

# Components of TB Patient Assessment

Debbie Davila, MSN, RN January 15, 2025

Introduction to TB Nurse Case Management Online Wednesdays, January 15 – February 5, 2025 Online from San Antonio, Texas

## Debbie Davila, MSN, RN has the following disclosures to make:



 No relevant financial relationships with any commercial companies pertaining to this educational activity



# Components of TB Patient Assessment

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Introduction to TB Nurse Case Management Online Course January 15 – February 7, 2025

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No conflict of interests

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### **Objectives**

- Identify components of TB Patient Assessment
  - Medical History
  - •TB History
  - •TB signs and symptoms
  - Co-morbidities



#### Purpose of the Nurse Assessment

- Identifies the needs, preferences, and abilities of a patient
- Includes an interview with and observation of a patient and considers the symptoms and signs of the condition, the patient's verbal and nonverbal communication, the patient's medical and social history, and any other information available
- Provides the scientific basis for a complete nursing care plan

http://medical-dictionary.thefreedictionary.com/nursing+assessment





#### **Nurse Assessment**

- Done Initially
- Updated and ongoingPhysically view patientAppearance (i.e., thin, frail)
  - Assess symptoms
    - Clinically improving or worsening
      Manage side effects/toxicities
      Prevent adverse reactions
- Intervene rapidly
- Address issues immediately





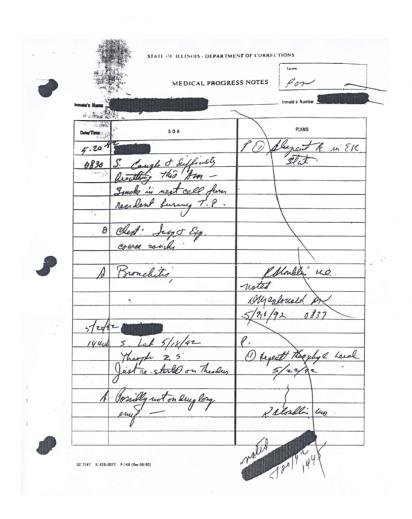


#### **Assessment**

#### Gather Data

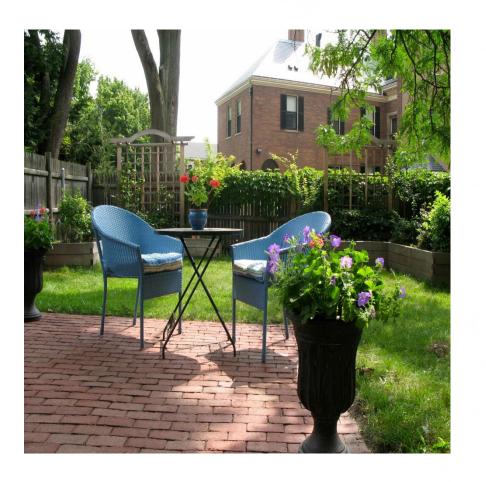
- Collect medical history from all medical providers to determine onset of symptoms
  - Hospital
    - H&P, admission notes, discharge summaries, microbiology results, lab reports, radiology reports
  - Health Dept. records
    - Prior screenings
    - Prior CXR
    - Treatment of LTBI or TB disease
  - PCP notes
    - Prior c/o TB symptoms
      - Allergies
      - Cough





### **Confidentiality & Privacy**

- Maintain confidentiality & privacy
- Ensure that the patient is comfortable
- If done at the clinic or home
  - Can do assessment outdoors
    - Do not have to use mask
- Build rapport





### **Building Rapport**

 Obtaining essential information to develop a treatment plan specific to that patient

- Medical
- Social
- Do Not Interrogate
- Do Not use judgmental tone



If the patient feels interrogated or judged, the patient is likely to be closed and unresponsive to questions and may disregard advice and instructions

Keep an Open Mind!!!



