

# Getting Started: HIV Integration Checklist

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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 HI- infected clients
- Other: \_\_\_\_\_

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:*
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- 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. 2<sup>nd</sup> 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.