

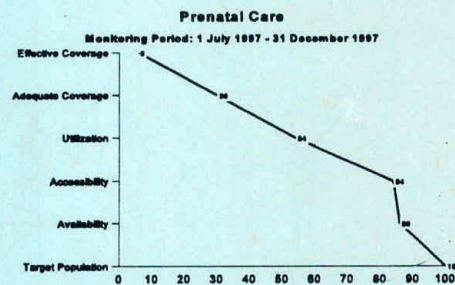
Training for Health Committees and Health Staff at Health Unit Level

ORGANIZE DELIVERY OF HEALTH SERVICES

Monitoring and Service Delivery



3



FACILITATOR GUIDE



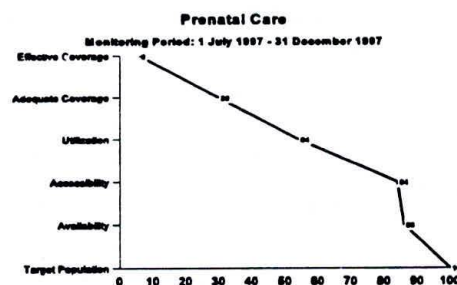
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Monitoring and Service Delivery



3



FACILITATOR GUIDE



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3 UN Plaza
New York, NY 10017
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The purpose of this training course is to improve the management of resources at health unit level and to build the capacity of health committee members and health staff to work with communities.

The training course was developed by Dr Kasa Pangu and Dr H el ene Gaumerais of the Health Systems Development Unit with the technical collaboration of the Center For Effective Performance (Atlanta, Georgia) and with the inputs from all the Unit's programme staff. The Health Systems Development Unit wishes to express its gratitude to the colleagues from other sections who gave comments on the draft.

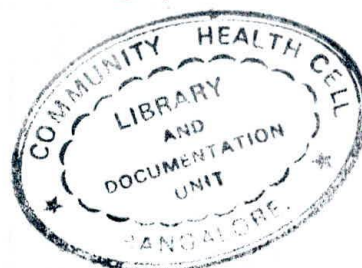
The design and content of the training course benefited greatly from the work undertaken by participants from panel review meetings held in New York, including E. Alihonou, M. Bah, G. Bukenya, B. Criel, K. Drame, J. Eshuis, H. Gorgen, M. Kader Konde, H. M. Kahssay, R. Knippenberg, B. McPake, L. Mpande, K. Mukelabai, M. Murro, V. Oketcho-Oketh, I. Rizzo and A. B. Touray.

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MONITORING AND SERVICE DELIVERY: ORGANIZE DELIVERY OF SERVICES

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FACILITATOR INTRODUCTION

MODULE OVERVIEW

One objective of a health unit is to provide services that address the main health problems and concerns of the community. To meet the objective, the health unit should organize and deliver health services as effectively and efficiently as possible. This means that the health unit should:

- establish hours of operation that provide the community with access to health services at all times
- offer health services which are accessible, affordable, and convenient for most patients
- improve patient flow and management to reduce long lines and excessive waiting periods for patients
- ensure proper maintenance of patient records.

In this module, participants will learn how to organize the delivery of services to more effectively and efficiently serve their customers.

Participants will also learn how to refer patients they cannot treat at the health unit.

Training Audience

- Health committee
- Health staff

Recommended Prerequisite Modules

- *Course Introduction*
- *Community Participation: Conduct Community Diagnosis*
- *Community Participation: Conduct Participatory Planning*

(continued)

- *Monitoring and Service Delivery: Monitor and evaluate at the Health Unit Level*
- *Monitoring and Service Delivery: Monitor and evaluate at the Community Level*

Estimated Length of Module

Entire module	1 day
Introduction	1 hour
Activity 1	3 hours
Activity 2	2 hours

MODULE PREPARATION

Because organizing the delivery of health services and procedures for referring patients may vary from one district to another, the content of this module is intended to serve as guidelines. It is your responsibility as the facilitator to ensure that participants learn how to perform these tasks according to the established procedures and policies in their area.

If the processes for organizing the delivery of health services and referring patients in an area differs from what is presented in the module, modify the content of the module so that you accurately teach how to perform the tasks in that area.

Preparation for Introduction to Module

- **Thoroughly read the introduction to the module** to familiarize yourself with the content.
- **Modify the material** to accurately reflect the delivery of health services and patient referral guidelines in the participants' area.
- **Prepare the appropriate flipcharts** that you will need for the module.
- **Prepare for a field visit** to a health unit.

