

Management of Tuberculosis Training for Health Facility Staff

I: Field Exercise – Observe TB Management



WORLD HEALTH ORGANIZATION
Geneva



TUBERCULOSIS FOUNDATION

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Field Exercise – Observe TB Management

Introduction

For the field exercise, you will visit a health facility or hospital outpatient department where TB case detection and treatment is ongoing. This field exercise is an opportunity to see how a general health facility carries out some aspects of TB case detection and treatment that you have learned about in the training course, *Management of Tuberculosis*. The field exercise is important to help you transfer what you have learned into a real-world setting.

This module includes nine lists that participants may use during the field exercise. The first three are essential; the other six are optional depending on the health facility visited, the objectives of your training, and which modules you have completed.

Objectives of the field exercise

You will visit a health facility to:

- Observe the identification of TB suspects.
- Review the *Register of TB Suspects* and some *TB Treatment Cards*.
- Ask staff at the health facility about how they perform steps of case detection and treatment of TB.
- If possible, depending on whether TB patients are present and can be observed, observe how staff at a health facility carry out steps of case detection and treatment of TB.
- Visit a laboratory that does sputum smear examination (if possible).

What you will observe during this exercise will depend on the activities that are underway at the time you visit the health facility, the records available, the emphasis of your training and the specific assignments given to you by your facilitator. Answer the questions on the lists assigned to you by observing activities, reviewing records, or by asking the staff questions. Write notes of your observations in the module.

On return to the classroom, you will:

- Report to the rest of the participants on what was observed or discussed with health staff.
- Compare work at this health facility with procedures described in the course.
- Discuss ways to improve case detection and treatment at your own health facility.

Field Exercise Lists

1. Review identification of TB suspects

Answer the questions below by observing activities in the health facility and asking health workers about the usual practice. If possible, also look at the Register of TB Suspects.

	<i>Record answers and notes here:</i>
Are all adult outpatients asked whether they are coughing?	
What criteria are used to identify TB suspects?	
Is sputum collected from every TB suspect?	
How many sputum samples are collected from each suspect for diagnosis?	
Where is sputum collected? (for example, outdoors or indoors? in a ventilated room or in a closed room? out of sight of others?)	
What is the approximate proportion of suspects examined (or sent for sputum examination) out of the total adult outpatients in the past week or month?	

<p>Are suspects recorded in the <i>Register of TB Suspects</i>?</p>	
<p>Do all or most suspects return with the second sputum sample on the next day as instructed?</p>	
<p>Where are samples stored until they are sent to the laboratory?</p>	
<p>Are laboratory results recorded in the <i>Register of TB Suspects</i>?</p>	

	<i>Record answers and notes here:</i>
<p>How are household contacts checked for TB?</p>	
<p>How are cases of sputum smear-negative TB and extrapulmonary TB identified?</p>	

Note your conclusions:

	Record answers and notes here:
Did you see any problems with how TB suspects are identified? What are they?	
What aspects of suspect identification are done well?	

2. Review Register of TB Suspects

Examine the Register of TB Suspects:

	<i>Record answers and notes here:</i>
What information is called for in the <i>Register of TB Suspects</i> (what are the column headings)?	
Is the register complete, that is, are all columns filled in?	
How long does it usually take to receive results from the laboratory?	
Is there any problem with results not being returned by the laboratory?	
How many suspects have only one smear examined? Is this a frequent situation?	
Was a <i>TB Treatment Card</i> opened for every identified TB case?	

Note your conclusions:

Did you see any problems with how the register is kept? What are they?	
What aspects of keeping the register are done well?	

3. Review TB Treatment Cards

Examine some TB Treatment Cards of current and past TB patients:

	Record answers and notes here:
Where are <i>TB Treatment Cards</i> for current patients kept?	
Is the general patient information section filled completely? If not, what is missing?	
Is the initial-phase treatment section filled in completely? If not, what is missing?	
Are the results of follow-up sputum examinations recorded on the card?	
Are patients having follow-up sputum examinations according to the correct schedule for the category of treatment? If not, note what follow-up examinations are missed or late.	
If you find a <i>TB Treatment Card</i> for one or more patients who were smear-positive at the end of the initial phase of treatment, were those patients given an additional month of initial-phase treatment?	
If you find a <i>TB Treatment Card</i> for one or more patients who were smear-positive at 5 months or later, were they classified as a treatment failure and put on Category II treatment?	

