

Effective Diagnosis, Treatment, and Monitoring of Hypertension in Primary Care: Training Workshop

Session

5

Reporting and Monitoring System

Content should be adapted with country-specific information prior to use.

Red text denotes places where modification may be required. Guidance on how to adapt the training is provided in the Course Overview.

Competency and objectives

Competency:

Ability to correctly fill out recording and reporting tools at primary health care level

In this session you will learn about:

- Facility Register for Hypertension
- Quarterly and annual reports
- Core indicators

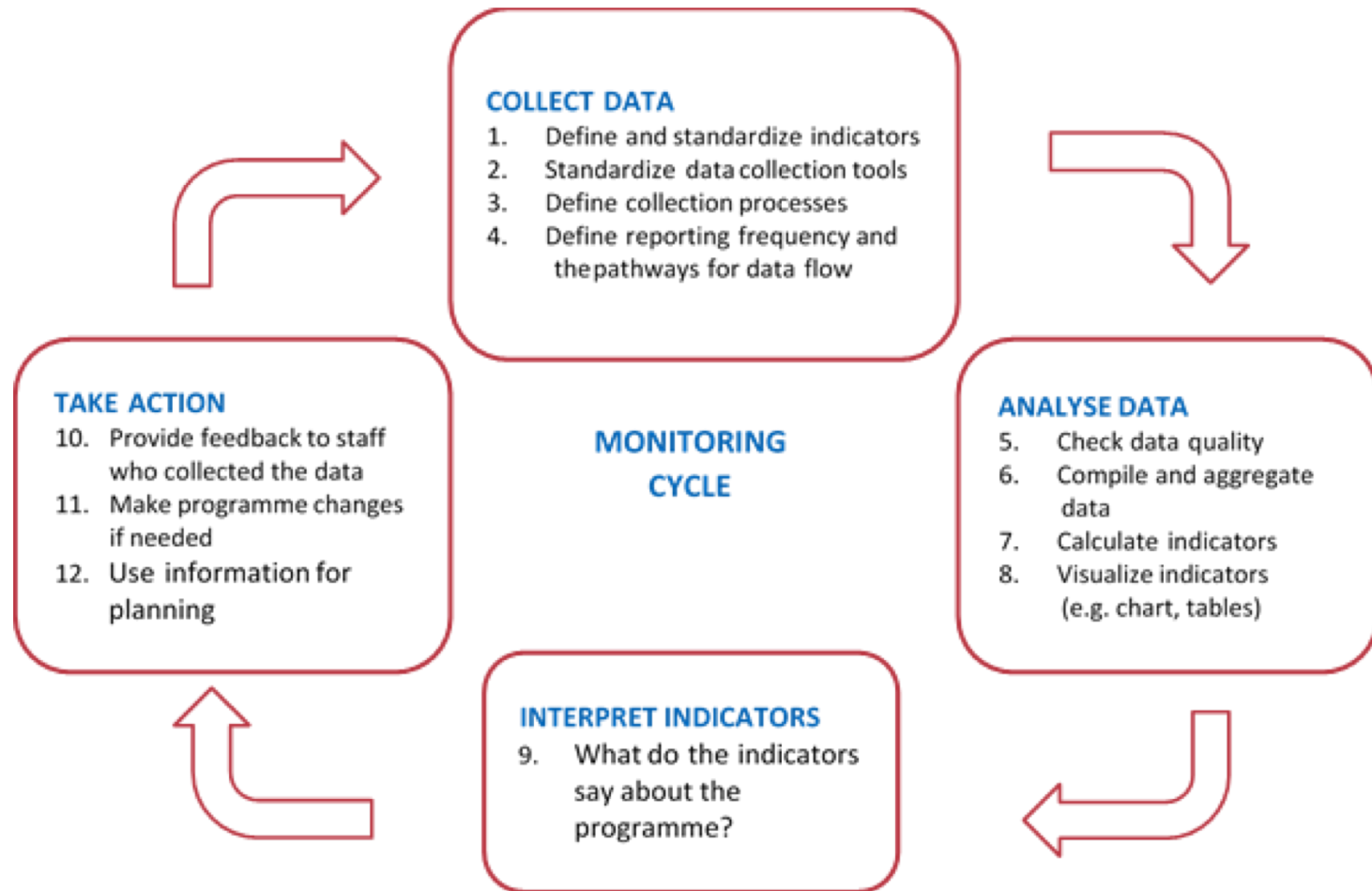
Monitoring

Monitoring = ongoing collection, management and use of information

It assesses whether:

