, read, record, and interpret Mantoux Tuberculin Skin Tests (TSTs); and
- 3| Information about the current trends and concerns of TB infection and disease.

**Who is eligible:** Interested healthcare personnel who administer, read, record, and interpret Mantoux Tuberculin Skin Tests.

TWO SEPARATE STEPS must be completed in sequence in order to receive a **Basic TB Validation Card** that is valid for three years:

- 1| Complete the Indiana Department of Health *TB Basics and TB Tests Used to Identify TB Infection* online course that includes:
  - Viewing the entire online course material
  - Taking the quizzes at the end of each module
  - Passing the final 20-question test with a score of 80% or higher.
- 2| Within **60 days** of completing the Indiana Department of Health *TB Basics and TB Tests Used to Identify TB Infection* online course above and under direct supervision (in-person) of an American Lung Association TB Instructor, successfully complete the Basic TB Validation Course.
  - Demonstrate proficiency in reading the "Reactor Arm" indurations, using the proper CDC techniques and achieving a reading that is within 2 mm of the correct answer.
  - Demonstrate competency in the simulation of a Mantoux-type intradermal injection, using sterile normal saline and a sterile TB syringe and needle on a live person's arm.

The TB Instructor will submit all Basic TB Validation Course rosters to the American Lung Association, at which time the participant will receive their **Basic TB Validation Card** electronically from the American Lung Association. An administrative fee does apply. This validation card is valid for three years.

## TB Instructor Course

Over 500 healthcare professionals are currently active TB Instructors in Indiana.

**The TB Instructor Course is designed to train future TB Instructors and cover:**

- 1| How to instruct the American Lung Association's Basic TB Validation Course.
- 2| All materials, procedures, and policies for leading the skills demonstration of administration, reading, recording, and interpreting of Mantoux Tuberculin Skin Tests (TSTs).
- 3| American Lung Association TB Education Program forms, their submission, and resources available.
- 4| The need to carefully assess and meet the needs of each Basic TB Validation Course participant.

**Who is eligible:** Indiana licensed healthcare personnel or professionals with a four-year degree in a health-related field.

The American Lung Association welcomes CMAs to complete the Basic TB Validation Course; however, CMAs are not eligible for the TB Instructor Course. Please note: Indiana long-term care, assisted living facilities, and home care agency regulations require that the healthcare professionals be licensed to practice the administration (subdermal injections) and interpretation (assessment skills) of the Basic TB Validation Course.

**How to complete:**

- 1 | Fill out and submit a [TB Instructor Course Registration Form](#) and [TB Instructor Agreement](#) for the TB Education Course to a TB Trainer (or the American Lung Association).
- 2 | Complete the TB Instructor Course and achieve a score of 90% or higher on the 50-question test.
- 3 | Notify the American Lung Association at least 30 days in advance of scheduled Basic TB Validation Course.
- 4 | After successfully completing all the above, submit all paperwork, via email, to the Lung Association within 20 days and request a new TB Instructor card. An administration fee does apply.
- 5 | The TB Instructor validation is good until December 31 of each year.

**To renew as a TB Instructor:**

To remain in good standing, TB Instructors must have:

- 1 | Taught at least one Basic TB Validation Course in that calendar year and submitted paperwork electronically to the American Lung Association
- 2 | Attended the required continuing education training.

At the end of each calendar year, the TB Instructor can submit to the American Lung Association for a new **TB Instructor Validation Card** to be valid for the following calendar year. An administration fee does apply.

**TB Trainer Course**

The TB Trainer Course is designed to teach the individuals to lead TB Instructor Courses. In addition to instructing on all subject matter contained in both the TB Instructor Course and Basic TB Validation Course, numerous case studies are reviewed. This validation is good until December 31 of each year. At that time, if the TB Trainer is in good standing (same qualifications as a TB Instructor listed above), a new TB Trainer Validation Card will be issued electronically by the American Lung Association.

**Who is eligible:** Must be a TB Instructor in active, good standing. Contact the American Lung Association for additional information.