	Record answers and notes here:
Is the continuation phase treatment section filled in completely? If not, what is missing?	
Is the outcome of treatment marked on the card?	
From what you can determine from studying the card, do you think the outcome marked is correct?	
From what you can determine from studying the card, are transfers followed-up to determine the patient's treatment outcome?	
If possible, also ask a health worker whether a staff member follows-up transfers to determine the patient's treatment outcome.	

Note your conclusions:

Did you see any problems with the way <i>TB Treatment Cards</i> are maintained? What are they?	
What aspects of <i>TB Treatment Cards</i> are done well?	

4. Review the laboratory (if the health facility has a laboratory for sputum examination)

Examine the laboratory registration book and talk with the laboratory staff:

	<i>Record answers and notes here:</i>
Is the laboratory registration book complete (that is, are all columns completed for each suspect or patient)?	
How many persons had sputum examined for diagnosis in the past month?	
How many smears were examined in the laboratory per day in the past month?	
What is the time elapsed from receiving the sputum specimens in the laboratory until sending back the result?	
If sputum is collected from patients at the laboratory, <i>also complete list 5 (on the next page) in the laboratory.</i>	

Note your conclusions:

Did you see any problems with the laboratory's work? What are they?	
What aspects of the laboratory's work are done well?	

**5. Review sputum collection
(if a TB suspect or suitable TB patient is available)**

If a TB suspect is identified when you are present, observe sputum collection. You may also talk with the health worker who collects sputum from TB suspects to answer the following questions.

	<i>Record answers and notes here:</i>
In what order does the health worker do the following tasks?	<input type="checkbox"/> Label the sputum containers <input type="checkbox"/> Ask the TB suspect to collect sputum <input type="checkbox"/> Record in the Register of TB Suspects
How does the health worker explain to the suspect how to cough up sputum?	
Where is sputum collected? (for example, outdoors or indoors? in a ventilated room or in a closed room? out of sight of others?)	
How does the health worker protect himself or herself from catching TB? (for example, by having suspects collect sputum outdoors? by having a well-ventilated area? by standing behind suspect? by wearing a mask?)	
How does the health worker explain to the suspect how to collect the early morning sample?	

	<i>Record answers and notes here:</i>
Does the health worker give the suspect a sputum container to take home?	
Where are samples stored until they are sent to the laboratory?	

Note your conclusions:

Did you see any problems with the way sputum is collected? What are they?	
What aspects of sputum collection are done well?	

6. Observe TB treatment (if a TB patient is present)

Observe treatment of one or more TB patients who come into the health facility:

	<i>Record answers and notes here:</i>
Does the patient have a <i>TB Treatment Card</i> ?	
Examine the card. Is it filled in correctly so far?	
Does the patient have his or her own drug box?	
Was the patient asked how he or she is feeling today?	
Was the patient given the correct drugs?	
Was water available at the health facility for the patient to take the drugs?	
Did the health worker watch the patient swallow the anti-TB drugs?	
Was the dose recorded on the patient's <i>TB Treatment Card</i> ? Was it recorded correctly?	

Interview a health worker to find out the following:

	Record answers and notes here:
Who chooses the appropriate treatment regimen for the patient?	
Are disease and patient classifications used to select a drug regimen?	
How is the place/person to observe treatment selected?	
Do some patients have a treatment supporter outside the health facility? If so, what types of people are treatment supporters?	
Do you ask about side-effects? Are they common?	

Note your conclusions:

Did you find any problems with how treatment is given? What are they?	
What aspects of TB treatment are done well?	

7. Review how patients are informed about TB and its treatment (if a TB patient is present)

If possible, observe the health worker giving information to a new TB patient about TB and its treatment. Otherwise, ask a health worker about the usual practice:

	<i>Tick topics mentioned:</i>
When a health worker first informs a new patient about TB and its treatment, what topics are covered?	<input type="checkbox"/> What is tuberculosis? <input type="checkbox"/> TB can be cured <input type="checkbox"/> How TB spreads <input type="checkbox"/> How to prevent TB from spreading <input type="checkbox"/> Who else should be examined or tested for TB? <input type="checkbox"/> Necessity of directly observed treatment <input type="checkbox"/> Details of patient's treatment regimen <input type="checkbox"/> What to expect; what to do next <input type="checkbox"/> <input type="checkbox"/>

If possible, observe the health worker giving information to a TB patient who is currently under treatment. Otherwise, ask the health worker:

	<i>Tick topics mentioned:</i>
What topics are covered during subsequent meetings with TB patients coming for treatment?	<input type="checkbox"/> Side-effects of drugs (if reported/observed) <input type="checkbox"/> Type, colour, amount, and frequency of recommended drugs <input type="checkbox"/> Importance of continuing treatment <input type="checkbox"/> What happens if the patient takes only some of the drugs or stops treatment <input type="checkbox"/> Frequency and importance of required sputum examinations, meaning of results <input type="checkbox"/> If patient must leave the area, need to inform the health staff so that continuing treatment can be arranged.

