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|----------------------------|--|
| Tasks: | Using OTZ Module on KenyaEMR |
| Objective: | To support use of OTZ Module and provide necessary services using the module |
| Who: | Healthcare providers, Counselors, Peer Educators |
| Required Materials: | Functional KenyaEMR with OTZ module installed |
| Version: | KenyaEMR 3.x Version 18.7.2 and above |
| Last Updated: | Mar 2024 |

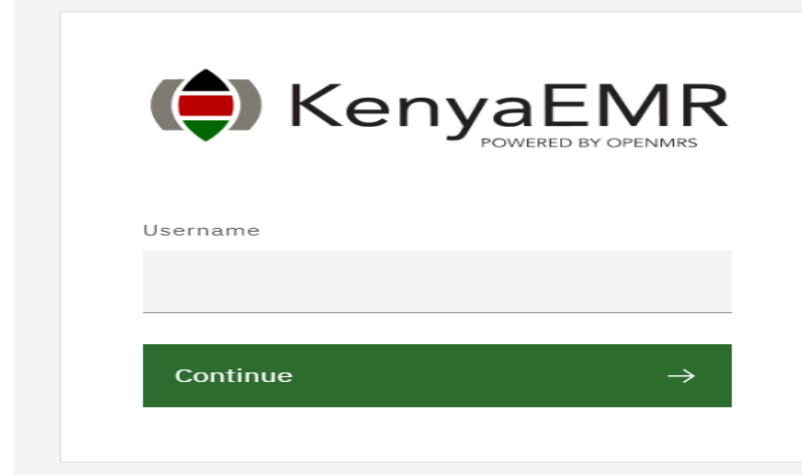
| Step | Action | Screen shots |
|----------------------------|---|---|
| Introduction | <p>This document provides detailed workflow for use of OTZ module on KenyaEMR system. The guide has been accompanied by relevant screenshot images for illustration purposes.</p> <p>The step-by-step guide is clustered into groups of related workflows for ease of reference.</p> | Refer to images |
| Learning Objectives | <p>By the end of this session, you will be able to:</p> <ul style="list-style-type: none"> • Successfully log into KenyaEMR • Enroll clients in OTZ module. • Complete OTZ activity form • Discontinue client from OTZ module and • Generate OTZ reports |  |

1. Login and Registration

Log into KenyaEMR

Before using OTZ module, the user is required to gain access into KenyaEMR system by supplying correct username and password.

- Enter Username
- Enter Password
- Click "Login"



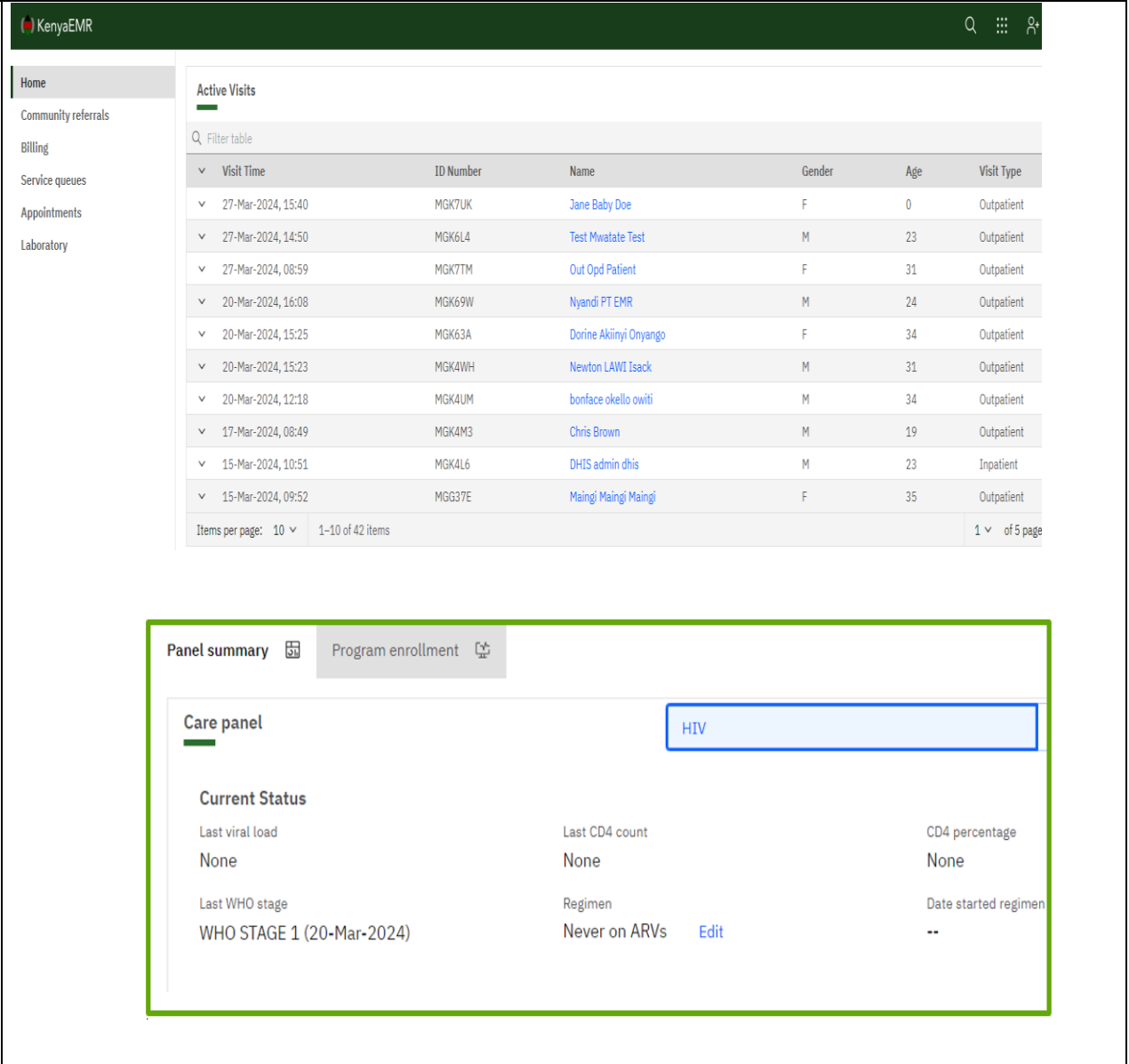
The screenshot shows the KenyaEMR login interface. At the top, there is a logo consisting of a stylized 'K' with the Kenyan flag colors (black, white, red, green) and the text 'KenyaEMR' next to it. Below the logo, the text 'POWERED BY OPENMRS' is visible. Underneath, there is a label 'Username' followed by a text input field. At the bottom of the form, there is a green button with the text 'Continue' and a right-pointing arrow.