Materials

These materials are needed for the entire module:

- Pencils - one for each participant
- Notebooks - one for each participant
- Participant Guides - one for each participant
- Two flipchart stands with pads and colored markers or one flipchart stand with pad and colored markers and one blackboard with colored chalk

Preparation for Activity 1 - Organize Delivery of Health Services

- **Thoroughly read *Activity 1 - Organize Delivery of Health Services*** to familiarize yourself with the content.
- **Modify the material** to accurately reflect existing guidelines and procedures for organizing delivery of health services in the participants' area.
- **Prepare the appropriate flipcharts** that you will need for the module.
- **Collect and bring the following tools to training:**
 - patient register
 - referral forms or notes
 - maternal and child cards
 - family files

Encourage participants to bring sample tools from their health unit, if it does not disrupt health unit operations.

- **Prepare and bring to training an example of how a health unit stores patient information.** For example, a health unit might store maternal cards in a wooden box that is divided into 12 sections, one for each month of the year. Each card is filed in the month that the patient is supposed to come in for his or her next appointment.

Preparation for Activity 2 - Ensure Referral of Patients

- **Thoroughly read *Activity 2 - Ensure Referral of Patients*** to familiarize yourself with the content.
- **Modify the material** to accurately reflect existing guidelines and procedures for referring patients in the participants' area.
- **Prepare the appropriate flipcharts** that you will need for the module.
- **Prepare the following Patient Register** on a separate flipchart or blackboard.

PATIENT REGISTER

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Number of Reattendances = 0

Serial No.	Patient Name	Village	Age	M/F	Diagnosis	Drugs/Treatment	Price (USD)	Referral No.
101	Mabalo Lokela	Kaloufla	8m	M	dysentery - no dehydration	Cotrimoxazole Ped: ½ tab x 2 x 5 days (*) Give fluids and continue feeding	2.00	--
102	Ekombe Mongwa	Gohitre	24m	M	severe malnutrition, clouding of cornea	Vit A 200.000 IU, 1 caps x 2 Refer urgently to hospital	0.10	26
103	Mbuzu Sophie	Zralou	15	F	malaria	Chloroquine 150 mg base: day1 (3+1)tab, day2 1tab, day3 1tab AAS 500 mg: 1cp x 3 x 3 days	0.40	--
104	Sebo Dombe	Pakouabo	18m	F	pneumonia - chest indrawing, unconscious	Cloramphenicol inj 500 mg 1/2 vial IM Refer urgently to hospital	0.10	27
105	Euza Ngongo	Tokamo	30m	F	measles - no complication	Paracetamol 100 mg 1tab x 3 x 5 days	2.00	--

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Number of Reattendances = 1

106	Myriam Ngwete	Bawada	42	F	backache	AAS 500 mg 1 tab x 3 x 5 days	0.10	--
107	Gizi Dobola	Sabar	4m		convulsions, severe malaria	Diazepam inj 1/2 amp IR Paracetamol 1tab x 4 Quinine 150 mg/ml inj 1/2 amp IM Refer urgently to hospital	3.00	28
108	Lizenge Embale	Koulouro	20	F	anemia	Fer 60 mg 2tab x 3 x 60 days Folic Acid 5 mg, 2tab x 1 x 30 days	0.20	--
109	Sukato Manzomba	Yatawa	12	M	scabies	Benzylbenzoate lotion 25%	0.50	--
110 reatt.	Ngoi Lintak	Goujia	14m	M	persistent cough, difficulty breathing	Amoxycillin 250 mg 1 tab x 3 x 5 days	--	--
111	Patrick Saboya	Nafouta	31	M	wound right hand	Chlorhexidine, bandage TT vaccination	1.50	--

(*) Cotrimoxazole Ped = Sulfamethoxazole 100mg + Trimethoprim 20 mg

HOW TO CONDUCT PERFORMANCE CHECKS AND PRACTICE EXERCISES

Follow these guidelines when you conduct Performance Checks or Practice Exercises:

Before You Conduct a Performance Check/Practice Exercise

- Thoroughly read the appropriate Module Preparation section and entire Performance Check/Practice Exercise.
- Modify the Performance Check/Practice Exercise to reflect local procedures and policies. You also may need to adapt the Performance Check/Practice Exercises to fit the availability of local resources.
- Make all necessary preparations (e.g., make copies of forms).
- Work through the Performance Check/Practice Exercise to make sure you understand how to conduct the activity.
- Prepare answers to the Performance Check/Practice Exercise.
- Review the Performance Check/Practice Exercise the day before you teach the module.

