

COHORT REVIEW

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COHORT REVIEW POLICY

It is the policy of the TB & Refugee Health Services Branch (TB Branch) that TB programs hold quarterly cohort reviews to:

- ❖ Promote consistent TB case management practices
- ❖ Promote program accountability
- ❖ Promote high TB evaluation & treatment completion rates
- ❖ Understand and analyze program strengths and weaknesses

COHORT REVIEW – OBJECTIVES

- ❖ Assess whether treatment completion rates, and contact investigations have met program standards to ensure successful patient outcomes.
- ❖ Collect data from a cohort review session and calculate outcome statistics to measure progress toward achieving Texas objectives.
- ❖ Discuss strategies for addressing clinical and programmatic gaps identified during a cohort review session.

COHORT REVIEW

❖ Linkage to New CQI Efforts

- Use cohort review process and application of continual quality improvement (CQI) processes to the improved management of clinical services and contact investigations.
- Improved LHD & HSR performance measures
- Desktop and on-site reviews

COHORT REVIEW

❖ What is a Cohort?

It is a group of TB cases counted over a specific period of time and in a defined geographic area

❖ What is a Cohort Review?

It is a systematic and **retrospective** review of the management of patients with TB disease & their contacts

- It is used as a tool to review and present patient outcomes and to monitor & evaluate program performance

COHORT REVIEW

- ❖ **Cases presented at a cohort review are examined for the following:**
 - Patient's clinical status
 - Adequacy of patient's regimen
 - Treatment adherence and completion
 - Results of the contact investigation

CASE REVIEW

❖ What is a Case Review?

It is a systematic **regular** review of individual patient progress presented by the case manager

It is a fundamental component of case management & is an ongoing process for each patient

Plans should be made to immediately address any treatment & patient management concerns identified during a case review

COHORT REVIEW vs CASE REVIEW

Cohort Review

- ❖ **Retrospective** analysis of treatment outcomes
- ❖ Provides an opportunity to review case data to address concerns regarding the overall management of TB patients
- ❖ Evaluate a program's performance & promote efficiency

Case Review

- ❖ Real time, ongoing
- ❖ Provides an opportunity to review individual patient specific care
- ❖ Allows for immediate analysis of a patients progress & plans to address needed changes to treatment & management

COHORT PERIODS

- ❖ TB programs will schedule cohort reviews on a quarterly basis following the timelines identified in the following table:

Cohort Period & Submission Schedule	
Cohort Period Cases Counted In:	Are reviewed and reported by:
1st quarter (Jan 1 to Mar 31) current year	March 31 of the following year
2nd quarter (Apr 1 to June 30) current year	June 30 of the following year
3rd quarter (July 1 to Sep 30) current year	September 30 of the following year
4th quarter (Oct 1 to Dec 31) current year	December 31 of the following year

COHORT TEAMS

- ❖ The cohort review process relies on participation of all team members involved in TB program
- ❖ At a minimum, the following participants should be actively engaged in the Cohort Review:
 - TB Program Manager
 - Case Manager
 - Supervisor

Ideally, **ALL** team members involved in TB prevention and control should participate in the Cohort Review to discuss what does and does not work.

REPORTING FORMS

- ❖ **Presentation Form**-used to collect & present patient information during the cohort review meetings
- ❖ **Summary Form**-to provide summarized & quantifiable data from all counted cases & associated contacts presented at each quarterly cohort review
- ❖ **List of Counted Cases**-used to list counted cases presented at each quarterly cohort review

REPORTING INSTRUCTIONS

- ❖ **Submit by the due date** identified in the Cohort Period & Submission Schedule
- ❖ **Submit via the Public Health Information Network (PHIN)**
- ❖ **Send email to TBEpiEvaluation@dshs.state.tx.us**
with the following information:
Folder location, file name and password to open the file

COHORT REVIEW RESOURCES

Texas Department of State Health Services

<http://www.dshs.state.tx.us/idcu/disease/tb/forms/>

The following links provide information on cohort review models:

The Centers for Disease Control and Prevention (CDC)

<http://www.cdc.gov/tb/education/cohort.htm>

Heartland National Tuberculosis Center

http://www.heartlandntbc.org/training/archives/tbnucama_20120720_0815.pdf

Questions
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Thank You!

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