Accessing OTZ Services

Step 1:

After a successful login, the KenyaEMR landing page (Dashboard) will be opened.

Requirement: Client MUST be enrolled in HIV module before they can access OTZ services.



The screenshot shows the KenyaEMR dashboard interface. At the top, there is a navigation bar with the KenyaEMR logo and search, user, and settings icons. A sidebar on the left contains menu items: Home, Community referrals, Billing, Service queues, Appointments, and Laboratory. The main content area is titled 'Active Visits' and features a search filter and a table of visit records. Below this, there is a 'Care panel' for HIV, which includes a 'Program enrollment' tab and a 'Current Status' section with various clinical data points.

| Visit Time | ID Number | Name | Gender | Age | Visit Type |
|--------------------|-----------|------------------------|--------|-----|------------|
| 27-Mar-2024, 15:40 | MGK7UK | Jane Baby Doe | F | 0 | Outpatient |
| 27-Mar-2024, 14:50 | MGK6L4 | Test Mwatate Test | M | 23 | Outpatient |
| 27-Mar-2024, 08:59 | MGK7TM | Out Opd Patient | F | 31 | Outpatient |
| 20-Mar-2024, 16:08 | MGK69W | Nyandi PT EMR | M | 24 | Outpatient |
| 20-Mar-2024, 15:25 | MGK63A | Dorine Akiinyi Onyango | F | 34 | Outpatient |
| 20-Mar-2024, 15:23 | MGK4WH | Newton LAWI Isack | M | 31 | Outpatient |
| 20-Mar-2024, 12:18 | MGK4UM | bonface okello owiti | M | 34 | Outpatient |
| 17-Mar-2024, 08:49 | MGK4M3 | Chris Brown | M | 19 | Outpatient |
| 15-Mar-2024, 10:51 | MGK4L6 | DHIS admin dhis | M | 23 | Inpatient |
| 15-Mar-2024, 09:52 | MGK37E | Maingi Maingi Maingi | F | 35 | Outpatient |

Care panel (HIV)

