nikshay

Version-2.0

सत्यमेव जयते

Ministry of Health and Family Welfare
Government of India

DOTS
Pura course Pakka ilaaj

Agenda

- Salient features of Nikshay 2
- Patient Management
- Patient Search
- Direct Benefit Transfer
- Referral and Transfer
- Task Lists *(under progress)*
- Reports (Notification Register)
- Admin Module
- Technical support /Help desk

Updated on 12-02-2019

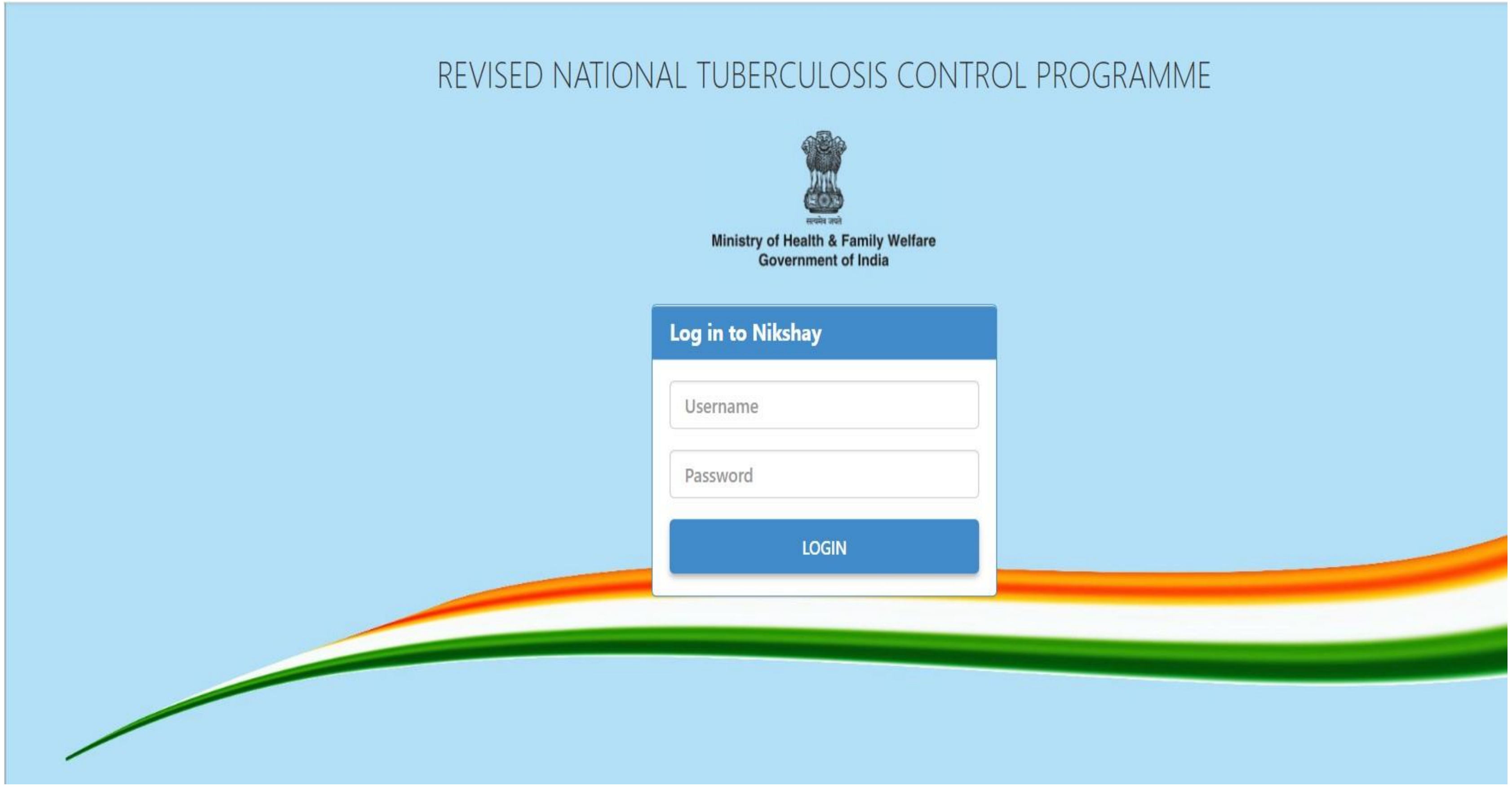
Salient Features of Nikshay 2.0

Nikshay is an Integrated ICT system for TB patient management and care in India. Consolidating various improvements since 2012, Version 2 makes the following upgrades:

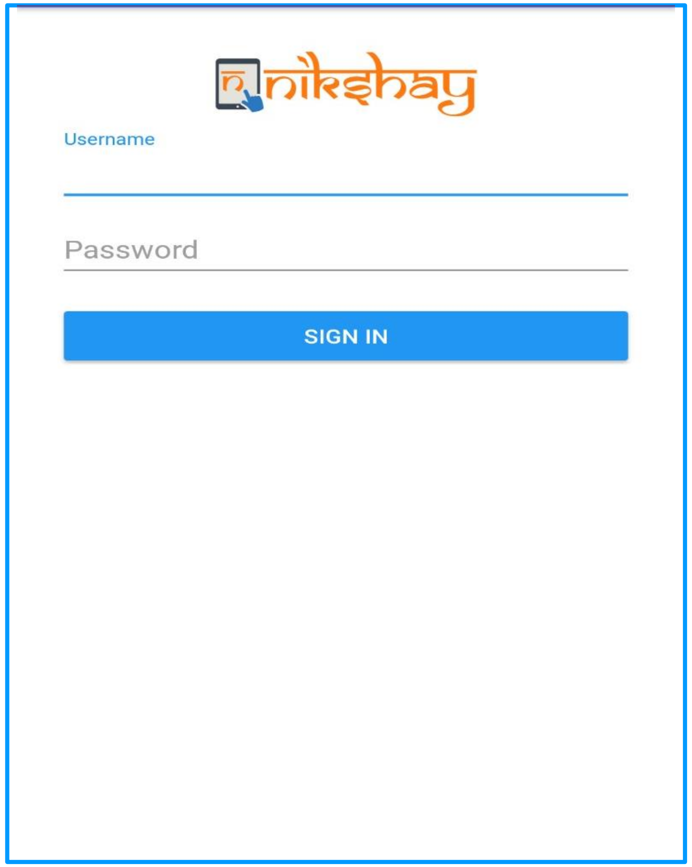
1. Unified interface for public and private sector health care providers
2. Integrates all adherence technologies such as 99DOTS and MERM
3. Unified DSTB and DRTB data entry forms
4. PHI level users
5. Mobile friendly website with mobile app

How to access Nikshay

Nikshay 2 is accessible either via web browser (https://Nikshay.in) or mobile App that can be downloaded from Google Play Store



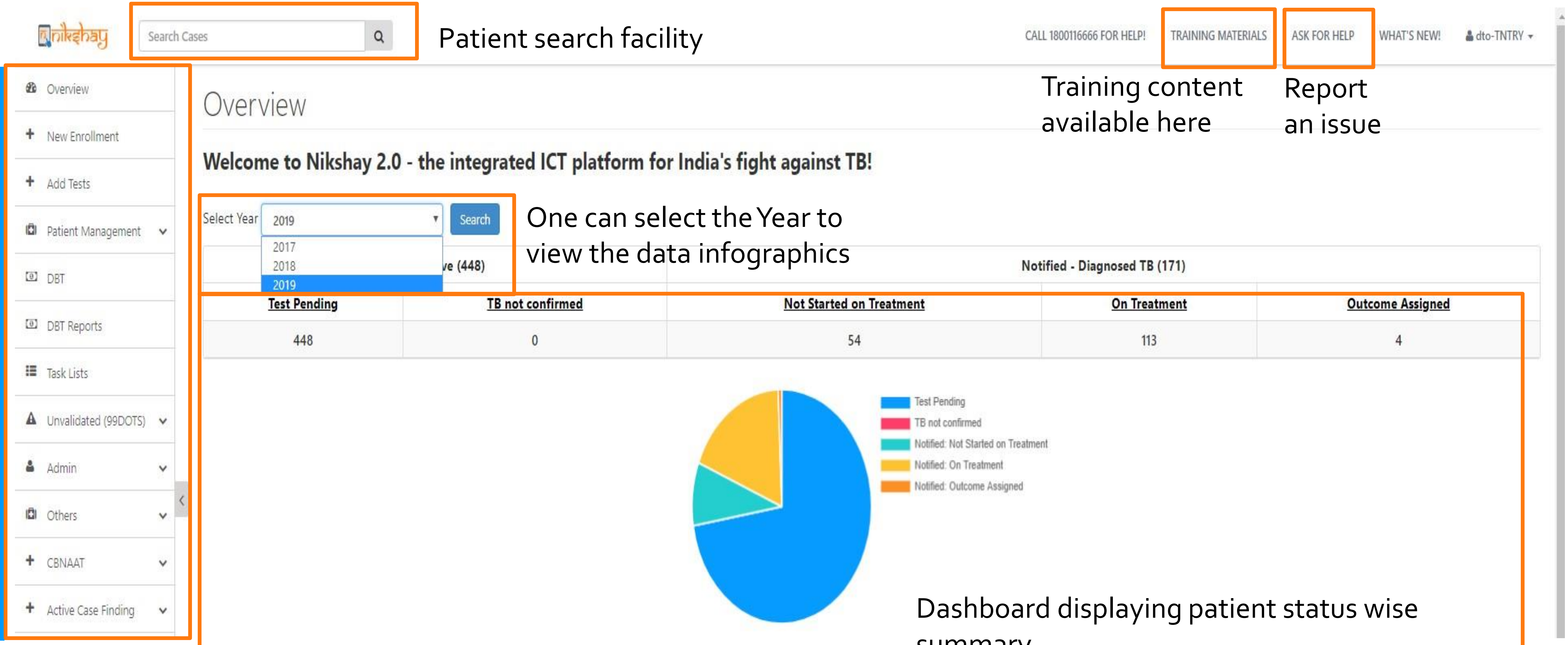
(log in page in web browser)



(log in page in mobile App)

The Home page

The Home page is loaded with many features to enable easier access and use



Patient search facility

Training content available here

Report an issue

One can select the Year to view the data infographics

Dashboard displaying patient status wise summary

Quick access Tool bar

Overview of Patient Management Workflow

	1	2	3	4	5	6	6
Activity	Identify a Presumptive or Confirmed case <One time>	Diagnosis <One time>	Treatment initiation <One time>	Adherence Monitoring <Continuous>	Follow up tests <Multiple>	Update Patient details <As required>	Declare Outcome One time
Module to be used	New Enrolment	Test	•Treatment •Prescription •Contact Tracing •Comorbidity •Health Facilities •Engagement •Staff	Adherence	Test	•Delete Patient •Treatment •Prescription •Health Facilities •Engagement •Staff •Notes	Close case
User	PHI	DMC or CBNAAT or C&DST Lab	PHI	PHI	PHI	PHI	PHI

Auto calculation of patient status during patient lifecycle

Patient treatment life cycle

Step	Action	Status
Step 1	New Enrollment	**Presumptive (Test Pending)**
Step 2a	Negative diagnostic test result	**TB Not Diagnosed**
Step 2b	Positive diagnostic test result	**Diagnosed (Notified) but pending Treatment**
Step 3	Treatment Initiation	**On Treatment**
Step 4	Outcome Assigned	**Outcome Assigned**

New Enrolment

- This module enables registration of ALL kinds of new cases
  - **Presumptive** Case or Confirmed **Patient**
  - Taking treatment from **Public** or **Private** Sector
  - **DS** TB and **DR** TB
- On enrolment, a unique 7 digit numeric Patient ID gets generated.
- Before enrolment of a new case, users should search (by Patient Name) to see if the patient is already registered, to avoid duplicates registrations

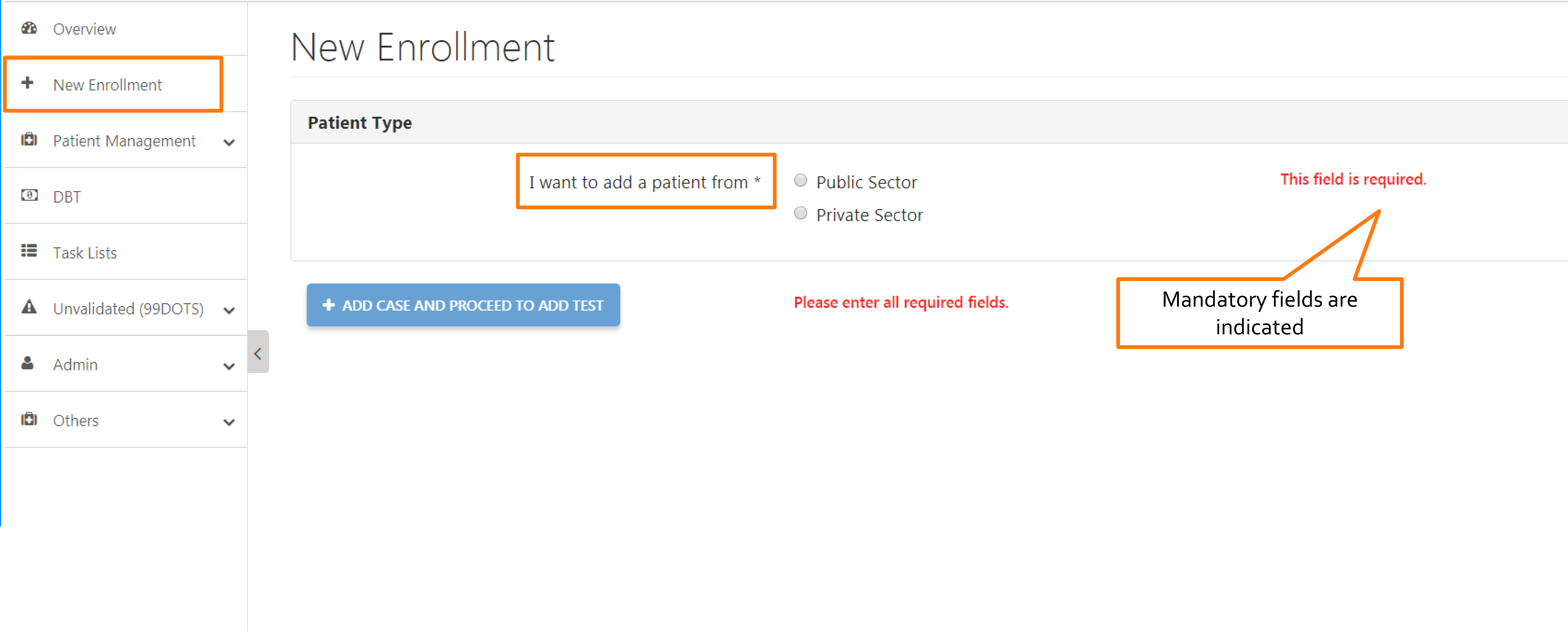
New Enrolment

Step 1

Click on New Enrolment

Step 2

Select Patient Type

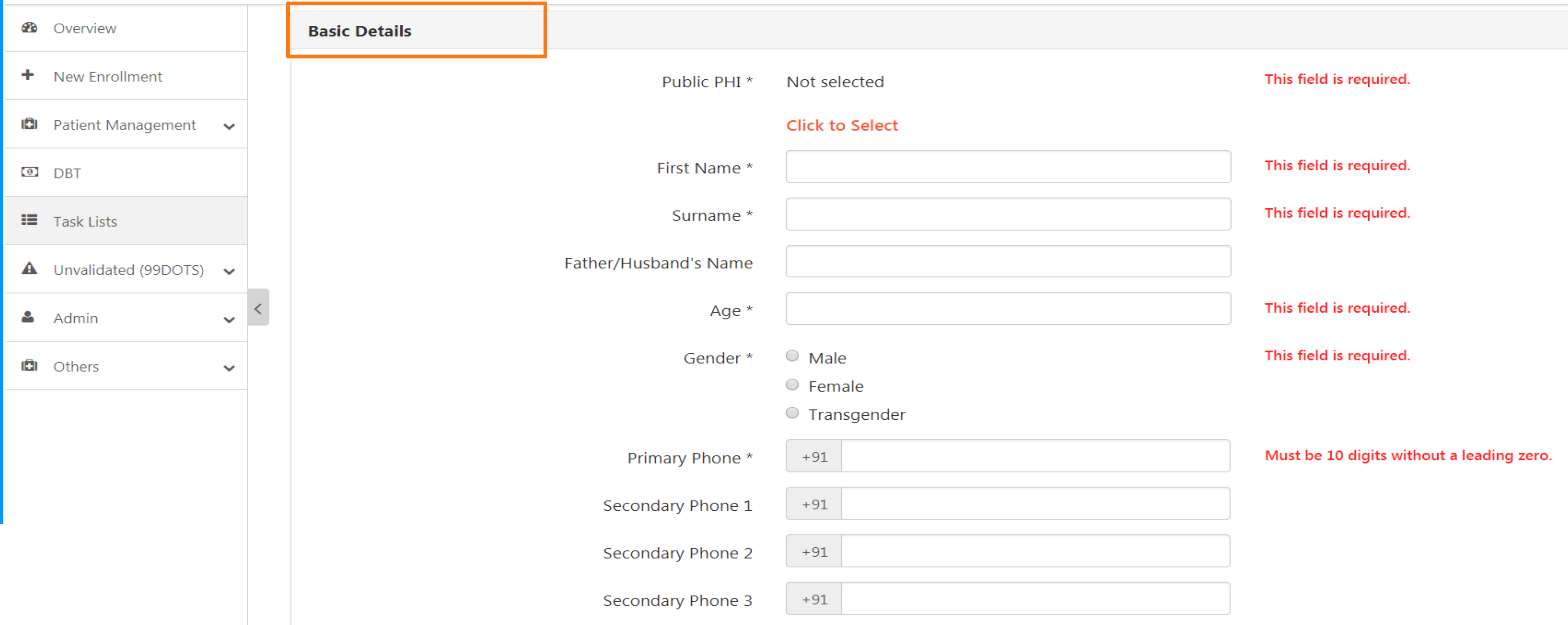


New Enrolment

Step 1
Click on New Enrolment

Step 2
Select Patient Type

Step 3
Enter Basic Details



New Enrolment

Step 1	Step 2	Step 3	Step 4
Click on New Enrolment	Select Patient Type	Enter Basic Details	Enter Residence Details

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Residence Details

Address * — This field is required.

Ward/Village

Taluka/Block

Landmark

State * — Gujarat

District * — Ahmadabad MC

TU — Shahpur

Pincode * — Must be 6 digits.

New Enrolment

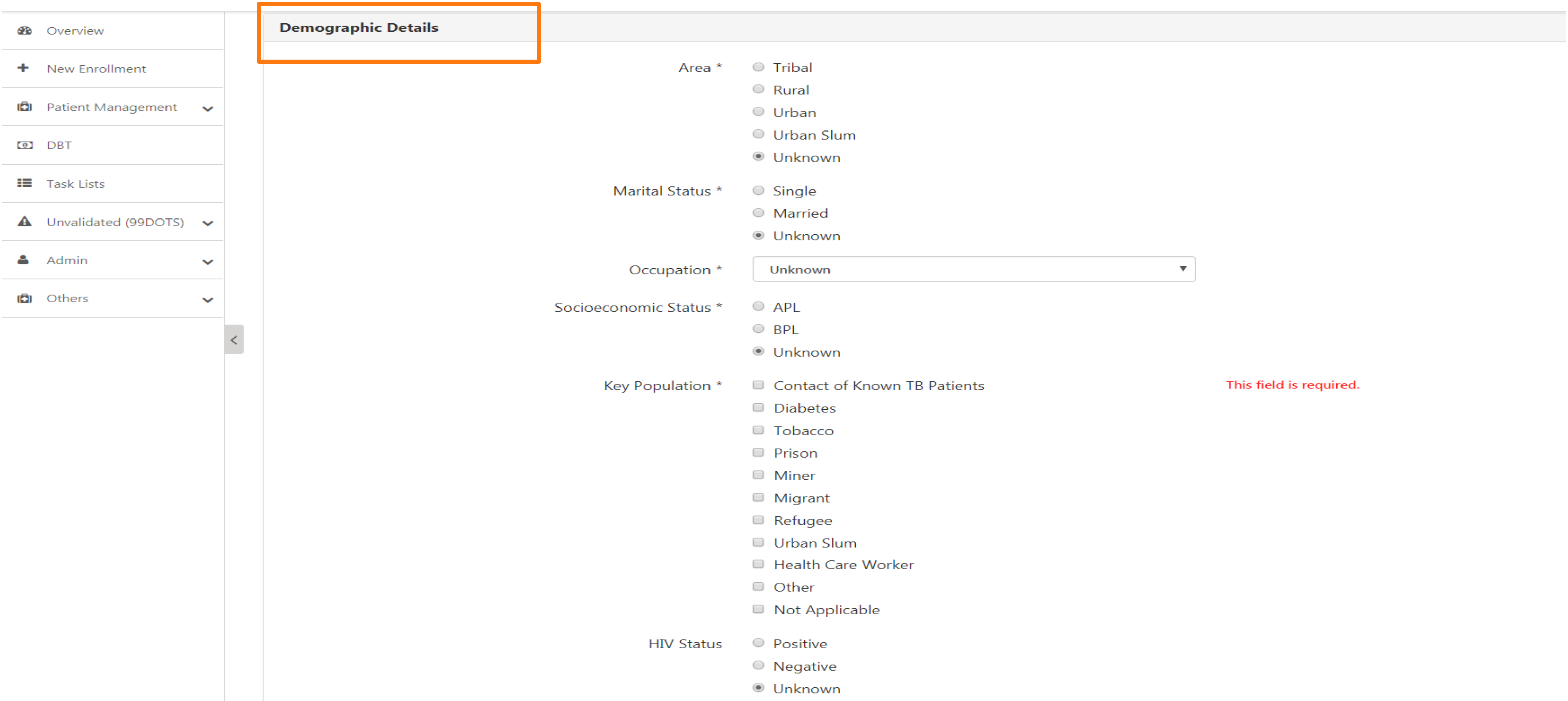
Step 1 – Click on New Enrolment

Step 2 – Select Patient Type

Step 3 – Enter Basic Details

Step 4 – Enter Residence Details

Step 5 – Enter Demographic Details



New Enrolment

Step 1 — Click on New Enrolment

Step 2 — Select Patient Type

Step 3 — Enter Basic Details

Step 4 — Enter Residence Details

Step 5 — Enter Demographic Details

Step 6 — Enter emergency contact person details

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Emergency Contact Person Details

Emergency Contact Person Name

Emergency Contact Person Phone +91

Emergency Contact Person Address

+ ADD CASE AND PROCEED TO ADD TEST

Please enter all required fields.

