



Department of Health  
Republic of South Africa

# HIV / AIDS Mentoring Clerk

October 2008



**ark**  
absolute return for kids





The ARV clinic

# ARV team - admin

- filing clerk
- data capturer
- receptionist

Keep stats register up to date

Drawing patient files for :

HIV clinic

ARV clinic

PA follow-up

Adults vs. Paediatrics

Lab results

Collating laboratory results

Organising patient files

Communication ( phone/fax)

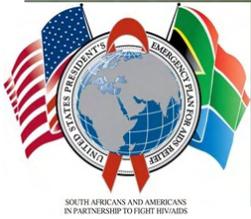
Computer skills for:

bookings

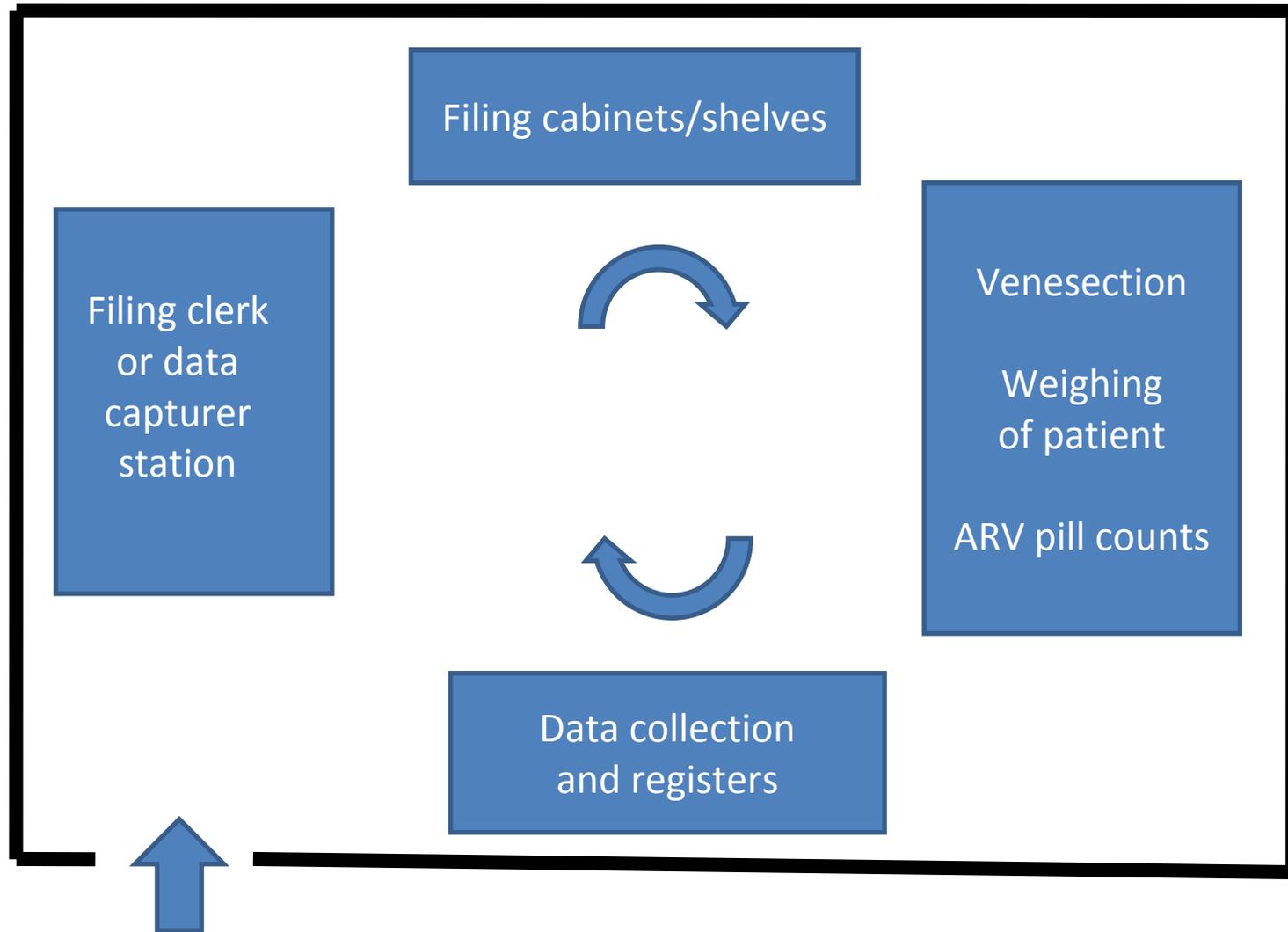
data retrieval

PA = patient advocate ( home based carers ) to support ART adherence





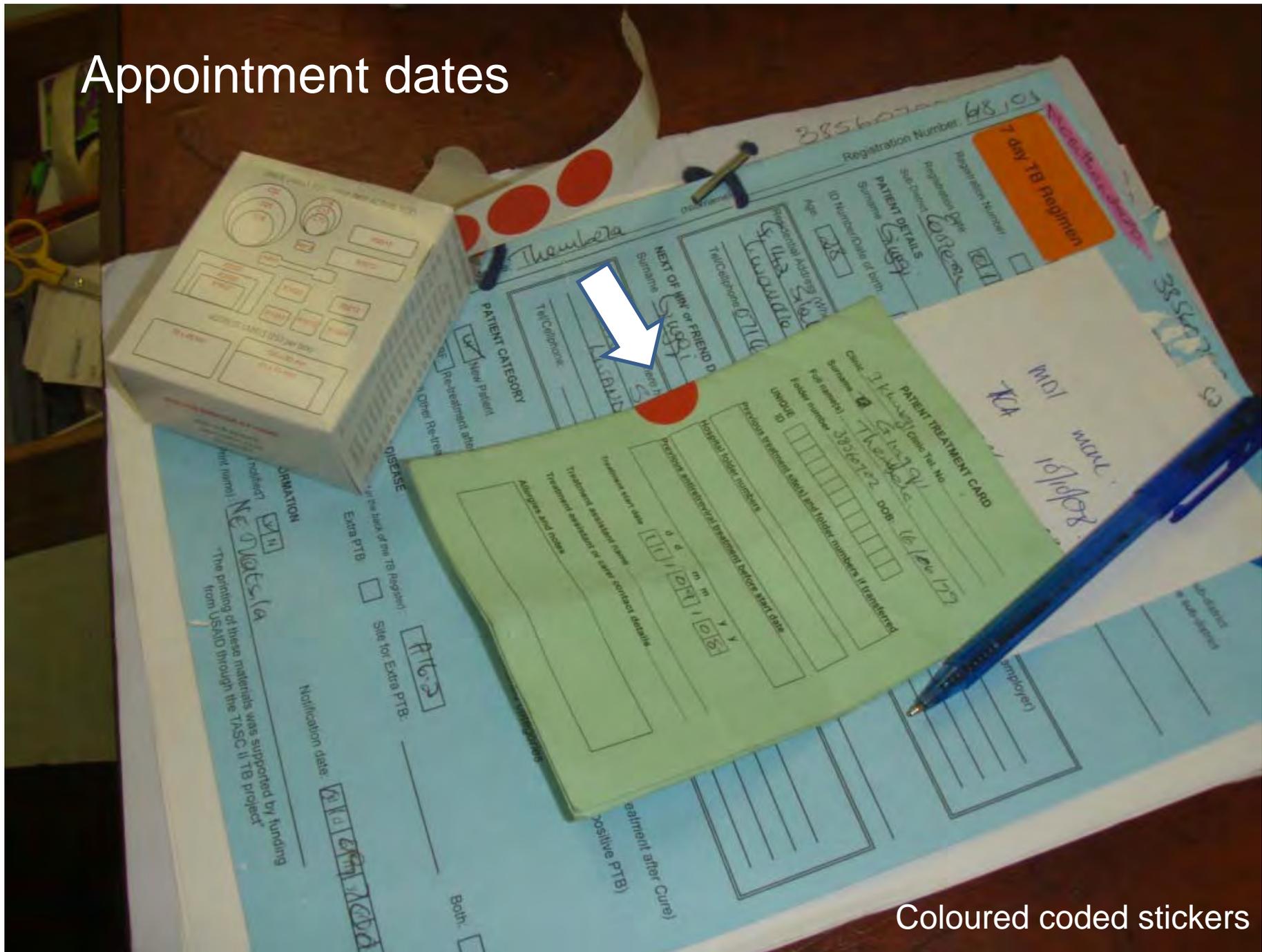
# Patient arrival – report to Triage Room “A model”



