

TB Case (Confirmed or Presumptive) Chart Organization

Documents are listed from top to bottom on each clip		# Recommend a tab/divider inserted to help organize clip
Clip 1 Registration & Consent	Include after case closure	Report of Verified Case of Tuberculosis (RVCT)
		Case Closure Form
	Registration Form	This clip includes required registration forms, consent forms, and financial information. These documents may vary by site.
	CHS – 1A	
	Income, insurance, photo ID etc.	
	Voter Registration Form	Make sure to include any specific directions to the patient’s home.
	Isolation Instructions	Include for patients requiring isolation
DOT Agreement		
VET Agreement	Include for patients eligible for and participating in the use of Video Enhanced Therapy	
Clip 2 Medications	VDH Summary of Providers of Care	
	Medication List	Includes all medications, not only for TB, that the patient takes throughout treatment
	Prescriptions	
	Drug Interaction List	Compile drug/drug interaction list for all of the medications. The prescribing clinician may request this information is compiled from a specific website of their choice.
	# Completed DOT Logs	File the DOT logs here each month after they are complete
Clip 3 Assessment	Active TB Case Summary	Updated throughout care. Used to collect the majority of cohort information, to be used for case reviews, and to be used for intake information.
	Monthly Clinical Assessment	If client not managed by Health Dept, a monthly visit summary from the outside provider should be here
	TB & Newcomer Health History	
	TB Risk Assessment 512 Form, or Contact Registration Form	Documents may or may not be in the chart depending on the history of entry into care
Clip 4 Notes	Progress Notes	For PHN and case management details only
	# Clinician Orders/Progress Notes	For treating clinician to document orders and notes
Clip 5 Lab Specimens	Bacteriology Flow Sheet	
	# Lab Flow Sheet	
	# Sputum Smears & Cultures	Sputum smears and cultures should be filed chronologically, newest on top, by date collected, then date of receipt
	# Lab Work (LFTs, HIV, HgbA1c, IGRA)	May also need to create a section for therapeutic drug monitoring
	# Radiology Reports	
	# Vision Monitoring	Hearing monitoring here for ototoxic medications
Clip 6 External	Electronic Disease Notification (EDN) forms	For use with refugees and immigrants with a TB classification
	# Correspondence and Miscellaneous	Faxes, letters, emails etc.
	# Medical records from other providers, Medical releases, Epi 1, IJNs, AHIP	Tag outside lab results, radiology reports etc. in the outside medical records for easy retrieval
	# HIPAA – Auth. for Disclosure of PHI	
	TB Treatment/Discharge Plan	