Click here to complete enrolment

Patient added with Id - 4370013. Click to add Tests.

- Patient will be assigned status: **Presumptive (Open)**
- Note the ID generated for the case
- Tests can be added from the link provided

Search and view patient details

- After enrolment, Patient records can be searched by **Name** or **Patient ID**
- Users can search presumptive cases and Patient records, registered by **both public and private sector** registered **under their** PHI or TU or District
- Nikshay also enables search if **Patient ID is not available** or if the record is not searchable by Name (due to spelling mismatch); via the **Patient Management** Module.
- In the Patient Management Module, patient lists are provided which enables **drill down** to PHI level and manually select the patient's record.
- For simplicity, patients are divided into lists and sub-lists based on treatment status
  1) Presumptive, **2) Diagnosed TB (Notified**) and, **3) Transfers**
- Note: Presently users **cannot** search for records **not enrolled by them** or are **not under treatment** with them. This Global search facility will be made available shortly.

Search and view patient lists

Search Cases

To search by Name or Patient ID

TRAINING MATERIALS ASK FOR HELP tbu-

- Overview
- New Enrollment
- Patient Management

To view Patient lists, click on the Patient Management link

PRESUMPTIVE

- Test Pending
- TB not confirmed

DIAGNOSED TB (NOTIFIED)

- Treatment Not Started
- On Treatment List
- On Treatment Calendar
- Outcome Assigned

TRANSFERS

- Transfer In
- Transfer Out

- Test Pending..................(*Presumptive cases enrolled but test results not updated*)
- TB not confirmed...........(*Presumptive cases enrolled with negative test results*)

- Treatment Not Started...(*Confirmed TB cases enrolled, diagnosed but not initiated on treatment*)
- On Treatment List...........(*Confirmed TB cases currently seeking treatment*)
- On Treatment Calendar...(*Confirmed TB cases for whom adherence has been recorded*)
- Outcome Assigned......... (*List of Confirmed TB cases for which outcome has been assigned*)

- Transfer In.....................(*Confirmed TB Cases referred/ transferred **into** the facility of the user*)
- Transfer Out..................(*Confirmed TB cases referred/ transferred **out** from the facility of the user*

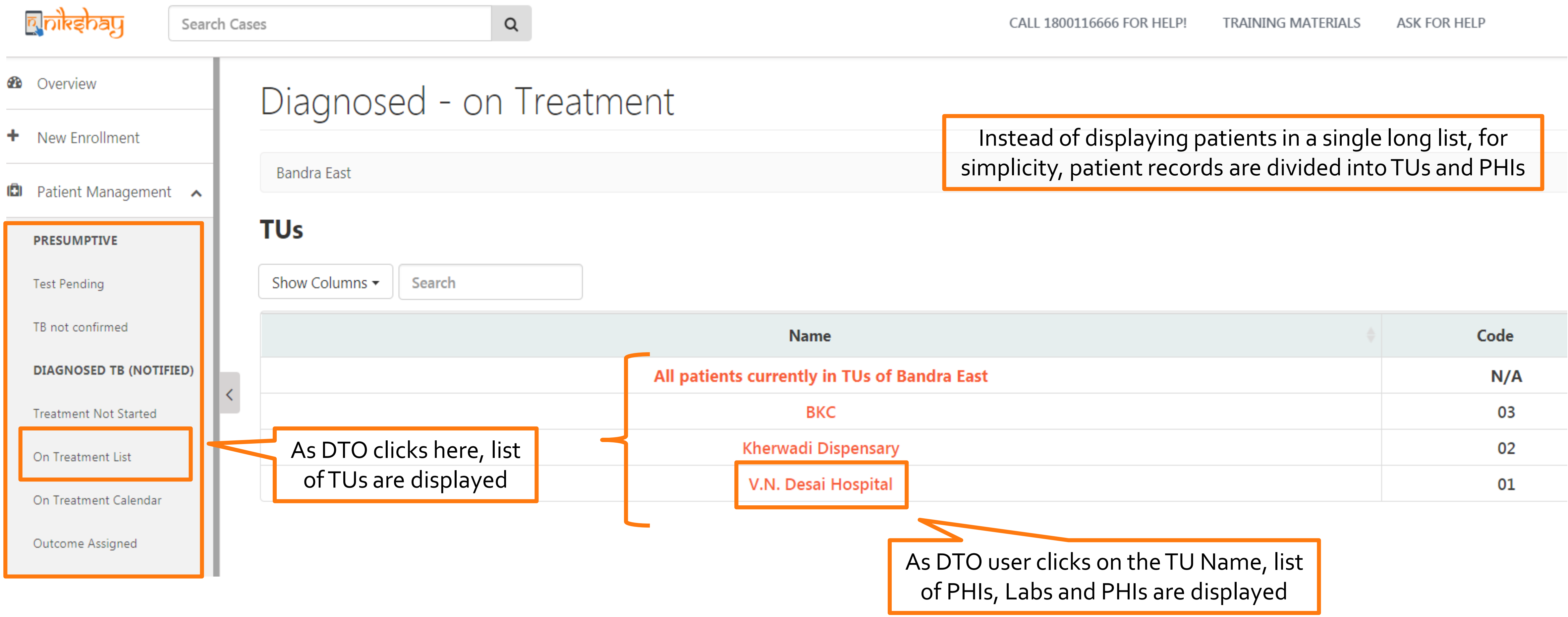
Drill down to patient record from Patient Lists

Step 1

Click on any of the Patient Lists

Step 2

Click on any TU Name



Drill down to patient record from Patient Lists

Search Cases

CALL 1800116666 FOR HELP! TRAINING MATERIALS ASK FOR HELP dto-

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Labs

Show Columns Search

List of all Labs of the TU is displayed. Click on the Lab Name to view patients

Name	Code
All patients currently in Labs of BKC	N/A
Prime Medical centre	181836

PHIs

Show Columns Search

List of all PHIs. Click on the PHI Name to view patients

Name	Code
All patients currently in PHIs of BKC	N/A
Government Colony Health Post	001
Kalina Health Post	002
Vakola Health Post	003

Hubs

Show Columns Search

List of Private Providers (Hubs) is displayed. Click on a Hub Name to view patients notified by them

Name	Code

Drill down to patient record from Patient Lists

Search Cases

CALL 1800116666 FOR HELP! TRAINING MATERIALS ASK FOR HELP

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Diagnosed - on Treatment

List of all Patients is displayed as user clicks on a PHI

Bandra East / BKC / Government Colony Health Post

Show Columns Search

ID	Old Nikshay ID	Name	Current Facility	Patient Type	Adherence Tech	Contact #	TB Treatment Start Date	ART Center
3088480	MH-BAW-01-01-18-0067	NARSA BAINI	Government Colony Health Post (001)	Public	NONE	9892419171	08/05/2017	N/A
3136892	MH-BAW-01-01-18-0076	BABLU SUNSUNA	Government Colony Health Post (001)	Public	NONE	9833590478	31/05/2017	N/A
2659893	MH-BAE-02-04-18-0029	Afifa Junaid Shaikh	Government Colony Health Post (001)	Public	NONE	7977005802	12/06/2017	N/A
3145217	MH-BAW-01-01-18-0080	SAYYED ASIF	Government Colony Health Post (001)	Public	NONE	9920852850	15/06/2017	N/A

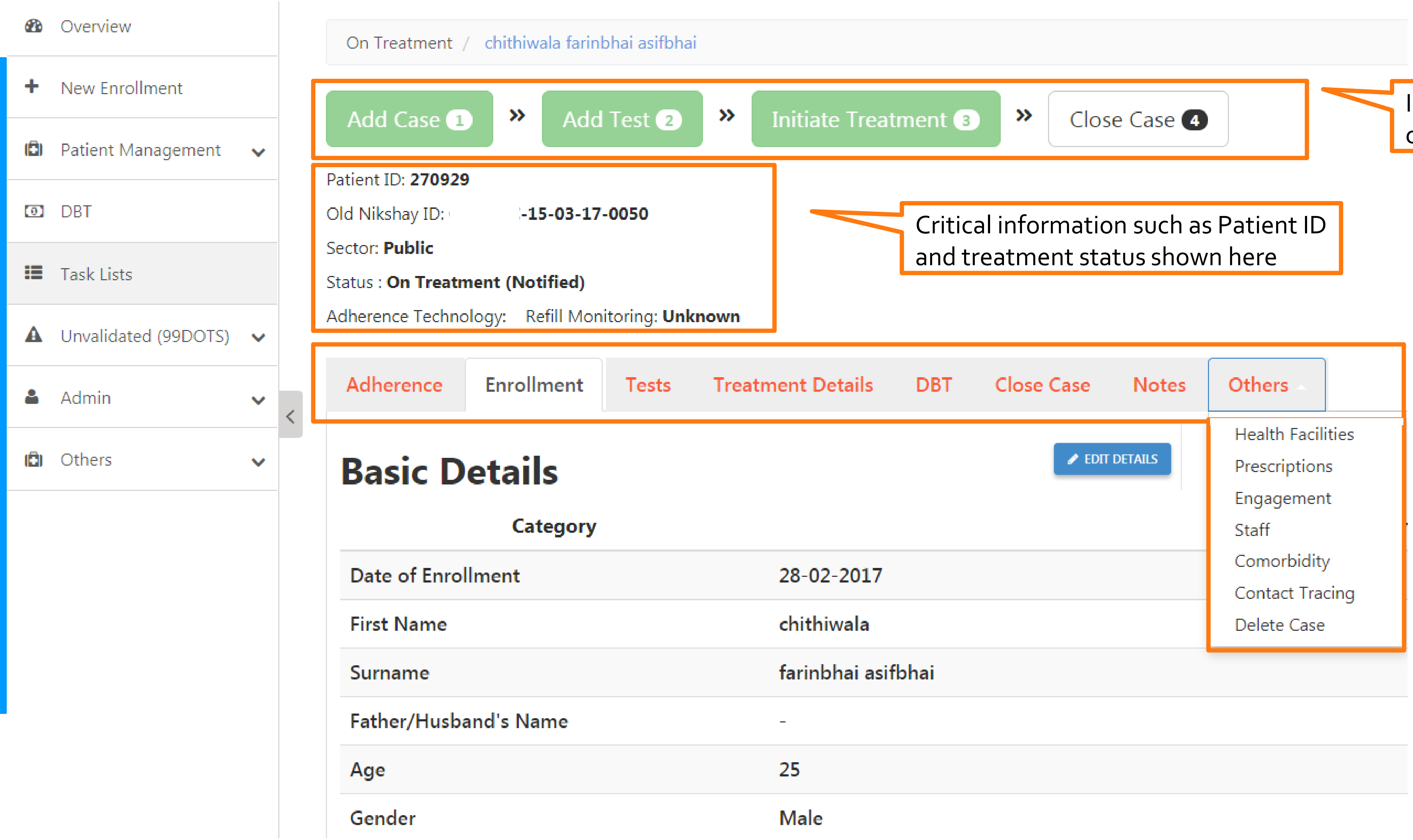
Click on Patient name to view the record

Patient Management

- Once enrolled, complete case information is visible and actionable from a single screen.
- For simplicity, information is divided into subsections or tabs.
- Users can take the following actions from here:
  - Add test details (Diagnostic or follow up)
  - Add or update Treatment/ Prescription/ Bank/ Adherence details
  - Update any patient details
  - Update Staff/Patient engagement details
  - Declare patient outcome

Patient Management screen

All patient details are visible on a single screen



Indicates the activities completed for the patient

Critical information such as Patient ID and treatment status shown here

For simplicity, patient information is distributed in various sections (tabs)

Various sections (tabs) in Patient Management Screen

	Module Name	Description / Details captured
1	Adherence	Adherence Calendar view/update *(Dose taken or missed - Manually/ 99DOTS/MERM)*
2	Enrolment	Basic details of the presumptive Case or Patient *(Name, Mobile No, Address, Area, Key Population etc.)*
3	Tests	Request Test & Update/view Result *(Diagnostic /Follow up) (Type of Test, Facility, etc.)*
4	Treatment Details	Record /view Treatment Details *(Type of Case, Site of Disease, Date of Rx Initiation etc.)*
5	DBT	Direct Benefit Transfer *(Bank Name, IFSC Code, Account Number, Branch Name)*
6	Close Case	Record Treatment Outcome for Case *(Rx Outcome, Date, Remarks)*
7	Notes	To record any remarks or additional details of the patient
8	Health Facilities	Update Health Facility for Patient *(Enrolment Facility, Diagnostic Facility, Current Facility)*
9	Prescriptions	Prescription/ Regimen *(Product Name, Weight Band, No of Days etc.)*
10	Engagement	Update engagement assistance *(via SMS, Call Centre, Household Visits)*
11	Staff	Update / edit health care staff information *(Staff name, Designation & Phone No.)*
12	Comorbidity	HIV, Diabetes and Tobacco
13	Contact Tracing	Record Contact Tracing
14	Delete Case	Enables deletion of duplicate or incorrect patient records *(Reason for deletion, Remarks)*

Edit Patient details

- Users can easily Edit patient details
- **Edit** option will be visible each of the sections.
- As User clicks on Edit, fields of the Form become editable
- The changes made are visible immediately.
- After closure of a Patient record (by update of Treatment Outcome), the patient record will not be editable.

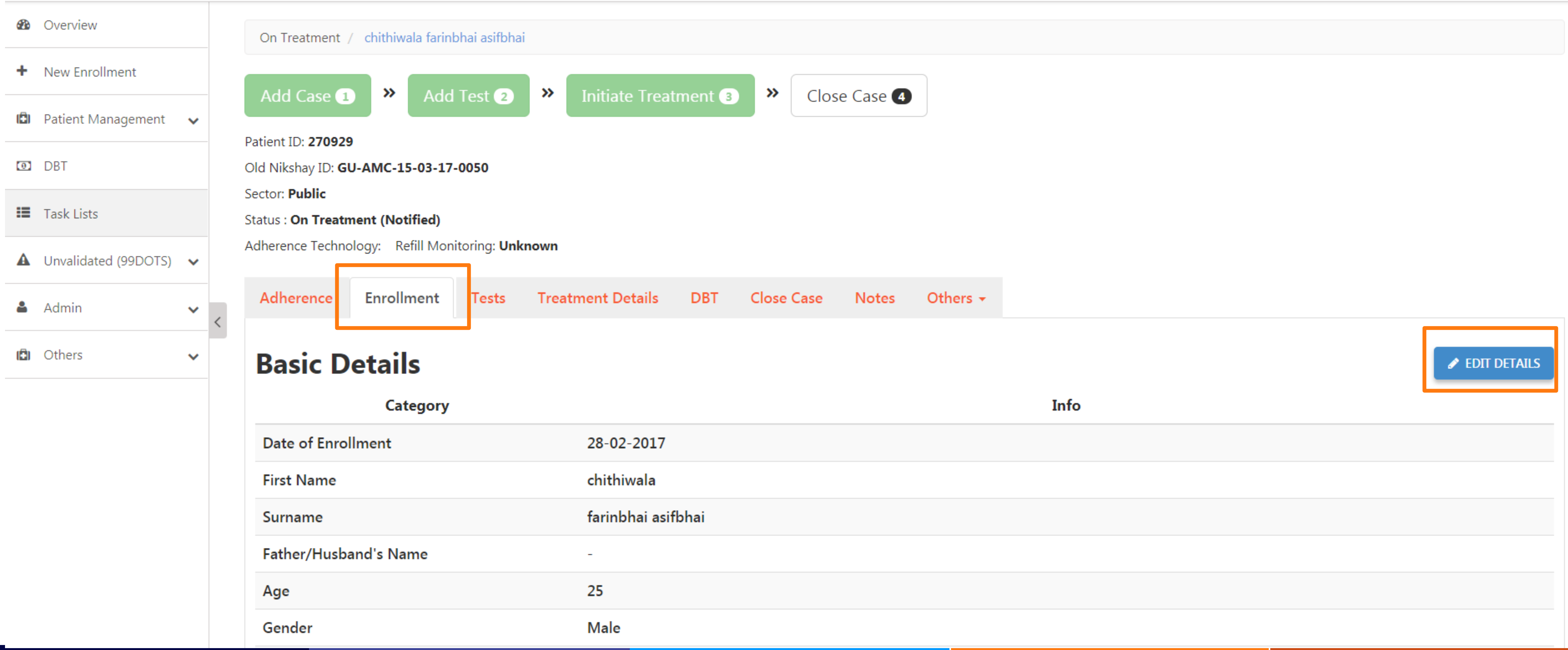
Edit Patient details

Step 1

Select the section that needs to be edited

Step 2

Click on Edit Details



Edit Patient details

Step 1

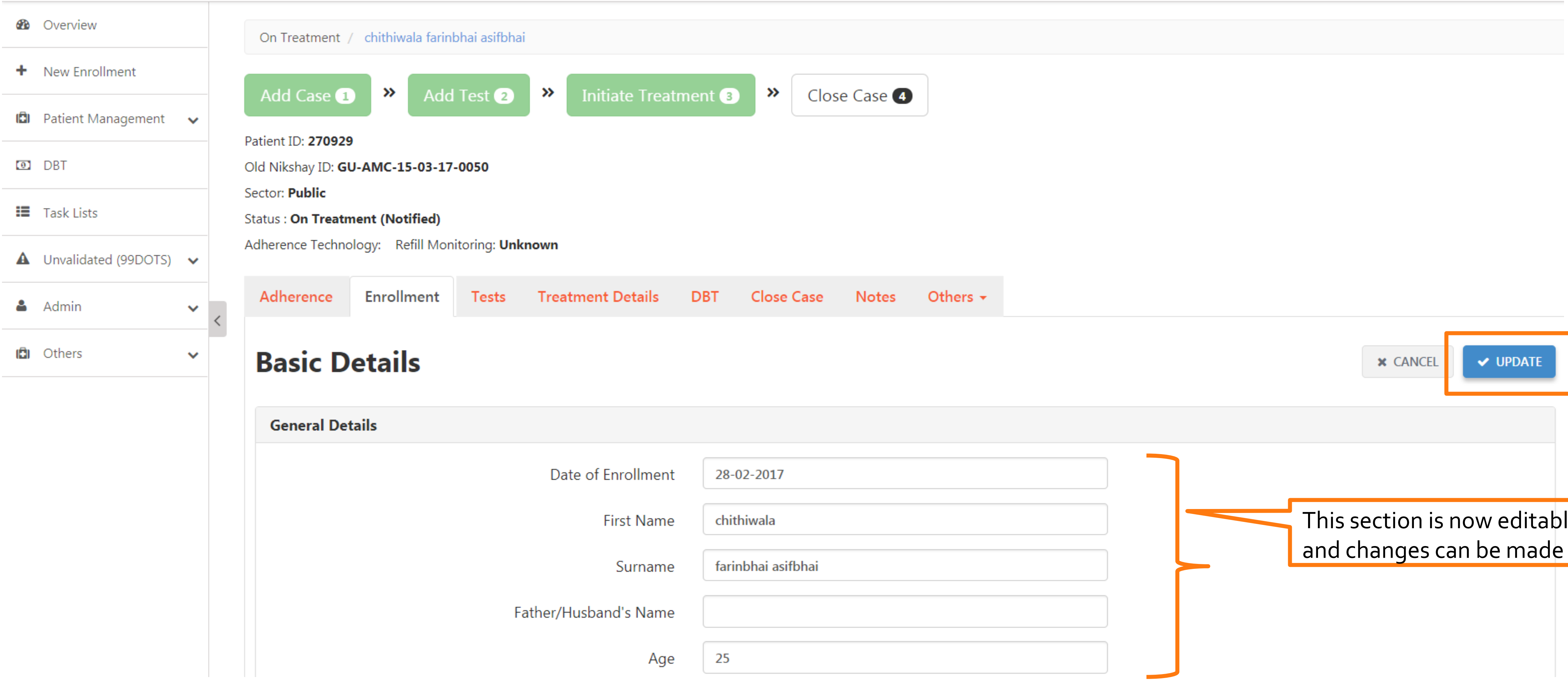
Select the section that needs to be edited

