

# Infections (*C. difficile*) Tracking Tool Overview & Instructions

September 1, 2016

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## Welcome to the Infections Tracking Tool! [\[QuickLinks\]](#)

This Tracking Tool is an Excel workbook that you can use to track your *C. difficile* infections (*C. diff*, or CDI) and related processes. It has been especially designed to support homes who would also like to report data to the National Healthcare Safety Network (NHSN), which is maintained by the Centers for Disease Control and Prevention (CDC).

- ⇒ Enter just four (4) required fields for each positive CDI lab event and the tool will automatically:
  - Accurately categorize the event as nursing home or community onset, incident, recurrent or duplicate
  - Identify events that are reportable on NHSN
  - Calculate monthly CDI nursing home onset incident rates
- ⇒ Two optional fields produce graphs to help monitor key processes in your CDI response and control.
- ⇒ Transfer four outcome numbers each month to your account on the Campaign [website](#) to view and download continuous trends of your progress over time.

Please contact the [HelpDesk](#) if you have any questions or would like support getting started with this tool.

**Thank you for participating in this important project!**

Your Help Desk

[help@nhqualitycampaign.org](mailto:help@nhqualitycampaign.org)



This material was prepared by Telligen under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy. 11SOW-CO-AE-09/1/002

**INSTRUCTIONS** [\[QuickLinks\]](#) You may wish to print these instructions for easy reference as you access the InfectionsTrackingTool.

**DOWNLOAD the tool** [\[QuickLinks\]](#) Open the InfectionsTrackingTool from the [Campaign website](#). **Save the file to a location on your computer.** (Some people will get a message asking for a username and password. This is not necessary. Simply click 'Cancel' once or twice until the file opens.) Rename the file as you save it. As with any file, you will want to resave the file periodically as you enter data. This workbook will last for 12 months.

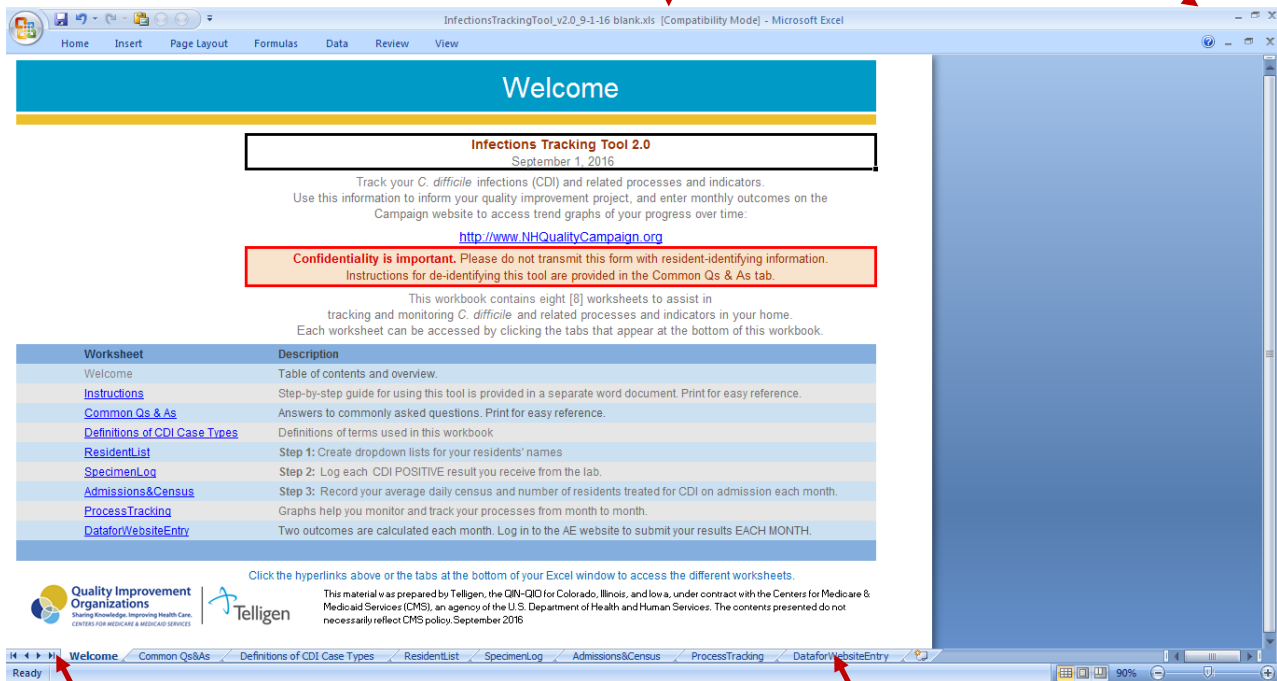
**Excel Tool Basics** [\[QuickLinks\]](#)