- an activity or programme is proceeding according to guidelines
- whether defined targets are being achieved

The monitoring cycle



Facility Register for Hypertension

FACILITY REGISTER FOR HYPERTENSION									
Date of reg.	Unique patient treatment no.	Name	Address	Gender M/F	Age	Quarterly HTN outcome: BP controlled? Y/N (6-9 months after reg.)	Annual HTN outcome: BP controlled: Y/N (Q1, year 2019)	Annual HTN outcome: BP controlled: Y/N (Q1, year 2020)	Annual HTN outcome: BP controlled: Y/N (Q1, year 2021)
Filled immediately or soon after starting the treatment card						Filled later			
Page summary						BP control:			
Total number registered:					Y = systolic blood pressure <140 mmHg and diastolic blood pressure <90 mmHg during last quarter				
Total number with documented control in Q1 6-9 months after registration					N = if blood pressure ≥140/90 or patient did not visit for follow up, or blood pressure not measured				
Total number with documented control in Q1 of 2019									
Total number with documented control in Q1 of 2019									
Total number with documented control in Q1 of 2020									
6-9-month cohort monitoring – registration and corresponding reporting dates									
If patient registered between:					Report to district on:				
1 January – 31 March					15 October				
1 April – 30 June					15 January				
1 July – September 30					15 April				
1 October – 1 December					15 July				

- Each patient with high blood pressure who is receiving treatment will be registered.
- Each quarter, summary information on the total number of patients registered will be recorded.
- Summary information on the number of patients that achieved controlled BP at 6-9 months and during annual follow-up will be recorded.

Sample completed facility register

FACILITY REGISTER FOR HYPERTENSION

Date of reg.	Unique patient treatment no.	Name	Address	Gender M/F	Age	Quarterly HTN outcome: BP controlled? Y/N (6–9 months after reg.)	Annual HTN outcome: BP controlled: Y/N (Q1, year 2019)	Annual HTN outcome: BP controlled: Y/N (Q1, year 2020)	Annual HTN outcome: BP controlled: Y/N (Q1, year 2021)
8.1.18	00001	Ram Singh	Alappad	M	56	Yes	Yes		
20.2.18	00002	Raj Kumar	Alathus	M	67	Yes	Yes		
22.3.18	00003	Prem Pal	Alappad	M	60	Yes	No		
15.4.18	00004	Saroj Rani	Inchamudi	F	58	No	No		
4.5.18	00005	Santhoshi Devi	Pullazhi	F	57	Yes	Yes		
2.6.18	00006	Kamal Kapoor	Anjur	M	42	Yes	No		
3.7.18	00007	Sunita Sharma	Alappad	F	47	No	No		
4.7.18	00008	Rahul Sharma	Mangad	M	53	No	Yes		
15.8.18	00009	Neha Trivedi	Kadappuram	F	48	Yes	Yes		
21.8.18	00010	Sumani Kapoor	Pullazhi	F	46	No	No		
Page summary						BP control: Yes = systolic blood pressure <140 mmHg and diastolic blood pressure <90 mmHg during last quarter No = if blood pressure ≥140/90 or patient did not visit for follow up, or blood pressure not measured			
Total number registered:									
Total number with documented control in Q1 6–9 months after registration									
Total number with documented control in Q1 of 2019									
Total number with documented control in Q1 of 2019									
Total number with documented control in Q1 of 2020									

6–9-month cohort monitoring – registration and corresponding reporting dates

If patient registered between:	Report to district on:
1 January – 31 March	15 October
1 April – 30 June	15 January
1 July – September 30	15 April
1 October – 1 December	15 July

Steps for reporting BP control status quarterly

Step 1: In the first week of every quarter, determine the quarter of registration of patients whose 6–9 month (two quarters) treatment outcome will be reported during the current quarter.