Step 2

Click on Edit Details

Step 3

Make changes and click on Update



This section is now editable and changes can be made

Edit Patient details

Step 1

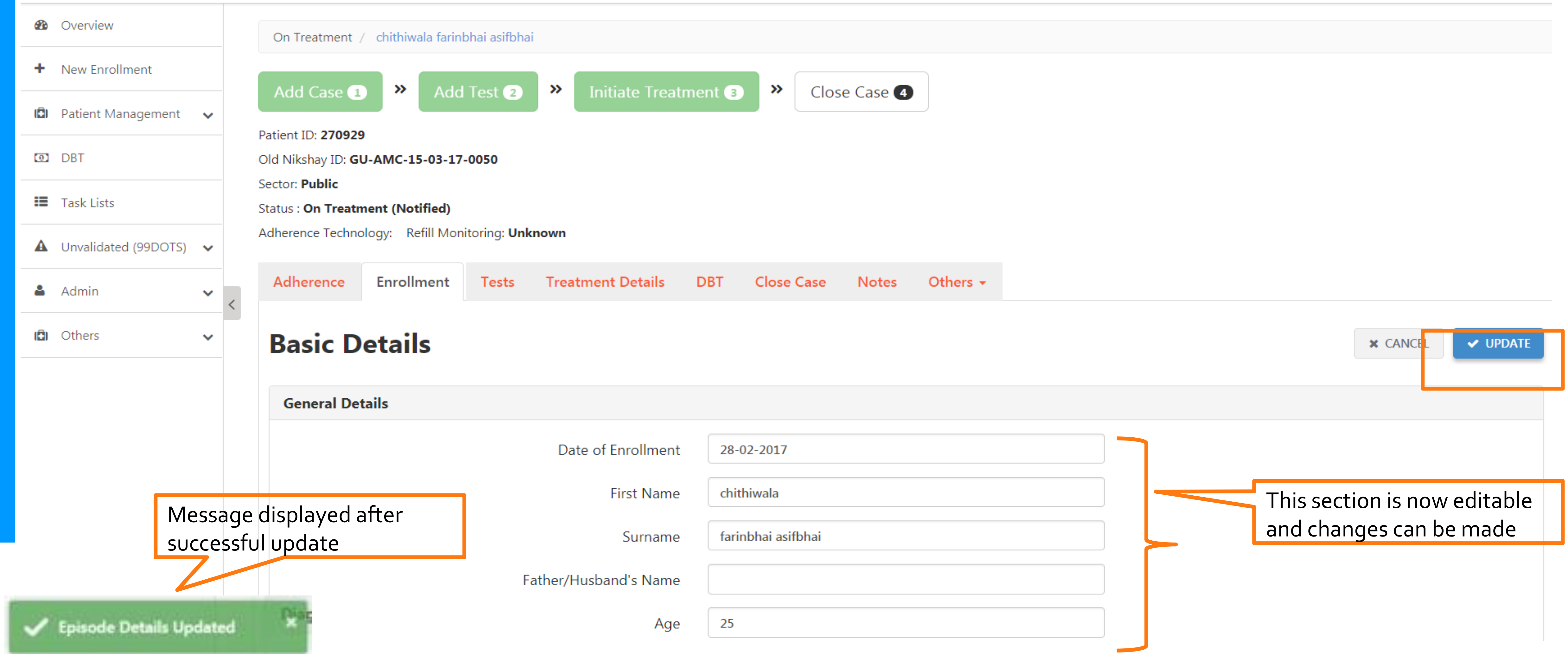
Select the section that needs to be edited

Step 2

Click on Edit Details

Step 3

Make changes and click on Update



Message displayed after successful update

This section is now editable and changes can be made

Add Test

- **Single screen** to add Diagnostic or Follow Up tests for Public or Private sector patients
- To register a **PATIENT**, it is compulsory to add a **POSITIVE DIAGNOSTIC** test
- Add Test is a 2-step process, **1) Test Request** and **2) Result Update**.
- These steps can be done by a user at once or by two different users.

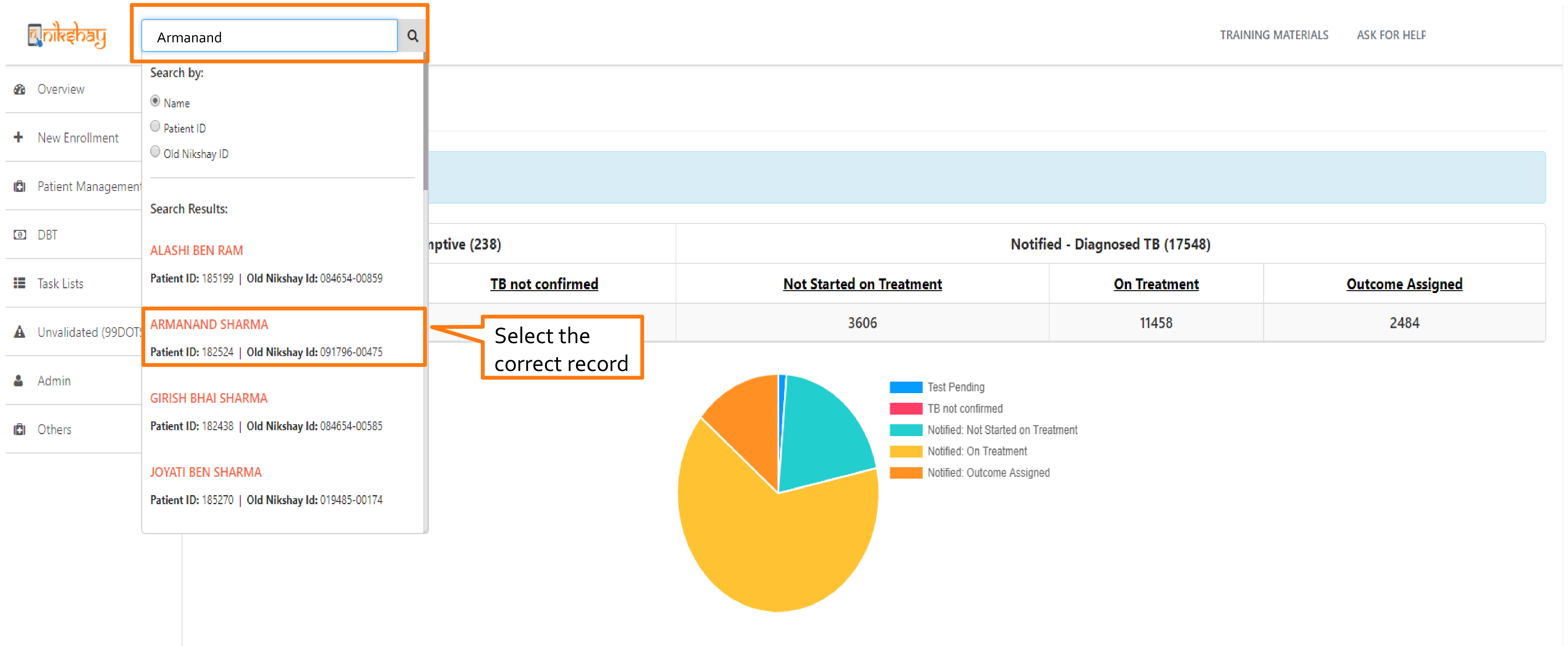
  Eg. 1: **TB HV** (enrols case + Requests Test) → **LT** (enters result)

  Eg.2: **TB HV or LT** (enrols case+ Request Test+ Enter Result)
- As soon as a positive test result is entered, the patient gets notified

Add Test details

Step 1

Search case for which Test to be updated

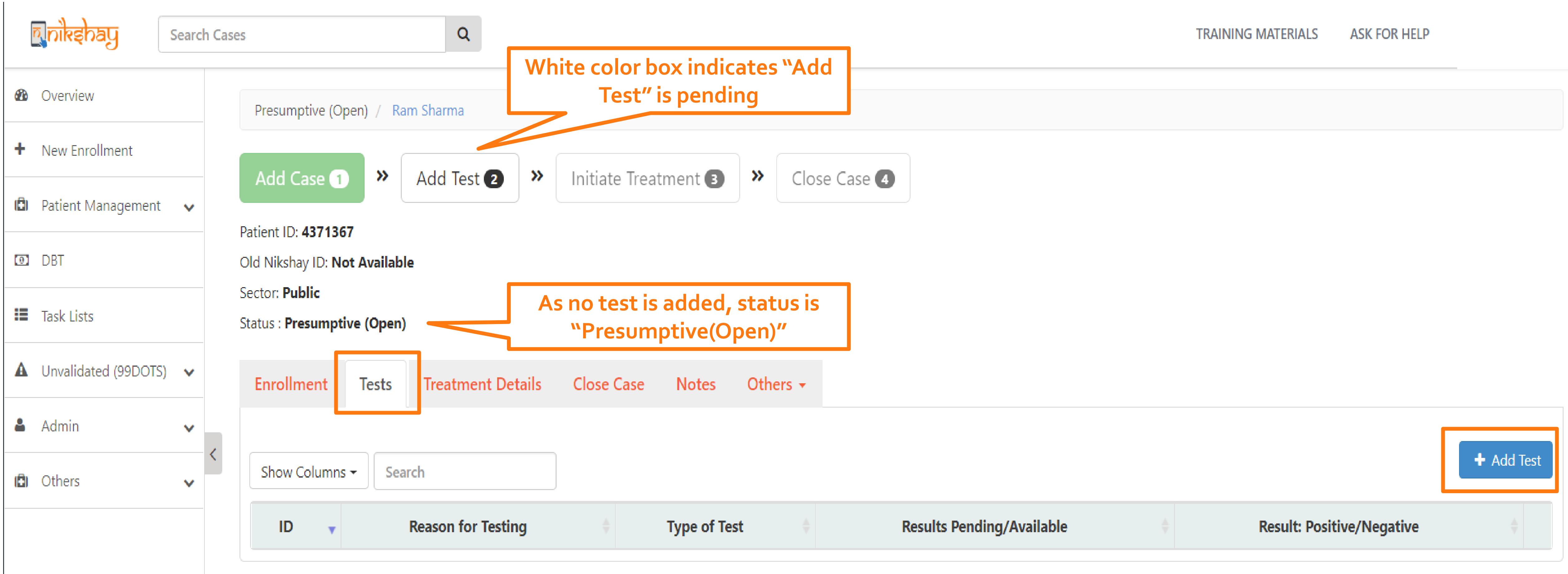


Add Test details

Step 1
Search case for which Test to be updated

Step 2
Open Patient record and select Tests section

Step 3
Click on Add Test



Details of tests added earlier (if any) are shown here

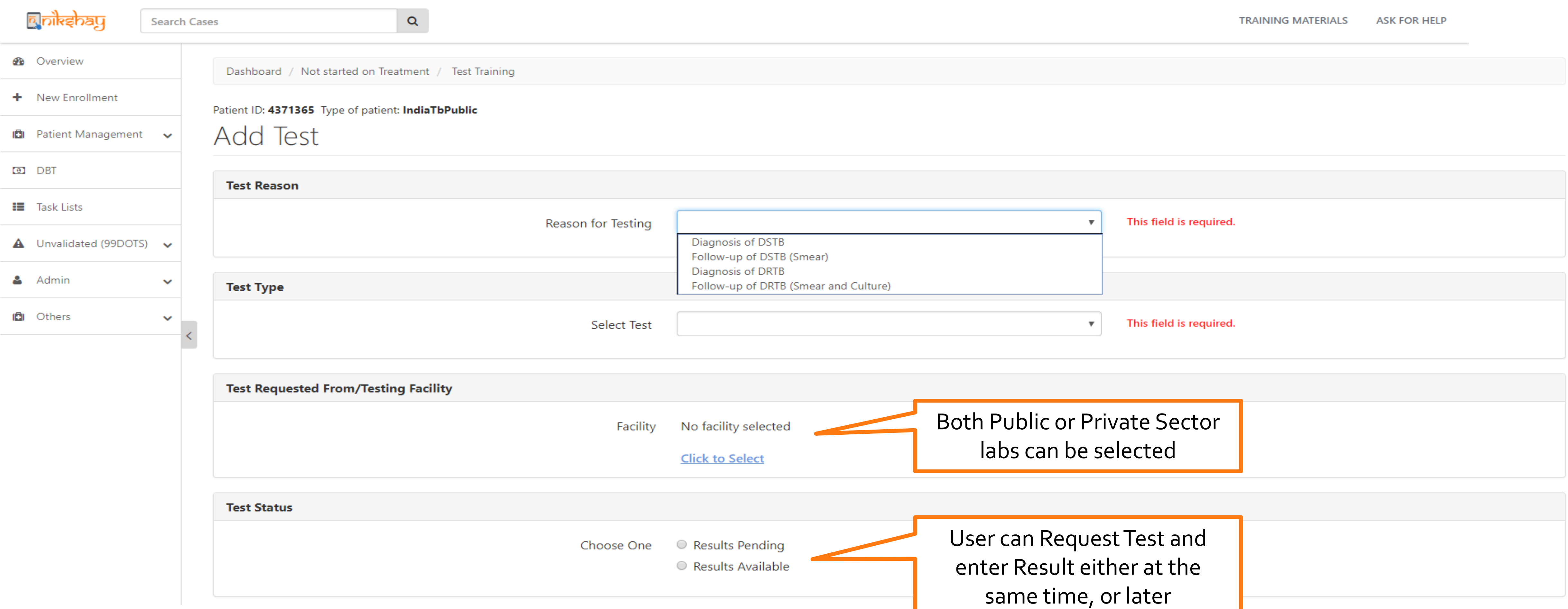
Add Test details

Step 1
Search case for which Test to be updated

Step 2
Open Patient record and select Tests section

Step 3
Click on Add Test

Step 4
Enter Test Details



Both Public or Private Sector labs can be selected

User can Request Test and enter Result either at the same time, or later

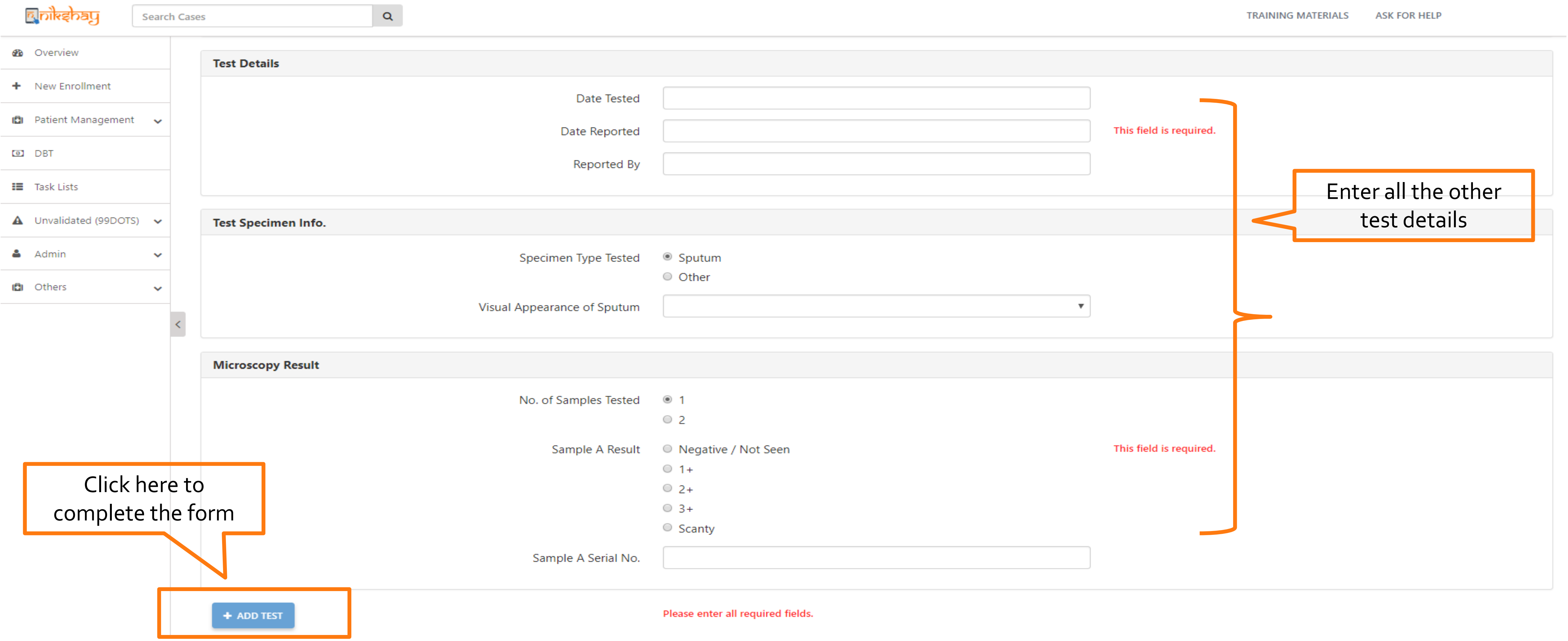
Add Test details

Step 1
Search case for which Test to be updated

Step 2
Open Patient record and select Tests section

Step 3
Click on Add Test

Step 4
Enter Test Details



Enter all the other test details

Click here to complete the form

Add Test details

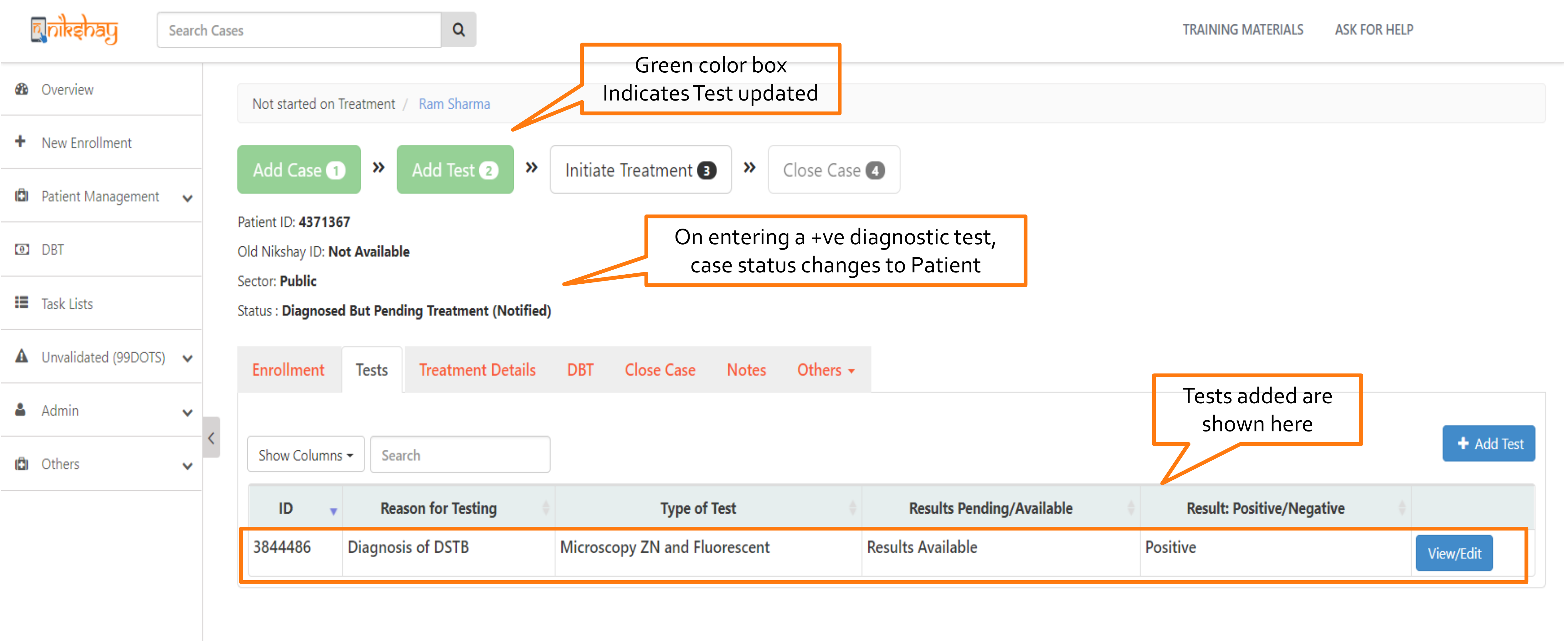
Step 1
Search case for which Test to be updated

Step 2
Open Patient record and select Tests section

Step 3
Click on Add Test

Step 4
Enter Test Details

Step 4
View Test Details



Adding Test Results for Patients across any Location

- Test Results for any Patient across the country can be entered now in Nikshay.
- Users can search any patient across any location in the country using **"+Add Test"** button in the home page.
- In the +Add Test section, patients can be searched using only the numeric patient ID and not by any other fields.

