PATIENT MANAGEMENT CHECKLIST

Sr. No.	Checklist Points	Tick
1.	Add the district and TU staff details to the dashboard using the district logins.	☐
2.	Ensure that TU is always allocated once the patient is registered.	☐
3.	Link Some or All patients to the TU staff so that SMS alerts go to the staff who is responsible for follow up of the patient.	☐
4.	Configure SMS alert frequency for staff. Multiple options are available. Refer to the SMS Guidelines document on the Training Page.	☐
5.	If the patient phone number changes, update it from the Details page of the patient. The dashboard turns green only if the call is made from the registered number. They will hear thank you even if they use an unregistered number, but the dashboard won't turn green.	☐
6.	Add relevant notes and tags for any patient information. For example, patient has stopped medication on advice, or there is some adverse reaction, or medicines not available. There are ready to use tags available in the patient page. You can also add free notes which can be seen by any staff viewing the patient page. This can be used as a platform to share patient information between ART and RNTCP staff.	☐
7.	Always keep a check for End Date Passed patients from current patient list. Once End Date is passed close the case with treatment outcomes.	☐
8.	For genuine cases, where patient is unable to make the toll-free call or does not have access to phone at all, you can mark manual doses. The dashboard will turn to light green for such markings.	☐
9.	If the patient is getting transferred to some other district no need to close or delete the patient. Just update the Treatment Center from the patient page.	☐
10.	Use the mobile app to show the patient adherence calendar during follow up and home visits.	☐