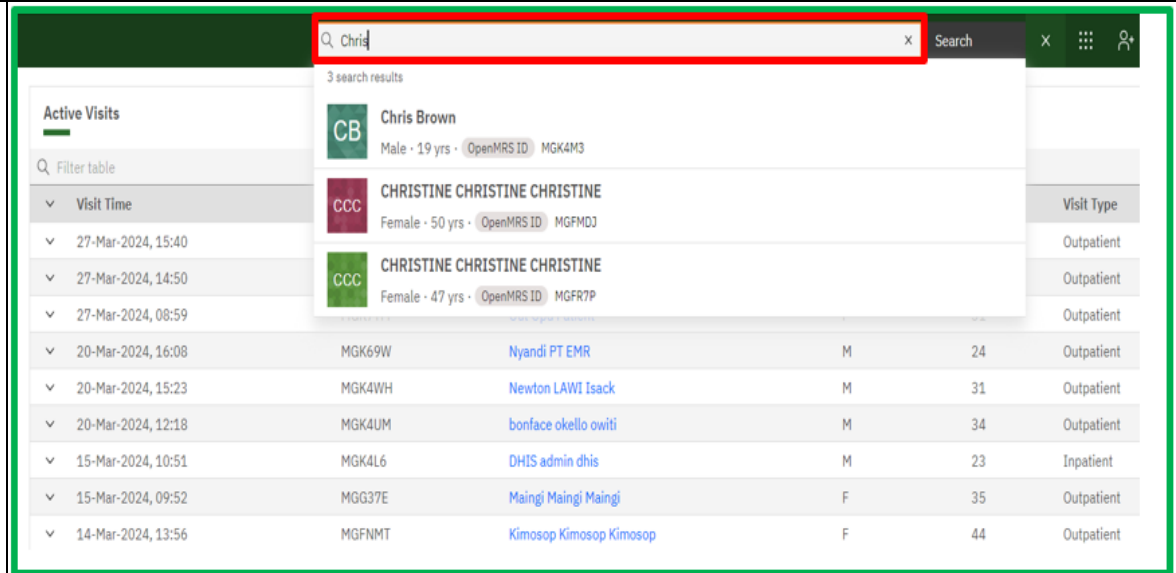
Current Status

| | | |
|---------------------------|------------------------------------|----------------------|
| Last viral load | Last CD4 count | CD4 percentage |
| None | None | None |
| Last WHO stage | Regimen | Date started regimen |
| WHO STAGE 1 (20-Mar-2024) | Never on ARVs Edit | -- |

Searching for eligible OTZ clients

Step 3: Search for client newly eligible for OTZ services.

- Client already enrolled in HIV Care aged 10yrs to 19yrs, or
- Up to 24 years for existing clients in the OTZ program.



The screenshot shows a search interface with a search bar containing 'Chris'. A dropdown menu displays 3 search results:

- CB** Chris Brown
Male · 19 yrs · OpenMRS ID · MGK4M3
- CCC** CHRISTINE CHRISTINE CHRISTINE
Female · 50 yrs · OpenMRS ID · MGFMDJ
- CCC** CHRISTINE CHRISTINE CHRISTINE
Female · 47 yrs · OpenMRS ID · MGR7P

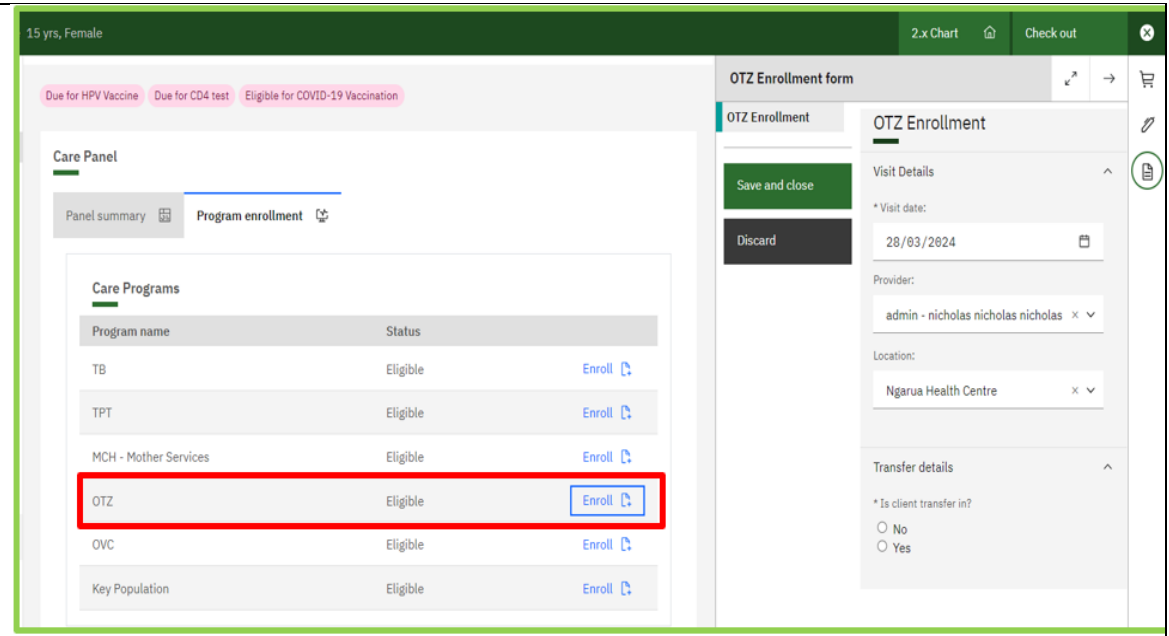
Below the search results is a table of active visits:

| Visit Time | OpenMRS ID | Client Name | Age | Visit Type |
|--------------------|------------|-------------------------|------|------------|
| 27-Mar-2024, 15:40 | MGK69W | Nyandi PT EMR | M 24 | Outpatient |
| 27-Mar-2024, 14:50 | MGK4WH | Newton LAWI Isack | M 31 | Outpatient |
| 27-Mar-2024, 08:59 | MGK4UM | bonface okello owiti | M 34 | Outpatient |
| 20-Mar-2024, 16:08 | MGK4L6 | DHIS admin dhis | M 23 | Inpatient |
| 20-Mar-2024, 15:23 | MGG37E | Maingi Maingi Maingi | F 35 | Outpatient |
| 20-Mar-2024, 12:18 | MGFNMT | Kimosop Kimosop Kimosop | F 44 | Outpatient |
| 15-Mar-2024, 10:51 | | | | |
| 15-Mar-2024, 09:52 | | | | |
| 14-Mar-2024, 13:56 | | | | |