During the Performance Check/Practice Exercise

- Read all instructions to participants. Answer any questions they may have about the instructions.
- Circulate among the participants while they are working to answer any questions. Be attentive so that you can correct any errors or misunderstandings.
- Take notes on the common difficulties participants may be experiencing.
- If a participant or group does not successfully complete the Performance Check/Practice Exercise, explain what is incorrect. Ask the participant(s) to redo the work. If needed, refer the participant(s) to someone who has fulfilled the objective.
- If a participant or group fulfilled the objective, give positive feedback.
- Listen carefully during group presentations. If you see any errors, first ask other participants to provide feedback to the presenters. If the error is not corrected by the participants themselves, explain what participants are doing incorrectly. Work through an example, if needed.

MONITORING AND SERVICE DELIVERY: ORGANIZE DELIVERY OF SERVICES

This introduction gives participants an overview of how to organize the delivery of health services and ensure referral of patients.

Welcome Participants

Introduce yourself and welcome participants to the training. Ask participants to introduce themselves if this is the first time they are working together on a module.

Introduction

Organize a field visit to a health unit, if it is convenient and feasible.

If the visit to the health unit is to be brief, visit the health unit and then teach the module.

If the field visit can be arranged for a longer period of time, teach the module at the health unit if it does not disrupt health unit functions and if it is convenient given the number of participants.

During the field visit, observe and then discuss with health workers the following:

- *hours of operation*
- *when, how often, and where they offer health services*
- *patient flow and management*

(continued)

- *how the health unit stores and maintains patient information*
- *how patients are referred*
- *how health workers keep track of referred patients*
- **The package of services your health unit offers should address the main health problems and concerns of the community.**
- **Use information obtained during community diagnosis, participatory planning, and monitoring and evaluating to organize the delivery of health services to address the main health problems and concerns of the community.**
- **Organize the delivery of health services so that:**
 - working hours are convenient for most community members
 - patients can easily move through the health unit and receive quality care, and
 - patient information is maintained and regularly updated.
- **Because your health unit may not have the drugs, equipment, or staff to treat every type of illness and disease, it may have to send or refer patients to another health unit or hospital to receive treatment.**
- **Your health unit should ensure that patients are referred and be able to track referred patients.**

Overview of Learning Process

- In the first activity, you will learn how to organize the delivery of services to more effectively and efficiently serve the community.
- In the second activity, you will learn how to ensure that patients are referred and that they are properly tracked.

Package of Services

- **When your health unit is first established, the District Management Team (DMT) works with the health unit staff to define the health services it will offer. This is called the “package of services.”**
- The package of services should be based on existing national policy, cost of health programmes, and available resources.
- When you define the package of services for your health unit, consider the services provided by the district hospital. The two packages should complement each other.
- The package of services should address the main health problems and concerns of the community.
- What is the package of services your health unit offers?

Solicit responses. Answers may include:

- *childhood immunizations*
- *prenatal care*
- *curative care based on the health needs of the community*

(continued)

- *deliveries*
- Your health unit can use information obtained during community diagnosis, participatory planning, and monitoring and evaluating to add to its package of services.
- Examples of information that can be obtained:
 - the frequency and seriousness of diseases in the community
 - the concern/demand of the community regarding some health problems or health services (e.g., you may learn that your community wants family planning services.)
 - the geographical accessibility to health services (obtained from village mapping)
- When your health unit defines or expands its package of services, it must decide what equipment and resources it needs to offer the services.
- For example, what equipment and resources does your health unit need to offer family planning services?

Solicit responses. Answers may include:

- *contraceptive products*
- *staff trained on family planning methods*
- **Your health unit must inform the community about the services it offers and which main diseases can be prevented.**
- What will happen if your health unit does not inform the community about the services it offers?

(continued)

Solicit responses. Answers may include:

- *people may seek treatment elsewhere*
 - *people will not know to go to the health unit for the particular service (e.g., family planning, immunizations, deliveries)*
 - *if many people do not use the services, the health unit may lose the money it invested to offer the services (e.g., buying equipment)*
- How does your health unit let the community know which services it offers?

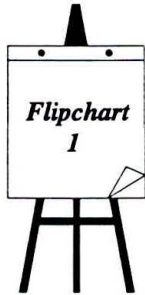
Solicit responses. Answers may include:

- *informs community through community leaders and the health committee during meetings, such as participatory planning meetings*
 - *posters at health unit show services it offers*
- After the package of services has been determined, the health unit staff and health committee work with the DMT to identify coverage and quality standards for the health unit.
 - You will use the coverage and quality standards during monitoring and evaluating to monitor and improve health unit performance.

Refer participants to the module Monitoring and Service Delivery: Monitor and evaluate at the health unit level.

ACTIVITY 1 - ORGANIZE DELIVERY OF HEALTH SERVICES

This activity teaches participants how to more effectively and efficiently organize the delivery of services. Modify the activity to reflect procedures in the participants' area.



Learning Objective

- The objective for this activity is:

Activity 1 - Organize Delivery of Health Services

Learning Objective

At the end of the session, participants will be able to describe how to more effectively and efficiently organize the delivery of health services.

