



# THE TB COHORT REVIEW PROCESS

July 14–15, 2011



[www.umdj.edu/globaltb/home.htm](http://www.umdj.edu/globaltb/home.htm)



## Course Location

**New York City, NY**

**Course activities: 80 Centre St**

**Cohort review: 346 Broadway 8th Floor Conference Room**

## Provided By

Charles P. Felton National Tuberculosis Center/ICAP,  
New York City Department of Health & Mental Hygiene Bureau of  
Tuberculosis Control, University of Medicine & Dentistry of New Jersey  
(UMDNJ), and New Jersey Medical School Global Tuberculosis Institute

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Prevention, Division of Tuberculosis Elimination*

The New Jersey Medical School Global Tuberculosis Institute is the Tuberculosis Regional  
Training and Medical Consultation Center for the Northeastern United States

## FACULTY

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## PLANNING COMMITTEE

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Iris Winter  
*Public Health Epidemiologist*

## COURSE DESCRIPTION AND OVERALL GOAL

The purpose of this one and one-half-day course is to provide TB program leaders, managers, and clinicians with the necessary knowledge and skills to lead TB cohort reviews in their program areas. The course covers principles of the TB cohort review process, guidance from the Centers for Disease Control and Prevention (CDC) regarding this requirement in the cooperative agreement, impact of cohort reviews, and planning for implementation in local program areas. The format includes lectures, observation of an actual cohort review, group discussions, individual and group exercises using tools for case presentation and data analysis, use of computers to enter, analyze and report cohort data, and a planning guide for adaptation and implementation.

## WHO SHOULD ATTEND

This educational experience is designed for teams of TB controllers, program managers, physicians and nurses, and epidemiologists or data analysts.

- Preference is given to management teams comprising a program manager, clinician, and data analyst or epidemiologist.
- Registration priority will be given to individuals within the Northeastern Region, including Connecticut, Delaware, District of Columbia, Indiana, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, Ohio, Pennsylvania, Rhode Island, Vermont and West Virginia, and the cities of Baltimore, Detroit, New York City and Philadelphia.

## WHY COURSE IS NEEDED

The Cohort Review Process has long been a “best practice” used by outstanding TB control programs in the US and internationally. Originally designed by Dr. Karel Styblo to systematically analyze treatment outcomes of every documented TB case in a program area, this useful management approach serves several purposes: staff motivation, quality improvement, training needs assessment, and program evaluation. Cooperative agreements with CDC require that programs begin implementing cohort reviews in 2010. This course will provide information and strategies for programs to do so.

## OBJECTIVES

Upon completion of this course participants will be able to:

- Apply CDC guidance regarding the TB cohort review process to ensure programmatic implementation
- Describe the elements of the cohort review process
- Lead a case management team in preparation, presentation, and follow-up
- Outline the role TB control staff play in a cohort review in order to conduct key activities with available resources
- Organize the details of a complex case into a brief oral presentation so that cohort review meetings will cover the essential information in a time-efficient manner
- Assess whether diagnoses, treatment regimens, monitoring, adherence, 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 in order to measure progress toward achieving national, state and local objectives
- Discuss strategies for addressing clinical and programmatic gaps identified during a cohort review session
- Compare cohort review experiences of TB control programs to identify aspects of different models which can be implemented in individual program areas
- Apply principles of continual quality improvement (CQI), as facilitated by the cohort review process, to the management of clinical services and contact investigations to prevent the spread of TB to the community.

## COURSE REQUIREMENTS

- Enrollment is limited to 20 participants.
- Participants must currently work in TB control.
- Each program/team should bring at least one laptop with MS PowerPoint and MS Excel available for the hands-on data entry exercises.
- In order to meet the course objectives, individuals should attend the entire course, participate in individual and group exercises using their own laptops, complete the pre- and post-tests, complete the program evaluation form at the end of the course, and a post-course follow up evaluation within 6 months of the course.

## AGENDA

### Thursday, July 14, 2011 – 80 Centre Street

12:00 pm	Registration and lunch
1:00 pm	Overview of RTMCC Activities
1:15 pm	Welcome; Introduction; Pre-test; Course objectives
1:45 pm	CDC instruction guide and video/DVD
2:15 pm	TB control and cohort reviews in this program area
3:00 pm	Break
3:15 pm	CDC guidance regarding the cohort review process
3:45 pm	Preparing for cohort review and using standard forms for concise case presentation
4:15 pm	Impact of cohort reviews in other program areas
4:45 pm	Guide and exercises for observing cohort review
5:00 pm	Adjourn
Evening	Free

### Friday, July 15, 2011 – 346 Broadway 8<sup>th</sup> Floor Conference Room

	Breakfast on your own
9:00 am	Review Pre-test results; Q & A
9:30 am	Observe Cohort Review <ul style="list-style-type: none"><li>• Perform four individual exercises; break to discuss</li><li>• Observe summary outcomes presentations</li></ul>
12:30 am	Questions and answers / Discuss experience / Analyze program strengths / weaknesses / solutions Walk 2 blocks to day 1 location – <i>80 Centre Street, NY, NY</i>
1:00 pm	Lunch
1:30 pm	Exercise: Making a concise case presentation
2:15 pm	Exercise: Enter case information, analyze data, manipulate spreadsheet, generate reports
3:45 pm	Break
4:00 pm	Planning how to adapt/implement the cohort review method in your own program area
4:45 pm	Post-test; Evaluation
5:00 pm	Adjourn

## CONTINUING EDUCATION INFORMATION

Continuing education credits are not provided for this activity.

## REGISTRATION INFORMATION AND FEE

Please complete a course application, and return it before **July 1<sup>st</sup>, 2011** to:  
NJMS Global Tuberculosis Institute  
PO Box 1709  
225 Warren Street  
Newark, NJ 07101-1709  
Attention: Beth Hurley  
Fax: 973-972-1064

Applications can also be emailed to [hurleybb@umdnj.edu](mailto:hurleybb@umdnj.edu)

Notification of acceptance and additional course information will be sent via email. Please be sure to provide a valid email address on the application form.

A \$40.00 fee is required prior to the start of the workshop. Acceptable forms of payment are check or money order made payable to *NJMS Global Tuberculosis Institute*. Participants will not be accepted into the course without payment.

## CANCELLATION INFORMATION

UMDNJ reserves the right to modify the activity content, faculty and activities, and reserves the right to cancel this activity, if necessary.

Participants who are unable to attend may cancel up to 2 weeks prior to the course.

## HOTEL AND TRAVEL INFORMATION

This will be provided upon acceptance to the course.

**If you require an accommodation because of a disability, or if you have any additional needs, please contact Bill Bower at (646) 448-0945 or (917) 882-0657, or email at [blb3@columbia.edu](mailto:blb3@columbia.edu)**