Accessing OTZ Module

Step 4: OTZ module on client homepage

- To access OTZ module on client homepage, **check in** the client.
- The OTZ module will now be available on the client care panel, under program enrollment as highlighted. Click on the enroll button to enroll the clients in the OTZ module.
- Note: OTZ service highlighted will not be available for newly created patients until you successfully enroll the client into the HIV service



15 yrs, Female | 2.x Chart | Check out

Due for HPV Vaccine | Due for CD4 test | Eligible for COVID-19 Vaccination

Care Panel

Panel summary | **Program enrollment**

| Program name | Status | Enroll |
|-----------------------|----------|---------------|
| TB | Eligible | Enroll |
| TPT | Eligible | Enroll |
| MCH - Mother Services | Eligible | Enroll |
| OTZ | Eligible | Enroll |
| OVC | Eligible | Enroll |
| Key Population | Eligible | Enroll |

OTZ Enrollment form

OTZ Enrollment | OTZ Enrollment

Save and close | Discard

Visit Details

* Visit date: 28/03/2024

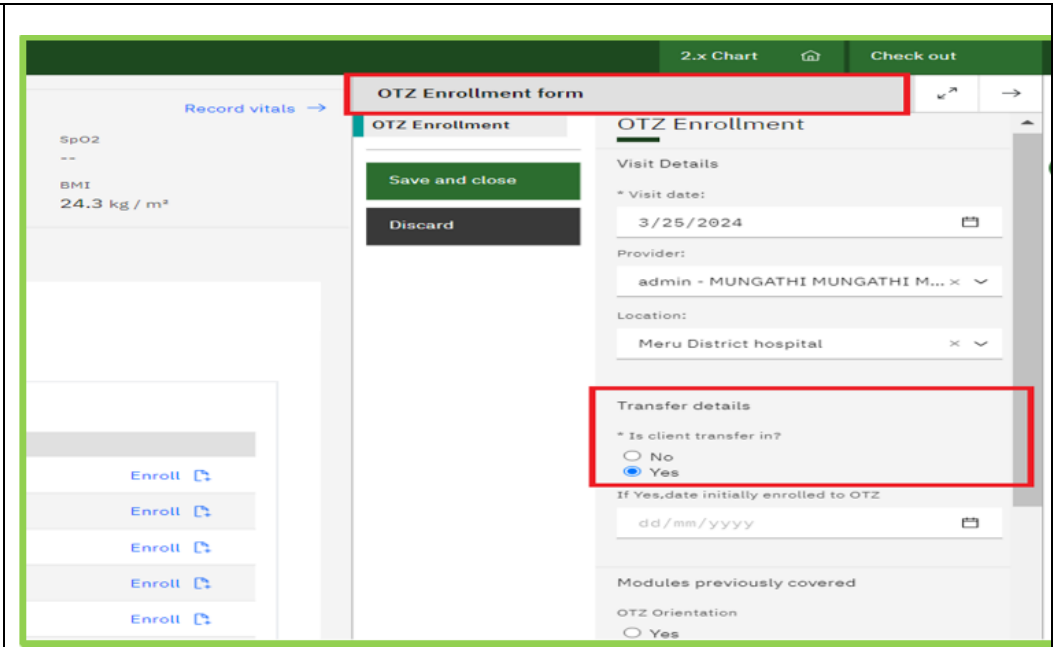
Provider: admin - nicholas nicholas nicholas