The file named 'InfectionsTrackingTool' is an Excel *workbook*.

Within the *workbook* are *worksheets*. Worksheets are accessed by clicking the **tabs** that appear at the bottom of your Excel window.

Note: If you can't see the tabs at the bottom of the Excel window, make sure your window is maximized.

If that doesn't work, or you can't see the upper right corner, double click the title bar



Sometimes there are so many worksheets in your workbook that you can't see them all. Use the scroll bar on the LEFT side of the window to see all tabs.

Click on the named tabs at the bottom of the window to move between worksheets.

**Welcome** [\[QuickLinks\]](#) The first worksheet (Welcome) provides an overview of the tool. Note the version number and date – occasionally updates are posted to the website. You may access the website by clicking the website address on this sheet. The table of contents indicates that there are 3 informational worksheets (Welcome, Common Qs&As, Definitions of CDI Case Types); The “Instructions” hyperlink will take you to the document you are reading now. There are 3 data entry worksheets. Following these worksheets are your reports. The **ProcessTracking** tab will produce graphs tracking the average number of days between date of diarrhea onset and the date contact precautions are implemented and the date a specimen is collected. The **DataforWebsiteEntry** tab contains your calculated outcome measures for the month: The number of CDI nursing home onset incident cases per 10,000 resident days and the percent of residents who are being treated for CDI when they are admitted to your home.

**Welcome**

**Infections Tracking Tool 2.0**  
September 1, 2016

Track your *C. difficile* infections (CDI) and related processes and indicators. Use this information to inform your quality improvement project, and enter monthly outcomes on the Campaign website to access trend graphs of your progress over time.  
<http://www.NHQualityCampaign.org>

**Confidentiality is important.** Please do not transmit this form with resident-identifying information. Instructions for de-identifying this tool are provided in the Common Qs & As tab.

This workbook contains eight (8) worksheets to assist in tracking and monitoring *C. difficile* and related processes and indicators in your home. Each worksheet can be accessed by clicking the tabs that appear at the bottom of this workbook.

| Worksheet                                     | Description   |
|---|---|
| Welcome                                       | Table of contents and overview.   |
| <a href="#">Instructions</a>                  | Step-by-step guide for using this tool is provided in a separate word document. Print for easy reference. |
| <a href="#">Common Qs &amp; As</a>            | Answers to commonly asked questions. Print for easy reference.  |
| <a href="#">Definitions of CDI Case Types</a> | Definitions of terms used in this workbook  |
| <a href="#">ResidentList</a>                  | Step 1: Create dropdown lists for your residents' names   |
| <a href="#">SpecimenLog</a>                   | Step 2: Log each CDI POSITIVE result you receive from the lab.  |
| <a href="#">Admissions&amp;Census</a>         | Step 3: Record your average daily census and number of residents treated for CDI on admission each month. |
| <a href="#">ProcessTracking</a>               | Graphs help you monitor and track your processes from month to month.                                     |
| <a href="#">DataforWebsiteEntry</a>           | Two outcomes are calculated each month. Log in to the AE website to submit your results EACH MONTH.       |

Click the hyperlinks above or the tabs at the bottom of your Excel window to access the different worksheets.