#### **Nurse Assessment**

#### Texas Department of State Health Services Tuberculosis Initial Health Risk Assessment/History



						Т
SSN	Medicaid#	0	ОВ	Sex	Phone 1	
						Т
Last	F	irst		Middle	Phone 2	_
						Т
Street Address		City		County	State Zip	
		ATS Clas	sification			
	B exposure, not infected		3-M. TB di	sease, clinically a	active	_
1-M. TB ex	sposure, no evidence of infe	ection	4-Previous	M. TB disease,	not clinically active	
2-M. TB in	fection, no TB disease		5-M. TB su	ispect, diagnosis	pending	
		Initial As	sessment			
Primary reaso	on evaluated for TB: Con	tact investigation	Immigration	medical exam	Health care worker	_
Employme	ent/administrative testing	Targeted testing	TB sympton	ns 🔲 Abnormal	chest radiograph	
	th TB) Incidental lab res					
Date of asses		Assessment cond				
	e assessment: Clinic C		Hospital   Ja	ail/prison		
Long term	care facility Other, spec	ify other:				_
						_
	Pedi	iatric TB Patier				
	th for primary guardian(s):			guardian relation	ship:	
	outside US for >2 months:		Countries:			
YesNo	0 Unknown					_
						_
			raphics			
Country of bir	th:			abroad to a pare	ent who was a U.S. citizen)	Ċ
		Yes	□ No			_
Date of arrival						_
	merican Indian or Alaskan N				anic or Not Latino	
	Black or African American		Unknown 🔲 F	kefused		
	Native Hawaiian or Pacific I Unknown 🔲 Refuse		teta Francisco I	Two The		_
			idle Eastern:			
Extended race	e(s):	II y	es, specify cou	ntry(les):		_
						_
		Foreign Bir				
Immigration status at first entry to the US: Not applicable Immigrant visa Student visa Employment visa						
☐ Tourist visa ☐ Family/flancé visa ☐ Refugee ☐ Asylee or parolee ☐ Other immigration status ☐ Unknown						
Specify other:						
Notice of arrival of alien with TB class: A B1 B2 B3 Alien number:						
Binational status: Contacts Laboratory/radiologic testing Counter Border Crosser or Transnational  Not Counted Border Crosser Counted by Binational Program Only/Binacional						
Residence or travel in country with high prevalence of TB in last 2 years: Country:						
Yes No		revalence of 15 in	last 2 years.	Country:		
Date of travel		Δ.	onrovimate lene	th of stay/reside	noa:	_
	eled for 8 consecutive hour				ht Bus Train	_
symptomatic?			Ship/boat	orazion riigi		
	9		pecity:			
Yes No	0	3	ecify:			
Yes No	0	18	pecity:			
Yes No	0	15	pecify:			





#### **Demographics**

Get as much information as you can about where patient can be located

- How long at this address
- Previous address
- Alternate address
- Get emergency contact information
  - Who can be contacted to locate patient
    - Unable to locate
    - In case patient moves



SSN	Medicaid#	DOB		Sex	Phone 1	
Last	F	irst	Middle		Phone 2	
Street Address		City	County	State	Zip	



Other Unknown Refuse
Extended race(s):
 Immigration status at first entry to
☐ Tourist visa ☐ Family/fiancé v
Specify other:
Notice of arrival of alien with TB c
Binational status:  Contacts
■ Not Counted Border Crosser
Residence or travel in country with
☐ Yes ☐ No

Demographics				
	in the US (or born abroad to a parent who was a U.S. citizen):			
	es No			
Date of arrival in the US:				
Races: American Indian or Alaskan Native	Ethnicity: Hispanic Not Hispanic or Not Latino			
Asian Black or African American	☐ Unknown ☐ Refused			
White				
Other Unknown Refuse	Middle Eastern: Yes No			
Extended race(s):	If yes, specify country(ies):			
Foreign E	Birth or Travel			
Immigration status at first entry to the US: Not applicable Immigrant visa Student visa Employment visa Tourist visa Family/fiancé visa Refugee Asylee or parolee Other immigration status Unknown				
Specify other:				
Notice of arrival of alien with TB class:   A B1 B2 B3 Alien number:				
	testing Counter Border Crosser or Transnational			
☐ Not Counted Border Crosser ☐ Counted by Bination	al Program Only/Binacional			
Residence or travel in country with high prevalence of TB in last 2 years: Country:				
Yes No				
Date of travel:	Approximate length of stay/residence:			
Have you traveled for 8 consecutive hours while	Method of transportation:  Flight Bus Train			
symptomatic?	☐ Ship/boat			
Yes No	Specify:			
Comments:				



