FormAudit User Manual

Hand Hygiene System

For hand hygiene assistance and inquiries:
HandHygiene@fraserhealth.ca

For FormAudit Technical Support:
Peter Kaloupis (604-828-8945)
Chandima Panditha (604-318-3245)
support@formaudit.com
# Table of Contents

1. Hand Hygiene Audit Basics .......................................................................................................................... 3
   1.1 Frequency ............................................................................................................................................... 3
   1.2 Requirements ........................................................................................................................................ 3
   1.3 Positioning for Observations .................................................................................................................. 3
   1.4 Log-In .................................................................................................................................................... 3
   1.5 Process for Auditor ............................................................................................................................... 4
   1.6 Using the Audit Form ............................................................................................................................ 5
   1.7 Definitions ............................................................................................................................................ 6
   1.8 Category codes for Health Care Provider (HCP) .................................................................................... 7
2. Accessing the FormAudit Hand Hygiene System ............................................................................................ 8
   2.1 Link ....................................................................................................................................................... 8
3. FormAudit Hand Hygiene System Navigation ............................................................................................. 8
   3.1 Screen Navigation ................................................................................................................................. 8
   3.2 The Unit Hand Hygiene Feedback Form ................................................................................................ 9
   3.3 Account Settings .................................................................................................................................. 10

Appendix A – Common User Errors ................................................................................................................ 11
Appendix B – FormAudit Cheat Sheet ............................................................................................................. 18
1. **Hand Hygiene Audit Basics**

1.1 **Frequency**

Hand Hygiene audits are required to be performed monthly and should include a minimum of 25 observations and 5 HCPs. They may take up to one hour to complete.

1.2 **Requirements**

- A complete audit requires a minimum of 25 observations and a minimum of 5 Health Care Providers (HCPs) documented on one Hand Hygiene audit form.
- Observe up to 10 opportunities for one HCP or follow for 10 minutes, whichever comes first.
- If the first 5 HCPs do not achieve 25 observations, complete observations for a 6th HCP.
- If you have not collected 25 observations after 6 HCPs select an additional form and complete subsequent 10 opportunities or 10 minutes with another HCP. Not all observations need to be collected on the same day. Just ensure all your forms have the same date of completion.
- If it takes more than one day to finish an audit, keep the form and continue to add observations over a period of days until requirements are met. Ensure the date on the form is the final date the audit is completed.

1.3 **Positioning for Observations**

- Find a convenient place to observe without disturbing care activities; you can move to follow the HCP, but never interfere with their work. Only audit what you can see.
- Your presence should be as discreet as possible and in no way infringe on the actions of the HCP.
- Follow the HCP, not the patient. The HCP may provide care for more than one patient during the time you are observing.
- If a HCP or patient feels uncomfortable with your presence he/she has the right to ask you to leave and you must do so if asked.

**Additional Notes**

- When auditing do not openly announce you are conducting a hand hygiene audit. If your activity and purpose is questioned while completing a hand hygiene audit, inform the staff you are performing infection control observations.
- Report inappropriate communications to unit Manager and Director of Infection Prevention & Control through HandHygiene@fraserhealth.ca
- Follow the HCP behind the curtain unless patient refuses or contact involves privacy issues (such as changing clothes, or private conversation).

1.4 **Log-In**

User ID
To login to the system enter your User ID and Password. The User ID is a three digit number assigned to you by the system administrator. You will receive your User ID once you have been certified.
Password
You will be prompted to change your password the first time you login.
If you forgot your password click on the “Forgot Password” link and an e-mail with instructions on resetting your password will be sent to you.

1.5 Process for Auditor

The audit tool is available through the FH Pulse page:

(http://fhpulse/QUALITY_AND_PATIENT_SAFETY/HAND_HYGIENE/Pages/Audit%20Tools%20and%20Processes.aspx)

Upon login you will be able to print the audit tool for the appropriate Facility and Unit (see Section 3.1).

A sharpie marker is best for properly filling in the “bubbles”.