Location: Ngarua Health Centre

Transfer details

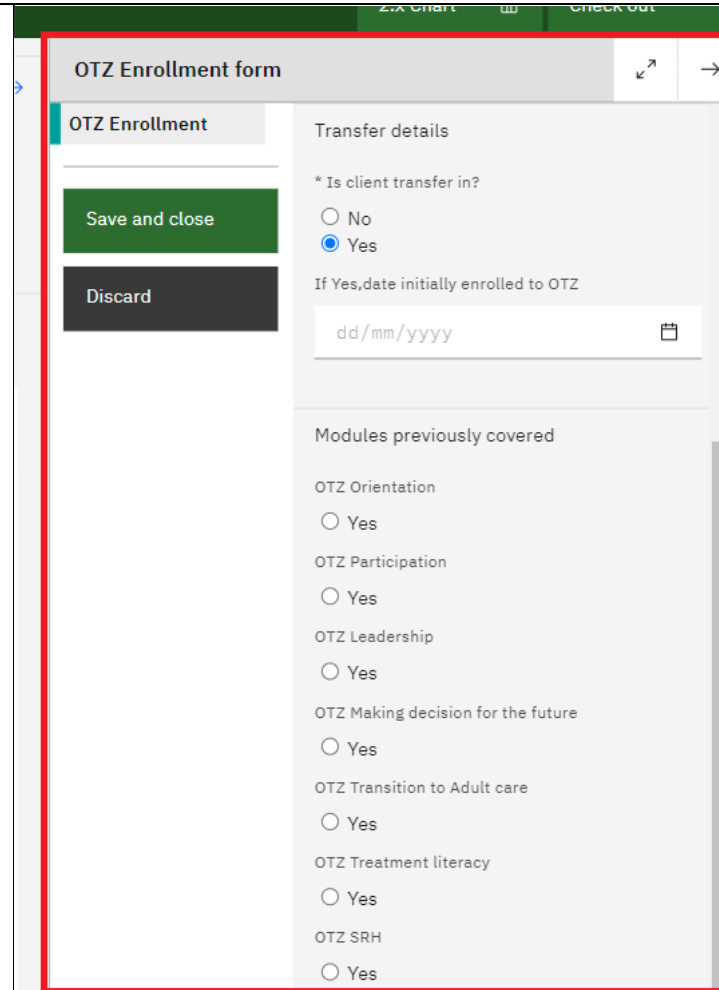
* Is client transfer in?

No
 Yes

| | | |
|-----------------------------------|--|---|
| <p>OTZ Enrollment Form</p> | <p>Select Yes if the client is a transfer-in and No if the client is not a transfer-in</p> |  |
|-----------------------------------|--|---|

OTZ Enrollment Form

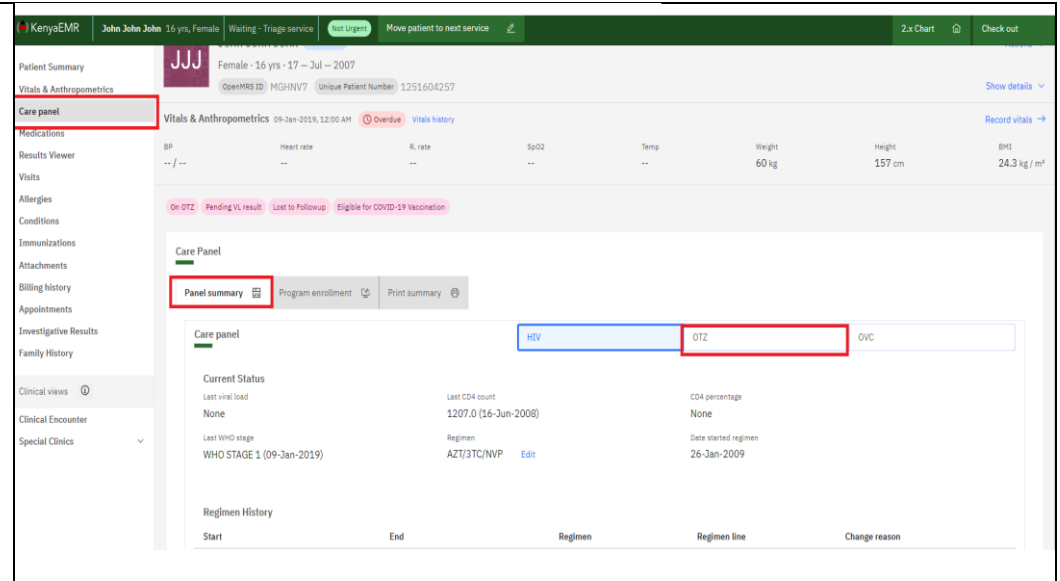
- If **Yes**, indicate modules previously covered by checking the radio button against each. Using the calendar indicate date when the modules were covered.
- Click **Enter** to save the OTZ enrollment form



The screenshot shows the 'OTZ Enrollment form' interface. It features a title bar with 'OTZ Enrollment form' and navigation arrows. Below the title bar is a tab labeled 'OTZ Enrollment'. On the left side, there are two buttons: 'Save and close' (green) and 'Discard' (dark grey). The main content area is divided into sections: 'Transfer details' with a question '* Is client transfer in?' and radio buttons for 'No' and 'Yes' (selected); a date field 'If Yes, date initially enrolled to OTZ' with a placeholder 'dd/mm/yyyy' and a calendar icon; and a section titled 'Modules previously covered' with a list of modules, each followed by a radio button for 'Yes': 'OTZ Orientation', 'OTZ Participation', 'OTZ Leadership', 'OTZ Making decision for the future', 'OTZ Transition to Adult care', 'OTZ Treatment literacy', and 'OTZ SRH'.