Tuberculosis Education



# Planning the Class

# SECTION 2



# List of Course Equipment and Supplies

## Site Equipment

- Large table and chairs in a well-lit area
- 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
- 2x2s or cotton balls
- Biohazardous sharps container
- See and touch reactor arms
- TB skin test rulers marked in millimeters (mm)

## Forms and Educational Literature

- Competency check-offs for TB TST administration, reading, recording, and interpreting
- Case studies
- Categories of Risk Factors for TB (page 14)
- Basic TB Validation Course Roster form
- Basic TB Validation Course Product Order Form
- Basic TB Validation Course Participant Evaluation Form
- Facility TST and health screen forms (optional)
- CDC video, *Mantoux Tuberculin Skin Test* (optional)

# Basic TB Validation Course

## Outline and Objectives

The Indiana Department of Health *TB Basics and TB Tests Used to Identify TB Infection* online course is a pre-requisite.

The principles of adult education identify that adults want to learn by doing. The expected outcome of the Basic TB Validation Course is that the participant will become a team member who has the skill to administer, read, record, and interpret Mantoux TSTs. This Basic TB Validation Course 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(s).

## Objective #1

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

### I. Introduction to the Basic TB Validation Course

- A. Getting started
  - 1. Introductions and announcements
  - 2. Competency check agenda and rationales
- B. Discuss TB knowledge base
- C. Discuss measurement outcomes

## Objective #2

The participant will be able to state the components of the Basic TB Education Program.

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

- A. Indiana Department of Health *TB Basics and TB Tests Used to Identify TB Infection* online course
- B. American Lung Association Basic TB Validation Course

## Objective #3

The participant understands and incorporates into a skills demonstration the procedures of administration, reading, recording, and interpreting Mantoux Tuberculin skin tests.

### III. Basic TB Validation Course 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 #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 conduct tuberculin skin testing.

### IV. Conclusion

- A. Participant evaluation survey completion
- B. American Lung Association Basic TB Validation Course cards
  - 1. Timeline: Will be received after the class roster has been submitted to the American Lung Association
  - 2. Duration: Validation good for three years

## TB Education Program Forms

Only current, American Lung Association TB Education Program forms may be used. These can be found on our [website](#). Please do not submit old forms or forms unique to your facility. All forms must be submitted electronically to [TB-IN@Lung.org](mailto:TB-IN@Lung.org).

### To schedule an upcoming class offered to the public (Basic TB Validation Course, Instructor Class, or Trainer Class):

- 1| Public events (i.e., open to the public, not limited to any one facility), should be scheduled online at least one week before the end of the previous month.
- 2| Let us know about your course by completing this [online form](#).

## Rosters and Materials Order Forms

- 1| For courses taught by more than one TB Instructor, EACH TB 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 submitted electronically to the American Lung Association within 20 days of the event. The most recent course forms can be found on the [Indiana TB Education Program](#) website. Forms can only be submitted electronically to [TB-IN@Lung.org](mailto:TB-IN@Lung.org).
- 4| Validation cards **must** be ordered when submitting the roster after each event. The American Lung Association will not issue Basic TB Validation Course cards prior to classes. Basic TB Validation Cards will only be issued to participants who successfully meet the course standards.
- 5| The American Lung Association will process all course cards electronically. Course cards will be sent electronically to both the individual participant and the TB Instructor.
- 6| **An organization may not make their own version or duplicate the American Lung Association Basic TB Validation Card.**

# 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 and understand situations in which IGRA is preferred.	<input type="radio"/>	
The Participant chooses a placement site on volar surface of forearm 2 to 4 inches below antecubital space or gives rationale for an alternate site.	<input type="radio"/>	
The Participant confirms they are using the correct solution, has checked the expiration date, and understands the conditions in which the solution should be stored.	<input type="radio"/>	
The Participant cleanses the site with an alcohol wipe and allows the site to dry appropriately.	<input type="radio"/>	
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.	<input type="radio"/>	
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° with skin surface, placing total bevel under skin at intradermal level.	<input type="radio"/>	
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.	<input type="radio"/>	
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.	<input type="radio"/>	
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.	<input type="radio"/>	
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.	<input type="radio"/>	
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.	<input type="radio"/>	
Correctly complete Facility Form which must include: site planted, signature of planter, time and date, antigen name, PPD expiration dates; manufacturer and lot number.	<input type="radio"/>	

