Standard Operating Procedures for Linkage of Clients to Care in EMRs

Version: May 2020

Objective: To ensure 100% linkage of clients to care in EMR's

To ensure 100% linkage of positive clients to care in EMR's the following should be carried out;

1. Validate paper HTS Report against the source document i.e. HTS Lab Register MOH 362
2. Compare paper HTS Report and EMR HTS Report, indicators of interest include; i. Clients tested
    ii. Clients who tested positive
3. Where variance is noted, download the line list for;
    i. Clients tested ii. Clients who tested positive
4. Using the HTS register, identify clients missing in the line list
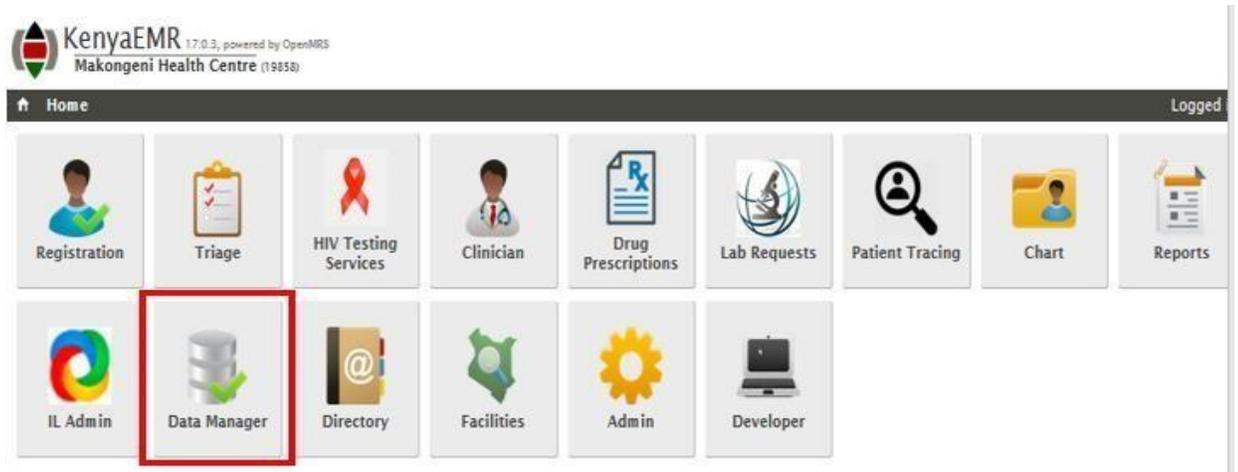5. Use the client names (obtained from register) to search through the EMR.

    Most likely scenarios include;
    i. The client with similar names is duplicated in the system, one record with HTS encounter and the second record with HIV encounter
    ii. Two clients existing in the system whereby one has different names (usually misspelt) but all other patient particulars are similar. Edit the misspelt word to the right spelling
    iii. The client exists in the EMR with a HTS encounter only and with no linkage data
        iv. The client exists in the EMR with a HIV encounter only v. The client does not exist in the EMR
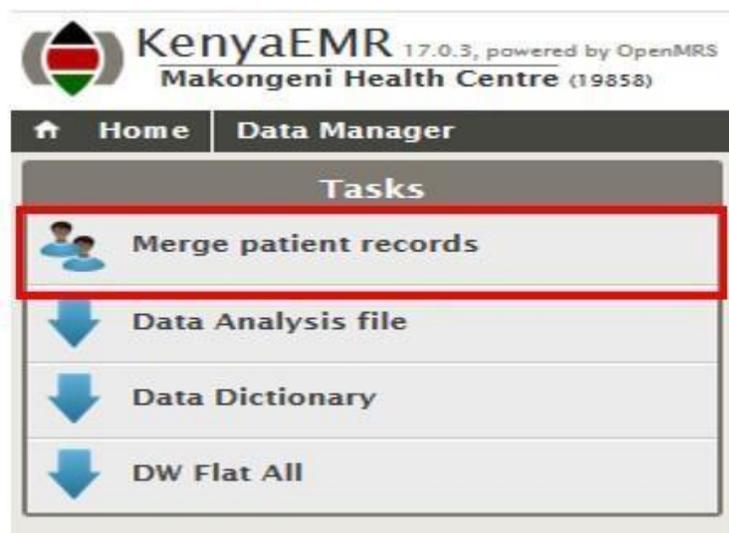
6. The following should be done to resolve each scenario mentioned above