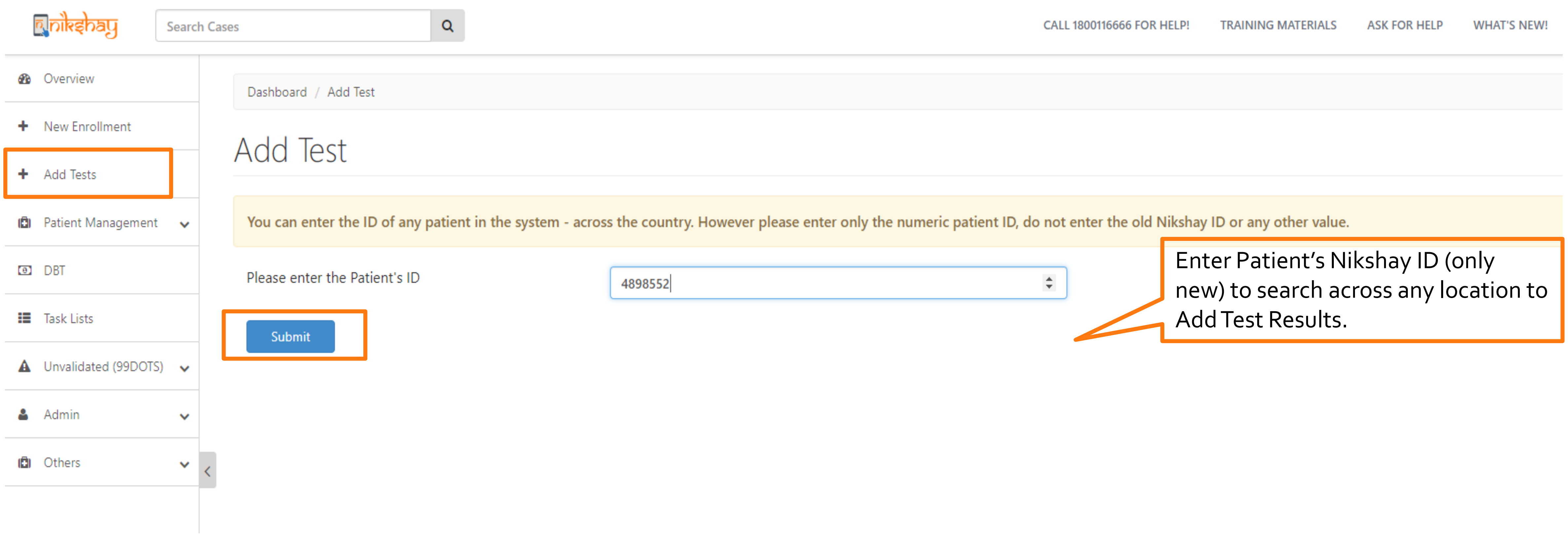
Adding Test Results for Patients across any Location

Step 1

Click +Add Tests to search any patient across the country

Step 2

Search Patients Nikshay ID to enter Test Results



Adding Test Results for Patients across any Location

Step 1

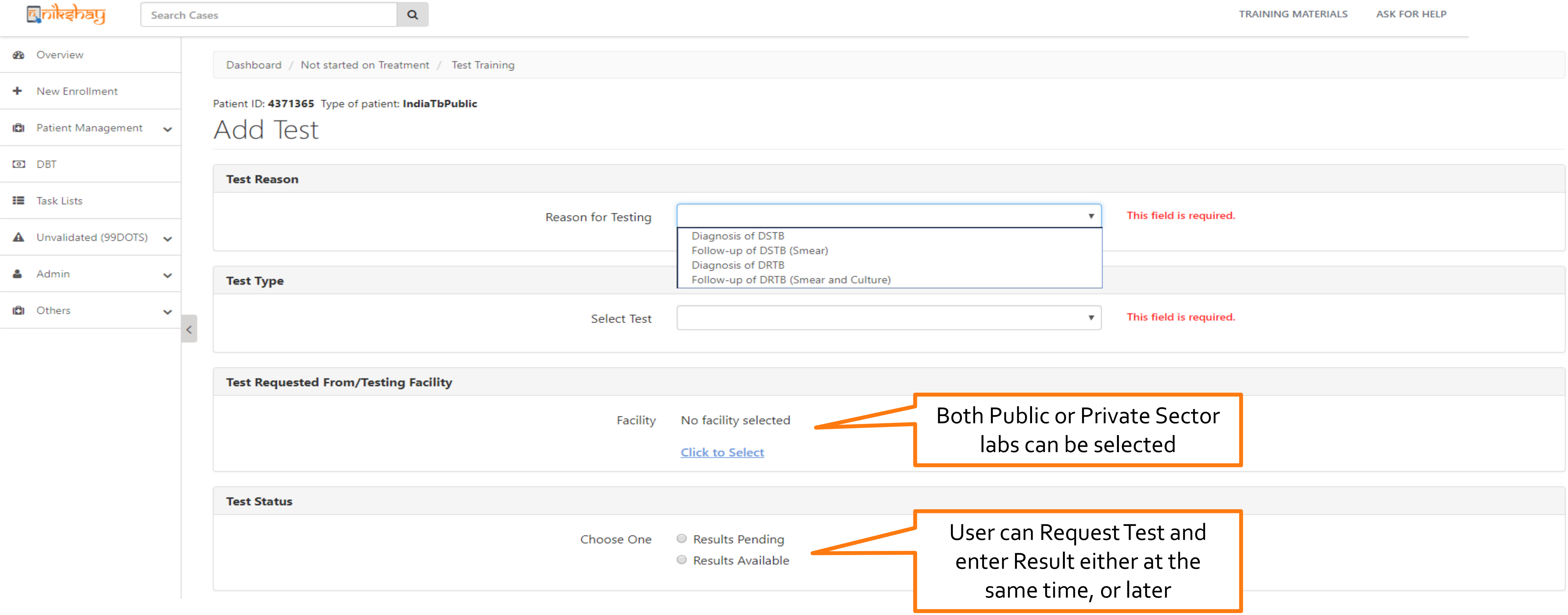
Click +Add Tests to search any patient across the country

Step 2

Search Patients Nikshay ID to enter Test Results

Step 3

Enter Test Details



Adding Test Results for Patients across any Location

Step 1

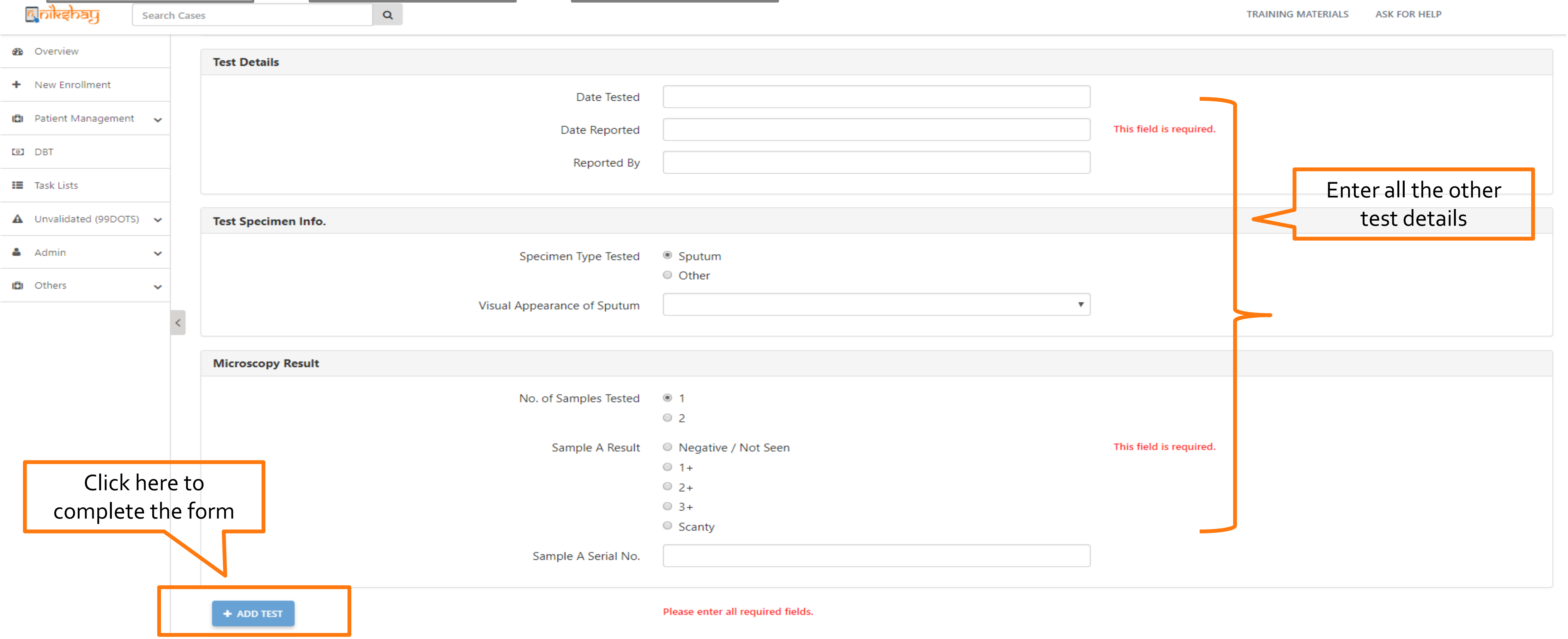
Click +Add Tests to search any patient across the country

Step 2

Search Patients Nikshay ID to enter Test Results

Step 3

Enter Test Details



Enter all the other test details

Click here to complete the form

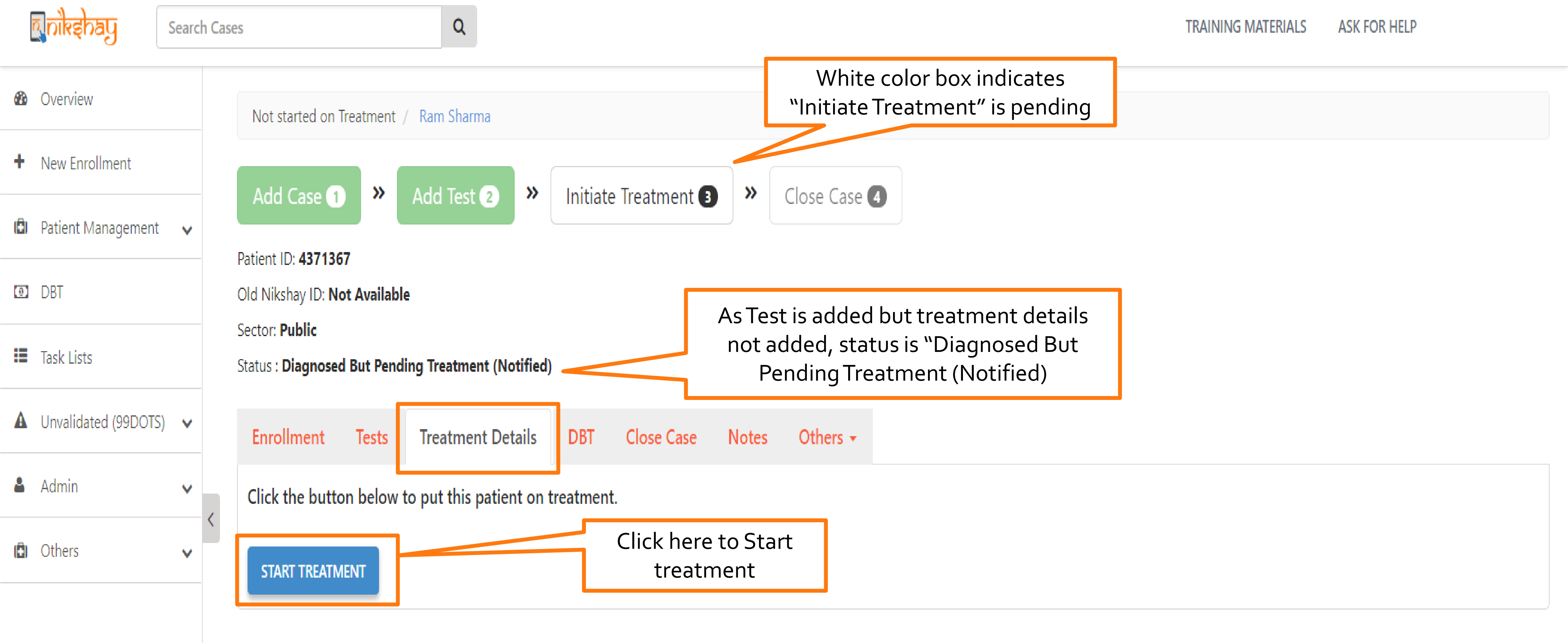
Start Treatment

- Initiation of Treatment is the third step in the Patient Management Lifecycle in Nikshay (After Enrolment and Enter Test Details).
- In Treatment Details section, “Date of Diagnosis” and “Basis of Diagnosis” gets populated based on the Diagnosis test details.
- Once Treatment details are updated, the Adherence Calendar is made available for view and update.
- The Start Treatment Screen is common for DS TB and DR TB Patients
- The Patient’s Regimen details should be updated from “Prescription” Section.

Enter Treatment details

Step 1

Click on Treatment Details



White color box indicates "Initiate Treatment" is pending

As Test is added but treatment details not added, status is "Diagnosed But Pending Treatment (Notified)