# 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 fingertips.	<input type="radio"/>	
The Participant inspects the site for evidence of injection and induration.	<input type="radio"/>	
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.	<input type="radio"/>	
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.	<input type="radio"/>	
The Participant correctly records results in mm. Please note, most "arms" have identical indurations of 0, 15, 10, and 5. <b>The technique must be correct.</b>	<input type="radio"/>	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.	<input type="radio"/>	

# Categories of Risk Factors for TB to Determine Significance of TST Induration Size

 <b>5 or more millimeters</b>	 <b>10 or more millimeters</b>	 <b>15 or more millimeters</b>
<p><b>An induration of 5 mm is positive for:</b></p> <ul style="list-style-type: none"> <li>• People living with HIV</li> <li>• A recent contact of a person with TB disease</li> <li>• People with fibrotic changes on a chest radiography consistent with prior TB</li> <li>• People with organ transplants</li> <li>• People who are immunosuppressed for other reasons (eg, taking the equivalent of &gt;15 mg/day of prednisone for 1 month or longer, taking TNF-<math>\alpha</math> antagonists).</li> </ul>	<p><b>An induration of 10 mm is positive for:</b></p> <ul style="list-style-type: none"> <li>• People who have come to the United States recently (&lt;5 years) from high-prevalence countries</li> <li>• People born in high-prevalence countries</li> <li>• People who use injection or illicit drugs</li> <li>• Residents and employees of high-risk congregate settings</li> <li>• Mycobacteriology laboratory personnel</li> <li>• People with clinical conditions that place them at high risk</li> <li>• Children younger than 5 years</li> <li>• Infants, children, and adolescents exposed to adults in high-risk categories</li> </ul>	<p><b>An induration of 15 mm is positive for anyone, including people with no risk factors.</b></p>

# Case Studies to Enhance Skin Test

## Interpretation Verifications

Decide if the following cases are “positive” or “negative” and give rationale for your decisions.

#	Case Study Facts	Induration	Interpretation 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 male who has multiple male partners, some of whom are known to have TB disease, 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 2 weeks ago from Ireland. She reports general malaise, recent weight loss, night sweats, hemoptysis. Her chest x-ray suggests previous TB disease.	12 mm	

# Basic TB Validation Course Participant Evaluation

The following content objectives were met:	Agree	to	Disagree		
1  Program was well organized.	1	2	3	4	5
2  Information provided is accurate and current.	1	2	3	4	5
3  Teaching methods were effective.	1	2	3	4	5
4  The content of this offering will benefit me in the clinical setting.	1	2	3	4	5
5  The Instructor provided an environment of interest and learning.	1	2	3	4	5
6  Overall, I would positively rate the program.	1	2	3	4	5

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

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## Administration Verifications

This form must be used (and saved for three years).

The following content objectives were met:	Agree	to	Disagree		
1  The Participants and Instructor(s) worked together in an atmosphere that encouraged an open exchange of information.	1	2	3	4	5
2  The Participant was be able to successfully demonstrate the procedures for administering, reading, recording, and interpreting a Mantoux TST.	1	2	3	4	5
3  The Participant was able to verbalize that completion of the two-part TB Education Program has provided knowledge and skills focused on TST.	1	2	3	4	5