# Patient file information

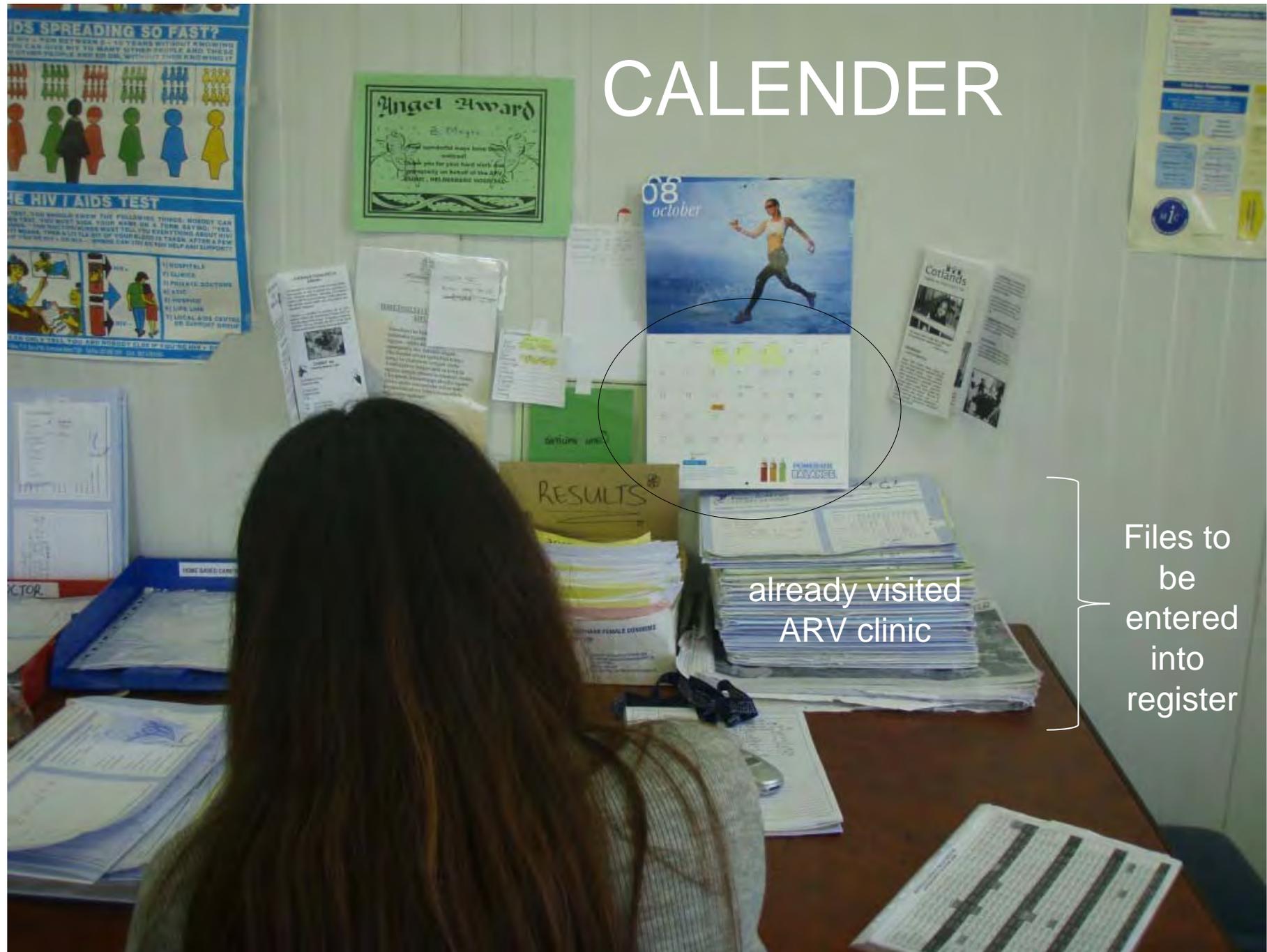
- ensure information about patient *correct* (correct file ?)
- if *patient's details* have changed, update file
- ensure correct *address* and contact *telephone* numbers ( patient may require to be contacted by doctor/nurse if abnormal blood result or by patient advocate if defaults )
- ensure right *clinic* and right *day* eg diabetic patient who is HIV positive should attend Diabetes Clinic

# Appointment dates



Coloured coded stickers

# CALENDER



already visited  
ARV clinic

Files to  
be  
entered  
into  
register

? Public Holidays

? Staff on leave

Training workshops

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
		1 Robert Gordon Memorial Day	2	3	4	5
6	7	8	9	10 World Mental Health Day	11	12
13	14	15 St. Valentine's Day	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

**TRAINING TIP**  
• Adding waist lifts to the end of every row will strengthen your quads, hamstrings and glutes, improving your speed and endurance. Lean against a wall with feet shoulder-width apart, squat with knees bent at 45 degrees. Hold for 30 to 60 seconds.