Click here to Start treatment

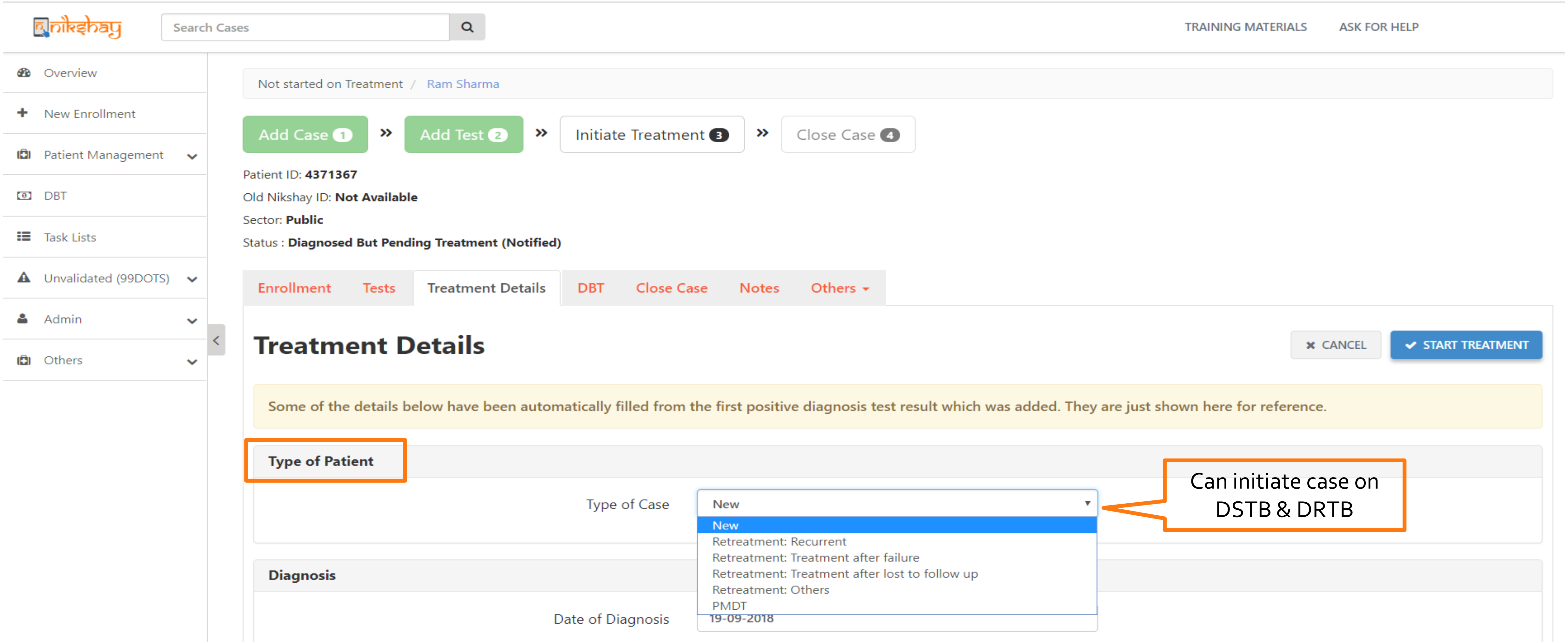
Enter Treatment details

Step 1

Click on Treatment Details

Step 2

Enter Type of Patient



Can initiate case on DSTB & DRTB

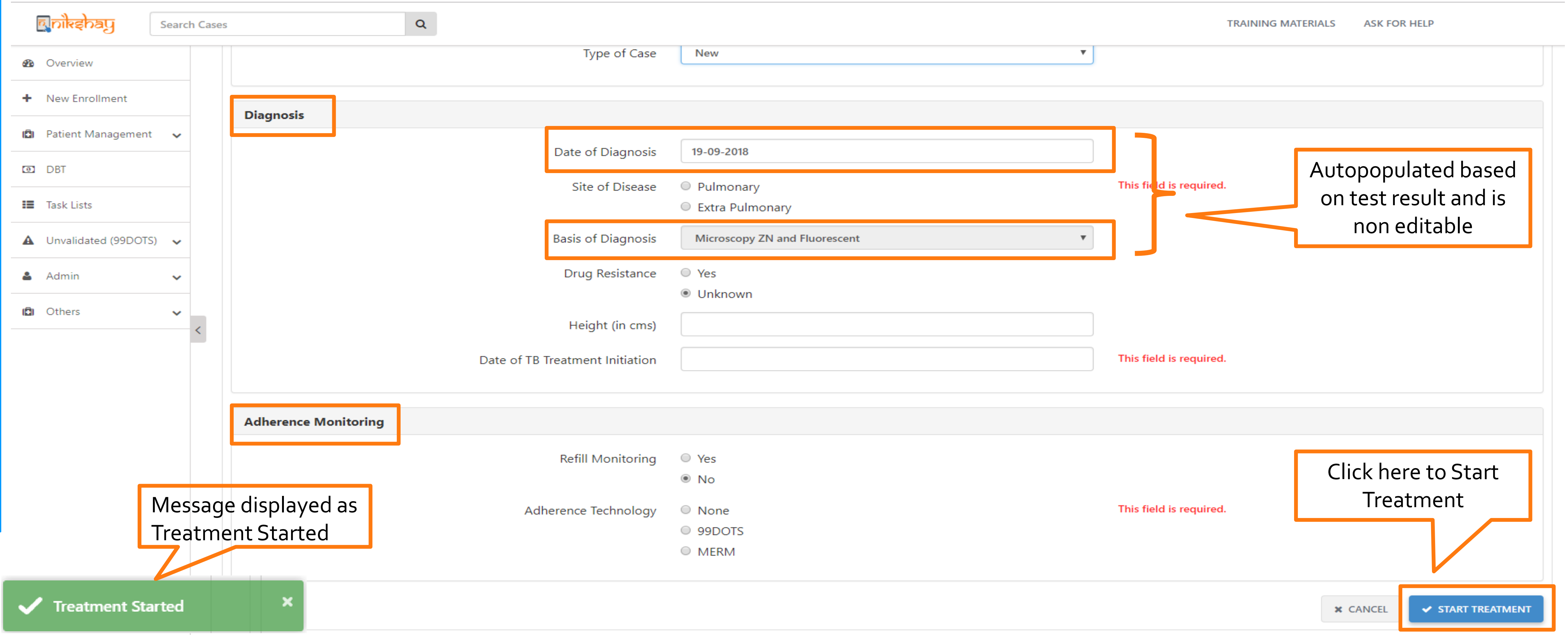
Enter Treatment details

Step 1
Click on Treatment Details

Step 2
Enter Type of Patient

Step 3
Enter Diagnosis details

Step 4
Enter Adherence details



Autopopulated based on test result and is non editable

Click here to Start Treatment

Message displayed as Treatment Started

Enter Treatment details

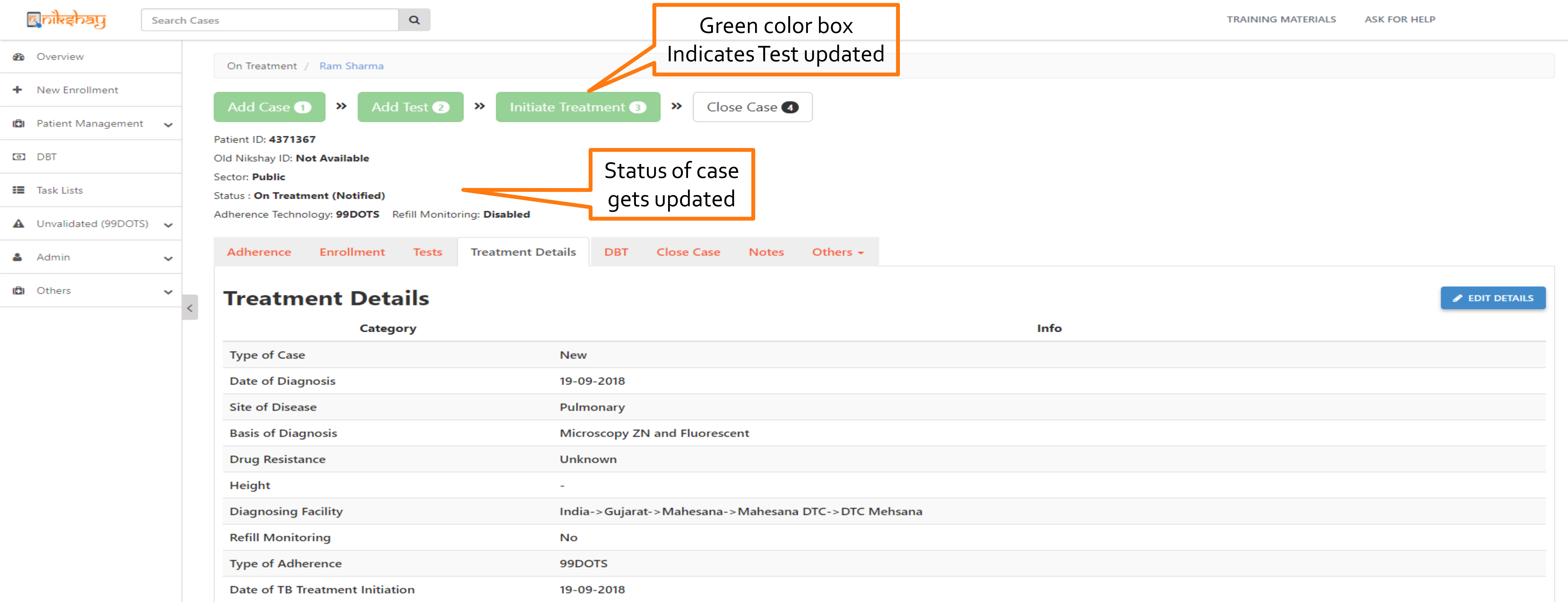
Step 1
Click on Treatment Details

Step 2
Enter Type of Patient

Step 3
Enter Diagnosis details

Step 4
Enter Adherence details

Step 4
View Treatment details



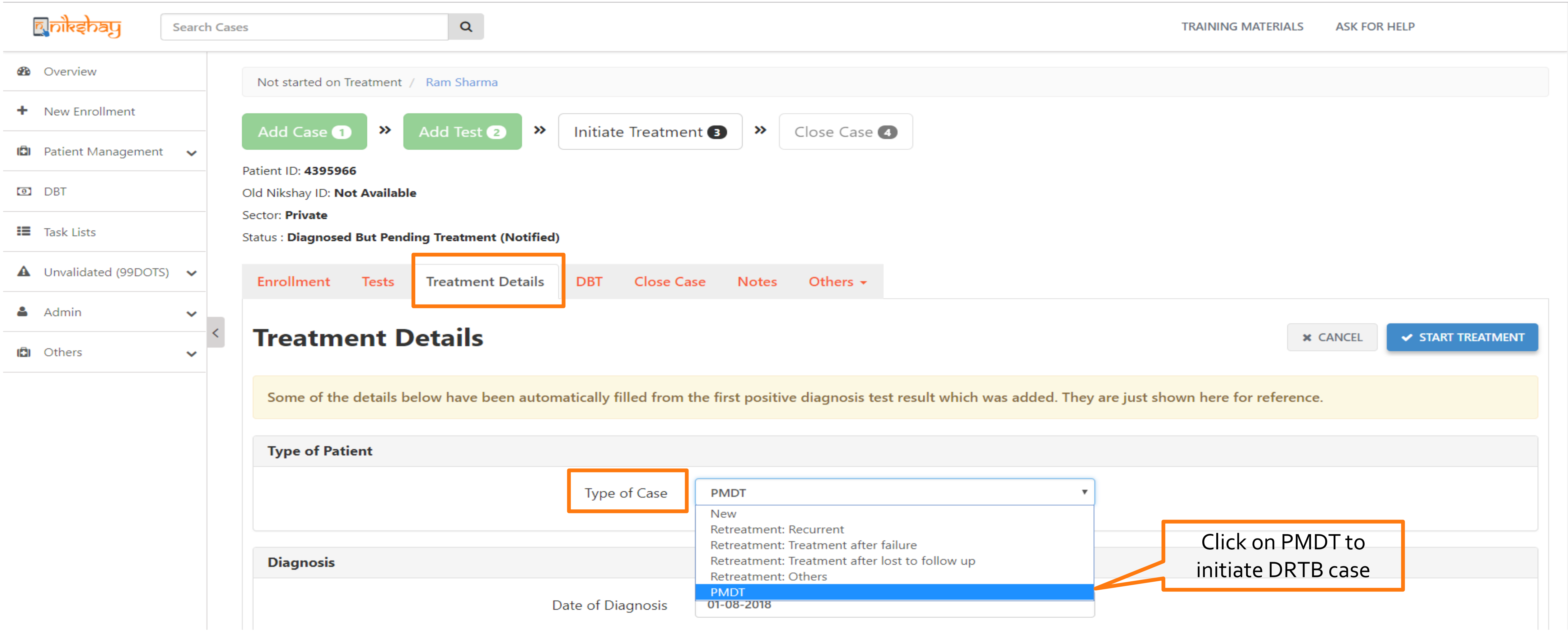
Enter treatment details of DRTB patient

Step 1

Click on Treatment Details

Step 2

Enter Type of case



Click on PMDT to initiate DRTB case

Enter treatment details of DRTB patient

Step 1

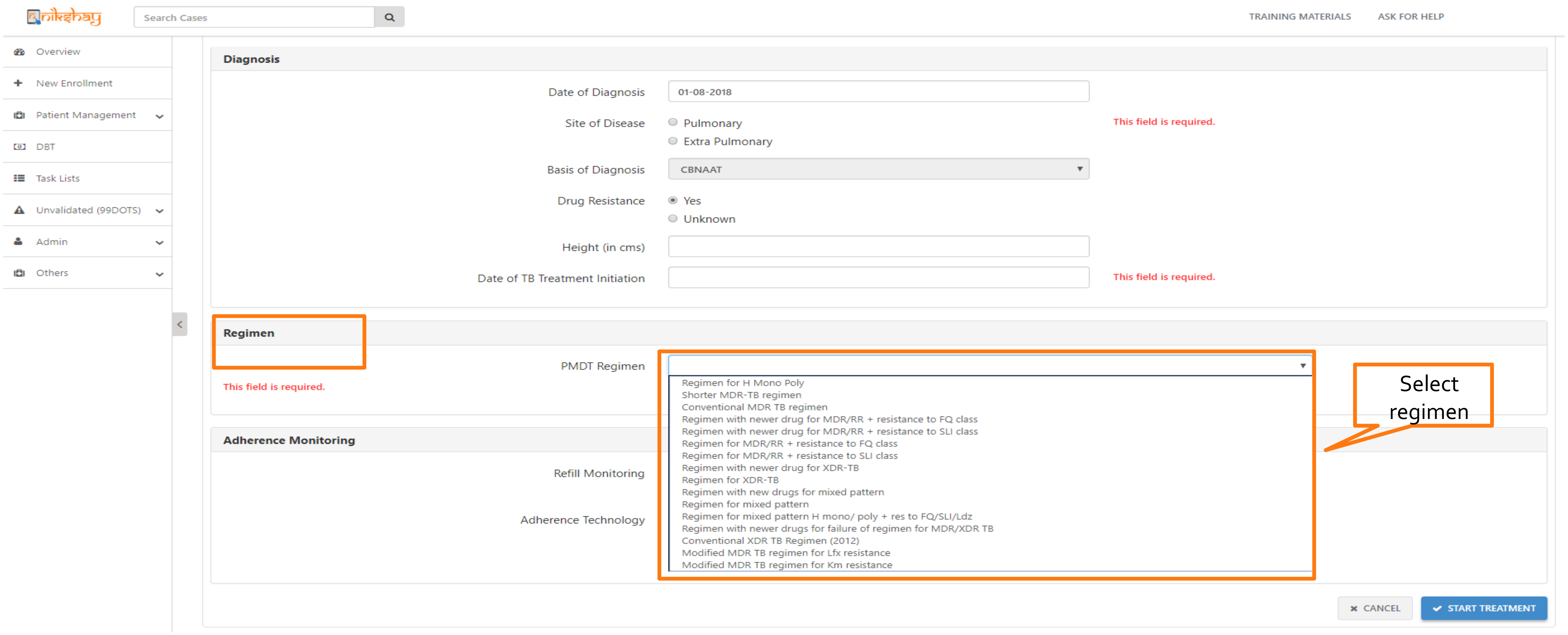
Click on Treatment Details

Step 2

Enter Type of case

Step 2

Enter Regimen Details



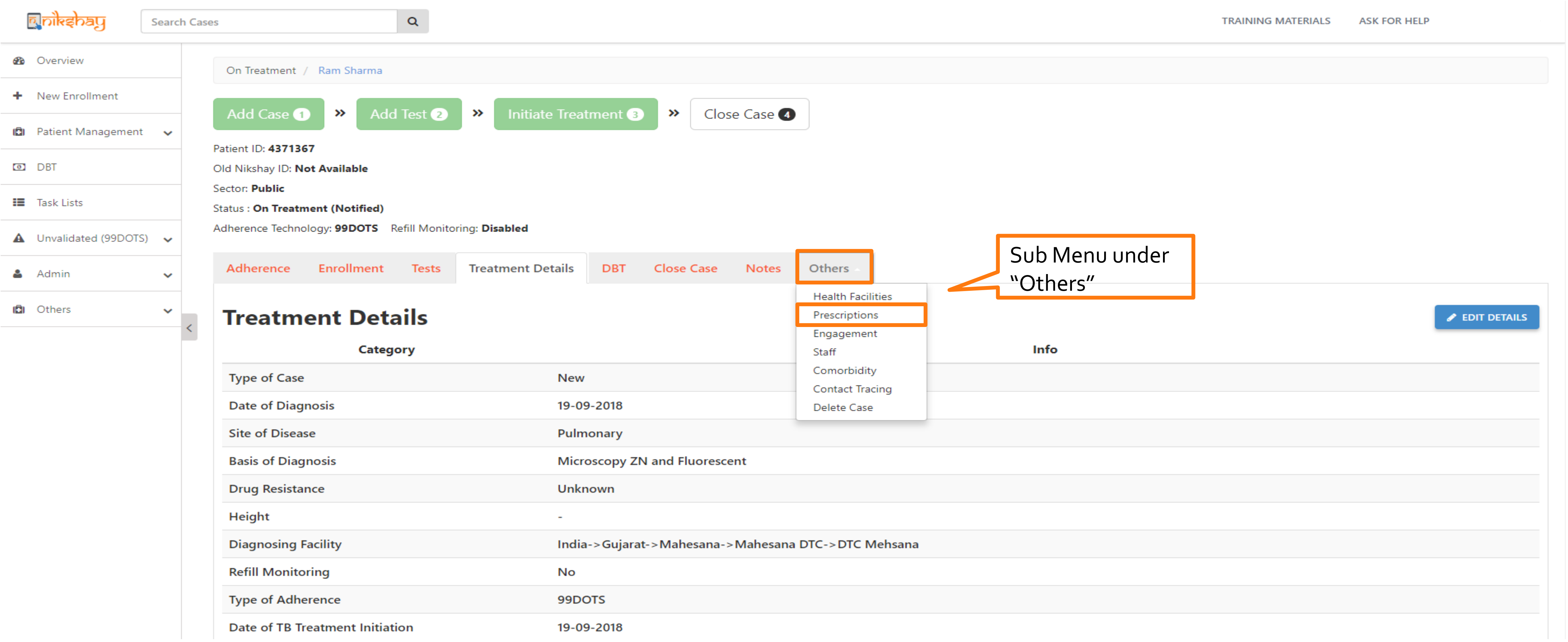
Add Prescription

- A Prescription should be added every time medicines are issued to the patient
- In this section, details of medicines issued (Product Name, No. of days for which medicines are issued etc.) are captured
- More than one medicine details can be added in one prescription (For Eg. in DR TB multiple drugs are issued to the patient)
- All the prescriptions added for a given patient are visible to the User

Add Prescription

Step 1

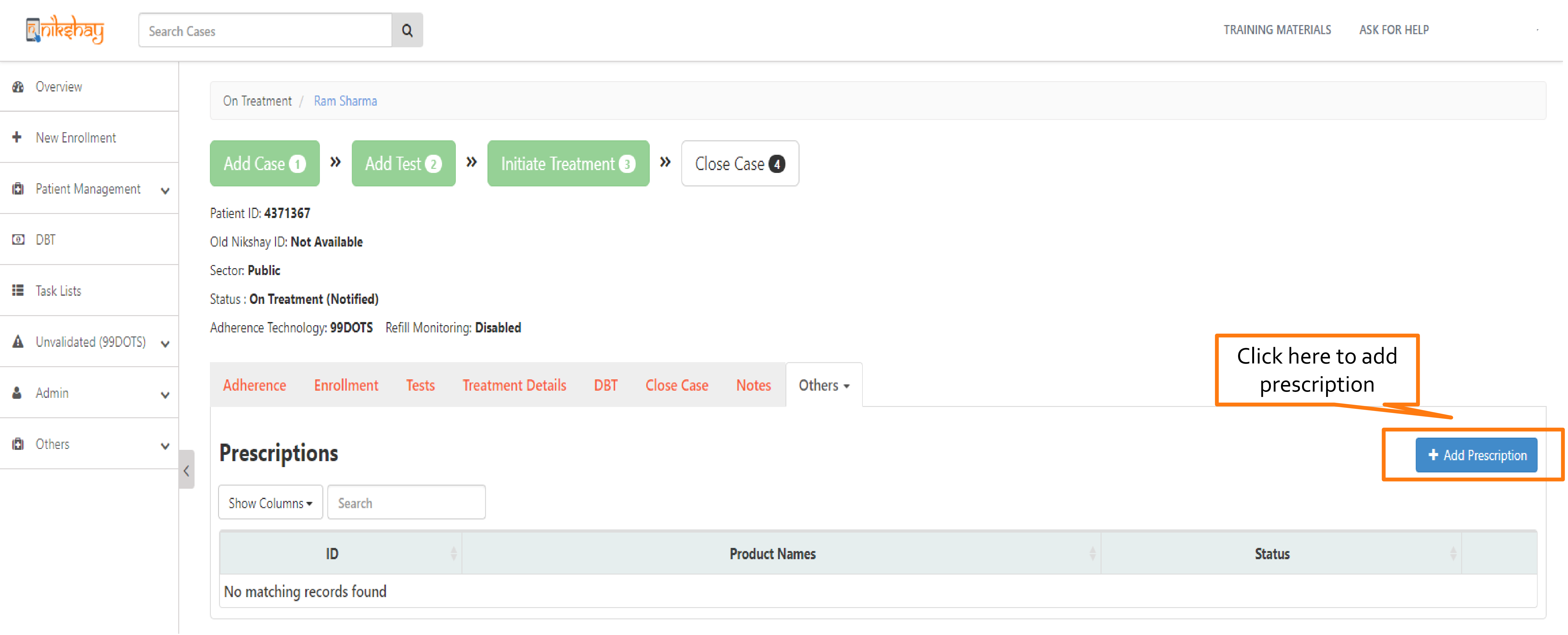
Click on Prescription



Add Prescription

Step 1
Click on Prescription

Step 2
Add Prescription

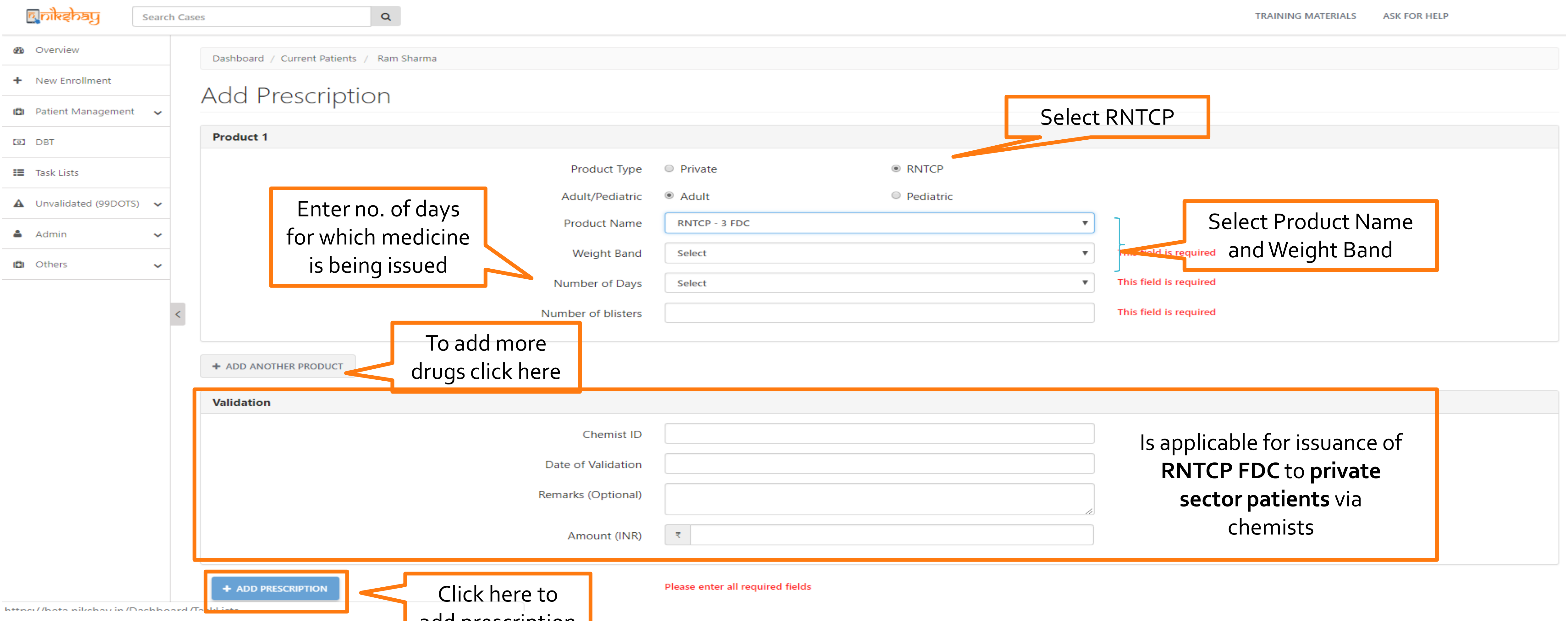


Add Prescription

Step 1: Click on Prescription

Step 2: Add Prescription

Step 3: Enter a Product (Medicine)



Select RNTCP

Enter no. of days for which medicine is being issued

Select Product Name and Weight Band

To add more drugs click here

Is applicable for issuance of **RNTCP FDC** to **private sector patients** via chemists

Click here to add prescription

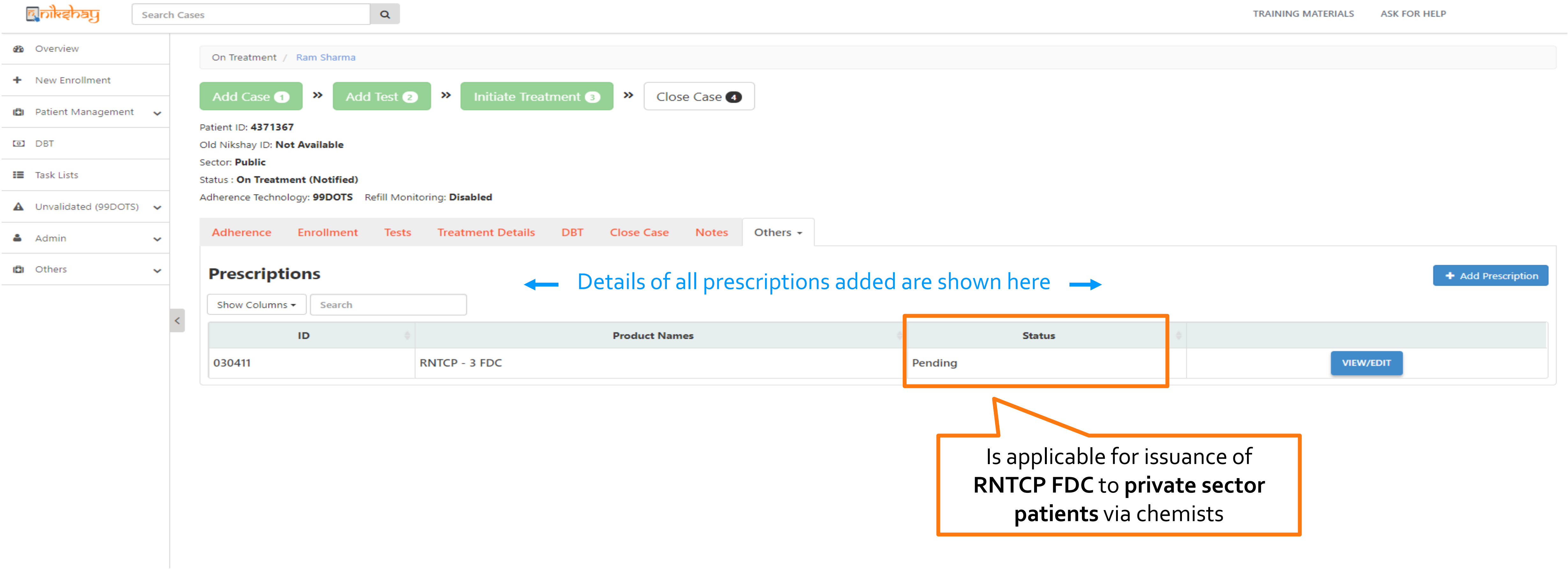
View Prescription

Step 1
Click on Prescription

Step 2
Add Prescription

Step 3
Enter a Product (Medicine)

