



**CONCEPTS OF TB NURSE
CASE MANAGEMENT**

DJ McCabe, RN, MSN - Trainer & Consultant
Lillian Pirog, RN, PNP – Nurse Manager
NJMS Global Tuberculosis Institute



Case Study: Danny



Background

- 5 year old born in Honduras, lives with his mother and two siblings (ages 6 and 9) in public housing project
- Presented at “well child clinic” for immunizations
- Risk assessment done and tuberculin skin test (TST) was indicated
- TST results = 10 mm induration

Case Management Concepts

 Question

To determine appropriate care, what else do you need to know?

 Clinical Evaluation

- **Physical exam**
Normal physical exam
Growth & development - wnl
- **Symptom assessment**
Child has no TB symptoms
- **Past medical history**
No family hx of TB or TST conversions
No prescription medications
Immunization status – needs DTaP booster
- **Chest x-ray**
Chest x-ray is normal

 Question

Should this patient be treated for latent TB infection (LTBI)?

Case Management Concepts

TB

Answer

- Since he is from a high TB incidence country, the TST cut-point is $\geq 10\text{mm}$
- He should receive treatment for LTBI

TB

Overview of TB Case Management

TB

Elements of Case Management

- Case finding
- Assessment
- Problem identification
- Development of a plan
- Implementation
- Variance analysis
- Evaluation
- Documentation

Case Management Concepts

TB Case Finding

Early identification of TB case/suspect

Case finding activities

- Communicate with healthcare providers
- Rapid initiation of TB control activities
- Develop a system to track patients with TB
- Follow reporting regulations/TB control policies

TB Case Finding – 2

Activities con't

- TB interview conducted as soon as the case is identified
- Contact investigation in accordance with national, state, and local policies
- Provision of education about TB infection and disease to health care providers

TB Assessment

Gathering objective and subjective data to form a basis for treatment and care

Initial assessment activities:

- Obtain demographic data
- Ascertain the extent of illness/infectiousness
- Review medical and psychosocial history
- Evaluate patient's knowledge of TB
- Identify barriers to adherence

TB Ongoing Assessment - Activities

- Monitor the clinical response to treatment
- Determine the HIV status or the risk factors for HIV disease
- Review the treatment regimen
- Review status of the contact investigation

TB Problem Identification

Existing or potential health problems derived from assessment process

Problem identification activities:

- Document problems identified by the healthcare team
- Validate findings with team members, patient, and family
- Monitor at intervals

TB Development of a Plan

Plan is based on assessment data

Plan development activities:

- Design interventions with specific outcomes
 - Should be flexible
- Monitor the plan and patient's response at established intervals

Case Management Concepts

TB Implementation

Includes aspects of both medical management and nursing interventions

Implementation activities:

- Monitor patient's response to treatment
- Refer the patient to other providers as needed
- Negotiate a plan for DOT
- Educate patient
- Monitor adherence

TB Variance Analysis

Discrepancy between the anticipated and actual patient care outcomes that may arise from changes in patient's personal situation, medical condition, or healthcare resources

Variance analysis activities:

- Assess patient outcomes at regular intervals
- Describe and document reasons for variances

TB Evaluation

Looks at the outcomes of case management and is a continuous and ongoing process

Evaluation activities

- Monitor care plan monthly
- Monitor reporting mechanism
- Review contact investigation for completeness and accuracy

Case Management Concepts

TB Documentation

Chronicles patient care outcomes and documents case management elements and activities

- Document all case management activities
- Assure patient confidentiality
- Be familiar with HIPAA guidelines
- Inform patient that information within the medical record is kept confidential
- Obtain written consent to obtain or provide any part of patient's medical record

TB Overall Goals of Case Management

- Manage costs and utilize resources effectively
- Achieve positive patient outcomes
- Provide quality care across a continuum
- Coordinate care to reduce fragmented services

TB Primary Goals of TB Case Management

- Render patient non-infectious by ensuring adequate course of treatment
- Prevent TB transmission and development of disease
- Identify and remove barriers to adherence
- Identify and address other urgent health needs

Case Management Concepts

TB Role of the TB Case Manager

TB Case Manager is the individual who is primarily responsible for ensuring that the patient:

- **Completes course of therapy in appropriate timeframe**
- **Is educated about TB and its treatment and management**
- **Has documented culture conversion**
- **Has a contact investigation completed when indicated**

TB Keys to Successful Case Management

- **Take a proactive approach**
- **Document clearly and concisely**
- **Maintain confidentiality**
- **Be familiar with institutional policies**
- **Know where to get support**

TB Advantages of TB Case Management

- **Standardizes a system for establishing a plan of care**
- **Establishes a framework to coordinate resources and services**
- **Provides feedback to team members leading to increased knowledge, motivation, and professional growth**

 Advantages of TB Case Management - 2

Integrated system for evaluation that provides:

- Evaluation of specific patient outcomes and program objectives
- Identifies gaps in the healthcare system
- Addresses variances that can lead to improved patient care