Fill out the Audit Date for each audit form. If it takes more than one day to complete an audit, ensure the date on the form is the date of completion. If the date is not completed, the audit will not be processed. Fill in the year, month, and then a TWO digit date for the day of the month (e.g., the ninth day of the month must be entered as “09”).

When completing the HCP field use the legend on the left for the HCP. For any HCP #0-10 fill out the appropriate single bubble. For any HCP 11+ fill in the bubble 10 then the corresponding #, eg: Social Worker (HCP #13), you must fill in the bubble “10” and “3”. If you make a mistake when filling out the HCP category code, fill in the “void” bubble to void the HCP section, and move onto the next HCP section.

Once the audit is completed it must be faxed to 1-888-304-3098.

Do not include a cover sheet.

Faxes must be sent using the “FINE” resolution on your fax machine. See appendix A

If available use a flat bed fax machine and place the form on the glass to scan rather than using the feeder tray.

The data and Unit Hand Hygiene Feedback form will be available within 15 minutes of submission (see section 3.2).

NOTE: an automated email will be sent to the auditor when an audit is successfully processed in the system OR when an audit is submitted with specific errors that can be addressed by the auditor. The email will contain details of the errors. Use the common user errors (Appendix A) as a guide for correcting the audit. If you continue to experience issues, please email handhygiene@fraserhealth.ca.
Responsibility of Auditor
Complete the audit
Fax the form to the number on the form
Send feedback form to the manager

It is important that you do not make any stray marks on the form as the audit will not be processed correctly.
See Common User Errors document in Appendix A.

1.6 Using the Audit Form

![Audit Form Image]

Figure 1 - Audit Form
For each observation choose one moment (Before or After) and one result (Soap and Water, ABHR, or Miss).
If you make a mistake, fill in a second bubble on that same observation row and this will not be counted. You can then complete the observation in the following row (see Figure 1).

**Examples when hand hygiene would be noted as “Before”**
- Before putting on gloves
- Before contact with the patient’s environment
- Before contact with the patient
- Before touching the patient after having touched the hospital environment
- Before touching the patient’s environment after having touched the hospital environment
- Moving from non aseptic tasks to aseptic procedures

**Examples when hand hygiene would be noted as “After”**
- After leaving the patient area and the environment
- After body fluid exposure risk
- After removal of gloves and or other personal protective equipment

1.7 **Definitions**

**Patient**
- Refers to patient, resident or client.

**Opportunity**
- Any opportunity for hand hygiene either before or after contact with the patient or the environment based on “Your 4 Moments of Hand Hygiene”.

**Patient Environment**
- In a single room the environment is everything in the patient’s room, including the bathroom.
- In a multi-patient room this is everything in the within the boundary of the patient’s privacy curtains and the bathroom(s).

**Health Care Environment**
- Environment beyond the patient’s immediate area. In a single room, this is outside the room. In a multiple room, this is everything outside the patient’s bed area.
### 1.8 Category codes for Health Care Provider (HCP)

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NP/RN/RPN</td>
<td>2</td>
<td>LPN</td>
</tr>
<tr>
<td>3</td>
<td>Care Aide</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Health Care Assistant</td>
<td>- Student aide</td>
<td>- Rehab worker</td>
</tr>
<tr>
<td></td>
<td>- unit clerk</td>
<td>- stocking aide</td>
<td>- PCA</td>
</tr>
<tr>
<td></td>
<td>- Emergency Room Aid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Physician</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Student (all except Dr’s)</td>
<td>6</td>
<td>Medical Student/ Resident</td>
</tr>
<tr>
<td>7</td>
<td>Medical Technician</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- SPD Tech</td>
<td>- cardio tech</td>
<td>- dental hygienist</td>
</tr>
<tr>
<td></td>
<td>- Dialysis Tech</td>
<td>- Perfusionist</td>
<td>- Medical Imaging tech</td>
</tr>
<tr>
<td></td>
<td>- Dental assistant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Respiratory Therapy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Lab Personnel</td>
<td>10</td>
<td>Porter/ Security</td>
</tr>
<tr>
<td>11</td>
<td>Housekeeping</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Maintenance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Social Worker</td>
<td>14</td>
<td>Rehab Therapy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- PT</td>
<td>- OT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- SLP</td>
<td>- Recreation Therapist</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Rehab assistant</td>
<td>- Physio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Speech therapist</td>
<td>- Audiology</td>
</tr>
<tr>
<td>15</td>
<td>Dietician</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Volunteer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Food Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Pharmacist</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**HCP Category Codes are grouped as follows for the purposes of provincial reporting:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Nurse</td>
<td>NP/RN/RPN, LPN, Care Aide/Student Aide, Student (Nursing)</td>
</tr>
<tr>
<td>Physician</td>
<td>Physician, Medical Student/Resident</td>
</tr>
<tr>
<td>Clinical</td>
<td>Medical Technician, Respiratory Therapy, Lab Personnel, Porter, Social Worker, Rehab Therapy, Dietician, Pharmacist</td>
</tr>
<tr>
<td>Other</td>
<td>Housekeeping, Maintenance, Volunteer, Food Services</td>
</tr>
</tbody>
</table>
2. Accessing the FormAudit Hand Hygiene System