Tuberculosis Education



# Reference Information

# SECTION 3

<p><b>DVD</b></p>	<p>Free TB DVD kit and supplemental class information from the CDC (Centers for Disease Control and Prevention) <a href="https://www.cdc.gov/tb/education/mantoux/default.htm">https://www.cdc.gov/tb/education/mantoux/default.htm</a></p> <p><b>You need to order the Mantoux Tuberculin Skin Testing DVD kit</b>, which includes DVD, facilitator guide, and ruler.</p> <p><b>TB rulers, poster, wall chart, DVD kit and supplemental class information. All items are free from CDC.</b> <a href="https://www.cdc.gov/tb/education/mantoux/default.htm">https://www.cdc.gov/tb/education/mantoux/default.htm</a></p>
<p><b>Education Information</b></p>	<p><b>Free TB Self-Study online TB Course, <i>Interactive Core Curriculum on Tuberculosis</i></b>  <a href="https://www.cdc.gov/tb/webcourses/Course/main_menu/">https://www.cdc.gov/tb/webcourses/Course/main_menu/</a></p> <p><b>TB Resource Database for Training and Educational Resources</b>  <a href="https://findtbresources.cdc.gov">https://findtbresources.cdc.gov</a></p> <p><b>TB Education and Training Network</b>  <a href="http://www.cdc.gov/tb/education/tbetn">www.cdc.gov/tb/education/tbetn</a></p>
<p><b>Indiana Statistics</b></p>	<p><b>Indiana Department of Health <i>Annual Tuberculosis Report</i></b>  <a href="https://www.in.gov/health/tuberculosis/annual-reports/">https://www.in.gov/health/tuberculosis/annual-reports/</a></p>
<p><b>TB Testing Supplies</b></p>	<p><b>TB Reactor Arms:</b> TB reactor arms can be purchased from Health EDCO or other distributors.  <a href="http://www.healthedco.com">www.healthedco.com</a>   800-299-3366</p> <p><b>Intradermal Injection Simulator:</b> Great for practice using syringes before students show their ability to perform an intradermal on a human. <a href="http://www.pocketnurse.com">http://www.pocketnurse.com</a></p> <p><b>Rulers (skin testing):</b> Free rulers can be ordered from the CDC at no charge. Quantities are limited.  <a href="http://wwwn.cdc.gov/pubs/cdcinfoondemand.aspx">http://wwwn.cdc.gov/pubs/cdcinfoondemand.aspx</a></p> <p><b>Sterile Normal Saline, TB Syringes and Needles:</b> From your organization (hospital, facility). You may need a prescription for normal saline and needles. <b>However</b>, do not allow the pharmacist to put these supplies through your personal insurance plan. The American Lung Association does not provide these supplies.</p> <p><b>For forms, upcoming classes, and general TB information</b>  <a href="http://www.Lung.org">www.Lung.org</a></p> <p><b>For IN-TRAIN Basic TB Online Course, Indiana Statistics, and general TB information</b>  <a href="http://www.tb.in.gov">www.tb.in.gov</a> Indiana State Department of Health, TB Department</p>
<p><b>Websites</b></p>	<p><b>Indiana Department of Health report TB disease and latent TB infection</b>  <a href="https://www.in.gov/health/tuberculosis/information-for-health-professionals/tb-reporting-forms/">https://www.in.gov/health/tuberculosis/information-for-health-professionals/tb-reporting-forms/</a></p> <p><b>Center for Disease Control, TB Section</b>  <a href="https://www.cdc.gov/tb/">https://www.cdc.gov/tb/</a></p> <p><b>Global Tuberculosis Institute</b>  <a href="http://globaltb.njms.rutgers.edu/">http://globaltb.njms.rutgers.edu/</a></p> <p><b>Mayo Clinic Center for Tuberculosis</b>  <a href="http://www.mayo.edu/tuberculosis-center">www.mayo.edu/tuberculosis-center</a></p>

\*The American Lung Association of Indiana has been assigned to the Mayo Clinic Center for TB for additional educational information.



Tuberculosis Education



# Program Policies

# SECTION 4

# Section 1: Agreements | TB Instructor

\_\_\_\_\_ (Candidate Name) is applying to become a Tuberculosis Instructor with the American Lung Association.

## Part 1: TB Instructor Agreement

The TB Instructor Candidate agrees to providing safe, accurate, evidence-based education, including:

1. Completing and turning in to your Trainer, a TB Instructor Course Registration Form and Statement of Financial and Resource Support (bottom of this form). These forms are available from your Trainer or on the website.
2. Completing the TB Instructor Course and achieve a score of 90% of the 50-question test.
3. Notifying the American Lung Association at least 30 days in advance of scheduled Basic TB Validation Courses open to the public.
4. Using Indiana Department of Health's *TB Basics* and *TB Test Used to Identify TB Infection* online course. The TB Instructor will not provide the education related to TB history, epidemiology, diagnosis, or treatment. The TB Instructor will not use any videos, posters, or other educational materials not provided or approved by the American Lung Association.
5. Using the *TB Education Program Instructor Manual* content to prepare for Basic TB Validation Courses.
6. Instruct at least one Basic TB Validation Course (including placement of an intradermal injection on a live person using normal saline, reading "Reactor Arms," and discussing case studies.
7. Using only current program forms.
8. Submitting all completed paperwork, payment, participant roster, and participant evaluations to the American Lung Association within 20 days of Basic TB Validation Course.
9. Maintaining appropriate class documentation and record keeping for a minimum of three years.
10. Attending the required bi-annual continuing education symposia. The Lung Association may offer virtual continuing educational offerings in lieu of an in-person symposium.
11. Remitting an administrative fee to the American Lung Association between November 1 and December 31<sup>st</sup> annually. Renewal of TB Instructor status administrative fee increases after December 31<sup>st</sup>.
12. Reaching out to the Lung Association if you need assistance accommodating individuals with various learning needs. The Lung Association is committed to advancing our mission to save lives by improving lung health and preventing lung disease while fostering inclusion in our practices, programs, and processes. We do not discriminate against persons with various characteristics, including, but not limited to, individuals with temporary and permanent disabilities, certain immigration status, and mental health conditions. We also are committed to ensuring we provide accommodations for persons with various learning needs.