If you are able to observe a health worker giving information to a new or current TB patient:

	<i>Record answers and notes here:</i>
What good communication skills did you observe the health worker using?	<input type="checkbox"/> Ask questions and listen <input type="checkbox"/> Demonstrate a caring, respectful attitude <input type="checkbox"/> Praise and encourage the patient <input type="checkbox"/> Speak clearly and simply <input type="checkbox"/> Encourage the patient to ask questions <input type="checkbox"/> Ask checking questions <input type="checkbox"/> <input type="checkbox"/>

	<i>Record answers and notes here:</i>
<p>Did you observe the health worker communicating poorly (rude, hasty, too busy to care, or not listening to the patient)? Note the poor communication behaviours.</p>	

Note your conclusions:

<p>Did you see any problems with the way information about TB is given? What are they?</p>	
<p>What aspects of giving information are done well?</p>	

**8. Ask about supervising and resupplying community TB treatment supporters with drugs
(if community TB treatment supporters are used)**

Ask a health worker about community TB treatment supporters. (If a treatment supporter comes for supervision while you are present, also observe the interaction with the health worker.)

	<i>Record answers and notes here:</i>
Does the community TB treatment supporter bring the <i>TB Treatment Card</i> to the health facility?	
Do you copy the entries onto the <i>TB Treatment Card</i> kept at the health facility?	
Do you examine the card to identify any problems? What problems have been identified before?	
Do you discuss the problems with the community treatment supporter? Are the problems solved? Do you interview the patients? When?	
Do you provide another month of drugs? Do you record the drugs provided on the <i>TB Treatment Card</i> ?	
Do you record the drugs provided on the <i>TB Treatment Card</i> ?	
Do you thank and give support to the community treatment supporter?	

Note your conclusions:

<p>Did you find any problems with supervising and resupplying community TB treatment supporters with drugs? What are they?</p>	
<p>What aspects of supervising and resupplying community treatment supporters with drugs are done well?</p>	

9. Review management of drugs and other supplies for TB

Observe where drugs for TB are stored and how they are managed. Also ask health workers questions to find out the following:

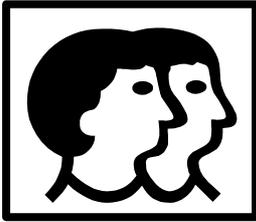
	Record answers and notes here:
Is a box containing a complete treatment regimen provided for each TB patient?	
Does the health facility receive complete treatment regimens each in a box, or must the health facility assemble the drug boxes? If the health facility must assemble the drug boxes, are there problems associated with that? What are they (some drugs not available, errors in assembly)?	
Are blister packs used? Are FDCs used?	
Are sufficient drugs kept in stock so that all new TB patients can begin treatment without delay?	
Are stocks of anti-TB drugs expired or nearing the expiry date?	
Are sufficient sputum containers always in stock? (that is, sputum examinations are never limited by a shortage of containers)?	
Are sufficient <i>TB Treatment Cards</i> always in stock, that is, health workers never run out?	
Are sufficient <i>Request for Sputum Examination forms</i> always in stock?	

Look at where and how drugs are stored:

	Record answers and notes here:
Are stocks of anti-TB drugs kept in a secure room or cabinet?	
Where are drug boxes for current TB patients kept? Are they always accessible?	
Do staff eat, drink, smoke, or keep food in the drug storeroom?	
Are drugs and supplies stored off the floor?	

Note your conclusions:

Did you find any problems with management of drugs and other supplies? What are they?	
What aspects of management of drugs and other supplies are done well?	



Exercise

Discussion of the field visit

Write answers to the questions below to prepare for the discussion. Then, during the discussion, add to your answers.

1. Refer to the checklists used during the field visit. Compare what you observed with what you have learned:
 - a) What problems did you observe at the health facility? What might be done to improve the problems?

 - b) What aspects are done well?

2. Compare case detection and treatment at your own health facility with the recommended procedures you have learned.
 - a) What aspects are done well at your health facility?

 - b) What problems are occurring?

 - c) List some ways that case detection and treatment could be improved at your own health facility.

Tell your facilitator when you are ready for the discussion.