Medical History				
Date medical history collected:				
Allergies: Yes No	Comments:			
Arthritis/gout: Yes No	Comments:			
Use of Remicade Humira Enbrel				
Autoimmune: Yes No	Comments:			
Cancer: Head Neck Other  Specify other:	Comments:			
Chronic malabsorption syndrome: Yes No	Comments			
Chronic renal failure: Yes No	Comments:			
	Comments:			
Corticosteroids (received equivalent of >15 mg/d Prednisone for >1 month):	Comments:			
Diabetes mellitus: Yes No	Comments:			
Type 1 Type 2  Diabetes controlled: Yes No Unknown	Comments:			
Controlled through: Pills Insulin Unknown	Comments:			
Gl/gastrectomy or jejunoileal bypass: Yes No	Comments:			
Gynecological: Yes No	Comments:			
Heart disease/PVD: Yes No	Comments:			
Hypertension/CVA: Yes No				
	Comments:			
Intellectual disability/developmental delay: Yes No Leukemia: Yes No	Comments:			
	Comments:			
Liver disease/hepatitis (risk factors HepB/C: IDU, HIV+ or birth in Asia, Africa or Amazon basin): Yes No	Comments:			
Lymphoma: Yes No	Comments:			
Mental illness(es): Yes No Anxiety Depression Schizophrenia Other Unknown	Comments:			
Specify other:				
When (select all that apply):				
☐ Currently ☐ Within past 12 months ☐ Ever				
Neurological/seizures: Yes No	Comments:			
Organ transplant: Yes No	Comments:			
Post partum: Yes No	Comments:			
Respiratory problems: Yes No	Comments:			
Silicosis/asbestosis: Yes No	Comments:			
Skin disease: Yes No	Comments:			
STD: Yes No	Comments:			
Surgeries/hospitalizations: Yes No	Comments:			
Thyroid: Yes No	Comments:			
Vision/hearing disorder: Yes No	Comments:			
Other medical history: Yes No	Comments:			

#### **Medication List**

- Assessment should also collect information about all medications your patient is taking
  - Collect information about both prescribed and over the counter medications
  - Start date
  - Dose
  - Schedule
  - Prescribing physician
  - Update as needed





Medications taking (excluding TB drugs)				
Medication	Start date	Dosage/schedule	Stop date	Prescribing Provider/Facility
(Attach additional medication list, if needed)				
Name of person taking history:				
Name of interpreter (if used):				
Barriers to compliance: Yes No Comments:				
Live virus immunization in last 6 weeks:  Yes No Date:				
Immunizations received: FluMist (influenza) MMR (measles, mumps, rubella) MMRV (measles, mumps,				
rubella, varicella) 🔲 Rotavirus 🔲 Herpes zoster (shingles) 🔲 Smallpox 🔲 Varicella 🔃 Yellow fever				

### **TB History**

- May have to contact local health department in city/county that patient lives in
  - May have previously been screened as a contact to a case
    - Contact to an MDR case
  - Determine if patient previously treated for LTBI or TB disease
  - How long ?
    - 6, 9, 12, 18, 24 months
  - What drugs?
  - Supporting Documentation

Last First	Middle DOB			
Previous Histor	y of TB and TB Infection			
Recurrence or previous diagnosis of TB or TB infection: TB Disease TB Infection No Unknown				
History: Documented Self report	Previous TB occurred in US: Yes No			
State/Country: State	e case number (if reported in Texas after 1993):			
Most recent year of previous diagnosis:	More than one previous episode:   Yes   No   Unk			
Start date previous TB treatment:	Start date previous TB infection treatment:			
Stop date previous TB treatment:	Stop date previous TB infection treatment:			
Previous TB drug regimen/Dosage (mg):	Previous TB infection drug regimen/Dosage (mg):			
Previous TB treatment documented:  Yes No Unknown	Previous TB infection treatment documented:  Yes No Unknown			
Previous TB treatment considered complete:  Yes No Unknown	Previous TB infection treatment considered complete:  Yes No Unknown			
Previous positive IGRA: Yes No QFT	Date of chest X-Ray:			
T-SPOT Date:	Result: Abnormal Normal Unknown			
Previous positive TST: Yes No Induration: mm Date:	Abnormal result: Cavitary Non-cavitary			
Comments:				
History of TB Exposure				
Known exposure to active TB case: Yes No How many years: Greater than 3 years 3 years or less				
Date: Relationship to patient:				
Comments:				



### Radiology

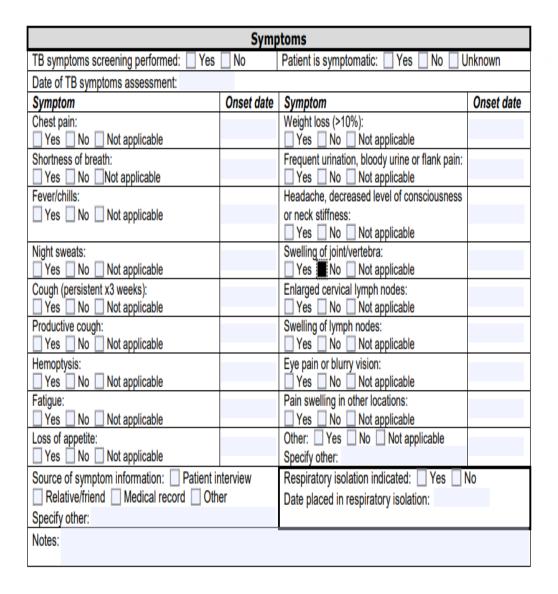
- Gather all radiology reports
  - X-rays, CT-Scans, Pet Scans, MRI's
- Reports show cavities? Infiltrates? Scarring?
- Films for comparison?