Overview of Learning Process

- During this activity, you will learn how to organize the delivery of health services to meet the community's needs.
- At the end of the activity, you will work in small groups to complete the Performance Check.

Introduction to Activity 1

- Why is it important to organize the delivery of services so that it addresses the main health problems and concerns of the community?

Solicit responses. Record accurate answers on the flipchart or board.

Answers may include:

Organize Delivery of Health Services

- so the community will use the health services
- the community may be more willing to pay for services if the health unit is meeting their needs
- to give the community ownership of the health unit
- so the health status of community members can be improved



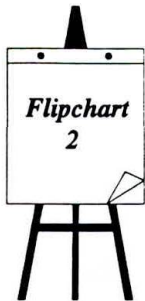
- **The patient is your customer.**
- **Meeting customers' needs and making sure that they are satisfied with health services is important to your health unit's success.**
- **Your health unit will go out of business if patients stop using its services.**
- **You should continuously get feedback from the community about how the health unit is meeting or not meeting their needs.**
- **Is your health unit meeting the community's needs? Are most of the patients satisfied with health services?**

Solicit responses. To further the discussion, ask participants the following questions:

- *Is your health unit open when it is most convenient for patients?*
- *How does your health unit provide access to those patients who cannot visit the facility during regular hours of operation?*

(continued)

- *What procedures are in place to make sure that patients do not have to wait in long lines for long periods of time?*
 - *How are patients managed at your health unit?*
 - *How does your health unit store and maintain patient information?*
- During this activity, we will discuss how you can effectively and efficiently organize the delivery of health services. You will learn how to:



How to Organize the Delivery of Health Services

- Establish hours of operation that provide the community with access to health services at all times.
- Offer health services that are accessible and convenient for most patients.
- Improve patient flow and management to reduce long lines and excessive waiting periods for patients.
- Ensure proper maintenance of patient records.

Establish Hours of Operation

- Patients are customers.
- **They must have access to health services at all times.**
- Sometimes, patients cannot visit the health unit during regular hours of operation because of other commitments or responsibilities.

(continued)

- For example, if many women are only able to visit the health unit in the early afternoon after they complete their morning household chores, the health unit should be open during that time.
- Use information obtained during community diagnosis, participatory planning, and monitoring and evaluating to learn if your health unit's hours of operation are convenient for patients.

Lead a discussion about the obstacles of maintaining convenient hours of operation and how participants can overcome them.

- Why is it important that patients always have access to health services?

Solicit responses. Answers may include:

- *If patients are very ill, they need treatment.*
- *Because the community helps support the health unit, it should have access to health services.*

- What are some ways you can make your health unit accessible beyond its regular hours of operation?

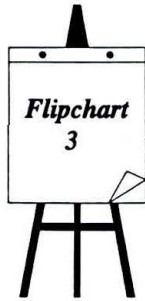
Solicit responses. Possible answer:

- *have a rotating schedule where one health worker is "on call" at all times for emergencies*

Offer Accessible and Convenient Health Services

- Determine if your health unit is meeting the community's needs about when, how often, and where it provides health services.

Review the information in the following flipchart:



When, How Often, and Where to Deliver Health Services

When

- Are health services convenient for most patients?

How often

- Are health services offered frequently enough to meet patient demands?

Where

- Is the location accessible and convenient for most patients for preventive services?

When

- Determine whether your health unit delivers health services on the day of the week and the time of day that is convenient for most patients.
- For example, if market day is Wednesday, you may want to offer prenatal care or family planning services on that day.
- During certain seasons (e.g., harvest time when people are busy with field work), health unit staff may consider keeping the health unit open during the evening hours.

How Often

- Determine if your health unit is offering health services frequently enough to meet patient demands.

(continued)

- If a health service is not offered frequently enough, consider offering the service on additional days.
- For example, if your health unit offers family planning services only once a week and the lines are always long, consider offering the service on additional days.
- To reduce the amount of time patients wait in line, you can also offer services for specific areas or villages on designated days, so that people from only one area attend the health unit on a given day.

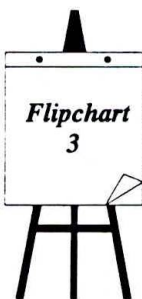
Where

- For preventive services, determine whether the location is accessible and convenient for most patients.
- For example, if the attendance of children is very low on the days your health unit offers immunizations, consider setting up outreach.
- For curative services, if the location of the health unit is not convenient and accessible for most members of the community, health staff and health committee members should discuss the problem with the DMO.

Refer to Flipchart 3.