2.1 Link

The audit tool is available through the FH Pulse page:

http://fhpulse/QUALITY_AND_PATIENT_SAFETY/HAND_HYGIENE/Pages/Audit%20Tools%20and%20Processes.aspx

![FormAudit Hand Hygiene System Homepage](image1.png)

Figure 2 - FormAudit Hand Hygiene System Homepage

3. FormAudit Hand Hygiene System Navigation

3.1 Screen Navigation

You can navigate the system by using the Tabs at the top of the page. Once you successfully login you will be directed to the home page tab. Select the facility and unit of your audit and print the form. See Figure 3.

![Printing Audit Forms from the Home Page](image2.png)

Figure 3 – Printing Audit Forms from the Home Page
Your User ID will be on the form. **Only use forms with your User ID.** You can change the fields as required if you are auditing a different Facility or Unit. Click on “Click Here to Generate Audit Forms” to get the form and then click the Printer icon to print.

### 3.2 The Unit Hand Hygiene Feedback Form

A Unit Hand Hygiene Feedback Form is to be emailed to the manager once an audit is completed. You must log into the system to access this report.

**Note:** The Unit Hand Hygiene Feedback Form is available 15 minutes after faxing an audit to send to the manager. If you cannot find your Unit Hand Hygiene Feedback Form, there has been an error in processing your form. An automated email may be sent to the auditor with specific errors that can be addressed. Use the common user errors (Appendix A) as a guide for correcting the audit. If you cannot access the Unit Hand Hygiene Feedback Form and have not received an email, your audit has not been processed and you will be notified by the administrator at a later date. **Do not refax.**

To access the Unit Hand Hygiene Feedback Form click on the “Reports” tab and select “Unit Hand Hygiene Feedback Form” from the menu.

**Figure 4 – Unit Hand Hygiene Feedback Form**

To access the Unit Hand Hygiene Feedback Form for your audit, select the Facility, Unit, and Audit Date. If you do not see the date of your audit in the dropdown menu, **do not refax.** See appendix A.

**Figure 5 – Retrieving the Unit Hand Hygiene Feedback Form**
The form shows the results of the audit you submitted. Email to the manager by clicking on the “Send” button. Enter the manager’s full email address in the “To:” field.

![Image of the Unit Hand Hygiene Feedback Form]

**Figure 6 – Sending the Unit Hand Hygiene Feedback Form**

### 3.3 Account Settings

This screen allows you to modify your own user information, including password, email address, and default Facility and Unit. See Figure 7.

![Image of the Account Settings screen]

**Figure 7 - Account Settings**
1) Use FINE Resolution

Set the printer to FINE resolution before faxing. Faxes turn out grainy if standard resolution is used and causes the form to be unreadable by the system. See #10 for instructions on how to change the resolution.

2) Use Flat-Bed Fax Machines

Fax machines with feeder trays tend to make lines on the forms, interfering with the barcodes on the form and causing the form to be unreadable by the system. Use flat-bed fax machines when available.