Month in which quarterly report is prepared and sent to the district	Quarter for checking if BP is under control (Yes/No) (A2)	Quarter in which patients registered for treatment of hypertension (A1)
October 2018	July – September 2018	January – March 2018
January 2019	October – December 2018	April – June 2018
April 2019	January – March 2019	July – September 2018
July 2019	April – June 2019	October – December 2018
October 2019	July – September 2019	January – March 2019
January 2020	October – December 2019	April – June 2019
April 2020	January – March 2020	July – September 2019
July 2020	April – June 2020	October – December 2019
October 2020	July – September 2020	January – March 2020
January 2021	October – December 2020	April – June 2020
April 2021	January – March 2021	July – September 2020
July 2021	April – June 2021	October – December 2020
October 2021	July – September 2021	January – March 2021
January 2022	October – December 2021	April – June 2021
April 2022	January – March 2022	July – September 2021
July 2022	April – June 2022	October- December 2021

Steps for reporting BP control status quarterly

Step 2: Determine the unique patient treatment numbers.

Step 3: Retrieve the relevant Patient Treatment Cards.

Step 4: Identify the quarter in which the BP control status of those patients was assessed.

Step 5: Review the patients BP reading at the last visit during the quarter determined in step 4.

Step 6: Enter BP control status of the patients into the Facility Register in the “Quarterly HTN outcome” column, using the BP reading described in step 5.

- Write “Yes” if BP <140 and <90 .
- Write “No” if BP ≥ 140 and/or ≥ 90 or if no patient visit or no BP was recorded during that period.

Steps for reporting BP control status annually

Step 1: Retrieve treatment cards of all patients from ID 0001 until last ID allotted on 31 December of the previous year.

Step 2: For each treatment card, identify the last BP reading in Quarter 1 (1 January - 31 March) of the current year

Step 3: Based on reading, enter BP control status of each patient as “Yes” or “No” in the “Annual HTN outcome” column of the Facility Register

- Write “Yes” if BP <140 and <90 .
- Write “No” if BP ≥ 140 and/or ≥ 90 or if no patient visit or no BP was recorded during that period.

Completing page summary of the Facility Register

Page summary	
Total number registered:	
Total number with documented control in Q1 6–9 months after registration	
Total number with documented control in Q1 of 2019	
Total number with documented control in Q1 of 2020	
Total number with documented control in Q1 of 2021	

Tips on filling out Facility Register

- For each patient, **six-monthly (6–9 month) treatment** outcome will be reported only **once**.
- For each patient, **annual treatment outcome** will be reported **every year**.
- **Each quarter, start a new page** in the Facility Register. This will help when preparing quarterly reports.
- **Quarterly outcomes** should be updated at the **end of every quarter** by summing up the page summaries.
- **Complete all columns** for registered patients. Any entries that are crossed out should be signed.

EXERCISE 1



Completing a Hypertension Treatment Register

Using a blank hypertension treatment register form, fill in the details of five patients:

- *Two patients from session 4*
- *Three more from treatment cards samples provided in Participant Guide 5.*

Quarterly Facility Report

HEALTH FACILITY REPORT		
<i>Sections A and B will be filled out by health facilities where HTN Facility Register is placed.</i>		
<i>Sections C and D will be filled out by all health facilities</i>		
Name of health facility:	Name of district:	
Name of state:	Date of reporting (day/month/year)	
Quarter for which you are making the report:	Quarter:	Year:
<i>This is the 'Reporting Quarter'. Usually this is the most recent quarter that has just finished.</i>		
Section A: Quarterly treatment enrolment and outcomes		Number of patients
A1: Number of patients registered two quarters earlier		
A2: Out of (A1), number of patients whose BP was documented to be <140/90 mmHg in the Reporting Quarter		
Section B: Annual treatment enrolment and outcomes <i>(To be filled in only once a year, with Quarter 1 report)</i>		Number of patients
B1: Number of patients whose BP is documented as <140/90 mmHg during Quarter 1. <i>(If the patient made more than one visit in the quarter, use most recent reading.)</i>		
B2: Estimated number of people with hypertension in the catchment population <i>(only for district level).</i>		
Section C: Drug consumption and availability		
Quarterly consumption of drugs <i>(Give number of tablets)</i>	Quantity of drugs available at the health facility <i>(Give number of tablets)</i>	Quantity of drugs requested for the next quarter <i>(Give number of tablets)</i>
calcium channel blocker		
angiotensin receptor blocker		
angiotensin converting enzyme inhibitor		
thiazide/thiazide like diuretic		
statin		
aspirin		
beta blocker		
Section D: Quarterly supervision		
Was there a supervision visit to this health facility by district staff during the reporting quarter?	Yes	No