OTZ Enrollment Form

- To confirm successful enrollment, Under care panel, panel summary, you will see **OTZ** as highlighted



KenyaEMR | John John | 16 yrs, Female | Waiting - Triage service | Not Urgent | Move patient to next service | 2.x Chart | Check out

Patient Summary | **JJJ** | Female - 16 yrs - 17 - Jul - 2007

Vitals & Anthropometrics | OpenMRS ID: MGH/NV7 | Unique Patient Number: 1251604257 | Show details

Care panel | Vitals & Anthropometrics | 09-Jan-2019, 12:00 AM | Overdue | Vitals history | Record vitals

Medications | Results Viewer | Visits | Allergies | Conditions | Immunizations | Attachments | Billing history | Appointments | Investigative Results | Family History | Clinical views | Clinical Encounter | Special Clinics

BP: -- / -- | Heart rate: -- | R. rate: -- | SpO2: -- | Temp: -- | Weight: 60 kg | Height: 157 cm | BMI: 24.3 kg / m²

On OTZ | Pending VL result | Lost to Followup | Eligible for COVID-19 vaccination

Panel summary | Program enrollment | Print summary

Care panel | HIV | **OTZ** | OVC

Current Status

| | | |
|---------------------------|----------------------|----------------------|
| Last viral load | Last CD4 count | CD4 percentage |
| None | 1207.0 (16-Jun-2008) | None |
| Last WHO stage | Regimen | Date started regimen |
| WHO STAGE 1 (09-Jan-2019) | AZT/3TC/NVP Edit | 26-Jan-2009 |

Regimen History

| Start | End | Regimen | Regimen line | Change reason |
|-------|-----|---------|--------------|---------------|
|-------|-----|---------|--------------|---------------|

OTZ Activity Form

- After successful enrollment of the client in the OTZ module, the **OTZ activity form** will automatically be availed under Clinical forms.

| Clinical Forms | |
|---|----------------|
| <input type="text" value="Search this list"/> | |
| Form Name (A-Z) | Last completed |
| Alcohol and Drug Abuse Screening(CAGE-AID/CRAFFT) | Never |
| Cancer Screening and early diagnosis | Never |
| CCC Defaulter Tracing | Never |
| COVID-19 Assessment form | Never |
| Depression Screening PHQ-9 | Never |
| Enhanced Adherence Screening | Never |
| Gender Based Violence Screening | Never |
| Generalized Anxiety Disorder Assessment | Never |
| HIV Green Card | Never |
| OTZ Activity Form | Never |
| Progress Note | Never |
| TB Screening | Never |
| Triage | Never |

Completing Activity forms

- Click OTZ Activity Form to update OTZ services provided today (Select all that apply),
- View the previously completed services and update support group involvement and remarks
- After updating all fields, click on enter to save the OTZ Activity Form