Step 3
View or Edit Prescription



Is applicable for issuance of **RNTCP FDC** to **private sector patients** via chemists

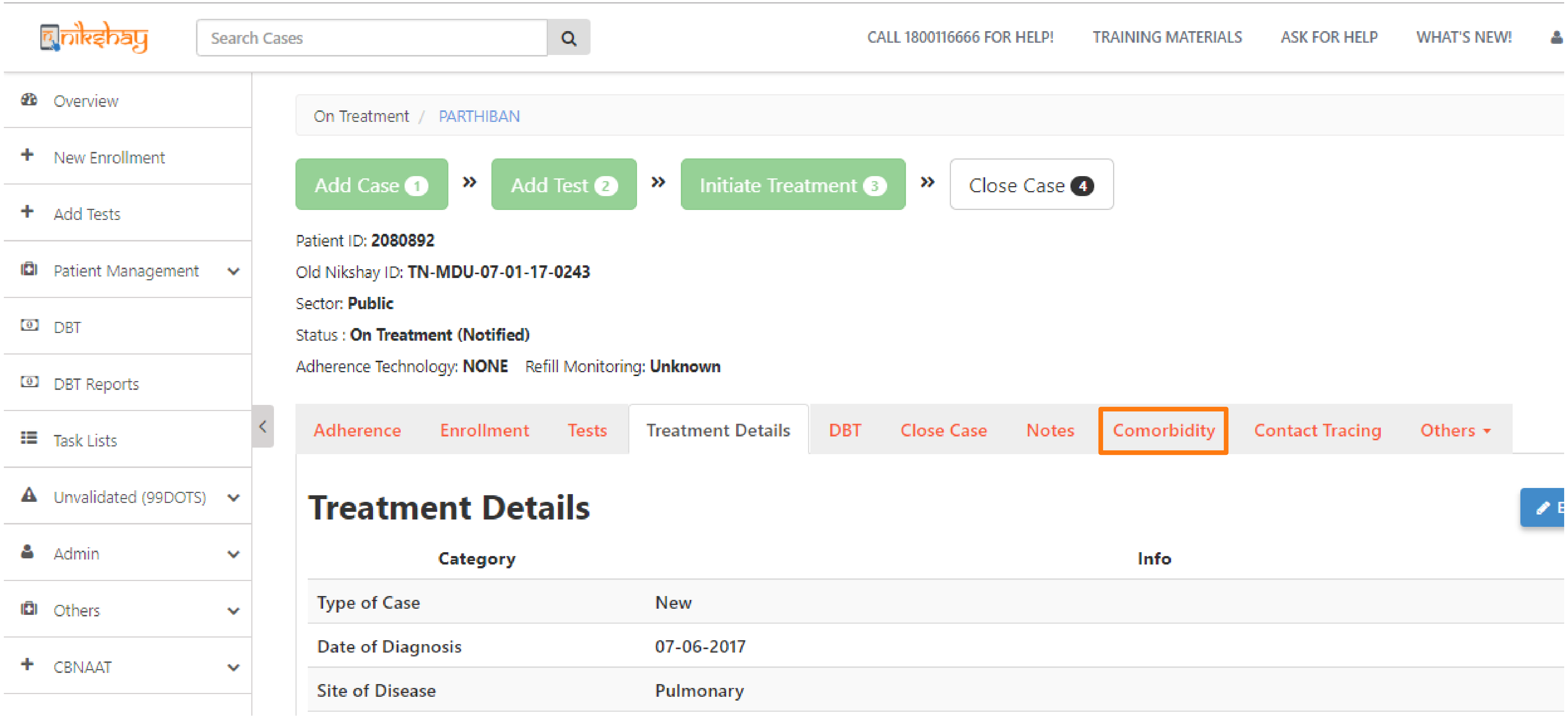
Add Comorbidity

- Comorbidity refers to the presence of one or more additional diseases or disorders co-occurring with a primary disease or disorder.
- In this section, HIV Information, Diabetes Information and Additional Information like Tobacco user or not, Alcohol intake etc can be added for a patient.
- All the comorbidity details added for a given patient are visible to the User

Add Comorbidity

Step 1

Click on Comorbidity



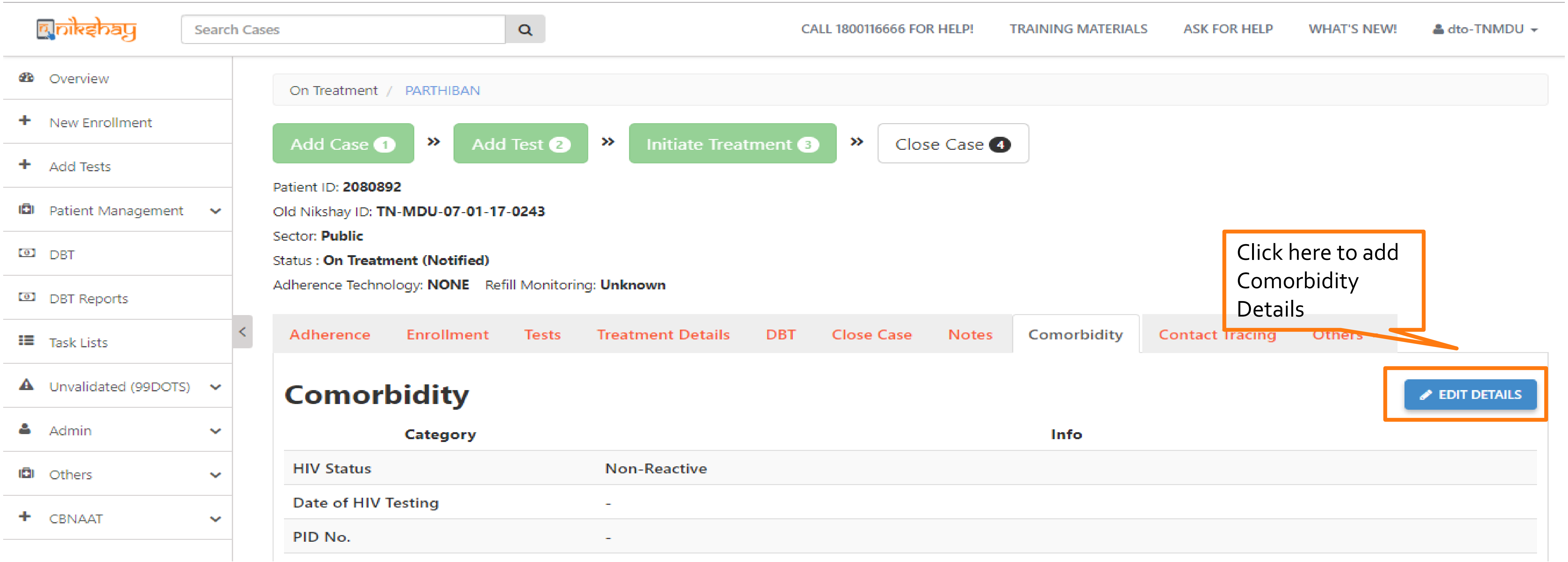
Add Comorbidity

Step 1

Click on Comorbidity

Step 2

Click Edit Details



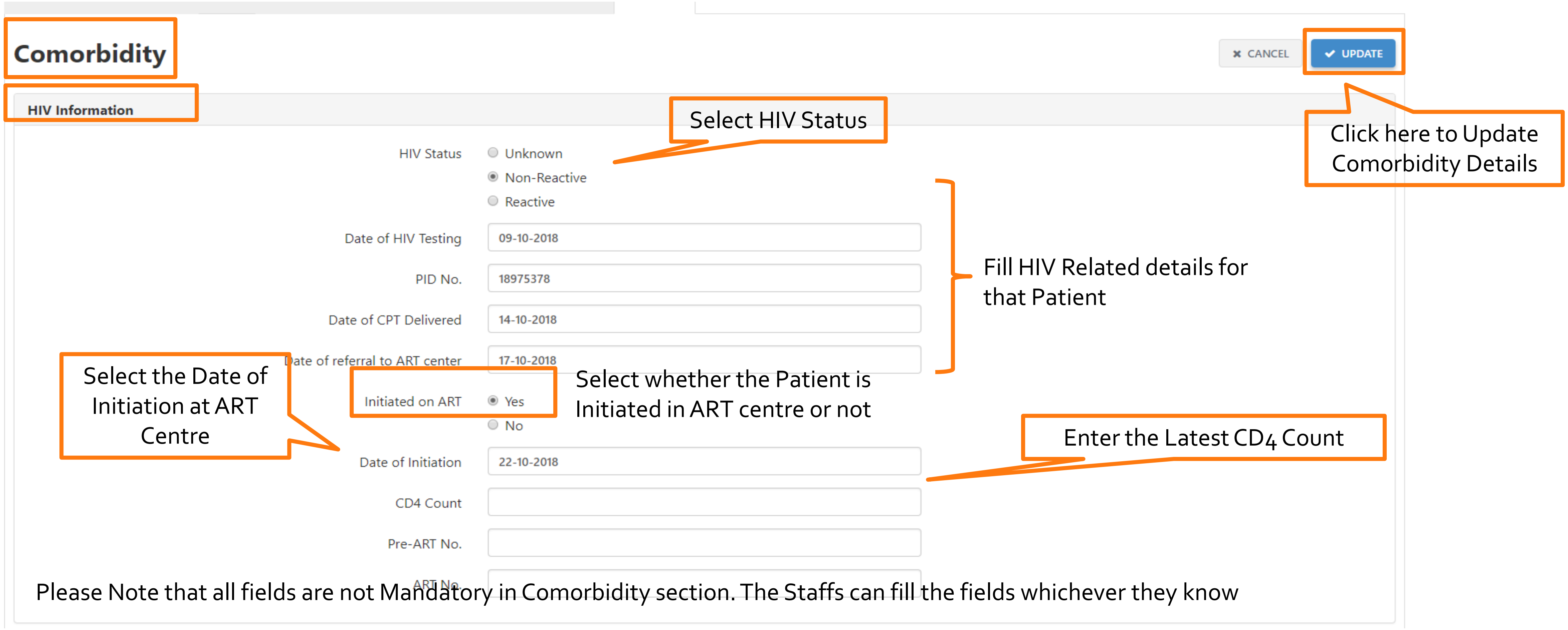
Please Note that all fields are not Mandatory in Comorbidity section. The Staffs can fill the fields whichever they know

Add Comorbidity

Step 1
Click on Comorbidity

Step 2
Click Edit Details

Step 3
Add Comorbidity Details



Please Note that all fields are not Mandatory in Comorbidity section. The Staffs can fill the fields whichever they know

Add Comorbidity

Step 1
Click on Comorbidity

Step 2
Click Edit Details

Step 3
Add Comorbidity Details

Diabetes Information

Diabetes Status: Unknown / Diabetic / Non-diabetic

Select the Diabetes Status for the Patient

RBS

FBS

End of IP

End of Treatment

Fill Diabetes Related details for the Patient

Initiated on Anti-diabetic treatment: Yes / No

Select whether the Patient is initiated for Anti-Diabetic Treatment

Date of Initiation

Select the date of Initiation of Anti-Diabetic Treatment

Other Co-morbidity

Enter any other Co-Morbidity

Please Note that all fields are not Mandatory in Comorbidity section. The Staffs can fill the fields whichever they know

Add Comorbidity

Step 1
Click on Comorbidity

Step 2
Click Edit Details

Step 3
Add Comorbidity Details

Additional Information

Current Tobacco User
- Unknown
- Positive
- Negative

Select whether the Patient is a Tobacco user or not

Linked for Cessation
- Yes
- No
- N/A

Select whether the Patient is linked to discontinuing Tobacco intake

H/O Alcohol Intake
- Yes
- No
- N/A

Select whether the Patient is a Alcoholic or not

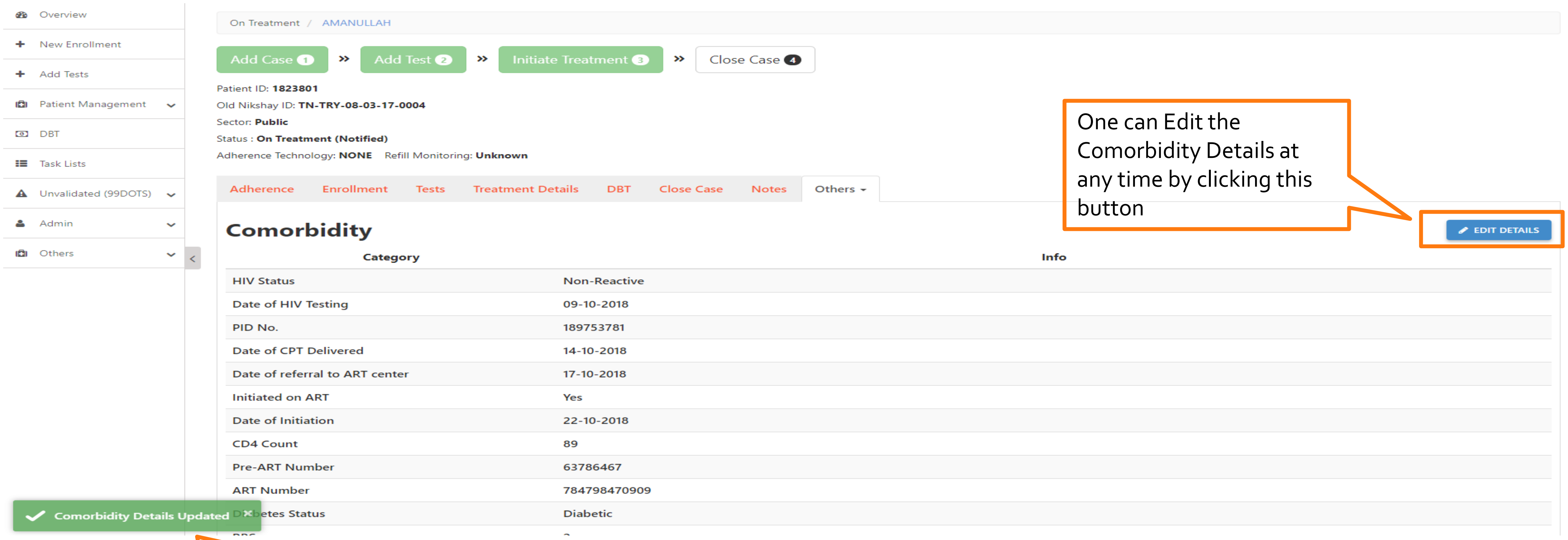
Please Note that all fields are not Mandatory in Comorbidity section. The Staffs can fill the fields whichever they know

Add Comorbidity

Step 1
Click on Comorbidity

Step 2
Click Edit Details

Step 3
Add Comorbidity Details



One can Edit the Comorbidity Details at any time by clicking this button

Message Displayed After Successfully updating Comorbidity Details

Please Note that all fields are not Mandatory in Comorbidity section. The Staffs can fill the fields whichever they know

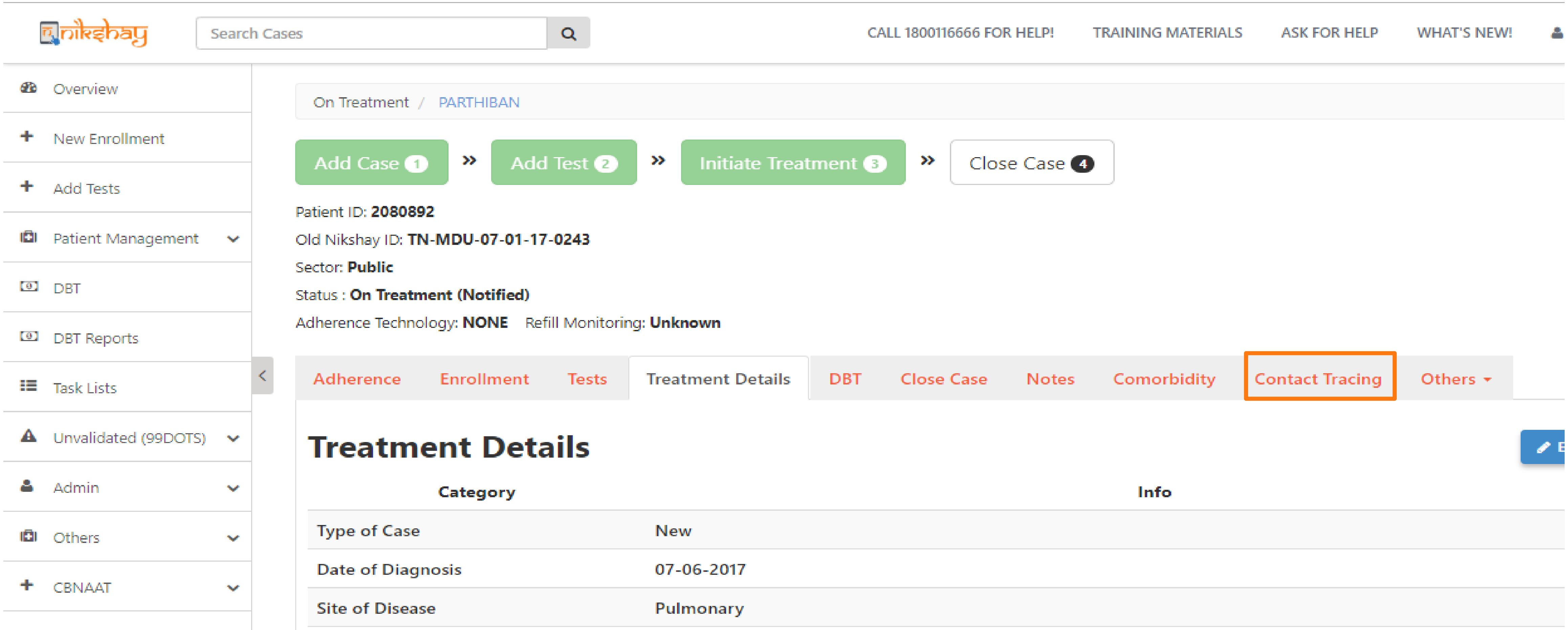
Contact Tracing

- Contact Tracing is a process of screening all household members in contact with the TB patients including Children less than the age of six.
- Contact tracing is very necessary to establish the primary source of the TB disease and to detect all those who are secondary infected for proper diagnosis and prompt treatment
- Under Contact Tracing tab, the details of other household members of the patient could be added.
- All the Contact Tracing details added for a given patient are visible to the User

Contact Tracing

Step 1

Click on Contact Tracing



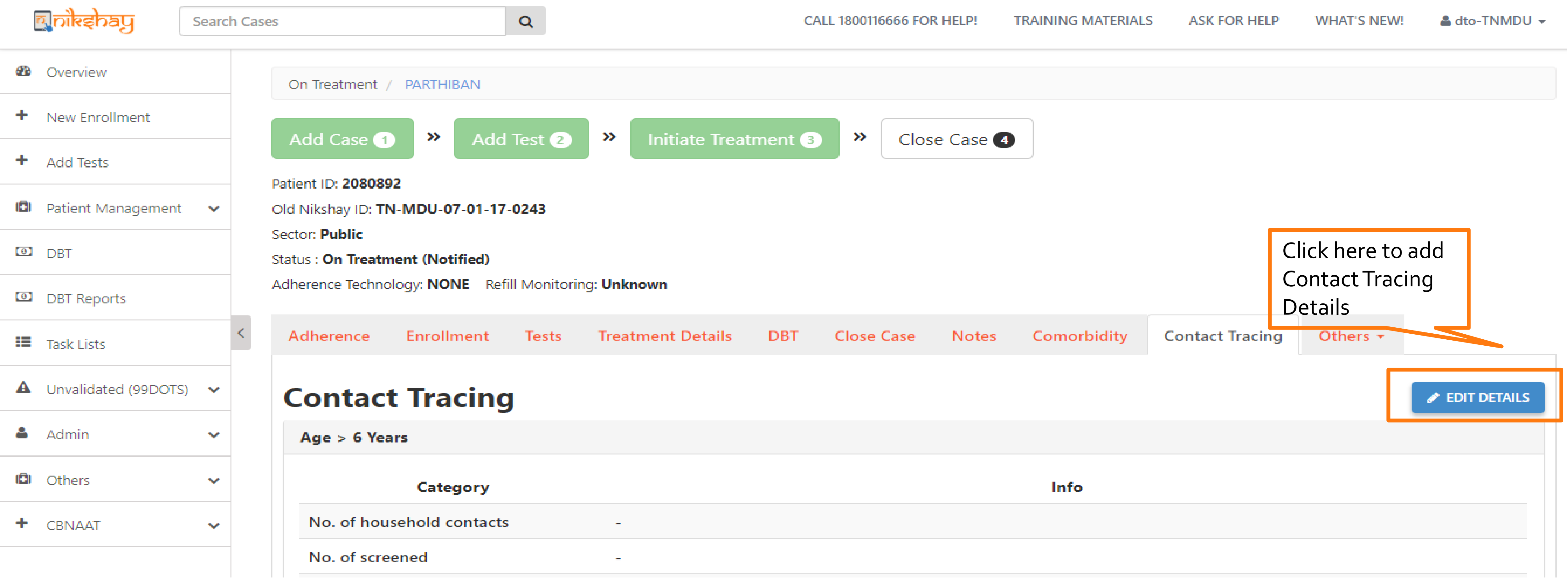
Contact Tracing

Step 1

Click on Contact Tracing

Step 2

Click Edit Details



Click here to add Contact Tracing Details

Please Note that all fields are not Mandatory in Contact Tracing section. The Staffs can fill the fields whichever they know nikshay