- Information is collected quarterly from the Facility Register
- A count is made of hypertensive patients and their outcomes
- A count is made of drugs consumed and stock outs
- A record is made of whether a supervisory visit was made

Annual Facility Report

HEALTH FACILITY REPORT		
Sections A and B will be filled out by health facilities where HTN Facility Register is placed.		
Sections C and D will be filled out by all health facilities		
Name of health facility:	Name of district:	
Name of state:	Date of reporting (day/month/year)	
Quarter for which you are making the report:	Quarter:	Year:
<i>This is the 'Reporting Quarter'. Usually this is the most recent quarter that has just finished.</i>		
Section A: Quarterly treatment enrolment and outcomes		Number of patients
A1: Number of patients registered two quarters earlier		
A2: Out of (A1), number of patients whose BP was documented to be <140/90 mmHg in the Reporting Quarter		
Section B: Annual treatment enrolment and outcomes <i>(To be filled in only once a year, with Quarter 1 report)</i>		Number of patients
B1: Number of patients whose BP is documented as <140/90 mmHg during Quarter 1. <i>(If the patient made more than one visit in the quarter, use most recent reading.)</i>		
B2: Estimated number of people with hypertension in the catchment population <i>(only for district level).</i>		
Section C: Drug consumption and availability		
Quarterly consumption of drugs <i>(Give number of tablets)</i>	Quantity of drugs available at the health facility <i>(Give number of tablets)</i>	Quantity of drugs requested for the next quarter <i>(Give number of tablets)</i>
calcium channel blocker		
angiotensin receptor blocker		
angiotensin converting enzyme inhibitor		
thiazide/thiazide like diuretic		
statin		
aspirin		
beta blocker		
Section D: Quarterly supervision		
Was there a supervision visit to this health facility by district staff during the reporting quarter?	Yes	No

Section B: Annual treatment enrolment and outcomes <i>(To be filled in only once a year, with Quarter 1 report)</i>	Number of patients
B1: Number of patients whose BP is documented as <140/90 mmHg during Quarter 1. <i>(If the patient made more than one visit in the quarter, use most recent reading.)</i>	
B2: Estimated number of people with hypertension in the catchment population <i>(only for district level).</i>	

- Section B of the Health Facility Report form contains the Annual Facility Report, submitted on 15 April every year

EXERCISE 2



Determining the quarter

Complete the table provided.

This exercise invites you to work out which time period you should be extracting data from when filling out Section A (Quarterly treatment enrolment and outcomes) of the Health Facility Report for a specific quarter.

EXERCISE 3



Completing the Quarterly and Annual reports

It is April 2019 and time to submit quarterly and annual reports.

Using the sample register provided, prepare a Quarterly and Annual Facility Report for 20 patients, filling in the template provided.

Core hypertension indicators

Standardized indicators are the foundation of a good monitoring system.

They measure whether various aspects of a programme are achieving what they are supposed to achieve.

Quarterly indicator

Proportion of patients registered for hypertensive treatment at the health facility whose blood pressure is controlled 6-9 months after treatment initiation

Numerator: Number of patients with controlled blood pressure (<140 and <90) at the last clinical visit in the most recent quarter (just before the reporting quarter)

Denominator: Number of patients registered for treatment of hypertension during the quarter that ended 6 months previously

Annual indicator

Proportion of patients with hypertension at health facilities in a given geographical area such as a district, province, or state who have controlled BP

Numerator: Cumulative number of registered patients with controlled blood pressure (<140 and <90) in the most recent quarter at all health facilities in a given geographical area, such as a district, province, or state

Denominator: Estimated number of people with hypertension at the subnational level

EXERCISE 4



Conducting a site visit to a health facility

Make a half-day visit a primary health facility to practise measuring blood pressure and providing care to patients, using the standard protocol and corresponding tools (e.g., patient identification cards, treatment cards, etc.).