

This information is for those clinicians who will act as trained monitors, and outlines principles and key duties associated with this role.

Prior to beginning, the HCW is going to make sure someone is supervising him/her – a trained monitor.

The Role of a Trained Monitor:

- Be a dedicated clinician with the sole responsibilities of guiding HCWs as they don and doff PPE, and ensuring adherence to the IP&C procedures outlined in the Operational Directive (OD)
- Ensure the correct PPE is appropriately worn, and that all personal items are removed prior to donning PPE
- Verify successful compliance with the protocol
- Read aloud to the HCW each step in the donning checklist, and visually confirm and document that the step has been completed correctly
- Do not provide care directly to patients. Instead, focus on ensuring the safety of HCWs
- Be a proactive risk monitor, protector, and guide who calmly leads HCWs through IP&C procedures in the EVD setting to adhere to infection control practices as they provide care
- Be vigilant in spotting breaches; is proactive in identifying upcoming risk; uses the checklist, but focuses on the big picture; is informative, supportive, and well-paced in issuing instructions or advice
- Work together with other staff using closed-loop communication and teamwork behaviours

Trained Monitor: Principles of Good Trained Monitor Practice

- Ensure the safety of HCWs by helping them manage the complexity of infection control while working within the EVD setting
- Provide psychological support during an inherently stressful experience
- Be responsible for monitoring to maximize safety by ensuring compliance with IP&C protocols; guiding and correcting colleagues as they work through the process of donning and doffing; promoting mindful and steady adherence to protocols; and anticipating and planning for risks. To achieve this, be a leader, protector, and a guide, who calmly coaches team members through the infection control practices needed in the EVD environment
- Do much more than watch and record; be an active participant in protecting HCWs. To do so, customize your participation according to the facility's physical layout; and understand the local process. For example, HCWs will require more intensive assistance doffing certain types of PPE
 - Actively lead and support colleagues actions
 - Use the checklist as a guide: it is a memory aide to direct action, and sensitize yourself and your team members to risks, and adhere to safe practices
 - Be a team leader, and is responsible for maintaining accurate, complete, and up-to-date situational awareness. To do this, keep the big picture in mind; manage details; and help HCWs identify and avoid any potential protocol breaches
- First, keep the big picture in mind. This includes understanding and managing the entire donning and doffing processes as well as other necessary tasks, where the HCW currently is in the process; what your team members need; and any possible safety risks that have or could arise in the situation. Don't hesitate to give team members an update on the big picture; it is critical to ensure everyone is on the same page
- Second, manage details. This includes the effective completion of each step in the process. Monitoring adherence to the protocols is central to the monitor role, but be an active participant, and use the checklist as a tool
- Third, help HCWs identify and avoid potential protocol breaches by understanding the situation; thinking ahead; being sensitive to risks; and proactively communicating with your team members
- Remain vigilant about 4 factors while leading the donning or doffing process: the situation; team members; environment; and progress towards your goal
 - Be aware of the situation, including preparing needed equipment and ensuring the work area is properly configured. Always ask: do we have needed supplies and PPE in the correct sizes? Is equipment functioning properly? Do we have waste disposal containers available? Are they full?
 - Be aware of your team members' status, and their needs in order to support them. Ask: are they fatigued? Proactively warn them during critical steps where fatigue may cause error; for example, when taking off a hood, warn them not to touch their face or wipe their brow. Are they overly anxious? In a calming tone, re-focus them on the task at hand; reassure them they will get through this. When

beginning doffing, think through the process and equipment; make sure the identified Assistant is available, and in the proper PPE before beginning the doffing process

- Be aware of the environment and any risks it may pose. Ask: is there contamination of any areas, surfaces, or equipment? Are there any hazards in the environment?
- Be aware of progress towards your goal. You will be coaching the HCW – you guide the process, and you set the pace. Letting your HCW know how far they are in the process can be calming, and support a steady and measured pace. Where are we in the process and what comes next? Pacing: are we moving too fast? Do we need to slow down?
- Be a team leader or coach. They lead the processes and set the stage for safe completion of the donning and doffing. This includes conducting briefings to establish role clarity. The trained monitor is responsible to ensure the right resources are available at the right time, and that people are all adequately protected with appropriate PPE. Additionally, they will need to anticipate challenges HCWs may experience along the way. Is there new PPE, equipment, or supplies in use? Have our processes changed recently? Are there any hazards in the environment that can be managed? This also includes asserting your leadership to manage distractions, and guide the clinicians through the process
- Facilitate effective communication. As the support system for your HCW, you can employ several tactics to ensure communication is clear, accurate, and timely
 - Establish red flag words to immediately stop action. These are verbal shorthand for important information or protocol steps – phrases that would be quickly understood. Red flag words improve the efficiency of communication and reduce the amount of effort and time spent getting across critical information. In healthcare, CUS words are commonly used: I'm concerned; I'm uncomfortable; this is a safety issue. These are easy phrases that require everyone to stop and pay attention. It is up to you to define and reinforce the red flag words. Use words that have a consistent meaning in your site. You should have red flag words defined for: a breach in protocol requiring a full stop, but no immediate hazard; a breach in protocol and immediate hazard.
 - Ensure understanding by having all directions firmly repeated by the clinician. Closed loop communication helps ensure communication is received and interpreted as intended. Here, messages that are sent are acknowledged and verified. Closed loop communication should be verbal and explicit instructions that are repeated by the HCW. Repeating instructions is critical in this situation. Your HCW will likely be fatigued and stressed – known contributors to communication slips and lapses. Additionally, some of the PPE can decrease hearing. To address these challenges, use closed loop communication for each instruction given. Closed loop communication should be verbal and explicit; it should be used for each step of the protocol at both the beginning and ending of each step. Specifically, you should verbalize the next step of the process – then the HCW should repeat this back to you – and subsequently, you should verbalize when that step has been completed successfully. This pattern of communication not only ensures good information exchange, it helps to control and slow the pace of the process
- Do not have contact the HCW – the assistant is available to aid the HCW with donning and doffing. You will not enter the patient room, or the anteroom of a patient with suspected or confirmed EVD