**POWERADE BALANCE**  
For more exciting information, go to [www.powerade.co.za](http://www.powerade.co.za)

DATES

RESULTS

**Primary Health Care  
PATIENT RECORDS**

ORGANISATION \_\_\_\_\_

**PATIENT**  
Surname: Maini  
First Name: Sambeliso  
Date of Birth: 01/02/08      Sex:  M     W

FOLDER NUMBER \_\_\_\_\_  
IDENTIFICATION NUMBER \_\_\_\_\_  
CLINIC \_\_\_\_\_

**PERSON/INSTITUTION RESPONSIBLE FOR PAYMENT**  
Name and  
Relationship  
Address

1961

# Data collection - essentials

- needs to be up to date
- accurate
- without these we do not know whether ART treatment is successful
- “don’t leave home without them “
- core indicators





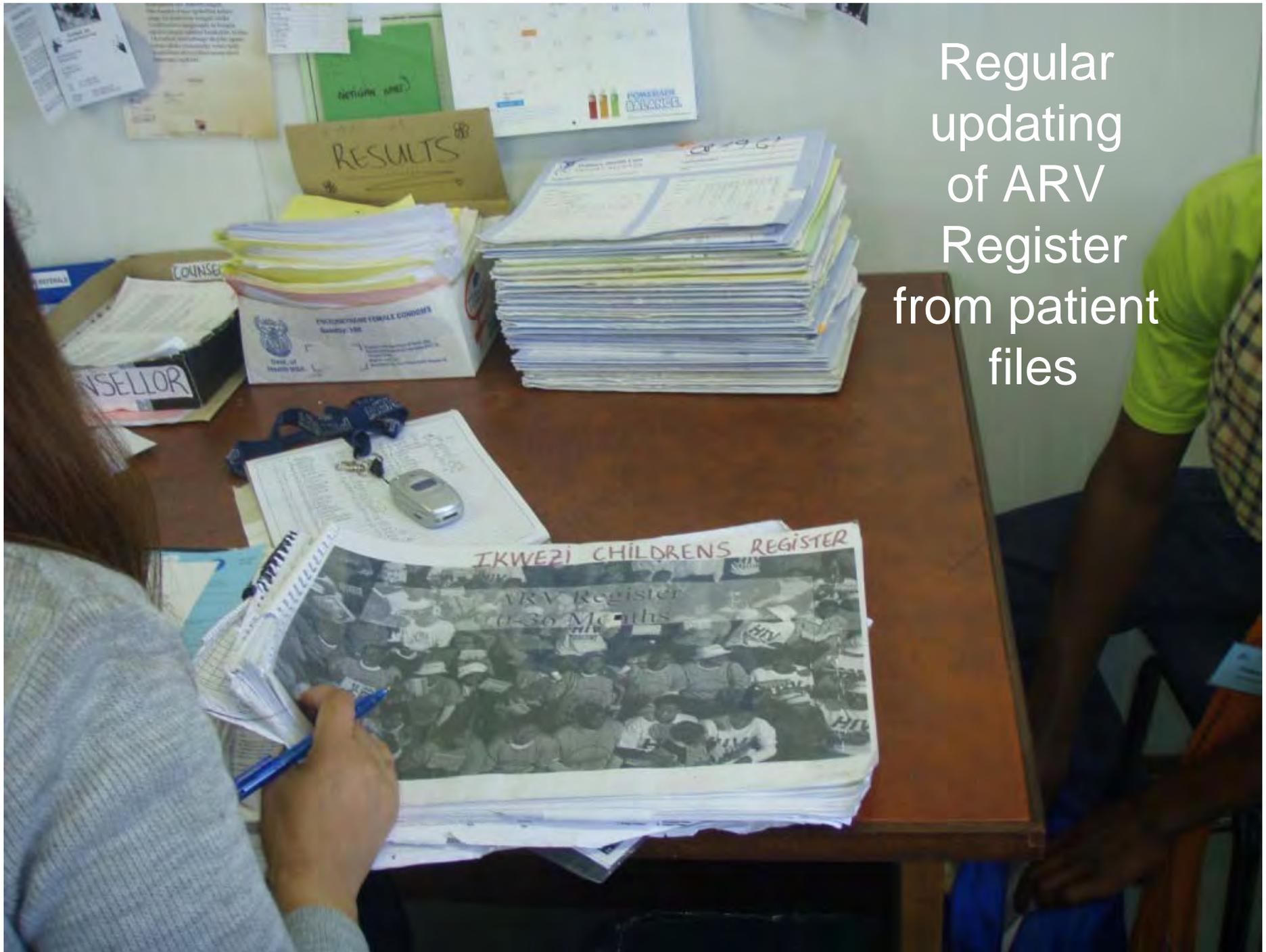
ARV Treatment Registers ( Adult and Paediatrics )

# Why do we keep registers ?

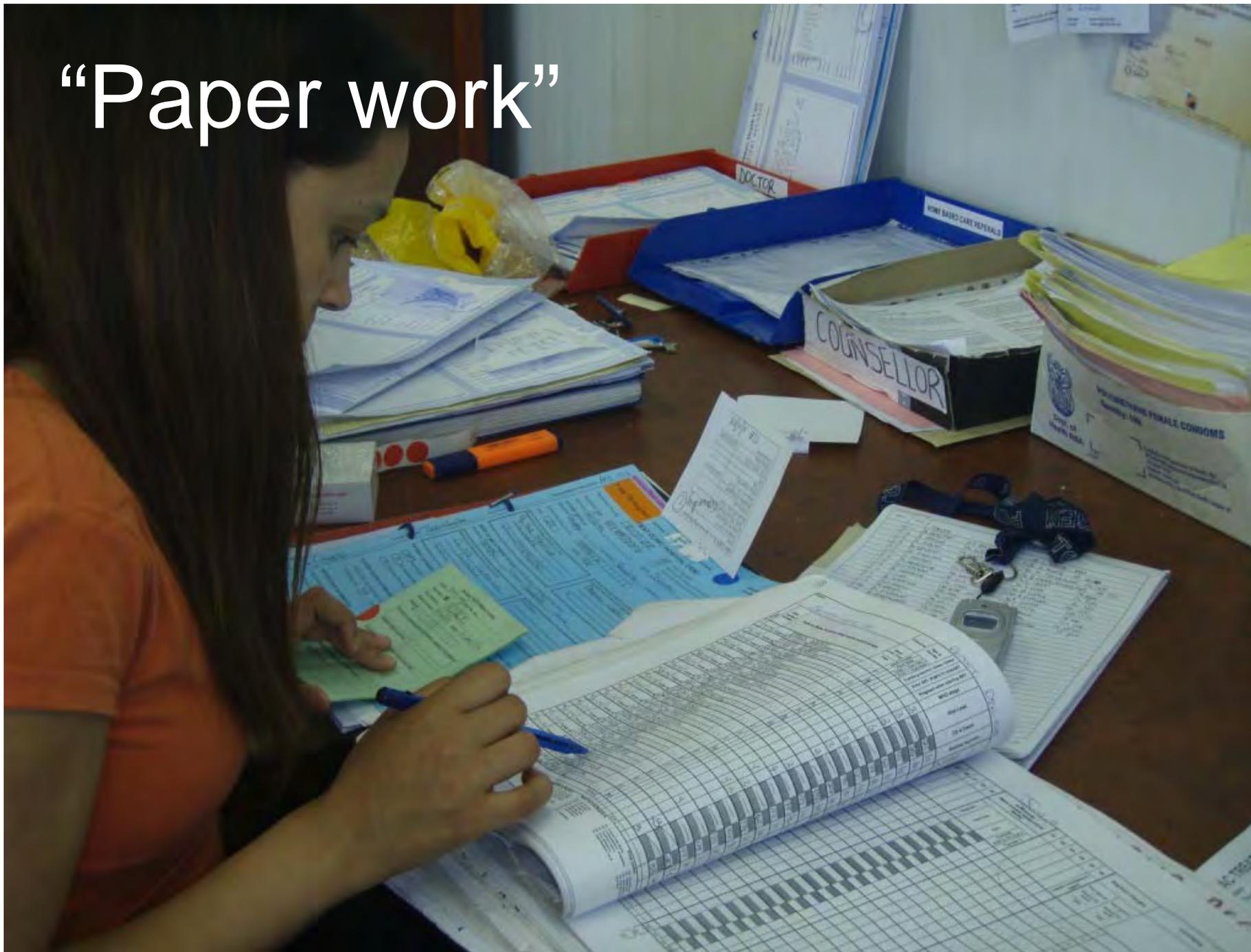
- ARK ( internal )
  - for programme management, planning and monitoring of progress
  - donor accountability
- DoH (micro level)
  - paper-based for reporting purposes for planning of staff and space
- DoH (macro level)
  - management of health services ( information obtained is fed back to these services )
  - plan budgets, monitor disease and its progress