OTZ Activity Form

OTZ Modules

Modules completed today

OTZ Orientation
 Yes

OTZ Participation
 Yes

OTZ Leadership
 Yes

OTZ Making decision for the future
 Yes

OTZ Transition to Adult care
 Yes

OTZ Treatment literacy
 Yes

OTZ SRH
 Yes

OTZ Beyond the 3rd 90
 Yes

Support group involvement

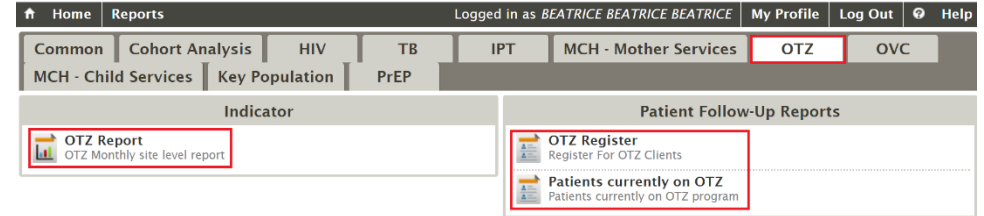
* Support group involvement
 No
 Yes

Save and close

Discard

Accessing OTZ Reports

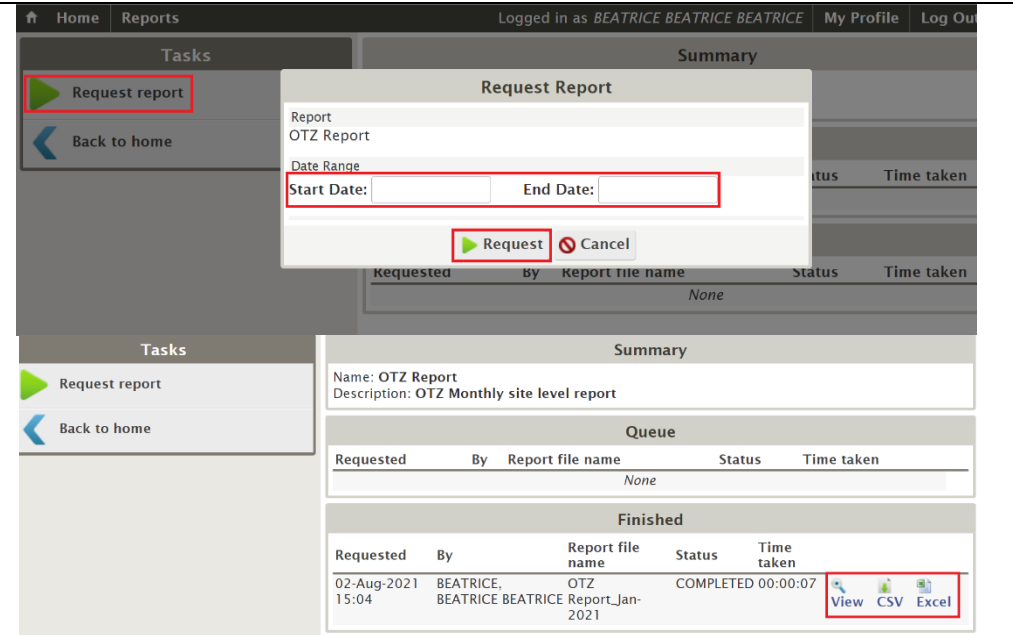
- To access OTZ reports and register, navigate to KenyaEMR home page and click on Report Icon
- Then navigate to the OTZ section to access the OTZ line list, OTZ Report and OTZ Register



The screenshot shows the 'Reports' section of the KenyaEMR interface. The user is logged in as 'BEATRICE BEATRICE BEATRICE'. The 'OTZ' menu item is highlighted in the top navigation bar. Below the navigation bar, there are two main sections: 'Indicator' and 'Patient Follow-Up Reports'. In the 'Indicator' section, the 'OTZ Report' link (with subtext 'OTZ Monthly site level report') is highlighted with a red box. In the 'Patient Follow-Up Reports' section, the 'OTZ Register' link (with subtext 'Register For OTZ Clients') and the 'Patients currently on OTZ' link (with subtext 'Patients currently on OTZ program') are both highlighted with red boxes.

Requesting OTZ Reports

- Click on any of the OTZ Reports and request report for the period of interest as highlighted.
- You can also request a line list of OTZ clients under “Patients Currently on OTZ” report.
- The report will generate and appear under finished. Click on either view, CSV or Excel to access the reports



The screenshot shows the 'Reports' section of the KeHMIS interface. A 'Request Report' dialog box is open, allowing the user to request an 'OTZ Report' for a specific date range. The 'Request Report' dialog box contains the following fields and buttons:

- Report: OTZ Report
- Date Range: Start Date: [] End Date: []
- Buttons: Request (green play icon), Cancel (red stop icon)

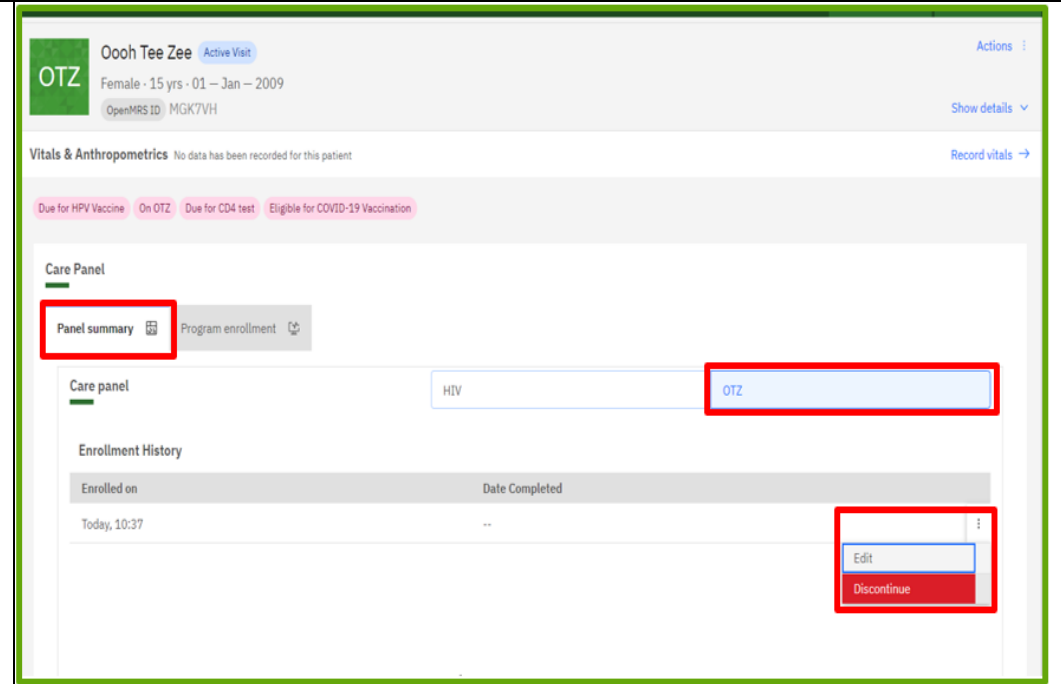
Below the dialog box, the 'Finished' report table is visible, showing a completed report with the following details:

| Requested | By | Report file name | Status | Time taken |
|-------------------|-----------------------------|---------------------|-----------|------------|
| 02-Aug-2021 15:04 | BEATRICE, BEATRICE BEATRICE | OTZ Report_Jan-2021 | COMPLETED | 00:00:07 |

At the bottom right of the 'Finished' table, there are three buttons: View, CSV, and Excel, which are highlighted with a red box in the screenshot.

