

# Skills assessment tool for public health nurses

**Immunizer Name:** \_\_\_\_\_ **Date of Hire into Program:** \_\_\_\_\_

**Observing Name(s):** \_\_\_\_\_ **Public Health/  
Community Health site:** \_\_\_\_\_

**Date(s) observed:** \_\_\_\_\_ **Next Skills Assessment due:** \_\_\_\_\_

**Status:**  Full Time  Part Time  Casual  Permanent  Temporary

**Assessment type:**  6 weeks  3 months  1 year  PRN

## About this tool and instructions for completion:

- The purpose of this document is to provide a standardized tool for observing and measuring immunization competencies. This is referred to as observation of nursing practice.
- The self-assessment section allows individuals to reflect on their strengths, areas for improvement, and overall progress to determine if they meet competencies to practice safe care and professional development.
- This document can also be used for performance evaluation, as determined by the managers and, to identify areas for review for staff returning from leave.
- Immunizers should receive this document at the start of their orientation.
- Once completed, this document is kept by the manager, in the employee's file, and a copy should be given to the employee for their records.

## Instructions for observer:

- Refer to the *Standard for Immunization Skills Assessment* for guidance on the competencies required for immunizers to demonstrate proficiency.
- At least three observations across different age ranges and immunization eligibility are recommended based on role and program area.
- Multiple observation days can be recorded on the same tool by noting the observation date above the 'Age' section.

For RNs	For LPNs
<p>It's strongly recommended to observe immunization for these age groups:</p> <ul style="list-style-type: none"><li>• 2 and/or 4 and/or 6-month routine immunizations</li><li>• 12 month and/or 18-month routine immunizations</li><li>• 4-year (preschool) routine immunizations</li><li>• Grade 6 students</li><li>• Grade 9 students</li><li>• Adult client.</li></ul>	<p>Immunizing clients 5 years of age and older, observations should include:</p> <ul style="list-style-type: none"><li>• 5-7 years of age</li><li>• Grade 6 students</li><li>• Grade 9 students</li><li>• Adult client.</li></ul>

## Clinic visit

**The checklist has competencies** the observer should see the immunizer perform or verbalize understanding of. When there is potential during a clinic visit that a competency may be missed, the observer should intervene to ensure the action is performed correctly. Provide the immunizer with an opportunity to discuss near-misses and take corrective action during their next observation.

## Competency Legend

Use the legend below to complete the self-assessment and observer columns.

Competency legend	
✓	Competent - Performance of nursing skills meets requirements.
*	Include details regarding skills that require improvement.
NA	Not Applicable.
X	No opportunity to observe.

## Clinic Visit

Clinic Set-Up	Self-assessment	Observation
Clean and disinfect all clinic surfaces and non-critical equipment using a 2-step process prior to clinic, between each client and when clinic is complete.		
Ensures immunization supplies are stocked.		
Organizes physical environment to: <ul style="list-style-type: none"> <li>• Allow for ergonomic movement,</li> <li>• Prevent injury to self and client,</li> <li>• Prevent contamination.</li> </ul>		
Ensure anaphylaxis kit is accessible. Checks anaphylaxis kit contents, including expiry dates of epinephrine prior to <b>each</b> clinic.		
Aware of PHC/CHC site address and phone number and has access to telephone.		
Replaces biomedical waste container when approximately $\frac{3}{4}$ full and disposes as per the AHS Biomedical Waste Procedure.		
Ensures online resources readily available for reference: <ul style="list-style-type: none"> <li>• Immunization Program Standards Manual (IPSM)</li> <li>• Zone Public Health Teams landing pages on Insite</li> <li>• Connect Care user guide</li> </ul>		
Demonstrates awareness of the 4 moments of hand hygiene as per the AHS <i>Hand Hygiene Policy &amp; Procedure</i> .		
Observer comments		

Storage and Handling of Immunizing Agents	Self-assessment	Observation
Demonstrates appropriate knowledge of provincial guidelines and zone-specific processes for vaccine storage and handling practices.		
Understands how to monitor and interpret temperature recording devices.		
Aware of the immediate and appropriate actions required in the event of a cold chain excursion (CCE).		
Demonstrates the key steps for maintaining cold chain in the clinic setting, including: <ul style="list-style-type: none"> <li>• How to appropriately pack a vaccine bag specific to the vaccine product being used as per zone processes.</li> </ul>		
Demonstrates how to read and document minimum, maximum, and current temperatures and how to reset/clear the min/max thermometer.		
Stocks vaccine bag with minimum required vaccine(s) for clinic.		
Keeps vaccine bag zipped close between uses.		
Monitors vaccine bag temperature, recommended at minimum every 30 mins to assure temperature is maintained between +2.0°C to +8.0°C.		
Refreshes ice/gel packs as needed to maintain cold chain.		
Observer Comments		

