



Guidance for Site Enrollment

Version: 16 July 2016

1. Introduction

After a health facility is selected for POC EID, a number of activities should be performed to ensure a comprehensive on-boarding and timely start-up of POC EID testing activities. It is assumed that a detailed and thorough capacity assessment of the site was completed, and the health facility chief administrator or in-charge is aware of the plans for POC EID placement. A site supervisor should be identified. District health officers or other MOH supervisory staff might take on this responsibility. The site supervisor will play a key role in the site enrollment process as they will be responsible for mentoring and supportive supervision at the sites, ensuring that all POC EID procedures are followed according to MoH and project policies, and that proper workflow and data reporting are completed. All of the below activities (or a subset of activities in case of spoke sites) should be performed for all sites enrolled in the project.

2. Steps for Enrolling a POC EID Site

Step 1: Pre-Installation Orientation and Planning. At least one month prior to the targeted start date of testing activities at a facility, arrangements should be made with the chief administrator or in-charge of the selected facilities, in order to plan for trainings and coordinate with local representatives of POC EID manufacturers to prepare for the training of staff, and provide support for infrastructure upgrades, if needed. Points 1 through 4 below provide more details for these activities.

1. **Communicate with the District Health Officer (DHO) or relevant sub-national authority about the health facilities in his/her district that were for POC EID testing.** The communications should inform DHOs about the facilities selected for POC EID, including how they were selected. It should also provide information about upcoming next steps, such as meetings with chief administrators or in-charges of selected facilities, introductions and orientations, trainings, monitoring and evaluation and routine supervision. Full collaboration from DHOs, including sharing data on site performance on a quarterly basis, will be key to the success of this intervention.
2. **Meet with the chief administrator or in-charge of each selected facility** to brief them on POC EID. This meeting should allow for a detailed discussion (and can include a visit of the units for short pre-orientation meetings with relevant staff) and ensure that the following points are discussed:
 - a. The core objectives of POC EID, which are to: (a) improve the percentage of HIV-exposed infants who receive their EID test results; (b) reduce the turn-around time between sample collection and return of test results; and (c) reduce the time from HIV diagnosis to initiation of treatment.
 - b. Site support. Detail the type of site support will be provided to ensure the successful implementation of POC EID. This support may include service and maintenance support

through extended warranty agreements, training of staff, regular visits, mentoring, site monitoring towards improvement, sample transport, etc.

- c. Workflow. Various staff will be involved, including those who request the test, collect the sample, perform the test, fill in registers and forms, initiate treatment, and coordinate sample transportation, if needed.
- d. Identify a designated focal point person for the project within the health facility. Each site (including spokes) should identify a focal person for POC EID with a specific set of tasks, including ensuring the agreed workflow, compliance with standard operating procedures, the scheduling of monitoring and supervisory visits, and the completeness of patient data forms.
- e. Agree on a designated space for instrument testing and for cartridge storage. This involves sharing guidance on space requirements (e.g. secure space, dry area, size of space). The cartridge storage space can be a shelf or a cupboard depending on site volumes, or an existing storage room if good temperature monitoring is in place. The cupboard or room should be secured; that is locked at night and with window grids ideally.
- f. Average, maximum and minimum temperatures required inside the room where the instrument could be installed. These should be maintained throughout a full year period. Agree how to ensure a stable temperature if extreme temperatures are observed, in order to comply with product requirements, and to inform infrastructure upgrade needs, if any.
- g. Discuss the potential need, and approval process if required, for any infrastructure upgrades based on the site assessment and product requirements. This includes identifying who is the approving authority for upgrades (e.g. MoH, city council, or other).
- h. Discuss the importance of thorough monitoring of the performance of all activities related to POC EID testing in order to learn and improve over time and to document the feasibility of EID testing in decentralized setting.
- i. If the facility will be a hub site, discuss the importance of receiving specimens from, and coordinating transport to, surrounding spoke sites. Discuss the sample transportation model and results relay model identified for this site. Discuss where (which room) the transported samples could be picked up/received, and who within the facility/unit could oversee the process.
- j. If the facility will be a spoke site, discuss how results will be relayed back to the spoke site, and who will act as designated carrier person (motorbike driver or else depending on model). This is assuming that the preliminary preparation work on the design of the transport system has been done.
- k. Discuss and **agree on timeframe** and set specific dates for:
 - Infrastructure upgrades, if any
 - An introduction/orientation session
 - Equipment installation
 - Trainings for different kinds of staff (as per separate document on types of trainings required)
 - Official start of testing activities

- I. Exchange detailed contact information of the chief administrator of in-charge, the facility key focal point (if different from the chief administrator or in-charge) and the site supervisor.
 - m. Wrap-up with a list of next steps, including who is responsible for each step and when it should be completed. Set the date for the next visit or meeting.
3. **Coordinate with manufacturers several weeks before** to plan for the timing of POC EID instrument installation and training of staff. This involves confirming the dates of installation and initial trainings with the manufacturers. Site supervisors should be present during the installation. Depending on the instrument selected, installation and training may be done on the same day, or one day apart.
 4. **Perform infrastructure upgrades, if needed**, as per the agreed timeframe and as soon as possible. This will most likely involve purchasing (locally ideally) and installation steps. Ensure that the specifications of what is needed and what is being purchased match.

Step 2: Installation, Training, and Start-up: One week before installing a POC EID device at a facility, the facility chief administrator or in-charge should be contacted to schedule the installation. Then or site supervisor, should install the instruments, complete orientation and training of facility staff, and start testing activities. These activities are described in more detail in points 6 through 9 below. It is highly recommended to complete all four activities within one week.

5. **Call the facility chief administrator or in-charge** to schedule POC EID installation. One week before (or a minimum of two days before) installation, call the chief administrator or in-charge to remind them of the coming visit to install the instruments and conduct orientation and training sessions with staff. Request the chief administrator or in-charge to ensure that staff will be informed of the visit and make time for it. Confirm your time of arrival and overall activities planned.
6. **Install POC EID Instrument.** A certified engineer identified by the manufacturer should install the instrument. Thus there will be a need to coordinate installation with manufacturer's technical team (see point 3 above).
7. **Perform an orientation session (1 – 1.5 hours), as well as the various training sessions (0.5-1 day).** Ensure that copies of relevant resource documentation are provided to the facility so that staff can refer to them as needed. On-site trainings are preferable in order to allow distinct sessions with various type of facility personnel and to be less disruptive with regards to routine operations (not to take away facility staff from their routine duties for too long for training). However, the relevant staff from spoke sites could be trained at their respective hub site together with the hub staff.
8. **Start testing activities**, usually after the training sessions are completed, or the following day.

Step 3: Post-Installation Monitoring and Follow up: Regular site monitoring and follow up visits to each facility should occur at regular intervals following POC EID installation. These monitoring activities should occur more frequently after the initiation of testing activities (e.g. monthly) and once good practices are documented, may be spaced out (e.g. quarterly).

Ensure close follow-up. Call or visit the POC EID focal point at each facility in the days and weeks following POC EID installation to ensure that the processes and systems that were put in place are working. Also call the site focal point prior to each follow up visit by the site supervisor.