- Because patients are your customers, you should ask these questions periodically to ensure that you are providing services that are accessible and convenient for most members of the community.
- **You can learn which services are not accessible and convenient for most members of the community during community diagnosis, participatory planning, and monitoring and evaluating.**

(continued)



Lead a discussion on some obstacles of providing health services that are accessible and convenient for patients. Ask participants to identify ways to overcome these obstacles.

Improve Patient Flow and Management

- What is “patient flow?” What is “patient management?”

Solicit responses. Answers may include:

- *Patient flow: how patients move through the health unit from registration until they leave the health unit.*
- *Patient management: how patients are cared for by the health unit staff from registration until they leave the health unit.*

- Why is it important to establish good patient flow and management procedures?

Solicit responses. Possible answers:

- *Because the patient is the customer, the health unit should treat him or her with care and respect.*
- *If patients have to wait in long lines for long periods of time, they might stop coming to the health unit.*

- What is desirable patient flow?

Solicit responses. Answers should include:

- *Patients should move easily from one work station to another (e.g., registration and weighing, consultations, delivery of drugs and payment).*

(continued)

- *Health workers should inform patients where to go and why they are going to a particular work station.*

Draw a picture of how patients should move from one work station to another in a health unit.

- **Identify bottlenecks in patient flow** and reasons for the bottlenecks, such as:
 - lack of personnel
 - inadequate allocation of tasks among staff
 - inadequate resources for properly managing patients, e.g., no scales, no patient register
- Patient flow is linked to the tasks of health unit staff.
- To make sure that patients move through the health unit quickly and efficiently, **assign specific tasks for the health staff.**
- By assigning specific tasks, you can also **avoid duplication of work** and improve the quality of health care.
- In some health units, it may be necessary to assign health staff to each work station (e.g., registration, consultations).
- In other health units, it may not be necessary or feasible to assign health staff to each work station.
- There should be at least one health worker responsible for the patient flow and global management of the patient. This person should check the waiting area periodically to see whether patients should be seen in an emergency.
- Health workers should manage patients with care and respect.

(continued)

- How else should health workers manage patients from registration to payment of services/drugs?

Solicit responses. Record accurate answers on the flipchart or board. Answers should include:



How Patients Should be Managed

- Health workers should see patients in private areas.
- Health workers should listen attentively to patients and allow them to speak and finish what they are saying.
- Health workers should identify patients' problems as quickly as possible.
- Health workers should explain the treatment carefully using local language and simple words. They should check for patients' understanding.
- Health workers should answer patients' questions or they should refer patients to someone who can answer them.

- It is important that health staff and patients know each other so that the health unit can deliver quality health care.
- While patients are waiting for services, health workers can learn about the patient's family, environment, and health problems.
- Encourage patients to provide feedback to health workers on how they feel they are being managed at the health unit.
- You can also gather valuable information during community diagnosis and monitoring and evaluating about how patients think they are being managed at the health unit.

(continued)

- During participatory planning, you can work with the community and health staff to identify ways to improve how patients are being managed.

Lead a group discussion on how to overcome problems identified in the management of patients such as:

- *The health unit staff does not see patients in private areas.*
- *The waiting time is too long.*
- *The waiting area has no roof and when it rains, patients do not know where to go.*
- *After treatment, patients do not know what to do when they go back home.*

Ensure Proper Maintenance of Patient Records

- What records and forms at your health unit contain patient information?

Solicit responses. Possible answers:

- *patient register*
- *under five cards*
- *maternal cards*
- *health booklets*
- *family files (records containing information concerning members of the family)*

(continued)

- *patient summary sheet*

The patient summary sheet serves 2 purposes:

- *It provides the summary of personal history form;*
- *It is a reference document for epidemiological surveys.*

If you and/or participants have brought any records to training, briefly display and discuss them.

- **Why do you keep this patient information at your health unit?**

Solicit responses. Possible answers:

- *to determine the quality of health services that is provided in terms of:*
 - *accessibility to health care*
 - *utilization of health care*
 - *coverage of target groups*
 - *continuity of health care*

Explain the above definitions as follows, if needed.

- **Accessibility** is the percentage of people in a defined area living less than 5 kilometers from the health unit.
- **Utilization** is the number of attendances per population in a defined area per period.
- **Coverage** is the number of people from the target group receiving a service per period divided by the population of the target group.

(continued)

- **Continuity of health care** is the percentage of consultants (per period) completing the full treatment based on diagnosis and treatment guidelines.
- What may happen if your health unit does not maintain or regularly update patient information?

Solicit responses. Answers may include:

- *You cannot use records to monitor, evaluate and improve the quality of health care (access, coverage and continuity).*
 - *Supervisors cannot use records to monitor, evaluate and improve health workers' performance. For example, they cannot look at the appropriate use of drugs in the patient register.*
 - *You cannot use records to track patients who do not complete treatment.*
- How does your health unit store and file patient records and forms?