Candidate Signature \_\_\_\_\_ Date \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Part 2: Statement of Financial and Resource Support

The support needed from the TB Instructor Candidate's organization includes:

1. Cost and time to attend the TB Instructor Course
2. Bi-annual required professional education courses
3. Cost of supplies, duplication of materials, and equipment to provide a safe, accurate course
4. Maintenance and documentation and record keeping for all classes taught for a minimum of three years
5. Accommodating non-employee participation in Basic TB Validation Courses and may charge a reasonable fee to recoup expenditures

The required signature below must be an administrative staff who has the authority to determine financial resource allocation for the organization. This signature also verifies that the TB Instructor Candidate is an employee or is affiliated with the organization and that financial and resource support will be provided.

CEO/Administrator Signature \_\_\_\_\_ Date \_\_\_\_\_

Facility \_\_\_\_\_

Facility Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## Section 1: Agreement | TB Trainer

**Purpose Statement:** To identify the requirements to receive and maintain the status of American Lung Association TB Trainer.

**Criteria:**

- 1 | Provide proof of validation as an American Lung Association TB Instructor.
- 2 | Be a TB Instructor in good standing for at least one year who has instructed at least six Basic TB Validation Courses prior to becoming a TB 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 American Lung Association at least 30 days in advance of scheduled classes open to the public.
- 5 | Produce evidence of having instructed at least one Basic TB Validation Course and one TB Instructor Course each year by submitting completed rosters to the American Lung Association within 20 days of each event.
- 6 | All validation cards will be distributed electronically by the American Lung Association.
- 7 | Maintain appropriate class documentation and record keeping for a minimum of three years.
- 8 | Attend updates, educational opportunities, or American Lung Association conferences 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 prior to December 31 each year.
- 11 | Complete and file a New Trainer Information Form with the American Lung Association.

**I agree to meet the above criteria:**

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Signature of applicant

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Date

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Daytime phone number

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Email

## Section 2: Documentation and Recordkeeping

### Basic TB Validation Cards

**Purpose Statement:** To clarify the process of issuing validation cards for Basic TB Validation Course

**Policy Statements:**

- 1| Upon completion of all requirements, an American Lung Association Validation Card will be issued.
- 2| Basic TB Validation Course is mandatory every three years. TB Instructors and TB Trainers must renew their status with the American Lung Association every year.
- 3| The American Lung Association will keep records for up to three years.
- 4| Instructors must use original Basic TB Validation cards for TB Education issued only by the American Lung Association.
- 5| American Lung Association Basic TB Validation Course cards should be ordered when submitting the roster after each course has been successfully completed. The American Lung Association will not issue Basic TB Validation Course cards prior to receiving the roster.
- 6| The American Lung Association will issue all TB Validation Cards electronically beginning October 1, 2021.
- 7| An TB Instructor cannot provide American Lung Association Basic TB Validation Course cards to another Instructor.
- 8| American Lung Association TB Validation Cards cannot be altered or duplicated.