Regular updating of ARV Register from patient files



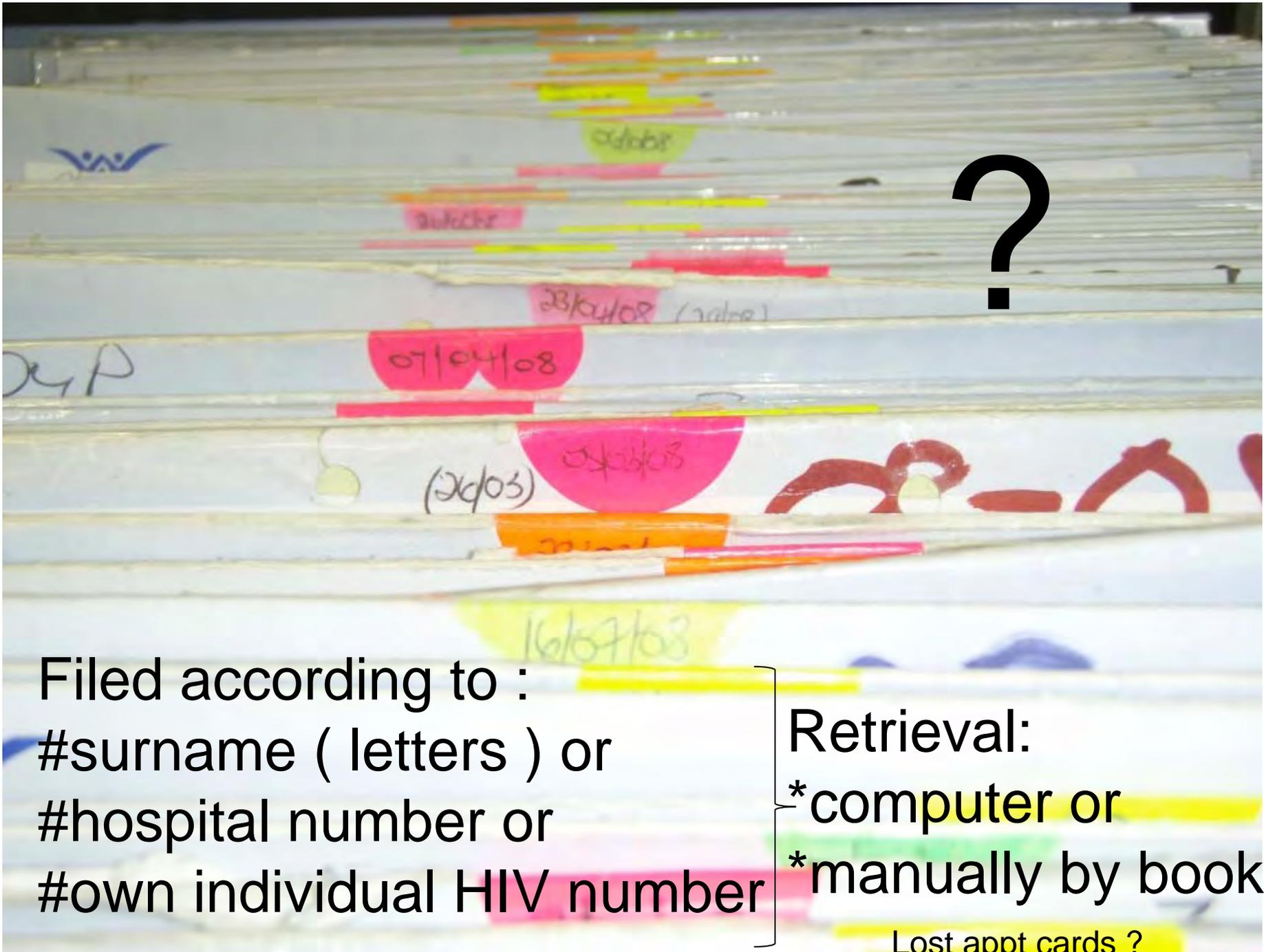
“Paper work”





How to avoid lost files ?





Filed according to :  
#surname ( letters ) or  
#hospital number or  
#own individual HIV number

Retrieval:  
\*computer or  
\*manually by book

Lost appt cards ?



Colour coding = establishes that patient has been INITIATED on ART and start date CLEARLY evident

# Patient demographics

Patient Information		
Clinic Information	Patient Information	System Information
<p><b>ART</b>   <b>PMTCT</b></p> <p>Clinic * <input type="text"/></p> <p>NearestClinic <input type="text"/></p> <p>ARV Folder * <input type="text"/></p> <p>PMTCT Folder * <input type="text"/></p> <p>GroupNumber <input type="text"/></p> <p>HospitalFolder <input type="text"/></p> <p>InitiatingClinic <input type="text"/></p> <p>InitiatingDate <input type="text"/></p> <p>PreviousFolder <input type="text"/></p> <p>PreviousClinic <input type="text"/></p> <p>NextClinic <input type="text"/></p> <p>WorkUpClinic * <input type="text"/></p> <p>DownReferralClinic * <input type="text"/></p>	<p>Surname * <input type="text"/></p> <p>FirstName * <input type="text"/></p> <p>IDNo * <input type="text"/></p> <p>DoB * <input type="text"/> Age <input type="text"/></p> <p>Sex * <input type="text"/> Language <input type="text"/></p> <p>PatientAddress <input type="text"/></p> <p>Resident <input type="text"/></p> <p>TelephoneNo <input type="text"/> CellNo <input type="text"/></p> <p>DonorValidation * <input type="text"/> <input type="checkbox"/> Pregnant</p> <p>Funder <input type="text"/> Criteria <input type="text"/></p> <p>OwnChildrenCaredfor <input type="text"/> TotalKidsCaredFor <input type="text"/></p> <p>FamilyDetails <input type="text"/></p>	<p>EnrolmentDate <input type="text"/> 2008/12/17</p> <p>Data Capturer <input type="text"/> michael</p> <p><b>VCT</b></p> <p>VCTTestDate <input type="text"/></p> <p><b>Support</b></p> <p>PatientAdvocate * <input type="text"/></p> <p>Comment * <input type="text"/> Patient Advocate Refused</p> <p>On Grant ? <input type="text"/></p> <p>To Be Discussed <input type="checkbox"/></p> <p>DiscussionDate <input type="text"/></p> <p>ExpectedStart <input type="text"/></p>
<p><b>Clinical Information</b></p> <p>PreviousPMTCTExposure <input type="text"/></p> <p><input type="text"/> PMTCT Drug Exposure</p> <p>WHOStage <input type="text"/></p> <p>WHOStage Condition <input type="text"/></p> <p>MedicalHistory <input type="text"/></p>	<p>CurrentARVReg <input type="text"/></p> <p>PreviousARVReg <input type="text"/></p> <p>TBTreatment <input type="checkbox"/></p> <p>STI Screen <input type="checkbox"/></p> <p>TreatmentNaive <input checked="" type="checkbox"/></p>	<p>Notes <input type="text"/></p> <p>MotherFolderNo <input type="text"/> n/a</p> <p>BaseLine Results <input type="text"/> PMTCT</p> <p>Status History <input type="text"/></p> <p>Undo and Exit <input type="text"/> Save and Exit</p>
Status * <input type="text"/>	StatusDate * <input type="text"/>	Status Comment <input type="text"/>

