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*Last updated 04.11.22*

**Student/Intern Orientation Checklist (Sample)**

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| **Topic** | **If Task Complete** | **Task List** |
| **Disease**  **Information** |  | Student has completed all required readings to become familiar with the communicable diseases for which they will be conducting case-interviews. |
|  | Student has completed exercises based on required readings (i.e., ‘Disease Information’ exercise examples attached for reference). |
|  | Student and mentor have together reviewed the communicable diseases for which they are assigned and corresponding completed exercises. |
|  | Student understands how to access reference material to look up information on diseases or processes (i.e., Control of Communicable Diseases Manual, Red Book, websites, regulations, state-specific protocols). |
| **Interview protocols/procedures** |  | Student has reviewed confidentiality and privacy issues regarding performing case investigations. |
|  | Student understands how to set up their cell phone/laptop with any systems needed for afterhours/weekend interview calls, texts and/or voicemails (i.e., ‘Google Voice for Interviews’ attached for reference). |
|  | Student trained on surveillance system and other systems as needed (i.e., Maven, Redcap, electronic lab reporting systems, trackers for initial and outbreak interviews). |
|  | Student is trained in how to retrieve new interview requests/assignments from the system(s) being utilized. |
|  | For assigned interviews, the student understands the need to identify pertinent case information, if available, based on case investigation forms. (i.e., primary language, age, occupation, outcome/disposition). |
|  | If the case is non-English speaking, the student understands the process to contact and use translation services for interviews. |
|  | Student is able to apply exclusion principles based on state guidance for high-risk and sensitive settings. |
|  | Student has reviewed sample dialogues for initiating an interview based on the given scenario/with whom they are speaking during the interview (i.e., case vs surrogate vs parent/guardian vs proxy). |
|  | Student is familiar with the disease-specific case investigation form and disease fact sheets. |
|  | Student understands the processes to follow when attempting to reach cases (via phone calls, voicemail, and texts), including:   * the number of times a case should be called. * time(s) of day to reach cases. * when to leave a voicemail or attempt text. * what information to leave in a voicemail or text. |
|  | Student understands how to schedule/reschedule an interview. |
|  | Student is able to complete a case interview and understands which questions are required. |
|  | Student understands how to track and document the status of the interview request and attempts (i.e., pending, completed, refused). |
|  | Student has completed mock interviews with other student team members or other staff. Mock interviews should consist of examples the student may get in real life, including hard to interview cases (i.e., poor recall, angry, etc.), chatty cases, and cases who work in a sensitive setting to practice how to handle. |
|  | Student has reviewed all required interview examples which demonstrate the interview process and provide tips for interviewing. (i.e., Colorado video: <https://www.youtube.com/watch?v=-uZsoal0by0>, Oregon video: <https://www.youtube.com/watch?v=HNZm7z_JELw&t=> ) |
|  | Student has reviewed any agency-specific required protocols not specifically mentioned above (i.e., referrals to other departments). |
|  | Student understands what to do if there are concerns about the health or safety of the individual being interviewed or others in the household. |
|  | Student is aware of how to contact necessary staff involved in case investigation for questions/technical assistance/follow-up. |
| **Interview Completion** |  | Once the interview is successfully completed, the student understands how to save/update the record in the communicable disease electronic reporting system being utilized. |
|  | If the interview is unable to be completed, the student understands how to save/update the record in the communicable disease electronic reporting system utilized, indicating the case is lost to follow up. |
|  | Student understands how to notify supervisor(s) and/or local or regional public health partners when a case interview is complete. |
|  | Student knows how to save and store the finished paper-based interview form, if applicable. |
|  | Student understands how to perform checks for missed interview requests, based on the communicable disease electronic reporting or tracking system utilized. |
| **Outbreak or Cluster Interview** |  | Student is able to retrieve and assign outbreak-interview requests. |
|  | Student understands how to track and document the status of the outbreak-interview request and attempts/outcome. |
|  | Student is able to complete a case interview using the outbreak questionnaire or NHGQ and understands that all questions must have a documented answer; they are aware to enter the correct number for the *PulseNet ID* and *State ID*. |
|  | Following interview completion, student understands how to update final outcome of the outbreak interview. |
|  | Following interview completion, student understands how to transmit the questionnaire to staff handling the outbreak investigation. |