Contact Tracing

Step 1
Click on Contact Tracing

Step 2
Click Edit Details

Step 3
Add Contact Tracing Details

Click here to update Contact Tracing Details

Contact Tracing

CANCEL | UPDATE

Age > 6 Years

No. of household contacts
No. of screened
No. with symptoms
No. evaluated
No. diagnosed
No. put on treatment

Fill the Contact Tracing Details of members aged above 6 years old

Age < 6 Years

No. of household contacts
No. of screened
No. with symptoms
No. evaluated
No. diagnosed
No. put on treatment

Fill the Contact Tracing Details of members aged below 6 years old

Click here to add information of vaccination given to child less than 6 to prevent TB

+ Add Child (< 6 years old given chemoprophylaxis)

Please Note that all fields are not Mandatory in Contact Tracing section. The Staffs can fill the fields whichever they know

Contact Tracing

Step 1
Click on Contact Tracing

Step 2
Click Edit Details

Step 3
Add Contact Tracing Details

Search Cases

CALL 1800116666 FOR HELP! | TRAINING MATERIALS | ASK FOR HELP | WHAT'S NEW! | dto-TNTRY

- Overview
- New Enrollment
- Add Tests
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Old Nikshay ID: **TN-TRY-13-01-17-0002**
Sector: **Public**
Status : **On Treatment (Notified)**
Adherence Technology: **NONE** Refill Monitoring: **Unknown**

Adherence | Enrollment | Tests | Treatment Details | DBT | Close Case | Notes | Others

Contact Tracing

EDIT DETAILS

One can Edit the Contact Tracing Details at any time by clicking this button

Age > 6 Years

Category	Info
No. of household contacts	4
No. of screened	4
No. with symptoms	3
No. evaluated	2
No. diagnosed	2
No. put on treatment	1

Age < 6 Years

Category	Info
No. of household contacts	2
No. of screened	2
No. with symptoms	1
No. evaluated	2
No. diagnosed	-

Contact Tracing Updated

Message Displayed After Successfully updating Contact Tracing Details

Adherence Tracking

- As soon as the Patient's treatment details are entered and, Patient's status changes to "On treatment", the "Adherence" section is displayed
- Nikshay 2.0 is integrated with ICT Based adherence technologies of 99DOTS and MERM.
- If a 99 DOTS patient makes a call or if a MERM Patient opens his Medicine box to indicate dose taken, Adherence calendar gets updated.
- The Adherence Calendar can also be manually updated for Missed dose or Dose taken
- Adherence details for a date range can be updated by selecting multiple dates
- Tags (Remarks) can also be added for later reference

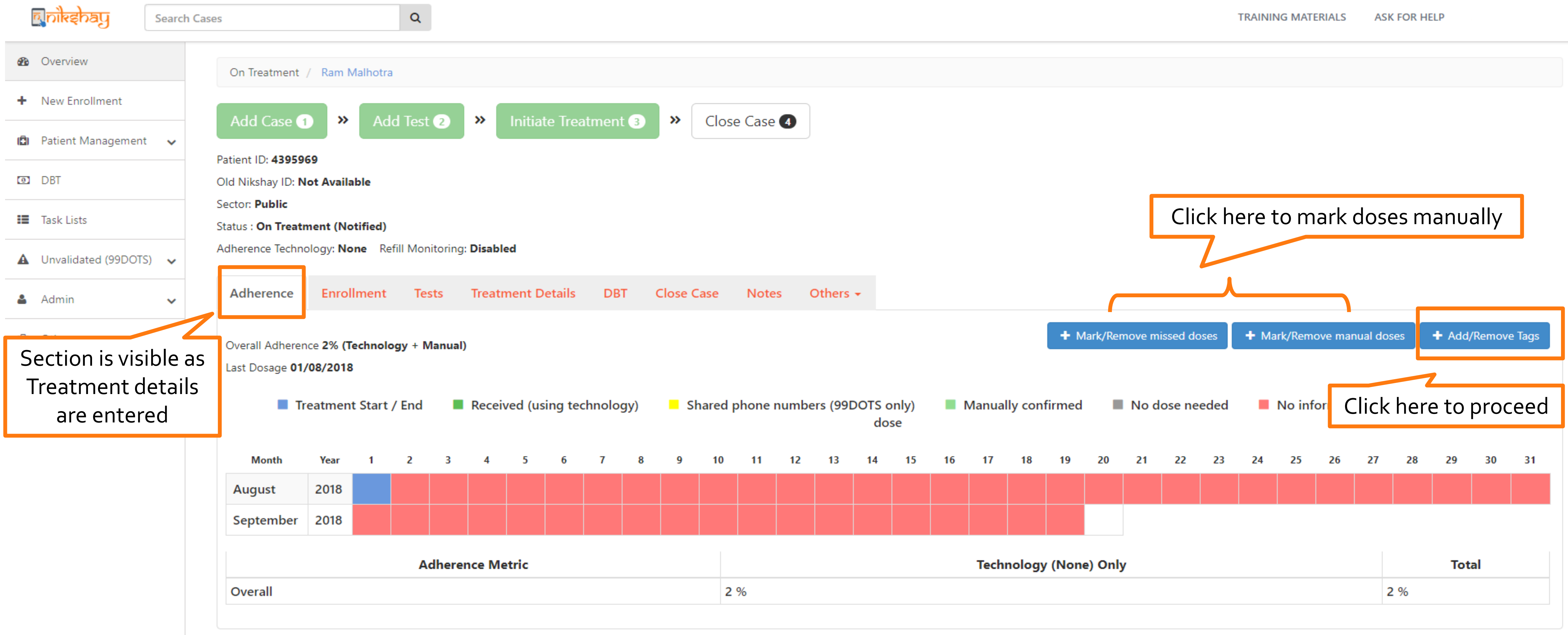
Manual Adherence update

Step 1

Click on Adherence

Step 2

Record Manual Dose



Click here to mark doses manually

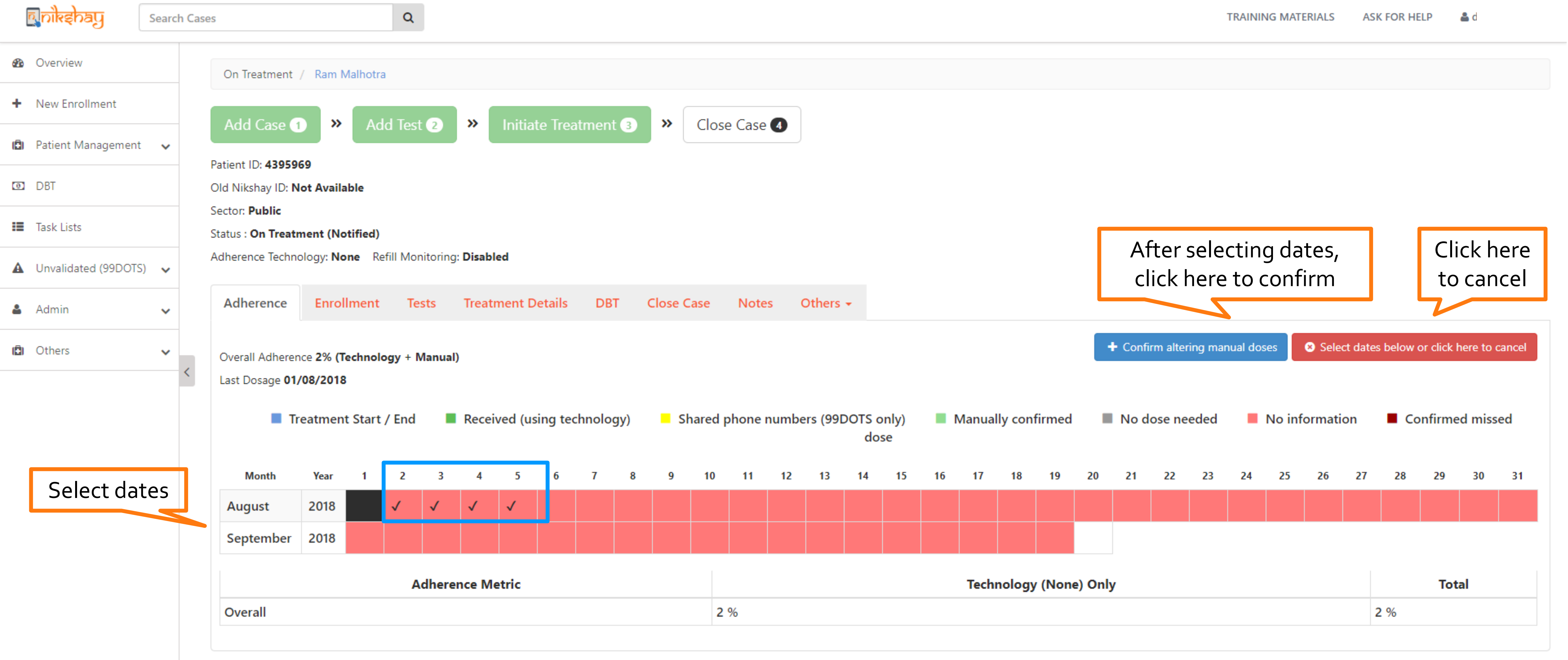
Section is visible as Treatment details are entered

Click here to proceed

Manual Adherence update

Step 1
Click on Adherence

Step 2
Record Manual Dose



After selecting dates, click here to confirm

Click here to cancel

Select dates

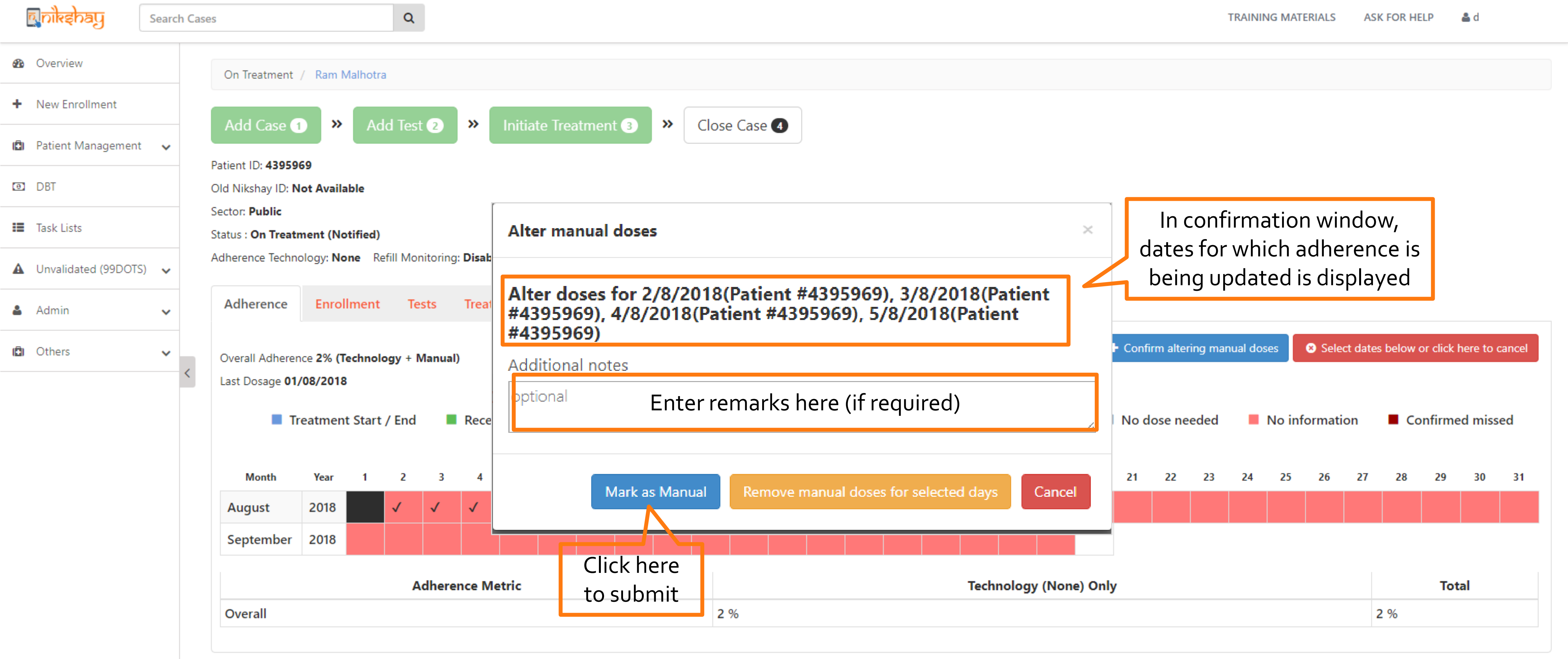
Manual Adherence update

Step 1

Click on Adherence

Step 2

Record Manual Dose

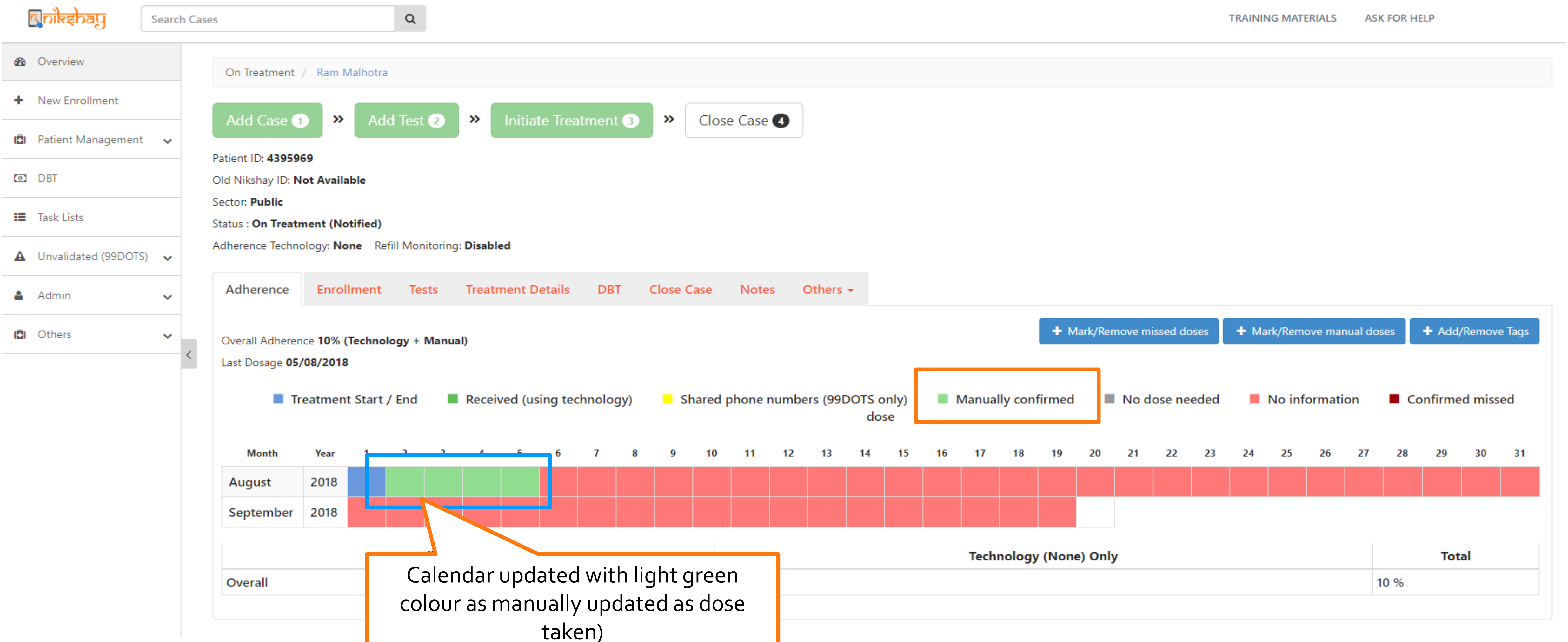


Manual Adherence update

Step 1
Click on Adherence

Step 2
Record Manual Dose

Step 2
View Calendar



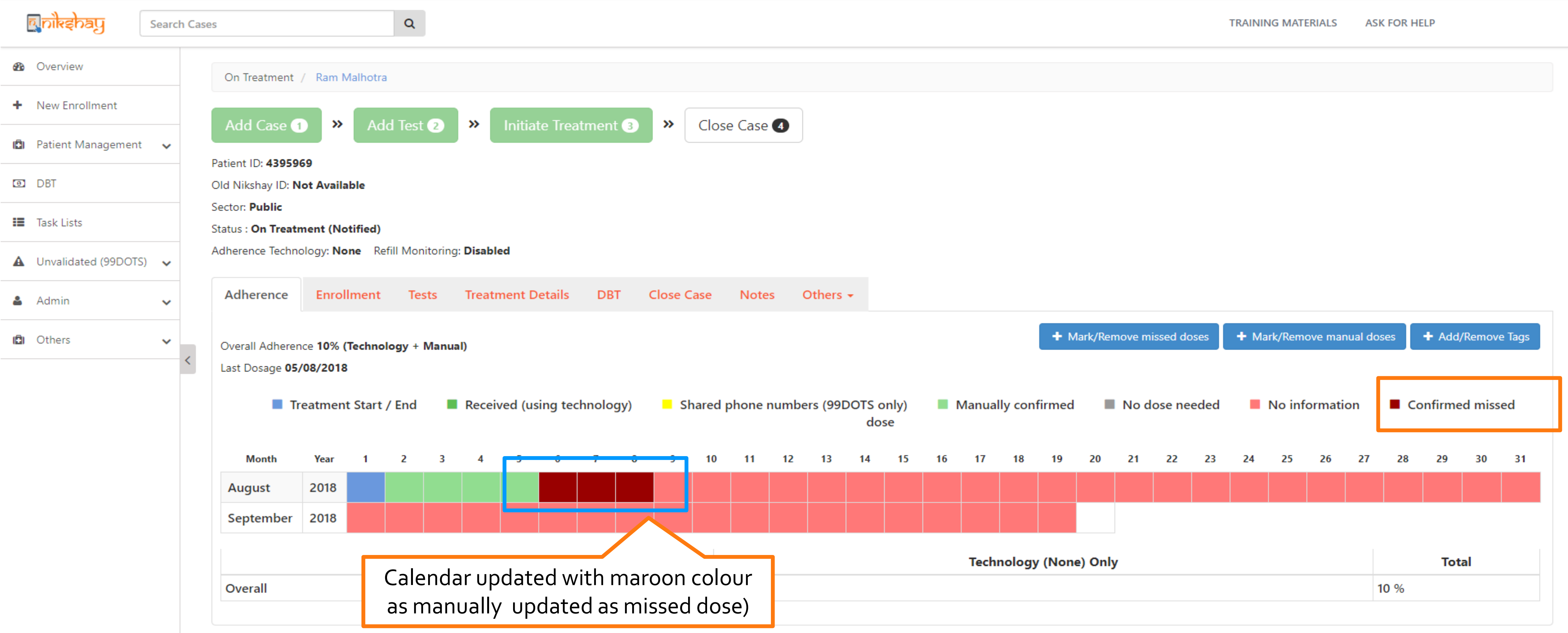
Calendar updated with light green colour as manually updated as dose taken)

Manual Adherence update

Step 1
Click on Adherence

Step 2
Record Manual Dose

Step 2
View Calendar



Calendar updated with maroon colour as manually updated as missed dose)