   Scenario i & ii (*Duplicate clients*)

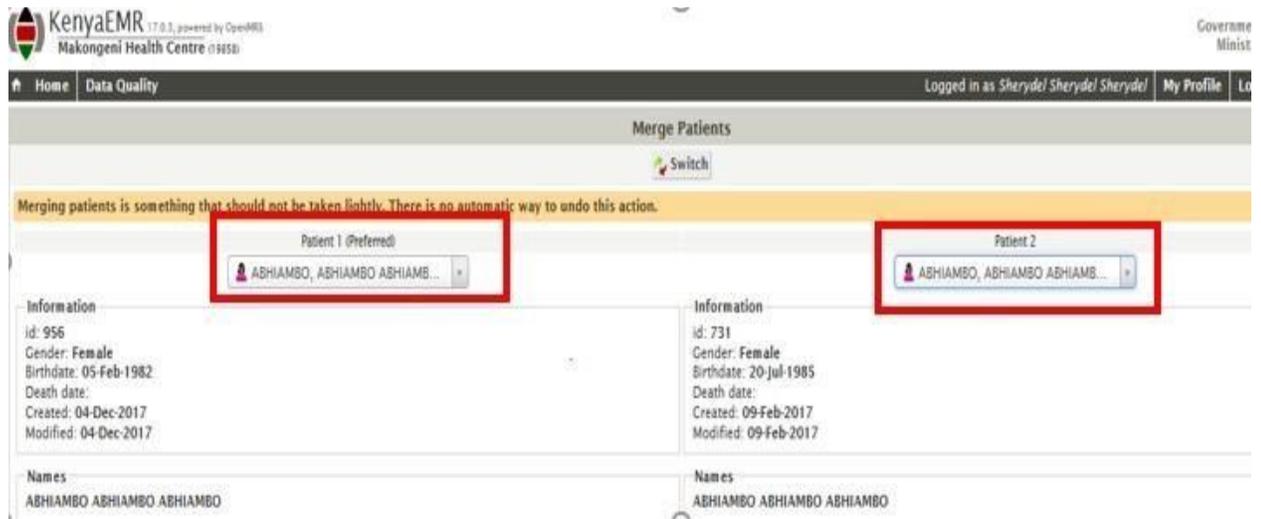   i. Log in to KenyaEMR and navigate to **Data Manager** Icon

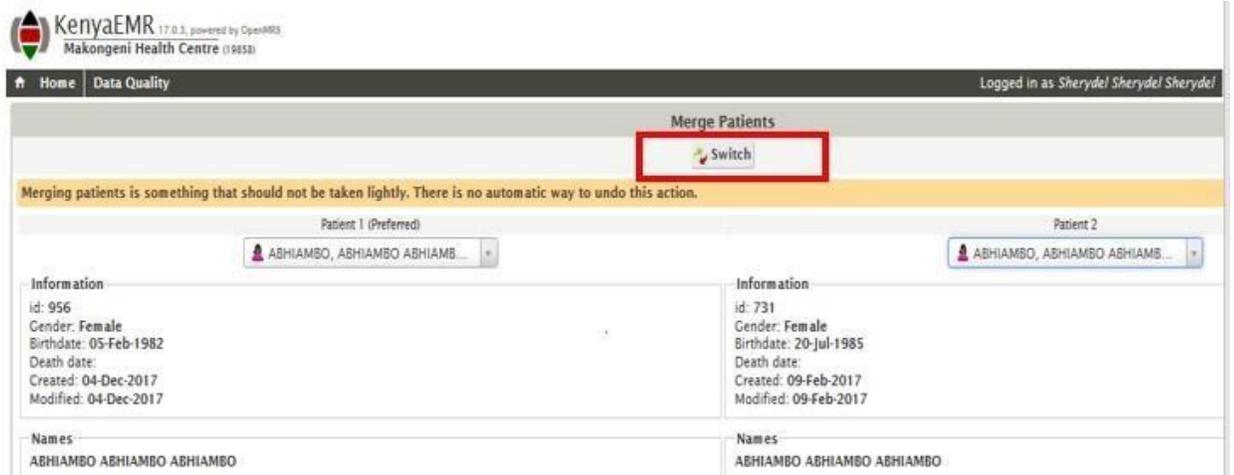   ii. Double click on data manager icon to access the **merge** feature