\* indicates a required field



Clinic Total	Month to Date	
RIC 668	New 0	Negative 0
Wellness 0	TransIn 0	Discontinued 0
WorkUp 0	Restart 0	TransOut 0
PMTCT 0	Wellness 0	LTF 0
LTF 46	WorkUp 0	Died 0
Died 37	PMTCT 0	Discussion 9

[Refresh](#) [Setup](#) [Reports](#) [Stats](#)

Clinic Information

- Add a New Patient
- Patient Switchboard
- Pharmacy Menu
- Reports Menu**
- Database Maintenance
- Log Off
- Exit Database

Click here

User Logged In  
/300

User Logged In  
michael



# Grey Hospital Patient Management Suite

Version 2.09

Clinic Total	Month to Date	
RIC	New	Negative
668	0	0
Wellness	TransIn	Discontinued
0	0	0
WorkUp	Restart	TransOut
0	0	0
PMTCT	Wellness	LTF
0	0	0
LTF	WorkUp	Died
46	0	0
Died	PMTCT	Discussion
37	0	9

- Clinic Reports
- Patient Reports
- Pharmacy Reports**
- Reports Database
- Error Trap Database
- Main Menu

Click here

/300  michael



# Grey Hospital Patient Management Suite

Version 2.09

Clinic Total	Month to Date	
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LTF 46	WorkUp 0	Died 0
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Refresh

Setup

Reports

Stats

Clinic Information

Prescriptions Not Collected

Click here

**Late Patients**

Non Adherent Patients

Patients on Other Medication

Daily Prescription Book

Regimen Totals

Reports Menu

Log Out / 300

Log Logged On michael

## Late Patients Selection Criteria

### Filter Criteria

- 0 to 7 Days
- 0 to 14 Days
- 0 to 28 Days
- All Late Patients

Late Patients Report

Exit



# Filing

- *where and who* – keep with main clinic files or in ARV clinic
- are general staff advised about HIV positive patients ?
- files for HV pregnant women ( PMTCT ) ?
- files for HIV and TB patients ?
- files for HIV Paediatric ( marry to mother – *same* day appointment )
- HIV files for:
  - HIV *wellness* clinic ( not on ART )
  - ARV clinic *workup* ( *waiting* to start ART )
  - already *started* on ART

ONE  
FILE  
?

# Patient records (clinic files/folders)

- if kept separate, need a separate filing clerk employed ( less chance of files being *misplaced*, and easier and *quicker* to retrieve )
- *access* after hours – confidentiality and safety
- *access* by home based carers or PAs ?
- available *after hours* for emergencies ?
- need to draw files for MTM and each appropriate ARV clinic day
- HIV registers

MTM = **M**ulti-disciplinary **T**eam **M**eeting

Doctors



Patient  
advocates



Adherence  
counsellors



RESULTS

# Laboratory results

File daily !

Check and sign all lab results daily

Take early ACTION on abnormal results

Recall all patients with abnormal results

# Essentials

1. Capture all important *blood test results* follow-up on lost results important

2. *Late patient* management

- link CAA facilitator ( based at the Facility; in charge of P.A.s with data capturer )
- *late* patients who have missed appointments in 1 or 2 or 4 weeks
- *lost to follow up* (LTF) definition : 3 months after running out of ART eg supplied with 1 months → LTF after 4 months



# Essentials

## 3. Be responsible for *accurate* and *complete* data results

- *marry* all laboratory “lab” results with the patient’s HIV file
- act on absent results eg repeat, obtain a telephonic result from the lab

