

## STEP 12: DEVELOP CLINICAL PROTOCOLS

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Your clinical protocols will outline the standards, steps, mechanisms, timelines, and accountabilities for the medical and clinical activities undertaken by your program, including:

- Targeted TB testing
- Medical evaluations to follow up positive tests and assess LTBI patients
- Medication regimens for DOT
- Distribution of medication doses
- Patient management
- Nonadherence or interruptions to treatment

If your jurisdiction does not already have such protocols in place, template forms and sample protocols provided in this Toolbox can be modified to suit your situation. For more detailed information, refer to [Background Guide 2](#).

### ACTIVITY 12-A

Review available models for clinical procedures.

As examples, the Tools section of the Toolbox contains a full set of protocols from one LTBI treatment program, [NYC DOHMH Protocols for LTBI](#) (Source: New York City Department of Health and Mental Hygiene), and select examples from another, [SF Treatment Protocol](#), [SF Missed Dose Flowchart](#), [SF Nonadherence Protocol](#), [SF Missed Appointments Protocol](#), and [SF Interruption Protocol](#) (Source: San Francisco Department of Public Health, Tuberculosis Control Program).

In addition, the Tools section includes a set of related guidelines: [ATS/CDC Statement: Targeted Testing and Treatment of LTBI](#) (Source: American Thoracic Society and Centers for Disease Control and Prevention).

To locate additional guidelines or to check for updates, see the CDC under the “Internet Resources” section of the [Resource Guide](#) in the Tools section.

#### ACTIVITY 12-B

Determine what modifications are needed to adapt the models to your program’s situation and locality.

Two templates for working with nonadherent clients, [Notification: Missed Appointment](#) and [Patient Tracking Log](#), are included in the Tools section.

#### ACTIVITY 12-C

Develop and document the specific clinical protocols that your program will use.

#### ACTIVITY 12-D

Distribute the completed protocols to appropriate providers and staff members and provide training as necessary.