Solicit responses.

Show participants the example you brought to class about how a health unit can store and file patient records.

- **When organizing patient records, consider:**
 - **that health workers should update patient records at every patient visit (for a new episode of illness)**
 - **the length of time to keep patient records.** (to be discussed with the DMO.)

(continued)

- **You can also use health unit records to track patients who do not complete treatment or who do not return for subsequent visits.**
- For example, if your health unit files patient cards by the month of the next appointment, health workers can easily keep track of patients who miss their appointments.

ACTIVITY 1 - ORGANIZE DELIVERY OF SERVICES

PERFORMANCE CHECK 1

Facilitator Instructions

Read the following instructions to participants. Write or draw any instructions on the flipchart or board, as needed.

- For the Performance Check, you will work in small groups to describe how to effectively and efficiently organize and deliver health services at your health unit.
- If you have any questions while you are completing the Performance Check, let a facilitator know.
- When you have completed the Performance Check, let a facilitator know.
- When everyone has completed the exercise, we will discuss the Performance Check.

Divide the participants into groups of four to five. Participants in each group should be from the same health unit. Assign each group to their own work area.

After all participants have completed the Performance Check, reconvene them for the plenary discussion.

Refer to the following pages which show the Performance Check exercise in the Participant Guide.

3. In the table below, describe when, how often, and where your health unit offers its five main health services. Also describe how to improve when, how often, and where the health unit offers its health services to better meet the needs of the community.

Type of Health Services	When	How Often	Where	How to Improve
1.				
2.				
3.				
4.				
5.				

(continued)

4. In the table below, describe problems or obstacles with patient flow and management at your health unit. Also describe how your health unit can overcome these problems or obstacles.

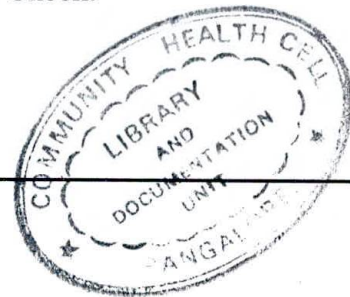
Problems or Obstacles with Patient Flow and Management	How to Overcome Problems/Obstacles

5. In the table below, describe any problems or obstacles your health unit has in storing and maintaining patient information and how to overcome these problems or obstacles.

Problems or Obstacles with Storing and Maintaining Patient Information	How to Overcome Problems/Obstacles

6. Let a facilitator know when you have completed the Performance Check.

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Plenary Discussion

When participants reconvene, ask each group to present their answers to the Performance Check questions.

Encourage participants to share any observations, problems, or concerns they experienced in completing the Performance Check.

Discuss the difficulties that you noted participants experienced during the Performance Check.

Ask participants the following questions:

- How often should you examine how your health unit delivers health services?
- How do you think your health staff would respond to the reorganizing of the services?
- How do you think the community would react to the reorganizing of the services?

Conclude the activity with positive comments about how the participants performed the activity. Provide a summary of the major points of the activity:

- Use information obtained during community diagnosis, participatory planning, and monitoring and evaluating to organize the delivery of services to address the main health problems and concerns of the community.
- Patients are customers.
- Meeting customers' needs and making sure that they are satisfied with health services is important to your health unit's success.



Briefly review how to organize the delivery of health services:

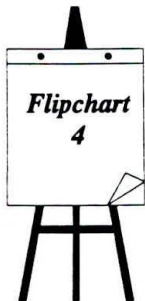
How to Organize the Delivery of Health Services

- Establish hours of operation that provide the community with access to health services at all times.
- Offer health services that are accessible and convenient for most patients.
- Improve patient flow and management to reduce long lines and excessive waiting periods for patients.
- Ensure proper maintenance of patient records.

ACTIVITY 2 - ENSURE REFERRAL OF PATIENTS

In this activity, participants learn how to ensure referral of patients. They learn how to refer patients and how to keep track of referred patients. Modify the activity to reflect procedures in the participants' area.

Learning Objective



- The learning objective for this activity is:

Activity 2 - Ensure Referral of Patients

Learning Objective

At the end of the session, participants will be able to identify:

- how health workers should refer patients
- how to keep track of referred patients

Overview of Learning Process

- During this activity, you will learn how to ensure referral of patients.
- At the end of the activity, you will work in small groups to complete the Performance Check.

Introduction to Activity 2

- Patients usually seek treatment from the health unit closest to them.

(continued)

- If a patient has an illness that your health unit cannot treat, health workers may refer the patient to another health unit or hospital that has the staff, drugs, and equipment to help him or her.
- How does your health unit refer a patient?