3) Do Not Write, Stamp, or Use White-out/Liquid Paper on Forms

Writing, stamping, and using white-out/liquid paper on the form prevents the system from reading the form properly. Please do not write, stamp, or use white-out/liquid paper on the forms.

4) Incorrectly Filled HCP Bubbles

When auditing an HCP that belongs in a two digit HCP category (Eg: #15 Dietician), the bubbles “10” and “5” needs to be filled out, NOT “1” and “5”.

[Diagram showing incorrect and correct HCP bubble fillings]
5) Do Not Use Pencil

Pencil marks are too faint when faxed and the system will not be able to scan the form. For best results, please use a black marker (eg: Sharpie). If you want to use a pencil in case of mistakes, you may use a pencil during the audit. But before you fax the form, please re-fill the bubbles with a black marker.

6) Incorrectly Filled Date

The form requires a two digit date. If the date is June 1st, the “0” needs to be filled-in before the “1”.

7) Do Not Refax Forms if Errors are Suspected

Fax your forms only once. If you suspect errors were made (Eg: Forgot to set the resolution to FINE), please DO NOT re-fax the form. If there is an error, a FormAudit administrator will contact you via email to confirm the error and instruct you to re-fax the form.

8) Do Not Cross-out Bubbles for Errors

For each observation, only one Moment (Before or After), and only Result (Soap & Water, ABHR, or Miss) can be recorded. If an error was made, simply fill out a second Result in the same observation row to eliminate the observation. Record the correct observation in the following row. Do not cross-out any bubbles that were filled-in by error as extra markings cause forms to be unprocessed by the system.
9) Do Not Use Fax Cover Sheets

Do not include a cover sheet when faxing the forms. Fax only the forms.

10) How to Change the Fax Machine’s Resolution

Depending on the type of fax machine you use, instructions on how to change the resolution are different.

If you have a fax machine that looks like this, follow the steps below.

- Place your completed audit form on the feeder tray. Look for labelled instructions on the machine, or ask another staff, on whether to place the form face up or down. In most cases it is face up.

- Dial “9” first, then enter the fax number 1-888-304-3098.

- Find the “RESOLUTION” button, and press it until it says “RESOLUTION FINE” on the display.
• Press the green “START” button.

• Done!

If your fax machine looks like this (flat-bed fax machine), follow the steps below.

• Lift the cover and place the form on the glass face down.
• Press “FAX”.

• Dial “9” first, then enter the fax number 1-888-304-3098.

• Press “MORE OPTIONS”.
- Press “**RESOLUTION**”.

- Press “**FINE (200 x 200 dpi)**” then press “**OK**”.

- The Resolution window should now display 200 x 200dpi.
• Press the green “START” button.

![Image of a machine with a green start button highlighted.]

• Done!

If you have any questions about the FormAudit Hand Hygiene System or about hand hygiene auditing, please email handhygiene@fraserhealth.ca
Infection Prevention & Control

Hand Hygiene

FormAudit Hand Hygiene System Cheat Sheet

1. Go to the FormAudit via the FHpulse page:
2. Enter your user ID and password that were sent to you via e-mail. Once you change your password your username remains the number sent to you.
3. Select the facility and unit you are going to audit and print off the audit form.
4. Fill in the bubbles using a black sharpie and ensure to use the two digit date (i.e. for July 9th fill both the 0 and the 9 bubbles). Ensure the date entered is the date the audit was completed.
5. Select the Health Care Provider (HCP) and identify the category code as per the selection sheet in the user manual.
6. Audit a HCP for 10 minutes or 10 observations.
7. After completing five HCPs ensure you have 25 observations. If there are less than 25 observations you will need to audit a sixth HCP.
8. Fax the audit form to the number on the form using fine resolution.
9. After 15 minutes go back into FormAudit and retrieve the Unit Hand Hygiene Feedback Form and email to the unit manager.
10. If there is no feedback form, that means there were issues with the fax - wait until you are e-mailed by the administrator for direction. (do not re-fax)
11. If you make a mistake fill in another bubble on the same line and complete the observation on another line.
12. Keep the audit form for three months.