## Section 2: Documentation and Recordkeeping

### TB Instructor Validation Cards

**Purpose Statement:** To clarify the process of issuing Instructor TB Validation cards for Instructors.

**Policy Statements:**

- 1| Only TB Trainers can order TB Instructor Validation cards.
- 2| Upon completion of all requirements, each TB Instructor will be given a new TB Instructor Validation Card to carry during their first year.
- 3| Provided all the criteria for renewing TB Instructor status are met, each TB Instructor will be issued an TB Instructor Renewal Validation Card to carry for that calendar year. An administrative fee will apply
- 4| Trainers must use original cards for TB education issued only by the American Lung Association.
- 5| All TB Validation Cards should be ordered when submitting the roster after the class has been taught.
- 6| American Lung Association will issue all TB Validation Cards electronically beginning October 1, 2021.
- 7| American Lung Association TB Validation Cards cannot be altered or duplicated.

## Section 2: Documentation and Recordkeeping

### TB Trainer Validation Cards

**Purpose Statement:** To clarify the process of issuing validation cards for TB Master Trainers. The American Lung Association issues Master Trainer TB Validation Cards.

**Policy Statements:**

- 1| Upon completion of all requirements, each TB Trainer candidate will be issued a New TB Trainer Validation Card to carry for the first year. These cards will be issued electronically by the American Lung Association. An administrative fee will apply.
- 2| Each January, provided all the criteria for TB Trainer status are met, each TB Trainer will be issued a new TB Trainer Validation Card to carry for that calendar year.
- 3| American Lung Association TB Validation Cards cannot be altered or duplicated.

## Section 2: Documentation and Recordkeeping

### Recordkeeping

**Purpose Statement:** To identify the required record keeping practices for the American Lung Association TB Education Program.

#### Responsibilities of the American Lung Association:

- 1| Maintain copies of rosters on file for all courses for at least three years.
- 2| Process orders for TB Validation Cards. All cards will be processed electronically.
- 3| Maintain computer records of current TB Instructors and TB Trainers, scheduled courses, and date, location, and number of participants for completed Basic TB Validation Courses.
- 4| Provide continuing education opportunities to TB Instructors and TB Trainers.
- 5| Review all course materials at least annually.
- 6| Communicate regularly with all TB Instructors.

#### Responsibilities of the TB Instructors:

- 1| Maintain Basic TB Validation Course rosters for a minimum of three years.
- 2| Email copies of these forms to the American Lung Association at [TB-IN@Lung.org](mailto:TB-IN@Lung.org)
- 3| Submit rosters and order forms within 20 days of every Basic TB Validation Course. (If more than one TB Instructor teaches a course, each TB Instructor must sign the roster to receive credit.)
- 4| Ensure the American Lung Association has an accurate email address for communication.

#### Responsibilities of the TB Trainers:

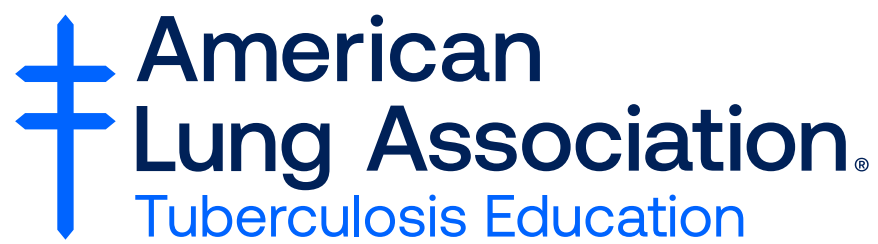
- 1| Maintain their rosters for three years.
- 2| Email copies of these forms to the American Lung Association at [TB-IN@Lung.org](mailto:TB-IN@Lung.org).
- 3| Maintain copies of TB Instructor Agreements on file for three years.

## Section 2: Documentation and Recordkeeping

### Quality Control

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

- 1| The American Lung Association will keep a current database of the following:
  - TB Education Program Trainers
  - TB Education Program Instructors
  - Basic TB Validation Course participants
- 2| Database will include:
  - Name
  - Address
  - Phone number/Fax number (if applicable)
  - Email address
  - Course participant date and TB Instructor name
  - Date of all updates or educational opportunities completed in the calendar year.
  - Payment of any administrative fee
- 3| A list of all the TB Instructors and TB Trainers will be maintained throughout the year. All those who meet the requirements will be issued a renewal validation card upon receipt of the administrative Instructor/Trainer fee.
- 4| Any TB Instructor/TB Trainer who does not meet the renewal requirements will be considered inactive and not eligible to teach in the American Lung Association TB Education Program.



317-819-1181 | [TB-IN@Lung.org](mailto:TB-IN@Lung.org)