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CENTERS FOR MEDICARE & MEDICAID SERVICES

Telligen

This material was prepared by Telligen, the QIN-QID for Colorado, Illinois, and Iowa, under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy, September 2016

Navigation tabs: Welcome, Common Qs&As, Definitions of CDI Case Types, ResidentList, SpecimenLog, Admissions&Census, ProcessTracking, DataforWebsiteEntry

## INFORMATION Sheets

### Instructions [\[QuickLinks\]](#)

A link to the document you are reading now is provided on the Welcome tab, so it is handy at all times. Print this document for easy reference while using your Tracking Tool.

### Common Qs&As [\[QuickLinks\]](#)

This sheet contains important information about how to use the tool, covering topics such as how outcomes are calculated, special instructions for copying and pasting data, and how to de-identify your tool. A special section provides links to get started reporting your data to CDC’s NHSN. Hyperlinks at the top of the page make it easy to jump to topics of interest.

### Definitions of CDI Case Types [\[QuickLinks\]](#)

Definitions of terms used in this workbook, including the Onset Types (nursing home and community), and Event Types (incident, duplicate, recurrent) are included along with a diagram.

## DATA ENTRY Sheets

**ResidentList** [QuickLinks](#) In this sheet, you will make a list of your residents. It may be easiest to copy in a list from a recent daily census to get started. Or, you may enter one resident at a time when a CDI positive lab event occurs. (The “Tips and Tricks” section in the Common Qs&As tab includes detailed instructions on how to paste into this workbook and how to sort the names on this list.) Add additional names as needed. The lists you create on this tab will appear as drop down lists for you to select from as you complete the SpecimenLog. It is **CRITICAL** to use these lists so that names appear consistently throughout the workbook. A resident’s name should appear **ONLY ONCE** on the Resident List (it may appear multiple times on your SpecimenLog.)

**First**, go to the ‘ResidentList’ sheet by clicking on that tab at the bottom of your window.

**Then**, read the on-page instructions.

The image shows a screenshot of the 'Resident List' worksheet in a spreadsheet application. The worksheet has a blue header with the title 'Resident List'. Below the header, there is a 'Step 1' instruction box that reads: 'In the column below, type or paste a list of the names of residents in your nursing home. Each name should appear ONLY ONE TIME. Keep your list sorted to prevent duplicate entries. You may add to the list at any time.' Below this instruction is a link: 'Instructions on Copying, Pasting & Sorting Names (3 items)'. The main area of the worksheet is titled 'Residents' and contains a list of rows labeled r1 through r13. A yellow box on the left side of the worksheet contains the text: 'Look! Click here for instructions on copying and pasting your lists from another source.' A red box on the right side of the worksheet contains the text: 'First: Read Instructions. Then, enter or paste your list of residents.' Another red box on the right side of the worksheet contains the text: 'These codes will follow the names throughout the workbook, no matter what order the names are listed in other sheets. They may be used to de-identify this workbook for sharing. Detailed instructions are provided in Common Qs&As.' Red arrows point from these callout boxes to the corresponding elements in the worksheet: from the left box to the 'Step 1' instruction, from the top-right box to the 'Step 1' instruction, and from the bottom-right box to the 'Residents' table.

**Look! Click here for instructions on copying and pasting your lists from another source.**

**Step 1**  
In the column below, type or paste a list of the names of residents in your nursing home. Each name should appear ONLY ONE TIME.  
**Keep your list sorted to prevent duplicate entries.**  
You may add to the list at any time.  
[Instructions on Copying, Pasting & Sorting Names \(3 items\)](#)

**Residents**  
In the spaces below, list the residents in your nursing home. This will ensure that their names appear consistently throughout the workbook.

r1  
r2  
r3  
r4  
r5  
r6  
r7  
r8  
r9  
r10  
r11  
r12  
r13

**First: Read Instructions. Then, enter or paste your list of residents.**

These codes will follow the names throughout the workbook, no matter what order the names are listed in other sheets. They may be used to de-identify this workbook for sharing. Detailed instructions are provided in Common Qs&As.

**IMPORTANT:** Each name should appear **ONLY ONCE** on this list. It is essential that names are exactly the same every time they appear in the workbook for calculations to be correct. You may add to your list and sort the list at any time.

## GETTING STARTED WITH DATA ENTRY

### Maximizing Your Screen Space [\[QuickLinks\]](#)

Go to the **SpecimenLog**. There are several things you can do to make the most screen space possible:

The image shows a screenshot of Microsoft Excel with several red callout boxes providing instructions on how to maximize screen space. The spreadsheet is titled 'InfectionsTrackingTool\_v2.0\_9-1-16 blank.xls' and is in 'Compatibility Mode'. The 'View' ribbon is active, showing options like 'Formula Bar', 'Gridlines', 'Headings', 'Zoom', 'New Window', 'Arrange All', 'Freeze Panes', 'Unhide', 'Synchronous Scrolling', 'Reset Window Position', 'Save Workspace', 'Switch Windows', and 'Macros'. A context menu is open over the 'Macros' button, with options: 'Add to Quick Access Toolbar', 'Customize Quick Access Toolbar...', 'Show Quick Access Toolbar Below the Ribbon', and 'Minimize the Ribbon'. The spreadsheet shows a table with columns labeled 'Begin workbook', 'September 2016', and 'End workbook', 'September 2017'. The row headers are numbers 1 through 5. The column headers are letters J through Y. The 'SpecimenLog' title is visible in the spreadsheet. The zoom level is set to 80%.

**If you can see the formula bar, click 'View' and uncheck 'Formula Bar'**

This is the formula bar.

**Make sure your window is maximized.**

**If you can see column and row headers, click 'View' and uncheck 'Headings.'**

These are column headings (letters).

These are row headings (numbers).

**If you have a wide ribbon of menu options visible, as shown here, place your cursor in the ribbon area, right click, and click 'Minimize the Ribbon.'**

**Set your zoom to a smaller percent. 80% often works well. Use the slider bar to increase or decrease your zoom.**

## GETTING STARTED WITH DATA ENTRY, continued

The screenshot shows the 'SpecimenLog' spreadsheet in Microsoft Excel. The spreadsheet has a blue header with the title 'SpecimenLog'. Below the header, there are fields for 'Begin Workbook' (September 2016) and 'End Workbook' (September 2017). A 'Step 2:' instruction block explains how to select a start date and record information for positive C. diff stool specimens. A red-bordered box highlights the instruction: 'Record ALL and ONLY CDI positive specimens identified after resident is admitted to your community'. The main data entry area has several columns: 'Automatic REPORT this case on NHSN Automatic no data entry', 'Has the documentation for this case been completed on NHSN?', 'Automatic Onset Type Automatic no data entry', 'Automatic Event Type Automatic no data entry', 'Resident Name \*', 'Resident Room Number', 'Date resident was most recently admitted to your nursing home MM/DD/YY', 'Long Stay / Short Stay', and 'Implemented MM/DD/YY'. A tooltip for 'Resident's Name' is visible, stating: 'Resident's Name Selected from dropdown list or enter name exactly as it appears on the drop down list.' A red-bordered box on the right side of the spreadsheet contains the text: 'These black lines indicate that there are "frozen" panes. This allows you to scroll to the far right and still see the resident's name. It allows you to scroll far down in the list and still see the column headers.' A red arrow points from this box to the black lines in the spreadsheet. Another red arrow points from the 'Resident's Name' tooltip to the 'Resident Name' column header.

Most data entry fields have reminders or instructions that will pop up when you click the cell.

These can become annoying and/or get in the way.

### Solutions:

1. To make the message disappear just once, hit the escape key. You will need to repeat this each time the message is in your way.

OR

2. Move the message box away from your work area: click on the box to select it and drag it to an area on your screen where it won't be in your way.

**SpecimenLog** [\[QuickLinks\]](#)

Each time you have a stool specimen that is identified by the lab as being positive for *C. difficile*, log the information for this event in your SpecimenLog. **NOTE** the first 4 columns will be automatically completed as you enter information. UPDATE the second column as you complete your NHSN reporting.

**IMPORTANT: Enter ONLY *C. difficile* cases that were identified while the resident was in your home.**

The screenshot shows the 'SpecimenLog' application window. At the top, there are tabs for 'Home', 'Insert', 'Page Layout', 'Formulas', 'Data', 'Review', and 'View'. Below the title bar, there are two buttons: 'Begin Workbook' and 'End Workbook'. The 'Begin Workbook' button is currently selected, and it has a dropdown menu showing 'September 2016' and 'September 2017'. Below these buttons, there is a 'Step 2:' instruction: 'Select your start date using the drop down menu in the field above. Then, record information for each positive *C. diff* stool specimen collected. Nursing home onset and incident CDI Lab ID events will be identified for you. \*Fields with red asterisk are required for calculations. Record ALL and ONLY CDI positive specimens identified after resident is admitted to your community'. Below this instruction is a table with columns: 'Reportable Events', 'About NHSN Login to NHSN', 'Onset Types', 'Event Classification', and 'Resident Name\*'. The table has several rows of data, including dates, onset types (e.g., 'Community Onset', 'NH Onset', 'Incident'), event classifications (e.g., 'Short Stay', 'Long Stay'), and resident names (e.g., 'Leland Florio', 'Mickie Toland', 'Kasi Massey'). A red arrow points from the 'Begin Workbook' button to the 'September 2016' dropdown. Another red arrow points from the 'September 2016' dropdown to the 'Step 2:' instruction. A third red arrow points from the 'Resident Name\*' column header to the 'Resident Name\*' column in the table. A fourth red arrow points from the 'Short Stay' dropdown menu in the table to the 'Short Stay' column header. A fifth red arrow points from the 'Short Stay' dropdown menu to the 'Short Stay' column in the table. A sixth red arrow points from the 'Short Stay' dropdown menu to the 'Short Stay' column in the table. A seventh red arrow points from the 'Short Stay' dropdown menu to the 'Short Stay' column in the table. 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A ninety-eighth red arrow points from the 'Short Stay' dropdown menu to the 'Short Stay' column in the table. A ninety-ninth red arrow points from the 'Short Stay' dropdown menu to the 'Short Stay' column in the table. A hundredth red arrow points from the 'Short Stay' dropdown menu to the 'Short Stay' column in the table.

Columns that are gray are automatic: They are completed for you. They are locked to protect the formula from being accidentally changed or removed. **EXCEPTION:** The second column will automatically read “need to do” if the first column indicates the event is reportable to NHSN. Once it has been reported, you may update this field using the dropdown to indicate the reporting is “completed.”

All fields except dates can be completed using the drop down lists. Once a response appears in a particular column, you can enter it again by typing the first letter of that response. For example, once the response ‘Long Stay’ has been entered in the ‘Stay Type’ column, you may simply type ‘l’ and the response will auto-complete.

**HINT:** Beginning data entry can be overwhelming. It may help to enter only the required fields for the first month while you are establishing the process. Required fields are marked with a red asterisk \*. *These fields are required to calculate outcomes.* There are only 4 required fields on this work sheet: Resident Name, Date of Current Admission, Stay Type, and Date Stool Specimen Collected.

## SpecimenLog, continued

Several things happen as you complete your SpecimenLog. Cases will be automatically identified as Nursing Home onset or Community Onset, and as Incident, Recurrent, or Duplicate. Definitions for each of these are provided on the sheet named "Definitions of CDI Case Types." Cases that are Nursing Home Onset *and* Incident will be flagged in red. When contact precautions follow date of diarrhea onset by more than a day, or the specimen is not collected within 3 days, these dates will be highlighted. For more information on addressing patterns in delayed action, click on the hyperlink above the column header.

All nursing homes are encouraged to report incident and recurrent cases to the CDC via the NHSN portal. The first column on the SpecimenLog will indicate which events are reportable. Use the second column to track which of the reportable cases have been reported and which still need to be done. These cells will be orange until the reporting is marked 'completed.'

Hyperlinks at the top of some columns link to definitions, instructions, information and resources.

Highlight indicates Nursing Home Onset Incident CDI Lab Event

Highlight indicates excess time between onset and action.

Record ALL and ONLY CDI positive specimens identified after residents admitted to your community

| Reportable Events  | ABOUT NHSN Log into NHSN                                     | Onset Types          | Event Classification | Resident Name* | Date of Current Admission*   | Stay Type*             | Date of Diarrhea Onset | Date Contact Precaution Implemented | Date Stool Specimen Collected |
|--|--|----------------------|----------------------|----------------|--|------------------------|------------------------|-------------------------------------|-------------------------------|
| Automatic REPORT this case on NHSN Automatic no data entry | Has the documentation for this case been completed on NHSN ? | Automatic Onset Type | Automatic Event Type |                | Date resident was most recently admitted to your nursing home MM/DD/YY | Long Stay / Short Stay | MM/DD/YY               | MM/DD/YY                            | MM/DD/YY                      |
| 1 YES  | completed  | Community Onset      | Incident             | Leland Florio  | 09/17/16   | Short Stay             | 09/17/16               | 09/21/16                            | 09/20/16                      |
| 2 YES  | completed  | NH Onset             | Incident             | Mickie Toland  | 10/15/16   | Short Stay             | 10/30/16               | 11/02/16                            | 10/31/16                      |
| 3 YES  | need to do   | NH Onset             | Recurrent            | Leland Florio  | 02/21/16   | Long Stay              | 11/02/16               | 11/04/16                            | 11/02/16                      |
| 4 YES  | need to do   | NH Onset             | Incident             | Kasi Massey    | 12/09/15   | Long Stay              | 11/05/16               | 11/05/16                            | 11/09/16                      |
| 5 no   | do not report  | NH Onset             | Duplicate            | Mickie Toland  | 08/30/16   | Short Stay             | 11/05/16               | 11/06/16                            | 11/06/16                      |

Nursing Home Onset Incident cases are flagged red. These are the cases you have the most control to prevent. Look for a decline in the number of nursing home onset incident cases as you work on this goal (Check out your trend graph on the website. See below).

Delayed action dates are highlighted yellow. These are opportunities to improve.



**Admissions & Census** [\[QuickLinks\]](#)

Follow the on-screen instructions and complete this information each month. Your average daily census will be used as the denominator for your monthly CDI nursing home incident rates. Your monthly admissions and the number of those treated for CDI on admission is used to create a percent of admissions treated for CDI at the time they are admitted to your home.

## Admissions & Census

**Step 3**

- ◆ At the **end** of each month, enter your total admissions for the month, the number of residents admitted to the month receiving treatment for CDI at the time of admission, and your average daily census (ADC) for the month.
- ◆ If you do not have an ADC for the residents you are tracking, **you may use your census on the 15th day of the month.**

**NOTE:** Whether you use ADC or census, this number should reflect the number of residents in the specified type of care during the month. It is not the same as 'paid beds.'

First: Read on-screen instructions.

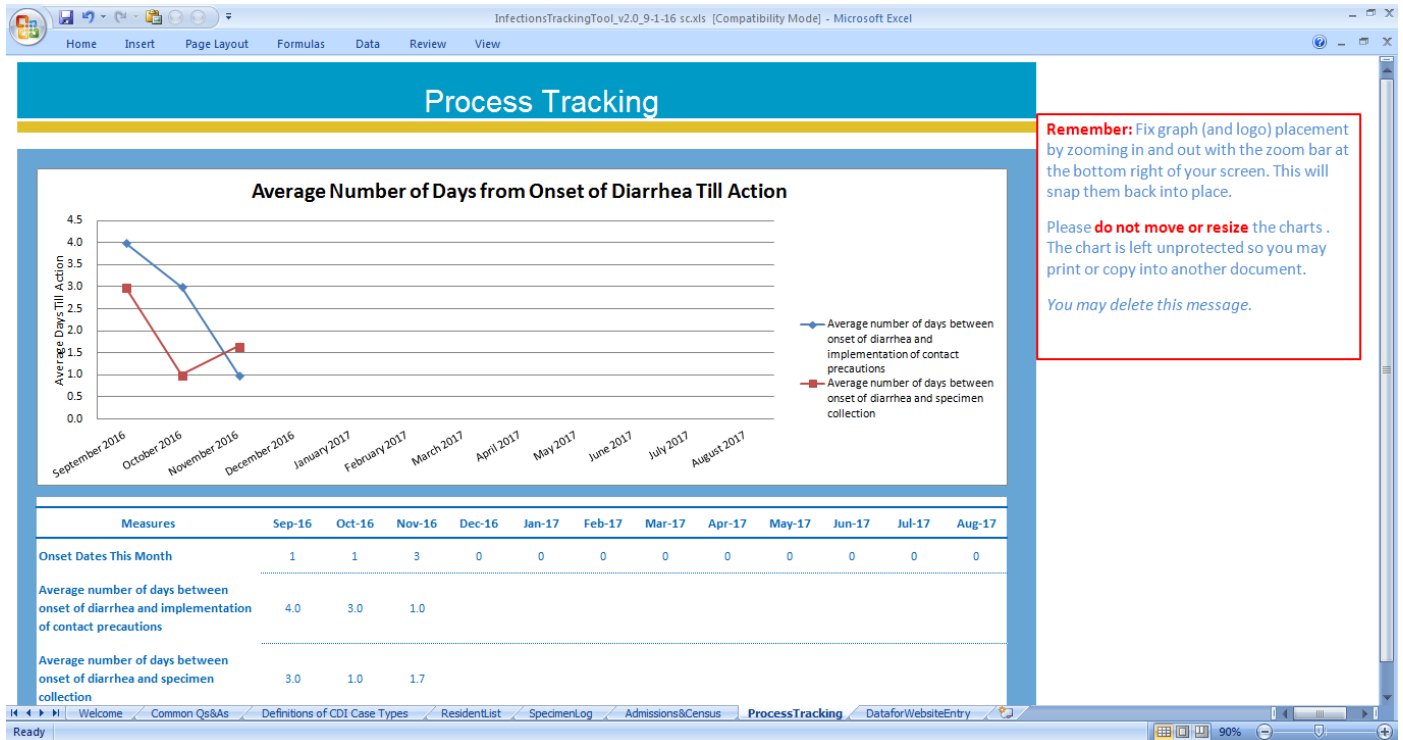
|                | Total Admissions*<br>include new admissions and readmissions | Number Treated for CDI at time of admission*<br>include all residents admitted to your home during the month who were receiving treatment for CDI | Average Daily Census for the Month* | Days in this Month | Resident Days this Month<br>ADC x The Number of Days in the Month<br>Calculated for You |
|----------------|--|---|-------------------------------------|--------------------|---|
| September 2016 | 34   | 2   | 135.0                               | 30                 | 4050  |
| October 2016   | 31   | 3   | 142.0                               | 31                 | 4402  |
| November 2016  | 38   | 4   | 139.0                               | 30                 | 4170  |
| December 2016  |  |   |                                     | 31                 | 0   |
| January 2017   |  |   |                                     | 31                 | 0   |
| February 2017  |  |   |                                     | 28                 | 0   |
| March 2017     |  |   |                                     | 31                 | 0   |
| April 2017     |  |   |                                     | 30                 | 0   |
| May 2017       |  |   |                                     | 31                 | 0   |
| June 2017      |  |   |                                     | 30                 | 0   |
| July 2017      |  |   |                                     | 31                 | 0   |

Appropriate months will appear in the first column based on the start date you enter for your workbook on the Specimen Log.

Resident days are calculated for you. No data entry in gray cells.

## PROCESS TRACKING [\[QuickLinks\]](#)

The ProcessTracking tab displays trend graphs of average days from diarrhea onset till specimen collection and till implementation of contact precautions. You will not enter any data on this sheet. You may print the sheet as a whole, or copy the graph into another document, such as Word or PowerPoint, to share with your staff, leadership and other stakeholders.



**Remember:** Fix graph (and logo) placement by zooming in and out with the zoom bar at the bottom right of your screen. This will snap them back into place.

Please **do not move or resize** the charts. The chart is left unprotected so you may print or copy into another document.

*You may delete this message.*

You may copy just the graphs by clicking once on a graph to select it (notice the pale blue border that appears). Then, right click and choose 'copy.' Paste into your Word or PowerPoint document.

To print just a graph: click a graph once to select it (look for the border). Then, when you select 'Print' from the menu, the 'Print what' option 'Selected graph' will be chosen.

**Note:** Sometimes the graphs on this page may appear out-of-place or mis-sized. **Please don't try to move or resize them.** Simply use your zoom bar to zoom in and out, and they will snap into place.

**Data for Website Entry & Website Trend Graphs** [\[QuickLinks\]](#)

- This sheet provides a monthly summary of your outcome measures.
- No data entry is required on this tab.
- Enter these numbers on the Campaign website and access [real-time trend graphs](#) of your progress. Submitting your data every month (about 2 minutes) fulfills participation requirements for the Campaign. Instructions are provided on this tab in your workbook.

**Data for Website Entry**

Your monthly outcomes are complete as soon as you've entered all of your information through the end of the month. When your data entry for the month is complete, follow these steps:

- ◆ Print this page.
- ◆ Log in to the Campaign website: <https://www.nhqualitycampaign.org>
- ◆ Select "Enter My Data" then choose "Infections." Select a year to enable data entry. Enter your numbers for the month (from below) in the corresponding fields.
- ◆ Click "Submit" and check the screen for the confirmation message.

**Thank You!**

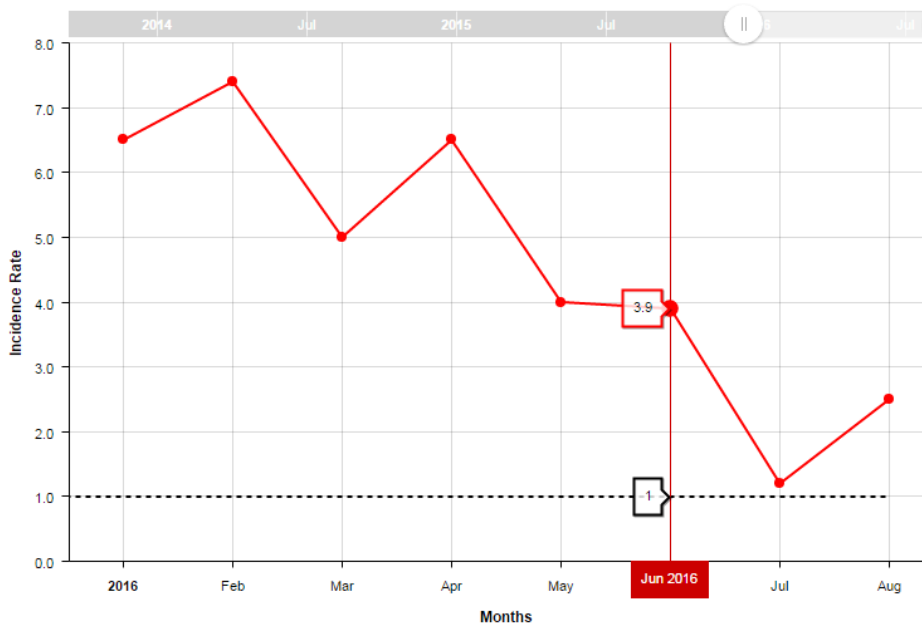
|                | CDI nursing home onset incidence cases this month (numerator) | Resident Days This Month (denominator) | CDI nursing home onset incidence per 10,000 resident days (numerator/denominator)*10,000 | Percent of new/re-admissions treated for CDI on admission to NH |
|----------------|---|--|--|---|
| September 2016 | 0   | 4050                                   | 0.0  | 5.9%  |
| October 2016   | 1   | 4402                                   | 2.3  | 9.7%  |
| November 2016  | 1   | 4170                                   | 2.4  | 10.5%   |
| December 2016  | n/a   | 0                                      | n/a  | n/a   |
| January 2017   | n/a   | 0                                      | n/a  | n/a   |

**Important: Follow these instructions.**

**Details on outcome measure calculations are provided in the Common Qs&As tab of the workbook.**

**CDI Nursing Home Onset Incidence Per 10,000 Resident Days**

The rate of C. difficile (CDI) nursing home onset incidence per 10,000 resident days.



Your trend graphs are produced real-time when you [transfer your monthly outcomes to the Campaign website](#) (about 2 minutes per month).

You can customize the time period displayed and download/save your images. [\[QuickLinks\]](#)

**Thank you for working on this important goal and participating in the Campaign!**