Solicit responses. Ask participants how they decide:

- *which health unit or hospital has the staff, drugs and equipment to help the patient*
- *how to keep track of the referred patient*

When and Why to Refer Patients

- Some patients can only be diagnosed and treated at the hospital or another health unit, where more equipment, drugs and specialized staff are available.
- Health unit staff should use standard diagnosis and treatment guidelines to determine when to refer patients.

How to Refer Patients

- How does your health unit refer patients?

Solicit responses. Record accurate answers on the flipchart or board. Answers should include:

(continued)



How to Refer Patients

1. Register a patient at the health unit before referring him or her.
2. Decide the correct health unit to which to refer the patient (adequate equipment and skilled personnel).
3. Identify the paperwork to complete (e.g., a referral form/note). Record the referral number from the referral form in the patient register.
4. Help transport the patients to the health unit to which they are referred.

Step 1 - Register Patients At the Health Unit Before Referral

- What are the advantages of registering a patient at your health unit before health workers refer him or her?

Solicit responses. Possible answers:

- *It helps to ensure the follow-up of patients when they return to the health unit.*
- *It is one way of keeping track of the referred patient.*

Step 2 - Determine Where to Refer Patients

- **Health workers should refer patients to health units or hospitals that have the equipment, drugs, and specialized staff to treat the patient.**

(continued)

- **It is very important that health workers do not send the patient to a health unit or hospital that cannot treat his or her illness or disease.**
- Encourage health workers from district health units and the hospital to meet regularly. During these meetings, health workers can learn more about the equipment, drugs and staff available at the health units and the hospital.
- The DMT can give you information about different health services at neighboring health units and the hospital.

Step 3 - Complete Paperwork for Referral

- When a health worker refers a patient, he or she should complete a referral form or note.
- If your health unit uses a referral form, it should be divided into two sections:
 - 1) to be completed by the referring unit
 - 2) to be completed by the health unit where the patient has been referred.
- The health unit where the patient has been referred should send the form back to the referring unit when the patient has reported and been registered.
- What information should the referring unit complete on the form?

Solicit responses. Possible answers:

- *patient's name, address, sex, and age*
- *district name or number*

(continued)

- *patient's symptoms and diagnosis*
- *type of treatment given*
- *drugs patient is receiving*
- *reason for referral*
- *name of the referral health unit*
- *name of health unit to which patient is referred*
- *date patient is referred*
- *a referral number*

- The health worker should record the referral number from the referral form in the patient register.

Show participants the sample patient register on the following page. Point out the Referral No. column.

- What information should the health unit where the patient has been referred complete?

Solicit responses. Possible answers:

- *patient's name, age, and sex*
- *date patient reported to health unit*
- *treatment provided*
- *follow-up actions (e.g., how to monitor and evaluate health conditions of the patient, further appointments to make at the referral unit/hospital, what advice and drugs to give to the patient)*



PATIENT REGISTER

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Number of Reattendances = 0

Serial No.	Patient Name	Village	Age	M/F	Diagnosis	Drugs/Treatment	Price (USD)	Referral No.
101	Mabalo Lokela	Kaloufla	8m	M	dysentery - no dehydration	Cotrimoxazole Ped: ½ tab x 2 x 5 days (*) Give fluids and continue feeding	2.00	--
102	Ekombe Mongwa	Gohitre	24m	M	severe malnutrition, clouding of cornea	Vit A 200.000 IU, 1 caps x 2 Refer urgently to hospital	0.10	26
103	Mbuzu Sophie	Zralou	15	F	malaria	Chloroquine 150 mg base: day1 (3+1)tab, day2 1tab, day3 1tab AAS 500 mg: 1cp x 3 x 3 days	0.40	--
104	Sebo Dombe	Pakouabo	18m	F	pneumonia - chest indrawing, unconscious	Cloramphenicol inj 500 mg 1/2 vial IM Refer urgently to hospital	0.10	27
105	Euza Ngongo	Tokamo	30m	F	measles - no complication	Paracetamol 100 mg 1tab x 3 x 5 days	2.00	--

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Number of Reattendances = 1

106	Myriam Ngwete	Bawada	42	F	backache	AAS 500 mg 1 tab x 3 x 5 days	0.10	--
107	Gizi Dobola	Sabar	4m		convulsions, severe malaria	Diazepam inj 1/2 amp IR Paracetamol 1tab x 4 Quinine 150 mg/ml inj 1/2 amp IM Refer urgently to hospital	3.00	28
108	Lizenge Embale	Koulouro	20	F	anemia	Fer 60 mg 2tab x 3 x 60 days Folic Acid 5 mg, 2tab x 1 x 30 days	0.20	--
109	Sukato Manzomba	Yatawa	12	M	scabies	Benzylbenzoate lotion 25%	0.50	--
110 reatt.	Ngoi Lintak	Goujia	14m	M	persistent cough, difficulty breathing	Amoxycillin 250 mg 1 tab x 3 x 5 days	--	--
111	Patrick Saboya	Nafouta	31	M	wound right hand	Chlorhexidine, bandage TT vaccination	1.50	--