Discontinuation from OTZ Module

- To discontinue a client from OTZ for one reason or the other follow the procedure below.
- Go to Care panel, then click panel Summary under OTZ module , click on three dots as shown with the arrow to access OTZ discontinuation form





OTZ Oooh Tee Zee Active Visit

Female · 15 yrs · 01 – Jan – 2009
OpenMRS ID: MGK7VH

Vitals & Anthropometrics No data has been recorded for this patient

Due for HPV Vaccine · On OTZ · Due for CD4 test · Eligible for COVID-19 Vaccination

Care Panel

Panel summary  Program enrollment 

Care panel HIV OTZ

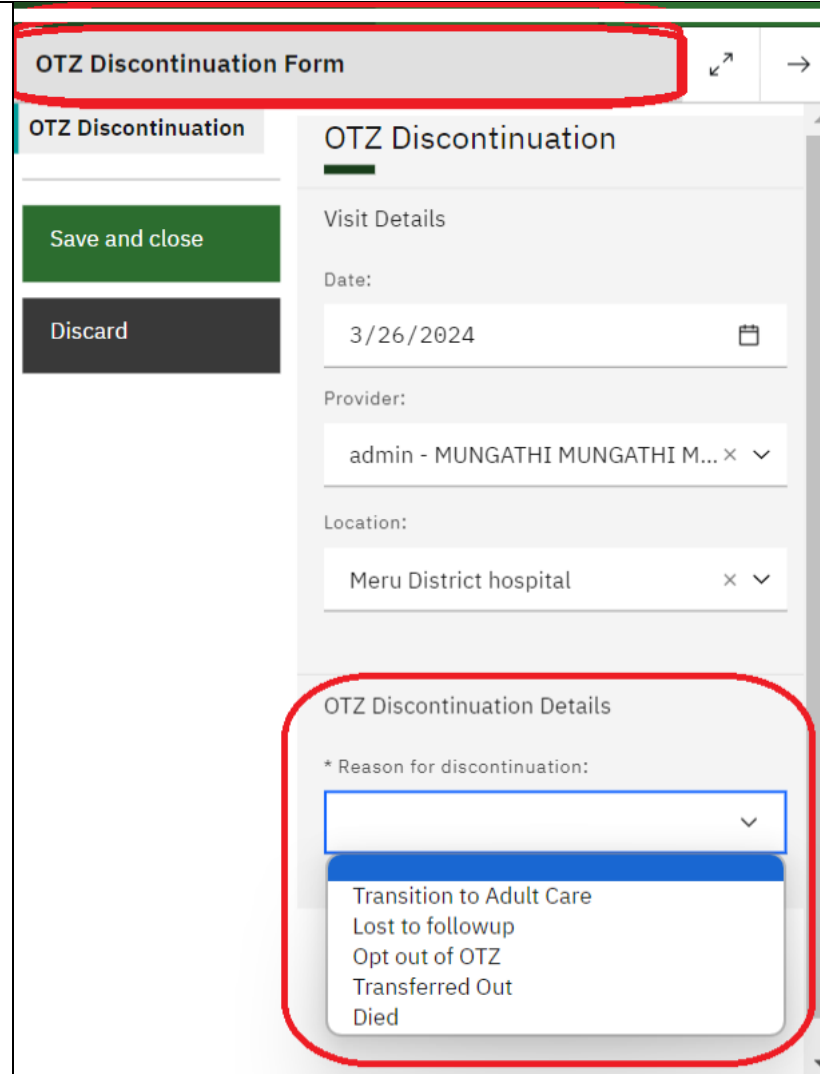
Enrollment History

| Enrolled on | Date Completed |
|--------------|----------------|
| Today, 10:37 | -- |

Edit
Discontinue

Discontinuation from OTZ Module

- Using the drop-down menu, select the reason for discontinuation and enter the form to save the discontinuation encounter



OTZ Discontinuation Form

OTZ Discontinuation

Save and close

Discard

OTZ Discontinuation

Visit Details

Date: 3/26/2024

Provider: admin - MUNGATHI MUNGATHI M...

Location: Meru District hospital

OTZ Discontinuation Details

* Reason for discontinuation:

- Transition to Adult Care
- Lost to followup
- Opt out of OTZ
- Transferred Out
- Died