Complete each column:	Self-assessment	Observation 1	Observation 2	Observation 3	Observation 4
<b>Date of observation:</b>					
<b>Age:</b>					
<b>Eligibility</b>					
Looks up client with ULI in provincial electronic database (EDB) and confirms client's name, DOB, ULI are correct in the EDB.					
Utilizes the IPSM when interpreting schedules.					
Reviews immunization history and associated notes in EDB, including: <ul style="list-style-type: none"> <li>• Previous Immunization assessments,</li> <li>• Documented vaccine refusals,</li> <li>• Adverse events following immunization (AEFI),</li> <li>• Contraindications and precautions,</li> <li>• and Allergies.</li> </ul>					
Utilizes IPSM to determine eligibility for vaccine(s), for example referring to Biological pages and Immunization of Specific Populations section.					
<b>Observer Comments</b>					

Complete each column:	Self-assessment	Observation 1	Observation 2	Observation 3	Observation 4
<b>Date:</b>					
<b>Age:</b>					
<b>Client and Family Interaction</b>					
Wears name tag.					
Performs moment 1 of hand hygiene: before contact with a client/family or client's environment.					
Introduces self and their role to the client, and request client consent to have an observer present during the appointment.					
Confirms client identity using at least two client identifiers, such as name (1st and last) and DOB. Verifies information (Name/DOB/UJI) on EDB.					
<ul style="list-style-type: none"> <li>Verifies guardianship in Connect care and follows consent process. Take appropriate steps when accompanying adult is not the parent/legal guardian.</li> </ul>					
Accesses Interpretation and Translation Services as appropriate.					
<p>Uses a client and family centered care approach.</p> <p>Uses language that is suitable for the client's age and understanding.</p>					
Addresses client's coping strategies for managing anxiousness related to immunizations as needed.					
<b>Observer Comments</b>					

Complete each column:	Self-assessment	Observation 1	Observation 2	Observation 3	Observation 4
<b>Date of observation:</b>					
<b>Age:</b>					
<b>Fit to Immunize/Informed Consent</b>					
Determines capacity for client/parent/guardian to provide consent.					
<p>Communicates with the client/parent/guardian in a manner that supports the client's ability to understand and addresses communication barriers including:</p> <ul style="list-style-type: none"> <li>• hearing</li> <li>• sight</li> <li>• language</li> <li>• culture</li> <li>• literacy</li> <li>• level of education</li> <li>• level of anxiousness</li> <li>• environmental factors, including location of discussion.</li> </ul>					
<p>Provides appropriate evidence-based resources to clients regarding immunization and vaccines including:</p> <ul style="list-style-type: none"> <li>• Vaccine information sheets</li> <li>• Care after immunization sheet</li> <li>• immunizealberta.ca and ahs.ca/immunize</li> </ul>					
Confirms and verifies immunization history with client/parent/guardian, including immunizations that may not have been recorded in the EDB.					
Names antigens to be administered, avoiding use of abbreviations.					
Explains immunization procedure, including route of administration for each vaccine.					
<p>Delivers clear, concise message about:</p> <ul style="list-style-type: none"> <li>• benefits of immunization</li> <li>• disease(s) being prevented</li> <li>• risk of not getting immunized.</li> </ul>					

<p>Review vaccine side effects:</p> <ul style="list-style-type: none"> <li>• Common side effects</li> <li>• Uncommon/rare side effects.</li> </ul>					
<p>Discusses after care, including:</p> <ul style="list-style-type: none"> <li>• Fever management recommendations</li> <li>• Comfort measures</li> <li>• When to seek medical attention</li> <li>• Call Health Link to report serious/unusual side effects.</li> </ul>					
<p>Provide information about possible anaphylaxis, signs &amp; symptoms, treatment &amp; recommended wait-time (15 or 30 min).</p>					
<p>Explain <b>Fit to Immunize Assessment</b> questions to client/parent/guardian.</p>					
<p>Complete <b>Fit to Immunize Assessment</b> to identify precautions/contraindications to the immunization.</p>					
<p>Provides opportunity to client/parent/guardian to ask questions.</p>					
<p>Obtains informed consent to proceed with immunizations.</p>					
<p>Inform client/parent/guardian:</p> <ul style="list-style-type: none"> <li>• Of continued eligibility for refused vaccines.</li> <li>• Who have refused a measles-containing vaccine of exclusion &amp; provide exclusion letter. Document letter was provided.</li> </ul>					
<p>Advises client/parent/guardian of next appointment as per immunization schedule, including seasonal immunizations.</p>					
<b>Observer Comments</b>					