**CD4 count and viral load *and* HIV**

# Stay in touch – stay linked to the team

Late Patients Selection Criteria

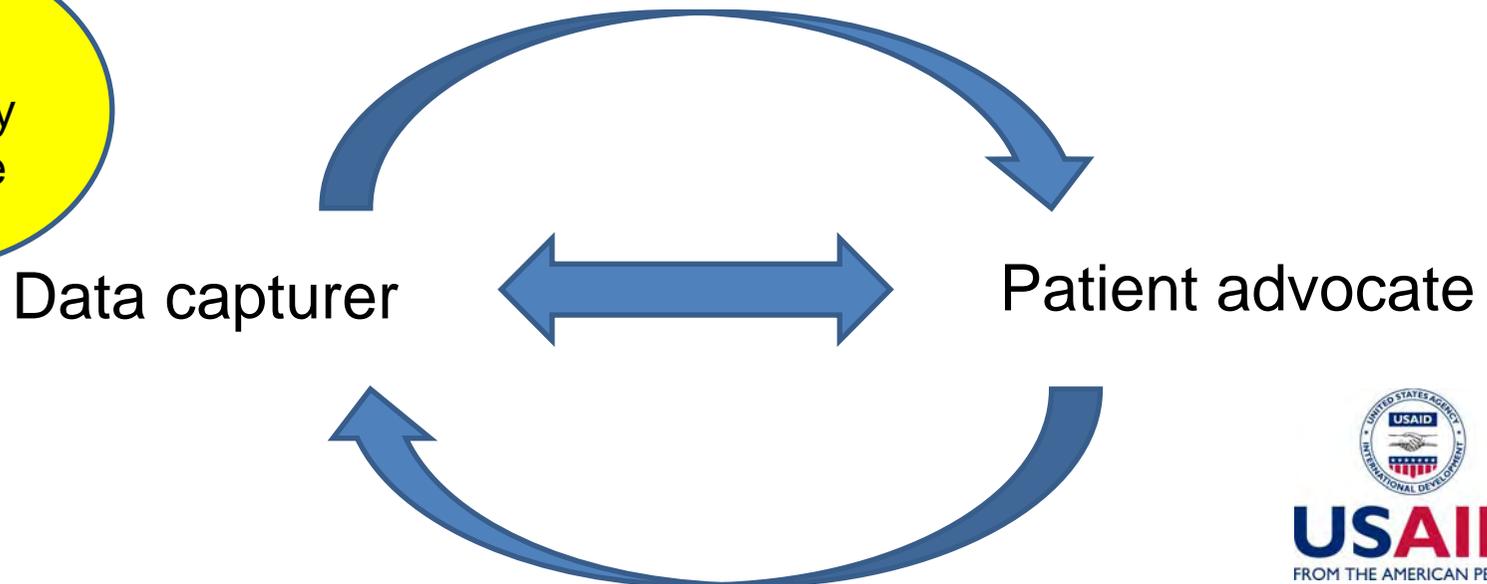
Filter Criteria

- 0 to 7 Days
- 0 to 14 Days
- 0 to 28 Days
- All Late Patients

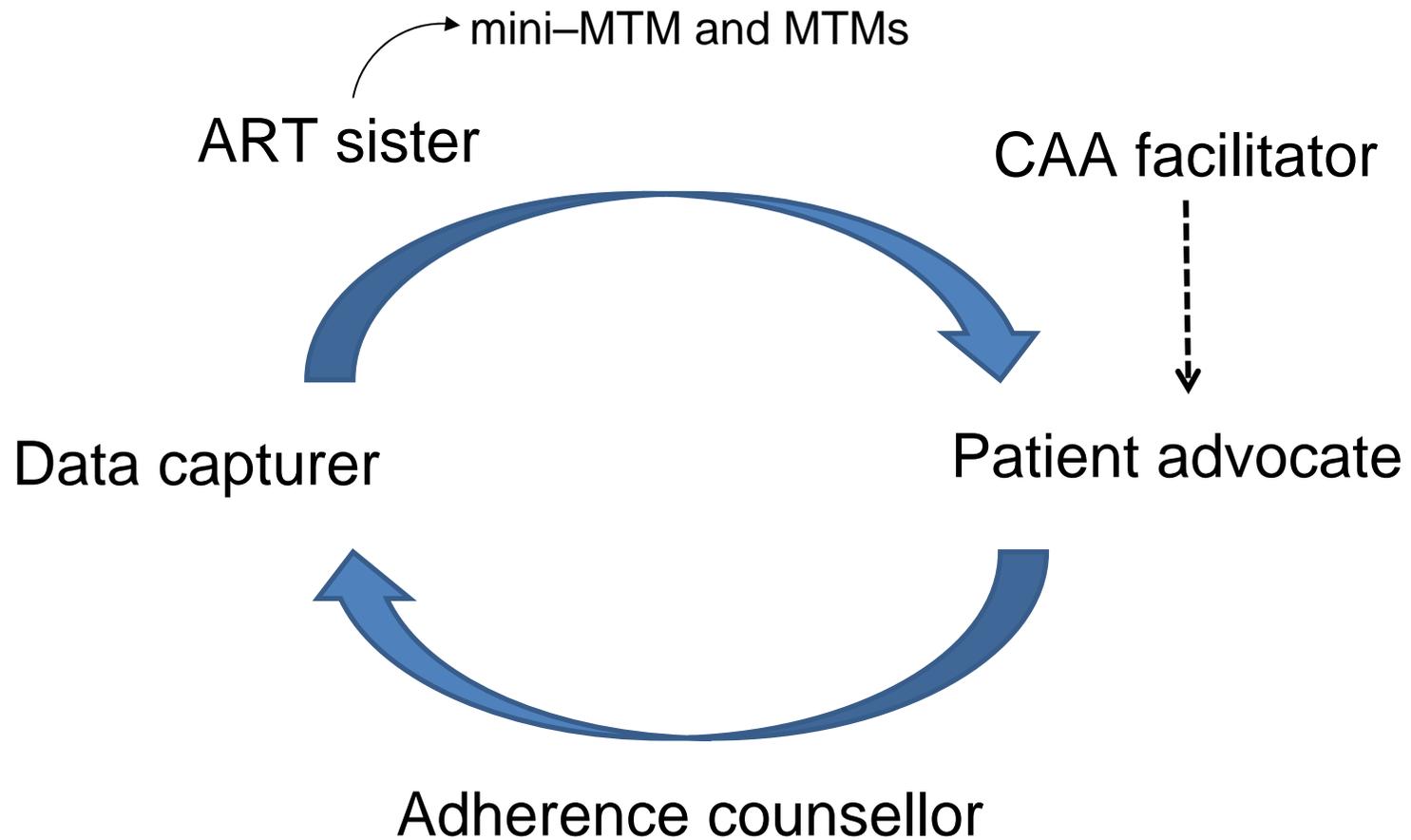
Late Patients Report

Exit

Maintain a two way dialogue



# HIV Team players



CAA = Community Access and Adherence

## P.A.s – part of the HIV Team

- feedback
- recognise that HIV is a health problem *AND* social problem
- Patient Advocates :
  - screen patients for ART medical and social
  - manage lost to follow-up patients

# Contacting patients

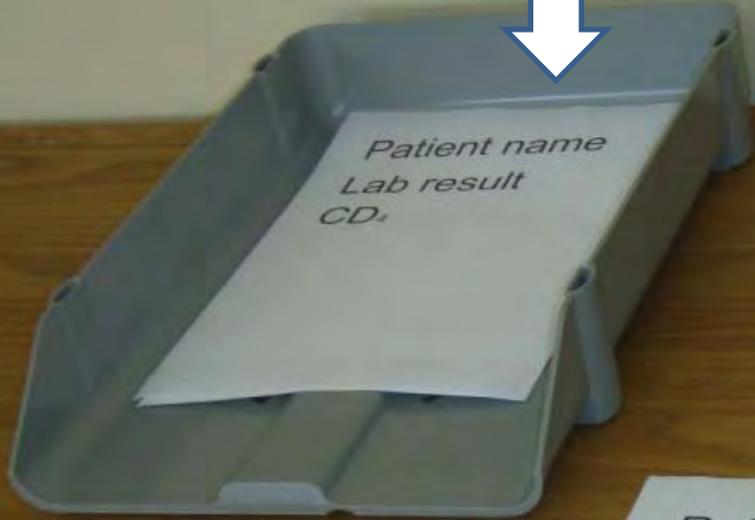
- most patients only have cellphones
- certain clinics only allow landline calls
- ensure budget in place to make necessary calls

Note: A telephone call is easier, quicker and less time consuming than a home visit !