Trained Monitor: Role in the Donning Process

- The trained monitor's role in the donning process has 2 major components:
 - Guide the HCW through the donning process using the checklist
 - Continually scan your colleagues' PPE and the environment for possible contamination risks during donning.
- The checklist is a memory aid that structures the donning process. Its details are important, but they are not your only focus. The big picture here is keeping your colleague and yourself safe, by identifying and avoiding contamination risks. All instructions from the checklist need to be verbally confirmed, closing the communications loop, before they are acted on. Ensuring successful completion of each donning step is one of the trained monitor's major roles. Use verbal and explicit closed loop communication for each step in the process. Ideally, as the monitor, you tell the HCW what step to perform – they verbalize back the task, to ensure they understood, and you, as the monitor then verbalize completion. Completion means a thorough check that every part of the HCW' PPE is: in place; intact; fits properly; allows freedom of motion so your colleague can do their work; and is positioned to ensure all skin and hair is covered. Completion also means a thorough check to ensure no part of the PPE is ripped or torn
- As the monitor you are guiding and protecting your colleagues. The foundation of the monitor's role is communication. The first step is to agree on a system of engagement, so you and your colleague can signal one another the process can begin. Will you use call bells or hand signs or verbal signals? Will you, as the monitor, always be in a certain location?
- The trained monitor should suggest to the HCW that he or she attend to personal needs; such as using the restroom and hydration prior to donning PPE
- The donning process begins when you and the HCW engage one another and verbally review the protocol. This time out, or pre-briefing includes: confirming all necessary supplies are available, conveniently located, correctly sized, and in good working order, including no rips or tears; running through the order of activities on the checklist; setting expectations about the timeline, and a slow, steady pace for completing the donning process; establishing a common understanding of what you will do if something unexpected happens
- Acting as a guide and protector means you are proactive about identifying breaches in protocol and possible points of contamination. As examples, when you and your colleague begin the donning process, you may notice they are still wearing jewelry or an id badge. Draw items like cell phones, jewelry, or id badges to your colleagues' attention well before they don any PPE. A good time may be when they first change into their fresh, disposable scrubs. Other examples of proactive risk monitoring during doffing might include identifying issues with equipment (do your gloves fit? They seem a little big... let's get you a better size). Identifying placement and fit issues with PPE (now I'm going to verify the PPE was placed properly and make sure all your skin is covered). Controlling the pace of the doffing process (we're going to do this safely; we're going to do everything slowly and methodically; I'm here to help you if you have any questions). These are only some examples. Your role is to protect not just by reading from the checklist, but by proactively monitoring for contamination risks

Trained Monitor: Role in the Doffing Process

The trained monitor's role in the doffing process has 3 major components:

1. Guide the HCW and assistant through the doffing process using the checklists
 2. Ensure doffing proceeds at a slow, deliberate pace
 3. Continually scan your colleagues' PPE and the environment for possible contamination risks during doffing
- A major part of your role as a monitor is to ensure safety, by proceeding at a measured pace, always engaging confirmatory closed loop communications, with the HCW and assistant you're guiding.
 - Ensure successful completion of each doffing step remembering that completion means a removed item is intact and has not touched clean areas; has been disposed of properly in the available waste container; and has not contaminated any staff member
 - The doffing process begins when you acknowledge your colleague's need to exit the patient care space. Before you approve their exit from the patient space, you must ensure the Assistant is wearing appropriate PPE. Once the Assistant is wearing appropriate PPE, she should inspect the doffing area to ensure an appropriately maintained and not over-filled medical infectious waste container is available. Any other equipment necessary for doffing should also be available, and in good working order.
 - As the monitor, it is part of your role to maintain awareness of the situation and anticipate needs. Ensure HCWs remaining in patient room do not perform activities if you, the monitor, are unable to observe practice
 - Once she is in the doffing area, remind the HCW and Assistant to wait for your instructions before beginning the doffing protocol (I'm here to help you through the doffing process. You'll hear me giving you directions that aren't part of standard processes, but they're designed to keep you safe)
 - It is important to remind the HCW not to touch their face during the process (remember – go slowly... do not touch your face)
 - Appropriate communication will help you keep the HCW and Assistant safe. Take the time to: go through the order and the activities on the checklist; set expectations for a slow and steady pace for safely completing the doffing process. Prompted by the checklist, provide step by step instructions to the HCW
 - Used closed loop communication throughout the process. Each step should be acknowledged by the HCW, the action taken, and then re-acknowledged by the monitor as completed. Only then should you move on to the next step
 - Be familiar with the checklist, but remember: your focus is on the bigger picture