Complete each column:	Self-assessment	Observation 1	Observation 2	Observation 3	Observation 4
<b>Date:</b>					
<b>Age:</b>					
<b>Administration of Immunizing Agents</b>					
Refers to vaccine biological page and product monograph for preparation instructions as needed.					
Performs moment 2 of hand hygiene: before a clean or aseptic procedure.					
Assess client's coping strategies for managing pain and anxiousness. Create a comfort plan.					
Prepare vaccine away from distractions & minimize conversation with client/family to reduce potential error. Explain same to family.					
Follows the rights of medication administration as per their college guidelines and <a href="#">Medication Administration Policy</a> .  The rights include: the right client, medication, dose, route, time & frequency, reason, documentation, and right to refuse.					
Uses aseptic technique throughout vaccine preparation/ administration.					
Confirm correct vaccine dosage, lot #, expiry date and punctured date for multi-dose vials when:  1. Removing vaccine from bag 2. Preparing vaccine 3. Prior to administration.					
Inspect vaccine/biological before & after preparation to ensure it appears as expected and there is no particulate.  • Do not administer vaccine if particulate does not dissolve.					
Prepares vaccine/biological as per <i>Standard for Administration of Immunization</i> .					

Does not routinely change the needle between drawing up and administration, unless the needle is damaged/contaminated.					
Arranges vaccines prior to administration, to ensure each is clearly identified.					
Supports the client/parent/guardian with correct stabilization method depending on site & age of client.					
Fully exposes limb to inspect immunization site. Landmarks by palpating muscle/ bony prominences to determine correct injection site.					
Clean injection site with alcohol swab by circling from the center of the site for 1-2". Let skin dry.					
Demonstrates correct injection technique.					
Engages safety mechanism on needle using one-handed technique right after administration.					
Dispose used needle immediately into the biomedical waste container.					
Apply cotton ball with pressure to injection site when bleeding. <ul style="list-style-type: none"> <li>Band-Aids are applied as appropriate or if requested.</li> </ul>					
Perform moment 3 of hand hygiene: after exposure or risk of exposure to blood and or body fluids.					

**Observer Comments:**

Complete each column:	Self-assessment	Observation 1	Observation 2	Observation 3	Observation 4
<b>Date:</b>					
<b>Age:</b>					
<b>Documentation</b>					
Document informed consent or refusal for immunization.					
Document contraindications and precautions, if applicable.					
Record the immunization encounter and visit information accurately.					
Record the reason when a scheduled immunization is not given and the follow-up plan.					
Provide immunization records and explain how to access it in the future.					
Perform moment 4 of hand hygiene: After contact with a client or client/family environment.					
<b>Observer Comments</b>					

## Key principles

The checklist below provides discussion points for the observer and immunizer. These topics are unlikely to be fully addressed during clinic observation.

The observer will indicate the date of review and place a checkmark (✓) next to the topic once discussion is complete. This is a knowledge check for the immunizer and is meant to identify areas for further review, not to indicate ability to practice independently.

Codes	
✓	Competent – Understanding meets requirements.
*	Include details that require improvement.
NA	Not Applicable.

## Key principles

Emergency Event Preparedness	Self-assessment	Observation
Immunizer identifies location of site emergency kits, AED and steps to initiate a Code Blue.		
Immunizer has completed annual anaphylaxis self-directed learning at <a href="#">Anaphylaxis Management   Insite</a> . <ul style="list-style-type: none"> <li>Demonstrates knowledge about anaphylaxis and syncope (fainting) management.</li> </ul>		
Reviewed site clinic emergency procedure within the past 12 months.		
Understands what constitutes a reportable incident and identifies when and how to submit RLS.		
Aware of protocol for managing and reporting a needle stick injury.		
Aware nurse must remain on site 15–30 minutes after last vaccine administered and until all clients are gone.		
Observer Comments		

Adverse Events Following Immunization Reporting	Self-assessment	Observation
Demonstrates where to locate resources related to adverse events following immunization (AEFI).		
Understands what constitutes a reportable AEFI.		
Understand steps to take when a client reports an AEFI at the time of the immunization appointment.		
Aware of documentation process, including completion and submission of AEFI report to Provincial AEFI Team.		
Advises client/parent/guardian of adverse reaction reporting process and provides rationale for reporting adverse reactions.		
Demonstrates how to access completed AEFI recommendation.		
Observer Comments		

Resources	Self-assessment	Observation
Demonstrates how to access Immunization Program Standards Manual (IPSM).		
Demonstrates how to access the Zone Public Health Teams landing page on Insite or Zone-specific SharePoint pages.		
Aware of Immunization information websites, such as: <ul style="list-style-type: none"> <li>• Primary &amp; Preventative Health Services (PPHS) Alberta Immunization Policy (AIP)</li> <li>• Myhealth.alberta.ca/topic/immunization</li> <li>• Canadian Immunization Guide (CIG)</li> <li>• National Advisory Committee on Immunization (NACI)</li> </ul>		
Aware of resources to support obtaining informed consent.		
Provides guidance to client/parent/guardian about credible sources of information about immunization and vaccines.		
Observer Comments		

## Additional Comments

Observing Nurse's Comments	
Signature/Designation:	Date:

Immunizer Comments & Goals	
Signature/Designation:	Date: