

Module 5

Recording and Reporting

Unit 1: Overview of Recording and Reporting of TB/HIV

1/11/2010

Mod 5 - Recording & Reporting

Overview of Recording and Reporting of TB/HIV

Objectives:

By the end of this unit, participants will be able to:

1. Define the term recording and reporting
2. Explain the importance of the health workers role in recording and reporting data and how that impacts the TB service delivery
3. List the key indicators used for reporting TB/HIV activities
4. Gain skill in completing accurate records
5. Gain skill in basic analysis skills for quality assurance of completing the registers and reports

Definitions

Recording – *The practice of capturing data on patients management over time and across clinical sites and writing information either directly on paper forms and/or entering into a computer*

Reporting – *The routine tracking (monitoring) of priority program management information and its intended aggregated patient outcome data (evaluation) at the facility, County, State and national level*

Indicator – *A variable or measurement used to assess progress towards stated goals*

Recording and Reporting Importance

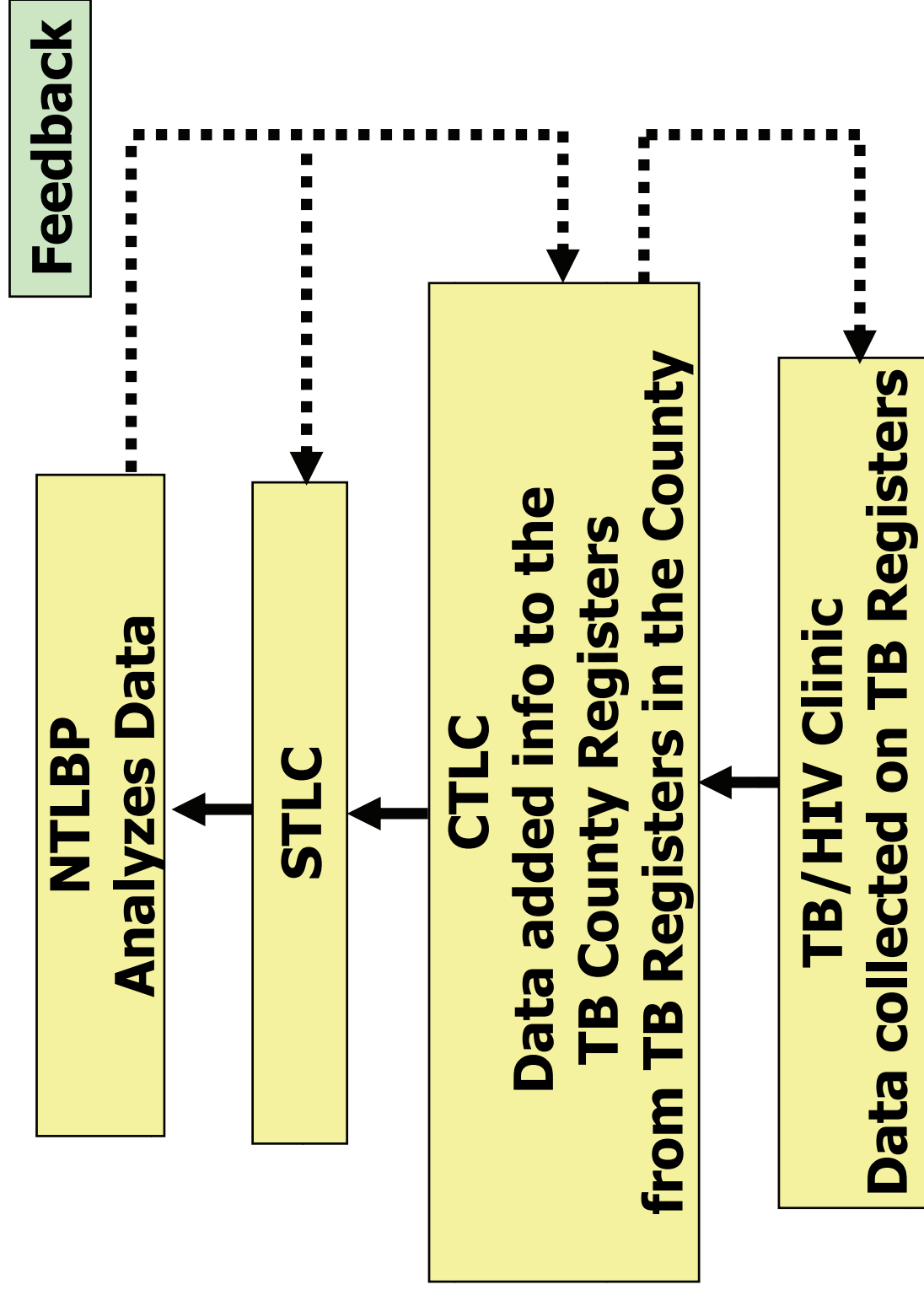
- Monitoring and evaluation by program managers at different levels
- Monitor patient's response to treatment
- Assess program performance
- Program planning
- Aid staff to provide adequate services to the individual patient
- Ensure patient quality of care, continuum of care, sharing of information with patient and transfer of information between health facilities
- Accountability

Recording and Reporting Indicators

Some key TB/HIV indicators

- HIV sero-prevalence among TB patients
- TB case finding among PLWHA
- Proportion of HIV infected TB patients receiving Cotrimoxazole
- Proportion of HIV infected TB patients receiving ARVs
- Proportion of HIV infected TB patients cured, completing TB treatment, defaulting, dying, out of control

Flow of TB Data



Consequences of Inaccurate Data

Negative impact on patients, facility, County, state and national program

- Inaccurate follow-up management
- Not enough drugs & test kits
- Can lead to MDRTB
- Overall ART can fail
- Inaccurate financial resource allocation
- Human resource constraints
- Infrastructure constraints (not enough space,
- Program failure
- Misrepresentation of the health situation

Unit 2

Accurately Completing the Recording and Reporting Tools

Accurately Completing the Recording and Reporting Tools

Objectives:

By the end of this unit, participants will be able to:

- 1. Describe the tools used for recording and reporting of TB/HIV**
- 2. Gain skill in completing accurate records**
- 3. Gain skill in basic analysis for quality assurance of completing the registers and reports**

Recording and Reporting Tools

- Tuberculosis Patient Appointment Card
- Tuberculosis Patient Record Card
- TB Treatment Unit Register
- Tuberculosis County Register
- Other Forms

Tuberculosis Patient Appointment Card

Purpose

- Enables the patient to collect drugs to continue treatment at a different TB clinic than the one than the one he/she is registered when in transit or moving residence

Who fills in information and when

- Filled by the health worker when the patient is started on treatment

Tuberculosis Patient Appointment Card (cont.)

Where it is stored

- Remains with the patient during and after the full period of TB treatment

Transfer

- In case of a more or less permanent transfer, a transfer form must be filled and be given to the patient

Tuberculosis Patient Record Card

Purpose

- Valuable source of information for operational/clinical research on TB management
- Focus is more on the clinical aspects of patient management
- Contains information, which cannot be put on the appointment card, and as such cannot be replaced by it

Who fills in information and when

- Filled by health worker who manages the patient's treatment
- Filled as completely as possible, during every patient visit

Tuberculosis Patient Record Card (cont.)

Where it is stored

- Stored at the unit where the patient receives treatment
- Given to the patient when he/she is transferred to another health unit for continuation of treatment. The patient must give it to the health worker who is responsible for his/her treatment in that unit.

Confidentiality

- Contains information that is strictly confidential and must be handled accordingly

Tuberculosis Treatment Unit Register

Purpose

- To record important information on every patient on tuberculosis drugs in the clinic.
- Data from this register provides the foundation for the County TB Register
- The information is the bases for many major decisions

Who fills in information and when

- Filled by health workers in TB clinic who provide drugs, treatment, counselling to patients
- Filled in immediately when a patient attends the clinic & collects drugs
- Defaulter tracing action must be taken when patient does not attend

Tuberculosis Treatment Unit Register (cont.)

Where it is stored

- Stored in confidential locations in each clinic where tuberculosis treatment is administered (under lock and key)
- Should not be carried by the CTLC or kept in his office

Confidentiality

- Contains confidential information – especially since HIV indicators are included.

Training

- The CTLC should train all health staff involved to properly keep this register

Quality Assurance for the TB Data

Problem	How to Prevent
Incomplete information	Fill all spaces correctly
Inaccurate information	Fill in the accurate information
Illegible information	Write clearly
Improper filling	Double check answers at time of entry
Delays in entering data	Do immediately

TB County Register

Purpose

- Valuable source of information for operational and clinical research on TB management.

Who fills in information and when

- Filled by CTLC
- Filled in at each clinic visit. The register should be updated with information from the Treatment Register of the particular clinic and vice versa.
- CTLC should ensure that information in the Patient Record Card, the Treatment Register and the Tuberculosis Register is consistent.

TB County Register (cont.)

Where it is stored

- Maintained by DTLC and stored at the district office

Confidentiality

- Contains information that is strictly confidential and must be handled accordingly

Other Forms

- Referral Forms
 - Facility
 - Community
- Transfer Forms
 - Unit to Unit
- Defaulter Tracing Forms
- Sputum Request Forms
- Reporting Forms
 - Quarterly and Cohort
 - Drug requisition
- Supervision checklist

Review

- What is the definition of recording?
- What is the definition of reporting?
- What are 5 tools used for recording and reporting?
- Why is it important to collect data?
- What are the consequences of the data not being accurate?