(*) Cotrimoxazole Ped = Sulfamethoxazole 100mg + Trimethoprim 20 mg

Step 4 - Help Transport Referred Patients

- If the health unit is responsible for transporting patients, then it should have transportation available and a logbook on transport.
- If the health unit is *not* responsible for transporting patients, then the health unit may help transport the patients by:
 - finding a means of transportation
 - accompanying the patient to the referral unit
 - paying a partial amount of the transport cost. (The health committee should decide whether to pay for transport.)

Why and How to Keep Track of Referred Patients

- Why is it important to **keep track of referred patients?**

Solicit responses. Possible answers:

- *to ensure that the patient went to the correct health unit and was treated*
- *to ensure the follow-up of the patient, when he/she is back at the health unit*
- The health unit staff, patients, community, and district should work together to keep track of referred patients.

(continued)

- One way of making sure the referred patient obtained treatment is to have the health unit/hospital return the completed section of the referral note/form to the referring health unit.
- The patient can return the completed referral note/form, or it can be sent by mail. In places where transportation has radio equipment, the radio can be used.

ACTIVITY 2 - ENSURE REFERRAL OF PATIENTS

PERFORMANCE CHECK 2

Facilitator Instructions

Read the following instructions to participants. Write or draw any instructions on the flipchart or board, as needed.

- For the Performance Check, you will work in small groups to discuss factors to consider when referring patients.
- If you have any questions while you are completing the Performance Check, let a facilitator know.
- When you have completed the Performance Check, let a facilitator know.
- When everyone has completed the exercise, we will discuss the Performance Check.

Divide the participants into groups of four to five. Assign each group to their own work area. Participants should be from the same health unit.

After all participants have completed the Performance Check, reconvene them for the plenary discussion.

Refer to the following pages which show the Performance Check exercise in the Participant Guide.

ACTIVITY 2 - ENSURE REFERRAL OF PATIENTS

PERFORMANCE CHECK 2



Do not begin the Performance Check until the facilitator has given you the instructions!

Work in your small groups to complete the following:

1. Why is it necessary to register a patient at the health unit before referring him or her?

2. Complete the following table about how to refer a patient:

<p>How to decide where to refer the patient</p>	
<p>What paperwork to complete, and by whom</p>	
<p>How to help transport referred patients</p>	
<p>How to keep track of referred patients</p>	

3. Let a facilitator know when you have completed the Performance Check.

Plenary Discussion

When participants reconvene, review participants' answers to the Performance Check.

Encourage participants to share any observations, problems, or concern they experienced in completing the Performance Check.

Discuss the difficulties that you noted participants experienced during the Performance Check.

Ask participants the following questions:

- What obstacles may you have in referring patients to neighboring health units or hospitals?
- How can you overcome these obstacles?
- What obstacles may you have in trying to keep track of referred patients?
- How can you overcome these obstacles?

Conclude the activity with positive comments about how participants performed. Summarize the main points of the activity.

Review the following flipchart about how to refer patients.

(continued)

How to Refer Patients

1. Register a patient at the health unit before referring him or her.
2. Decide the correct health unit to which to refer the patient (adequate equipment and skilled personnel).
3. Identify the paperwork to complete (e.g., a referral form/note). Record the referral number from the referral form in the patient register.
4. Help transport the patients to the health unit to which they are referred.

- Keep track of referred patients to ensure the follow-up of the patient, when he/she is back at the health unit

Conclude the module with a summary of what participants learned.

Discuss any plans you have for following up with participants after training.

Health Systems Development Unit

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Community participation

1. Apply basic communication skills
2. Conduct community diagnosis
3. Organize and support health committee
4. Establish relationships with community leaders, local organizations, and authorities
5. Conduct participatory planning

Monitoring and service delivery

1. Monitor and evaluate at the health unit level
2. Monitor and evaluate at the community level
3. Organize delivery of services

Management of staff and equipment

1. Hire and manage support staff
2. Ensure training of health unit personnel
3. Maintain equipment and health unit facility

Drug/supply management

1. Store supply and establish inventory procedures
2. Order and procure
3. Receive and inspect
4. Monitor and evaluate daily and monthly inventory

Financial management

1. Establish prices and exemptions systems
 2. Manage revenue and expenditures
 3. Establish a budget
 4. Audit health unit financial records
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