# Management of Lab results



IN tray ( all new results )



Filing of lab results

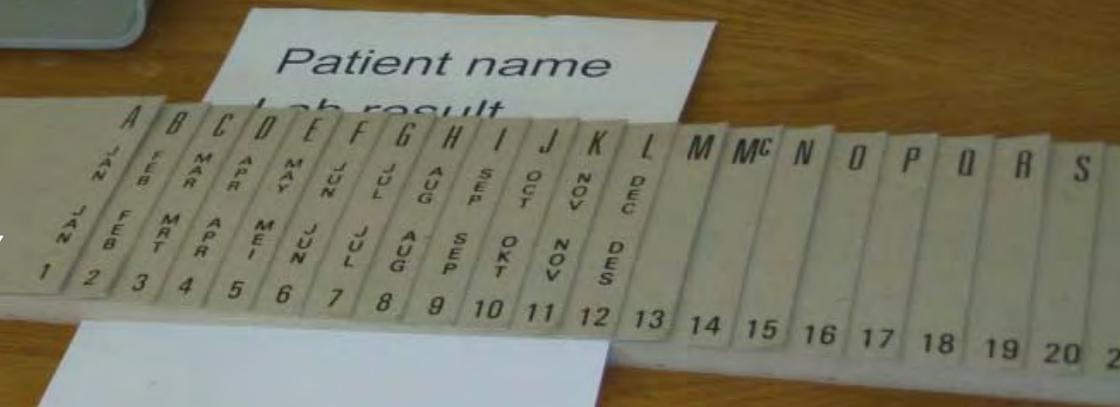
ARK  
ACCOUNTS

"KWIKSORT"

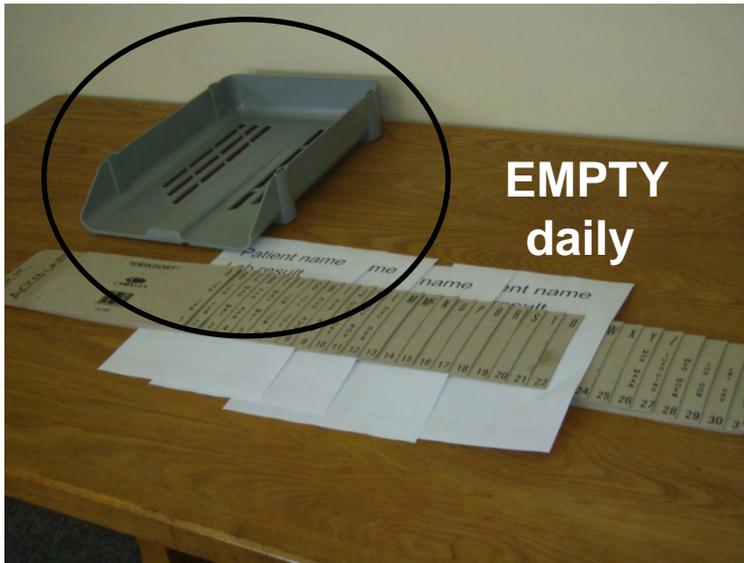
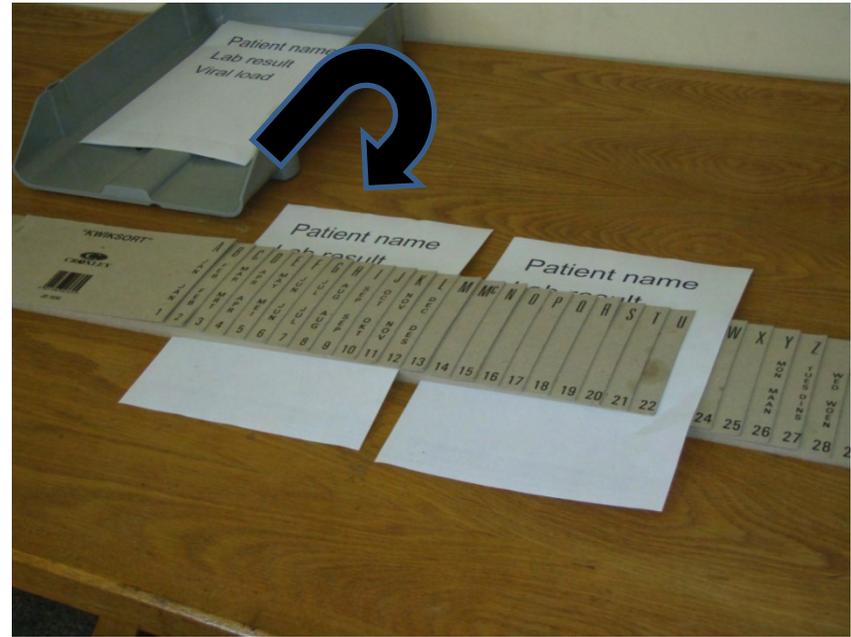
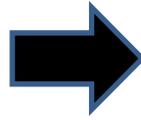
CROWLEY



© 1982



A to Z



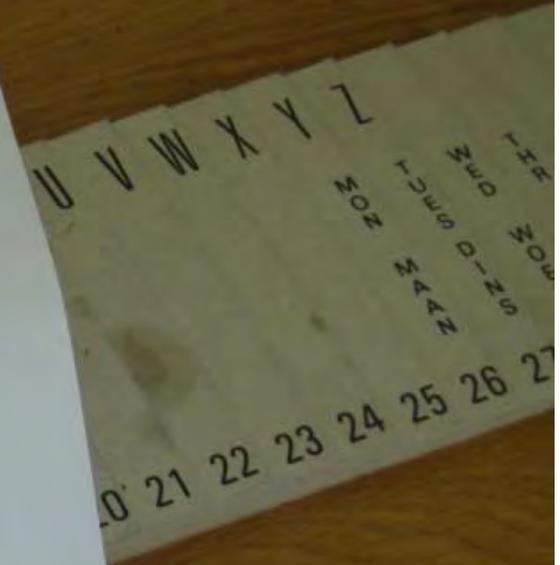
Use an “A to Z” to help sort out the laboratory reports received from the NHS laboratory services