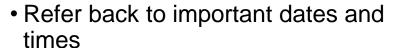
#### **TB Symptoms**





#### **Gathering Information**

- Gather chronological history of presenting signs and symptoms
  - Most patients will have difficulty remembering when symptoms began



 Christmas, Thanksgiving, Birthday, Birth of a Baby

These cues may prompt patient memory and give us more accurate dates as when symptoms began

> Important in determining infectious period and conducting contact investigations









### **Social History**



Yes   No   Unknown	Risk and Social History				
Yes   No   Unknown					
Contact to MDR-TB case (2 years or less):  Yes No Unknown Inner-city resident:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  Yes No Unknown If patient has diabetes, was nutrition education provided:  If patient has diabetes, was nutrition education provided.  In patient diabetes (very consistent with manufacture or has diable active TB, no Unknown  If patient patient education provided addi	Contact to infectious TB patient (2 years or less):	Cancer: Head Lung Neck			
Yes					
Inner-city resident:		Chronic renal failure or on hemodialysis:			
Yes					
History of homelessness (current or previous):	Inner-city resident: Yes No Unknown				
Yes   No   Unknown   Including fibrotic changes on X-Ray consistent with previous TB:   Yes   No   Unknown   Immunosuppression (not HIV/AIDS):   Yes   No   Unknown   Yes   Yes   No   Unknown   Yes	Low income: Yes No Unknown	End-stage renal disease: Yes No Unknown			
previous TB:	History of homelessness (current or previous):	History of untreated or inadequately treated active TB,			
Yes   No   Unknown	Yes No Unknown				
Incomplete TB infection therapy:	Current resident of homeless shelter:	Immunosuppression (not HIV/AIDS):			
Yes					
Missed contact (2 years or less):   Yes	Homeless within past year:	Incomplete TB infection therapy:			
Yes		Yes No Unknown			
Juvenile correctional facility:	History of incarceration (current or previous):	Missed contact (2 years or less):			
Juvenile correctional facility					
Skin test conversion - increase of 10mm or more within 2 years:					
Unknown   Specify other:   Sthe detainee in ICE custody?   Yes   No   TNF-alpha antagonist therapy:   Yes   No   Unknown   Yes   No   Unknown   Yes   No   Unknown   Yes   No   Unknown   Specify other:   Testing required by employer or school program:   Yes   No   Unknown   Yes   Yes   No   Unknown   Yes   Yes   No   Unknown   Yes   Yes   No   Yes   Yes   No   Unknown   Yes   Yes   Yes   No   Yes   Yes   Yes   No   Unknown   Yes   Yes   Yes   Yes   No   Yes   Yes   Yes   No   Yes   Yes   Yes   Yes   Yes   No   Yes   Yes   Yes   Yes   Yes   Yes   Yes   No   Yes		1			
Specify other:					
Incarceration date at diagnosis:    Current resident of long-term care facility:   Yes   No   Unknown     Yes   No   Unknown     Ves   Ves		years: Yes No Unknown			
Under custody of immigration and customs enforcement:    Yes	, ,				
Under custody of immigration and customs enforcement:    Yes	Is the detainee in ICE custody?  Yes  No				
Yes					
Incarceration date at diagnosis:    Testing required by employer or school program:   Yes		Other medical risks: Yes No Unknown			
Yes					
Yes	Incarceration date at diagnosis:	Yes No			
Resident of other congregate setting at diagnosis:  Colonia Displaced citizen School dorm Unaccompanied alien child/minor (UAC) Homeless Shelter Other  Specify other:  Employee of high risk congregate setting or institution: Yes No Unknown  Primary occupation in the past year: Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  Reason not seeking employment: Child Disabled  Other illicit drug Specify other: Patient was provided additional resources: Yes No Non-injecting drug use within past year: Methamphetamines Other illicit drug Specify other: Patient was provided additional resources: Yes No Packs per day: Years of use: Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No	Current resident of long-term care facility:				
Colonia Displaced citizen School dorm Unaccompanied alien child/minor (UAC) Homeless Shelter Other  Specify other: Employee of high risk congregate setting or institution: Yes No Unknown  Primary occupation in the past year: Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  Patient was provided additional resources: Yes No Non-injecting drug use within past year: Methamphetamines Other illicit drug Specify other: Patient was provided additional resources: Yes No Packs per day: Years of use: Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No Reason not seeking employment: Child Disabled	Yes No Unknown	☐ No ☐ Injected drugs ☐ Cocaine ☐ Heroin			