iii.   Click on merge patient records to access the list of possible duplicates page. Since we already know the clients who need to be merged, click on **Select patient manually**

iv.   The merge sections pops, type in the patient name on patient 1 (preferred) text box and patient 2 respectively

v.   Confirm that the patient particulars are the same since before merging since the merge function is irreversible.

vi.   Identify the preferred record (in this case, the record with HIV encounter should be the preferred). The preferred section should be on the left side, if not, click switch to interchange position between patient 1 and Patient 2

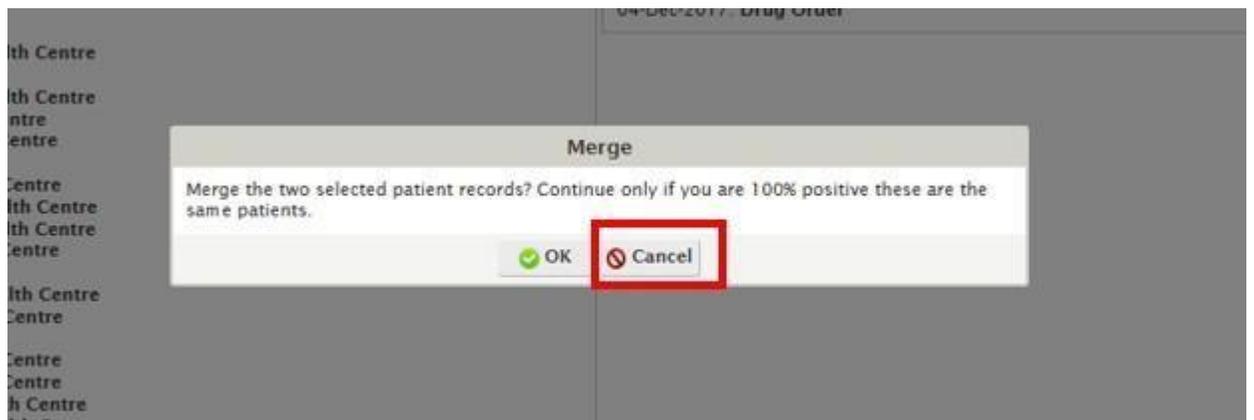vii.   Once duplicate records have been confirmed and the preferred record set, click on Merge

viii.   An alert pops up informing the user that they should only continue if they are 100% sure that the selected clients are the same. This is because merging patient is irreversible

Click **OK** if they are the same

ix.   Click **cancel** if they are not.

7. **For Scenario iii (*The client exists in the EMR with a HTS encounter only and with no linkage data*)**

    i.   Using the linkage register, confirm whether the client was linked to care.

        a. If **yes**, update the linkage form Follow this link for instructions https://drive.google.com/drive/folders/1ogkF6tkFT8dctedc7nJXFuztkpFscWcH. For clients linked in this facility, enroll them to HIV Care and update accordingly

        b. If **no**, leave the record as is

8. **For scenario iv (*The client exists in the EMR with a HIV encounter only*)**

    i.   Create the client using Muzima or HTS module and update the testing data. Follow this link for instructions

https://drive.google.com/drive/folders/1ogkF6tkFT8dctedc7nJXFuztkpFscWcH

    ii.   Merge the client as documented in step 6 above

9. **For scenario v (*The client does not exist in the EMR*)**

    i.   Create the client using Muzima or HTS module and update the testing data. Follow this link for instructions

       https://drive.google.com/drive/folders/1ogkF6tkFT8dctedc7nJXFuztkpFscWcH