

 <p>Tuberculosis Cohort Review Policy</p>	Policy Number	7000
	Effective Date (<i>original issue</i>)	8/12
	Revision Date (<i>most recent</i>)	3/15
	Subject Matter Expert (<i>title</i>)	Manager, TB & Hansen's Disease Group
	Approval Authority (<i>title</i>)	Manager, TB & Refugee Health Services Branch
	Signed by <i>Sandra Morris</i>	

1.0 Purpose

The purpose of this policy is to clarify roles and expectations for TB programs conducting cohort reviews and to promote consistent and standard cohort review presentation practices statewide.

2.0 Policy

It is the policy of the Tuberculosis & Refugee Health Services Branch that in order to promote consistent TB case management practices, program accountability and high TB evaluation and treatment completion rates, TB programs will hold quarterly cohort reviews. Cohort reviews are integral to TB control and provide a systematic retrospective review of the management of cases and contact investigations. DSHS health service regional TB programs will work with low morbidity local health departments in their jurisdiction to implement cohort reviews.

3.0 Definitions

Cohort review is a systematic and retrospective review of the management of patients with TB disease and their contacts. A "cohort" is a group of TB cases counted over a specific period of time and in a defined geographic area. The review occurs after the cases are counted and within the time frame in which most cases are expected to complete treatment.

Cohort review is used as a tool to review and present patient outcomes and to monitor and evaluate program performance. At a cohort review, cases presented are:

1. Examined for the patient's clinical status
2. Adequacy of patient's regimen
3. Treatment adherence and completion
4. Results of the contact investigation

Case Review is a systematic regular review of individual patient progress presented by the case manager. It is a fundamental component of case management and is an ongoing process for each patient. Plans should be

made to immediately address any treatment and patient management concerns identified during a case review.

Difference between Cohort Reviews and Case Reviews – Case reviews are real-time, ongoing and provide an opportunity to review individual patient specific care. They allow for immediate analysis of a patient’s progress and plans to address any needed changes to treatment and management. As cohort reviews are a retrospective analysis of treatment outcomes, it provides an opportunity to review case data to address systemic programmatic concerns regarding the overall management of TB patients in order to improve patient care and programmatic performance and to promote efficiency.

4.0 Cohort Periods

Tuberculosis 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

5.0 Cohort Teams

The cohort review process relies on the participation of various members involved in TB control at the program level. A cohort review should include at a minimum the following participants:

1. TB Program Manager
2. Case Manager
3. Supervisor

If available, the following participants should also be a part of the team:

- Medical reviewer
- Data analyst
- Contact Investigator
- DOT Worker
- Social Worker
- Clinicians
- Lab Personnel

6.0 Reporting Requirements for Cohort Reviews

The Cohort Presentation Form shall be used to collect and present patient information during the cohort review meetings.

The Cohort Review Summary Form shall provide summarized and quantifiable data from all counted cases and associated contacts presented at each quarterly cohort review.

The Cohort Review List of Counted Cases shall be used to list counted cases presented at each quarterly cohort review.

Submit, by the dates identified in section 4.0 of this policy, the following forms using PHIN (Public Health Information Network):

- Cohort Review Presentation Form
- Cohort Review Summary Form
- Cohort Review List of Counted Cases

7.0 Cohort Review Resources

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

8.0 Revision History

(Show list of changes to this document. Used for new documents and all subsequent changes. Action notations should include all document reviews, with or without changes. Section notations identify the location of any change e.g. 1.0, 2.3, etc.)

Date	Action	Section
August 2012	New Policy	
April 2013	Revision	6.0
March 2015	Revision	2.0, 4.0, 6.0, 8.0