Getting Started: HIV Integration Checklist

This checklist was created to help you to think about all of the different issues to consider in implementing routine HIV testing at your health center. Use this checklist as a guide to assess what you have in place and what you need to put into place. Not all issues will apply to your agency. Good luck!!

Vision
What HIV-related services are currently provided at your agency and what is your vision for the future?

Identify the (clinical and non-clinical) staff who can be the HIV champions to help ensure success of this HIV integration effort. ________________________________________________________________

Agency currently provides:
- No HIV services
- HIV education
- HIV counseling
- Conventional HIV testing
- Rapid HIV testing
- Care & treatment for HIV-infected clients

Vision of what agency could provide:
- HIV education
- HIV counseling
- Conventional HIV testing
- Rapid HIV testing
- Care & treatment for HIV-infected clients

Other: ________________________________

Comments:

Policies and Procedures
- Updated protocols and guidelines about the following available and easily accessible to staff:
  - How to provide HIV education and risk reduction counseling to clients (as needed)
  - How to educate/counsel clients about the testing available
  - How to conduct the HIV test(s) being used
  - How to protect the client’s confidentiality
  - What the procedure for acquiring consent from the patient for the testing (each state has different requirements regarding written vs. informed consent)
  - Documentation of education, counseling and testing
  - How to make appropriate referrals, especially for HIV+ clients.
  - Reporting requirements (HIV is reportable in most states-check your state laws)
- How to keep all HIV-related forms updated
- Quality Assurance requirements
- Staff training requirements to conduct tests and disclose results
- Other: please specify ________________________________________________

☐ Clinic has identified process for reimbursement/funding for HIV testing.
☐ Laboratory has been notified of new testing changes (if applicable)
☐ Laboratory requirements for HIV testing identified. See your state Office of AIDS for more guidance
  - Rapid testing: Must apply for a CLIA Waiver with the State Laboratory Field Services

**Documentation and Administration**

☐ Procedures for specimen flow and quality assurance identified
☐ Current reimbursement options and procedures for HIV testing and other services are identified
☐ Offering of HIV counseling and/or testing and test results currently being documented in patient charts
☐ Identify current state laws addressing sharing of HIV test results. Identify how test results will be shared among staff (as needed)

**Cost of New Services**

☐ Anticipate what the costs of the new services will be and how you will pay for these
☐ How will your agency be reimbursed for new services?
☐ What other sources of funding might you have or need
☐ More HIV testing (e.g. adding rapid testing) may not necessarily mean more money for clinic
☐ Rapid testing: how will your revenues change with only one visit done in the clinic?
☐ What are the costs of each type of test? How can you order more tests (check in with other organizations to share costs) to lower the cost?
☐ How will the staff training costs be different with new services? Will staff need less training (e.g. some clinics do little or no counseling with rapid testing) or more training?
☐ How will your staff be trained? Do you have access to internal training or would you need to hire trainers from the community or local training centers?

**Clinic Flow**

☐ Observe your current clinic flow and assess best times to add HIV services
☐ Be flexible: Start with a plan about how/ when (before exam, after, etc.) and be flexible
☐ Try to be realistic about how much time added services will take for staff and build into flow
☐ Determine how many visits will be needed for testing (e.g. rapid is one but two with confirmatory)
- Decide when HIV services will be offered, (to everyone, to certain visit types, etc.).
- Identify which staff will be involved in offering new services including offering education or testing.
- Walk through the clinic and identify where and how each new piece will take place before starting.

**Staff Training and Other Issues**

- Identify any staff concerns or resistance to new HIV services.
- Identify one clinical and one non-clinical to be the Champions of new HIV services.
- Involve staff in the discussions and meetings as much as possible from the beginning.
- Identify barriers or challenges for individuals and agency to making changes and discuss what will make it easier/more efficient.
- Identify any state or funder requirements for staff training.
  - Train staff on coding/reimbursement guidelines, as needed.
  - Train staff on new services (education, counseling, testing, care and treatment) as needed.
- Determine whether cultural proficiency training is appropriate (potential for new clientele).
- Pilot the new service in a given time (e.g. Friday mornings) or with a particular visit type (annuals).
- Work out the kinks in the first few weeks and assess with staff what is working/not working.
- Give staff opportunity to give feedback on the proposed new services and after a couple weeks.
- Some staff issues will go away with training, others will not.
- Decide whether to cross train staff (preference) or keep HIV staff separate. Some training topics may include:
  - How to conduct the education, counseling, and testing of clients.
  - Phlebotomy, finger sticks, and other specimen collection.
  - How to give positive and reactive (rapid) test results.

**HIV Testing**

- Choosing which HIV test(s) to offer: Weigh the pros and cons of each HIV test considering the following:
  - Cost of each test.
  - Conventional and/or Rapid Testing.
  - Specificity/Sensitivity/Potential for False results.
  - Confidential and/or Anonymous.
  - Blood tests versus Oral Fluids.
  - Stability of test (e.g. can we move it once we run it or does it need to stay in one place).
• Rapid testing: How long does it take to run the test? How long to read the results
• Laboratory considerations (who runs the confirmatory testing, how long does it take)

☐ Before testing: agency will offer ☐ nothing ☐ education ☐ counseling ☐ informed consent information ☐ Other: Please explain:

__________________________________________________________________________

☐ Will the same staff do the education/counseling, explain and run test, and give the results?
☐ Discuss whether your agency will use an on-site or off site lab for testing/confirmatory testing
☐ For rapid testing: determine the State laboratory approval process for CLIA-waived tests

**Results and Referrals**

☐ Identify procedure and staff for giving negative and positive test results.
☐ For conventional testing, how to give results (e.g. 2nd appointment, no news is good news, phone, etc.)
☐ Ensure that procedures for delivering positive results include:
  • Ensure adequate time for discussion
  • Include knowledgeable personnel
  • Provide the patient with referrals to care
☐ Devise a system for those who do not return for results
☐ Create a log or system to follow up on clients testing positive
☐ Identify local health department contact for HIV reporting
☐ Identify support agencies to refer patients to (recovery, hotlines, mental health, etc.)
☐ Establish a relationship with an HIV specialist in the area to refer clients to
☐ Contact local referrals to confirm what services are offered, requirements, hours of operation, etc.
☐ Create a referral list for clients that includes all types of agencies that can provide support

**Client Considerations**

☐ How will clients find out about new HIV services, how will you advertise or market new services?
☐ What information and educational materials will you provide
☐ How will you keep HIV materials up to date?
☐ Identify materials that are culturally appropriate for client population
☐ Anticipate how the new services may attract a new client population (e.g. teens, men who have sex with men, etc.)
If new services attract a new population, determine whether there are special considerations related to the waiting room, creating a sense of safety, confidentiality, educational materials, etc. to consider.

**Implementation Ideas**

- Make sure that the appropriate people are invested in new changes
- Educate staff about CDC HIV Testing recommendations and purpose of new services
- Design a Pilot test or practice to begin the new services slowly before a full scale roll out
- Conduct staff meetings to check in about how the implementation is going (1 week later, 1 month later)
  - Clinician champion selected: ________________________________
  - Non-clinician champion selected: _____________________________
  - Vision of what agency wants is outlined and discussed

**Next Steps Planned**

1.

2.

3.

4.

5.