Unaccompanied alien child/minor (UAC) Homeless Shelter Other  Specify other:  Employee of high risk congregate setting or institution: Yes No Unknown  Primary occupation in the past year: Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  Non-injecting drug use within past year: Methamphetamines Other illicit drug Specify other: Patient was provided additional resources: Yes No Packs per day: Years of use: Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No	Resident of other congregate setting at diagnosis:				
Homeless Shelter Other  Specify other:  Employee of high risk congregate setting or institution:  Yes No Unknown  Primary occupation in the past year:  Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee Health care worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  No Marijuana Cocaine Heroin Crack Methamphetamines Other illicit drug  Specify other:  Patient was provided additional resources: Yes No Packs per day: Years of use: Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No					
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Employee of high risk congregate setting or institution:  Yes No Unknown  Primary occupation in the past year: Correctional facility employee Health care worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  Specify other:  Specify other: Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No					
Patient was provided additional resources: Yes No  Primary occupation in the past year: Correctional facility employee Health care worker Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other: Correctional facility employee type: Inmate Volunteer  Patient was provided additional resources: Yes No Packs per day: Years of use: Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  0-4 days 5 days or more Unknown Patient was provided additional resources: Yes No	Specify other:				
Primary occupation in the past year:  Correctional facility employee Health care worker Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  Tobacco use: Yes No Packs per day: Years of use: Patient was provided additional resources: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No					
Correctional facility employee  Health care worker  Migrant/seasonal worker  Not seeking employment  Patient was provided additional resources: Yes No  Alcohol use: Yes No  Unknown  In the last 30 days, how many days did the patient consume more than 4 drinks?  Correctional facility employee type:  0-4 days 5 days or more Unknown  Patient was provided additional resources: Yes No	Yes No Unknown	Patient was provided additional resources:   Yes   No			
Correctional facility employee  Health care worker  Migrant/seasonal worker  Not seeking employment  Patient was provided additional resources: Yes No  Alcohol use: Yes No  Unknown  In the last 30 days, how many days did the patient consume more than 4 drinks?  Correctional facility employee type:  0-4 days 5 days or more Unknown  Patient was provided additional resources: Yes No	Primary occupation in the past year:	Tobacco use: Yes No			
Migrant/seasonal worker Not seeking employment Retired Unemployed Other Unknown  Specify other:  Correctional facility employee type: Inmate Volunteer  Patient was provided additional resources: Yes No Alcohol use: Yes No Unknown In the last 30 days, how many days did the patient consume more than 4 drinks?  0-4 days 5 days or more Unknown Patient was provided additional resources: Yes No		Packs per day: Years of use:			
Specify other:  In the last 30 days, how many days did the patient consume more than 4 drinks?  Correctional facility employee type:  Inmate Volunteer  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No					
Specify other:  In the last 30 days, how many days did the patient consume more than 4 drinks?  Correctional facility employee type:  Inmate Volunteer  O-4 days 5 days or more Unknown Patient was provided additional resources: Yes No	Retired Unemployed Other Unknown				
Correctional facility employee type:  Inmate Volunteer    Consume more than 4 drinks?	Specify other:				
□ Inmate □ Volunteer □ Volunt	' '				
Inmate Volunteer Patient was provided additional resources: Yes No Reason not seeking employment: Child Disabled		0-4 days 5 days or more Unknown			
	☐ Inmate ☐ Volunteer				
	Reason not seeking employment: Child Disabled				
HOHIGHIAKEL HISULUUOHAIIZEU SUUGENIL	☐ Homemaker ☐ Institutionalized ☐ Student				

#### Summary

- The TB Case Manager should conduct a face-to-face interview with the patient in efforts to develop a plan of care
- Assessment is ongoing and dynamic and should be continuous throughout the course of the patient's treatment
- The purpose for assessment to development of a treatment plan with a goal for successful completion of treatment





It's time

to invest in nurses and healthcare workers

Nurses
and health
workers play a
critical role in
tuberculosis
prevention and
care. Enabling
them to work
to their full
potential
improves
healthcare
for all.