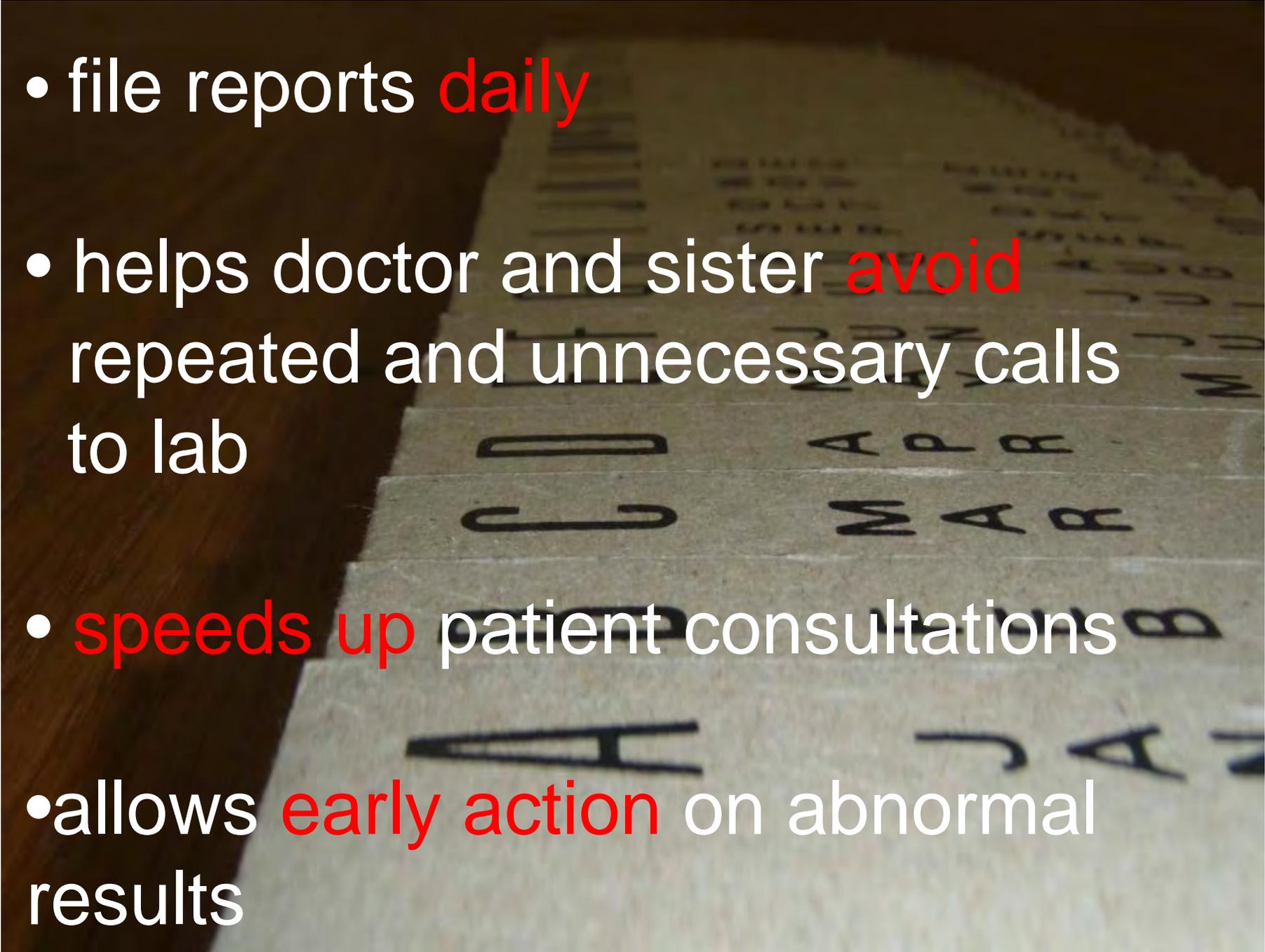
A sorting strip with columns for letters A-Z, months JAN-DEC, and days of the week MON-SAT, numbered 1-31.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	MON	TUES	WED	THR	FRI	SAT
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC															MON	TUES	WED	THR	FRI	SAT
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC															MON	TUES	WED	THR	FRI	SAT
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	

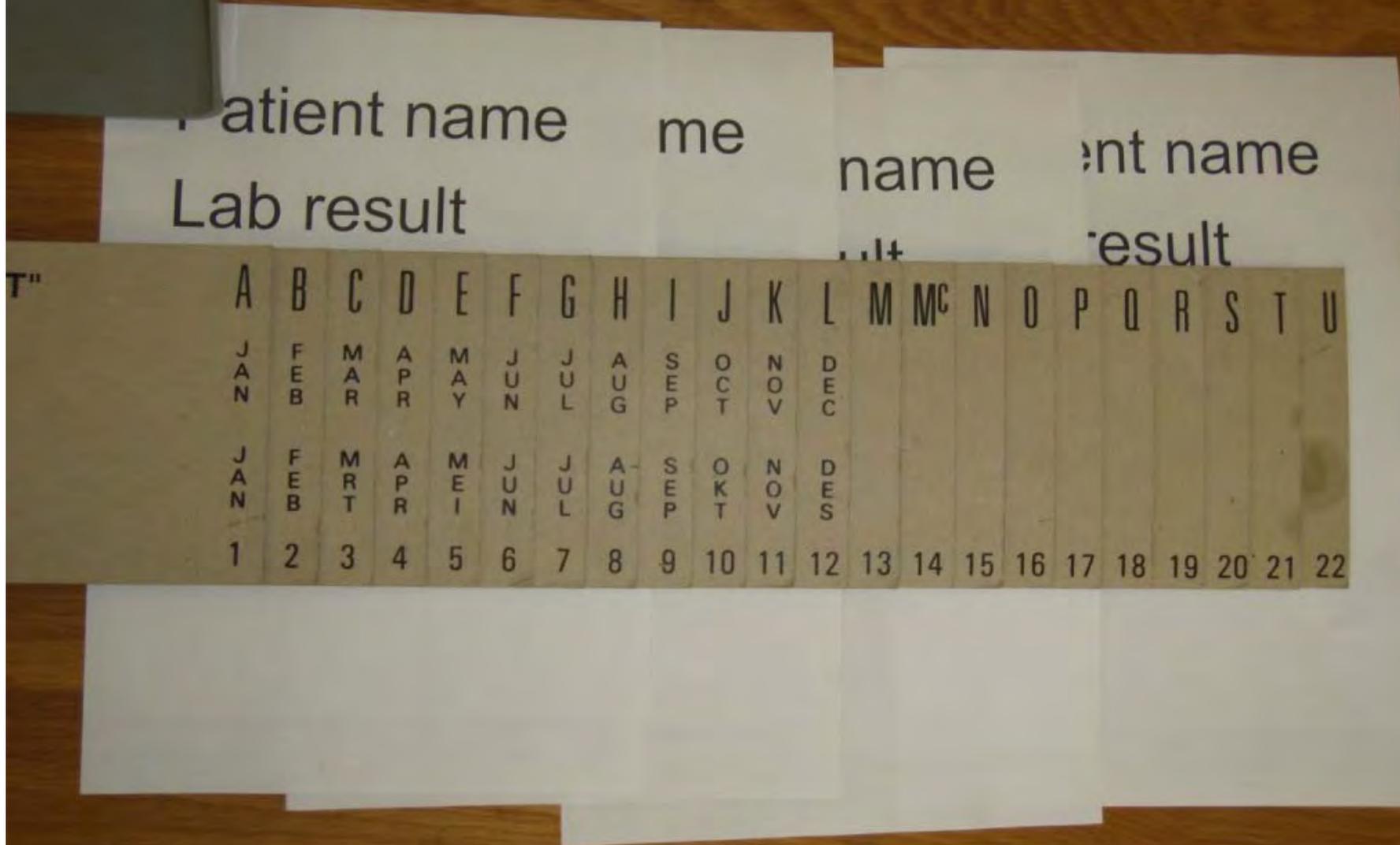
Enables all results to be easily  
“married” to Patient folder

Patient name  
Lab result  
CD<sub>4</sub>



- 
- file reports **daily**
  - helps doctor and sister **avoid** repeated and unnecessary calls to lab
  - **speeds up** patient consultations
  - allows **early action** on abnormal results

\*Enables data capturer to find all results



\*Enables HIV / AIDS register to be completed and remain accurate

## Summary

1. Capture ALL requested results
2. Identify and manage all late patients
3. Maintain team work and ensure results complete and accurate as possible

**ark**  
absolute return for kids



**Department of Health**  
*Republic of South Africa*



SOUTH AFRICANS AND AMERICANS  
IN PARTNERSHIP TO FIGHT HIV/AIDS



**USAID**  
FROM THE AMERICAN PEOPLE