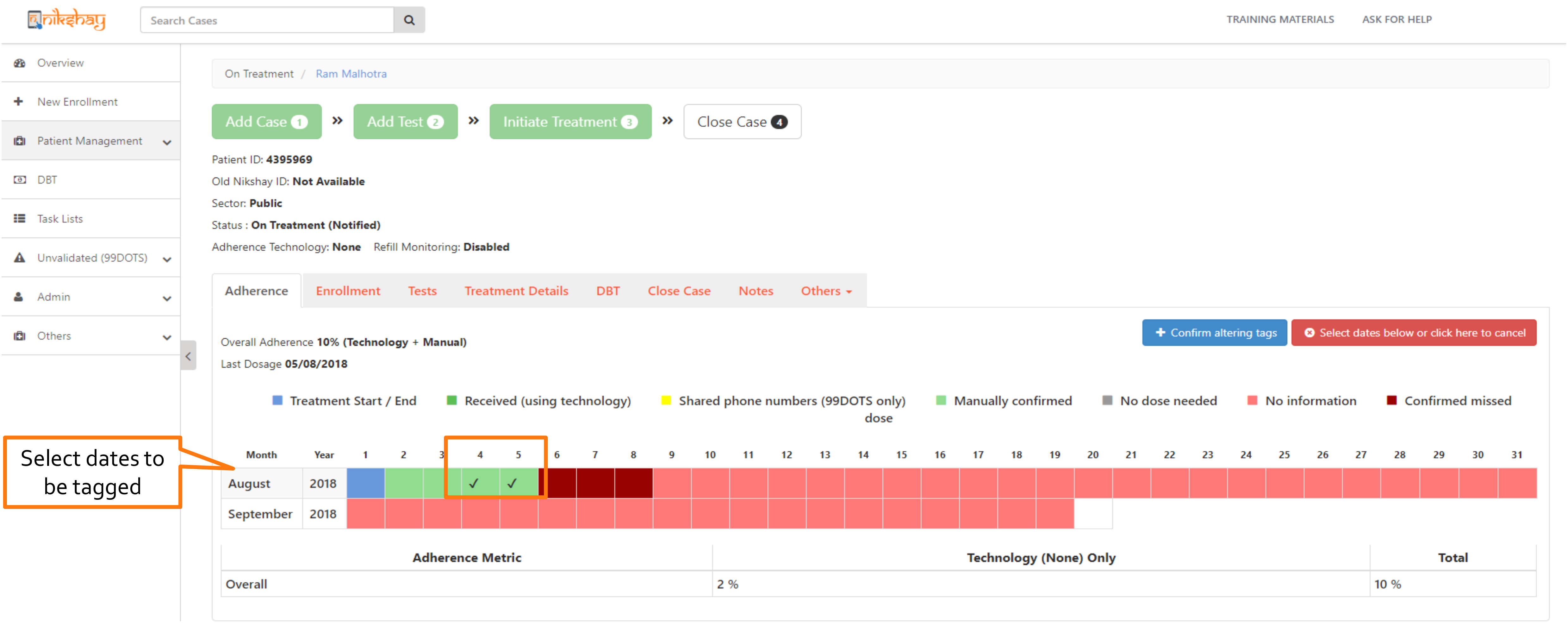
Manual Adherence update

Step 1 – Click on Adherence

Step 2 – Record Manual Dose

Step 2 – View Calendar

Step 4 – Add Tags



Select dates to be tagged

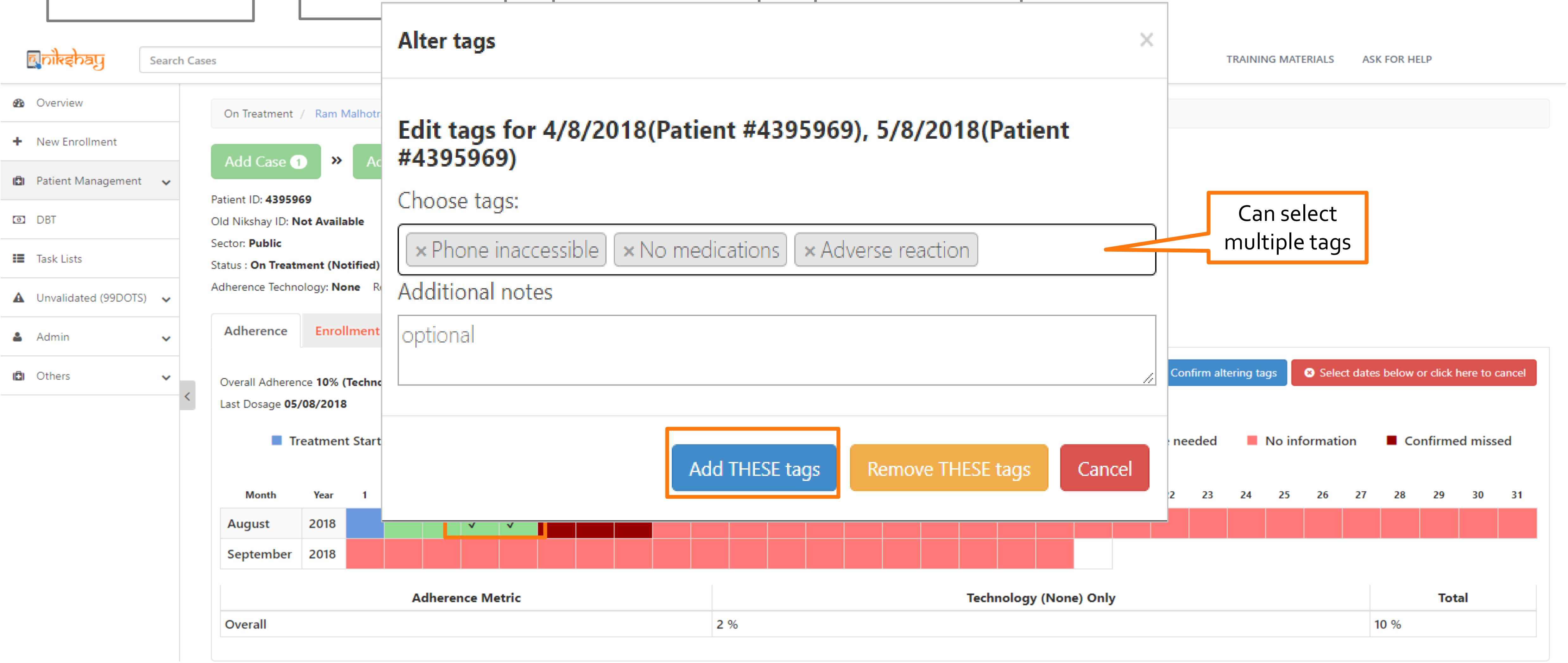
Manual Adherence update

Step 1 – Click on Adherence

Step 2 – Record Manual Dose

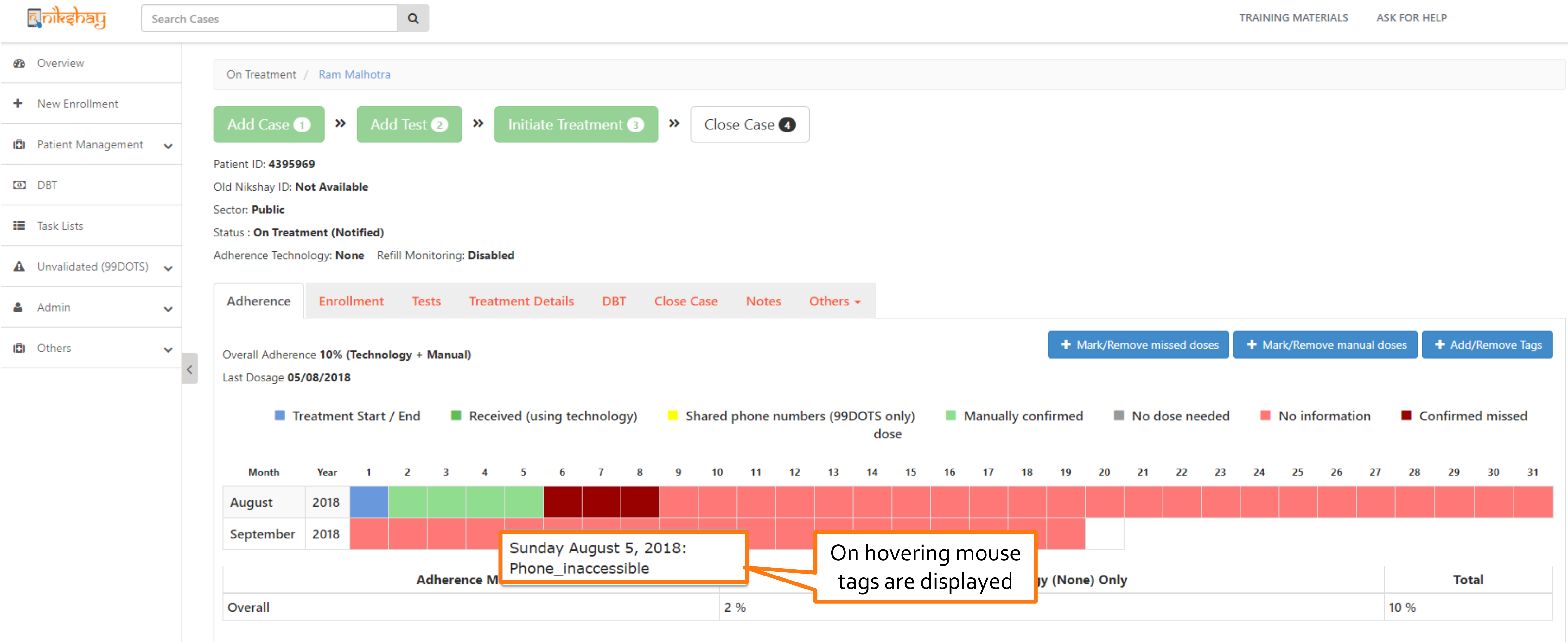
Step 2 – View Calendar

Step 4 – Add Tags



Manual Adherence update

Step 1	Step 2	Step 2	Step 4	Step 4
Click on Adherence	Record Manual Dose	View Calendar	Add Tags (optional)	View Tags

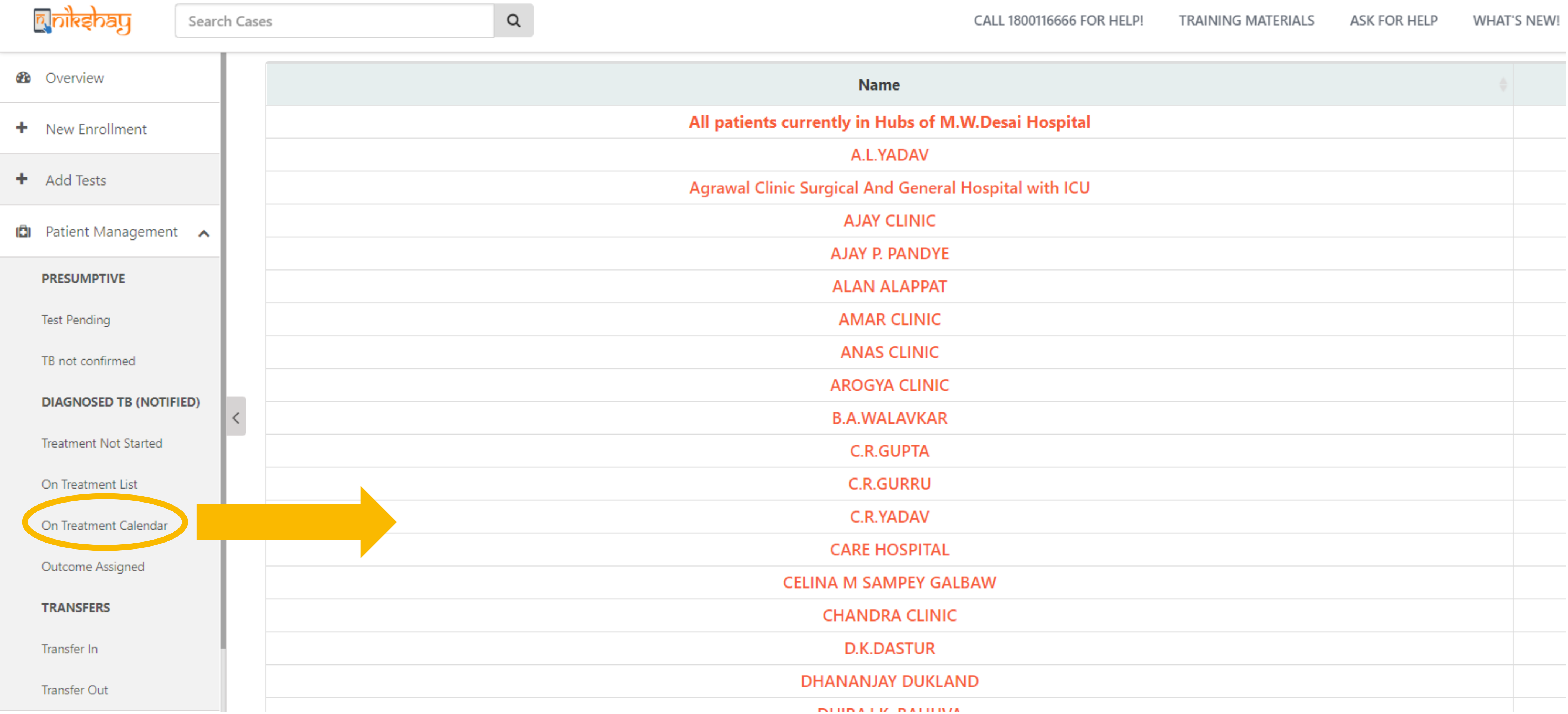


On hovering mouse tags are displayed

Adherence Monitoring in Nikshay Version 2.0

- In Nikshay Version 2.0, one can monitor adherence in the following ways:
  - Using On Treatment Calendar in Web Dashboard
  - Using Patient Page in Web Dashboard
  - Using Notification Report in Web Dashboard

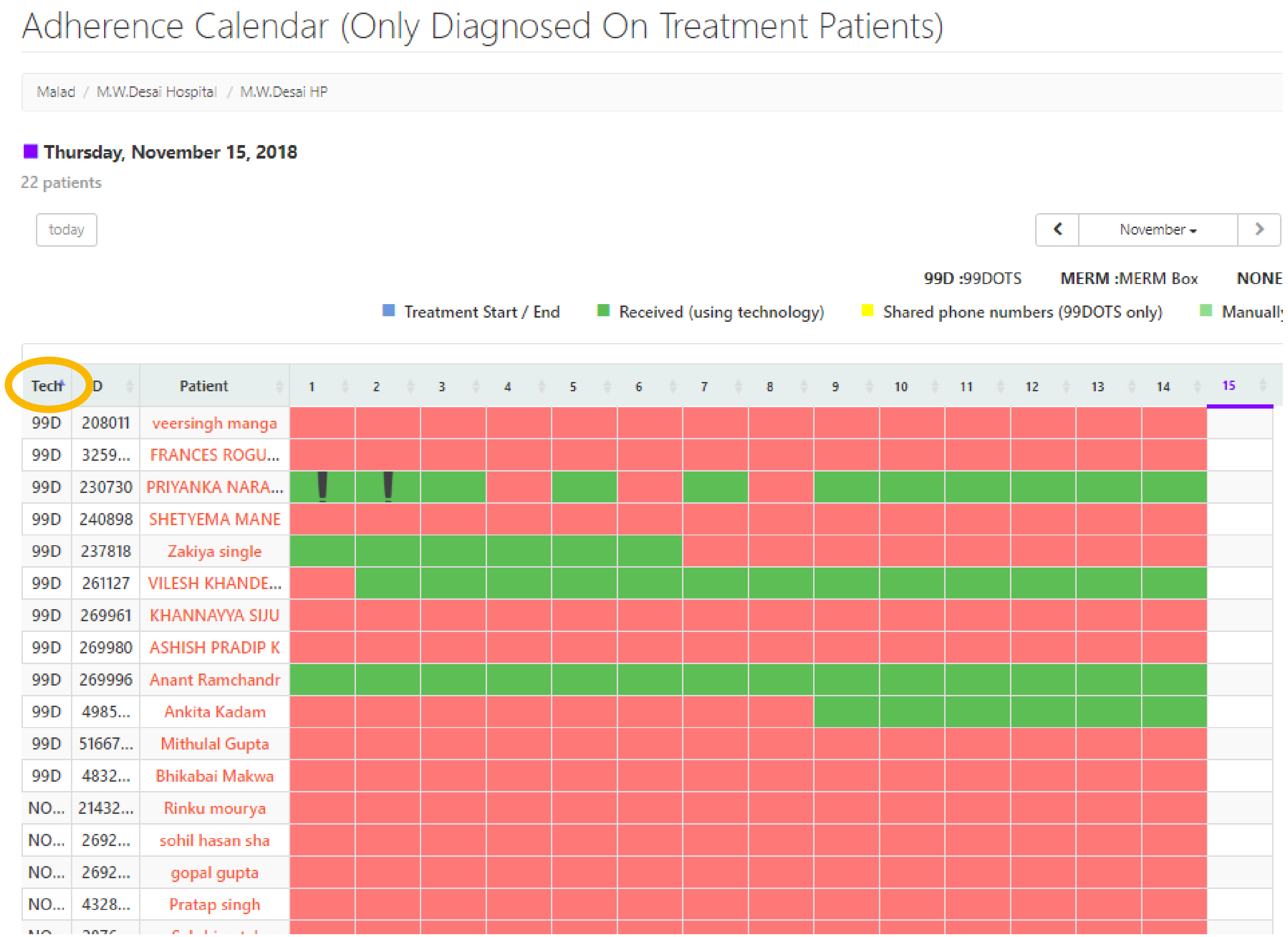
Adherence Monitoring - Using On Treatment Calendar in Web Dashboard



Step 1 – From Patient Management meu select On Treatment Calendar option

Step 2 – Select the hierarchy for which you want to see the list of patients in calendar view. Note that if you are logged in with private facility or PHI login you will directly see the calendar of all patients under it.

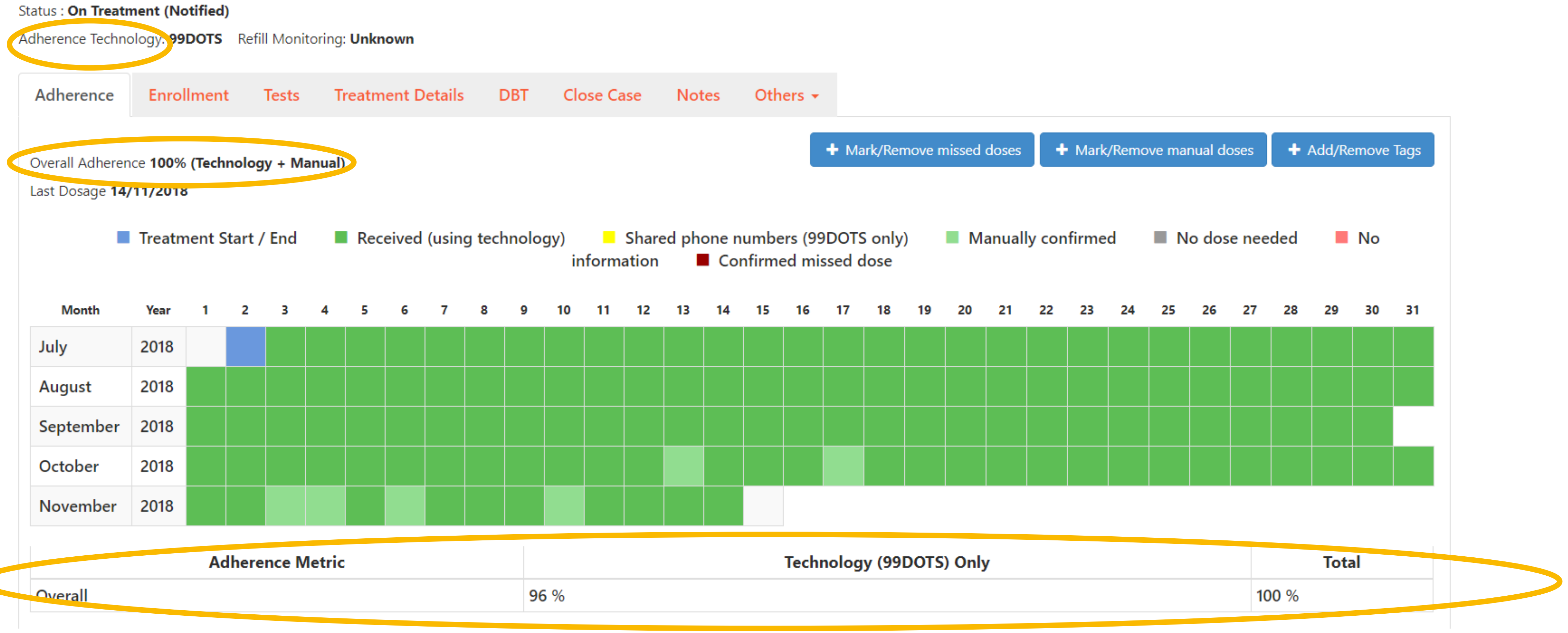
Adherence Monitoring - Using On Treatment Calendar in Web Dashboard



Step 3 – From the calendar view, click on the Tech column to sort the list as per adherence technology. Once you click sort the list will group patients on 99D, MERM and No technology options

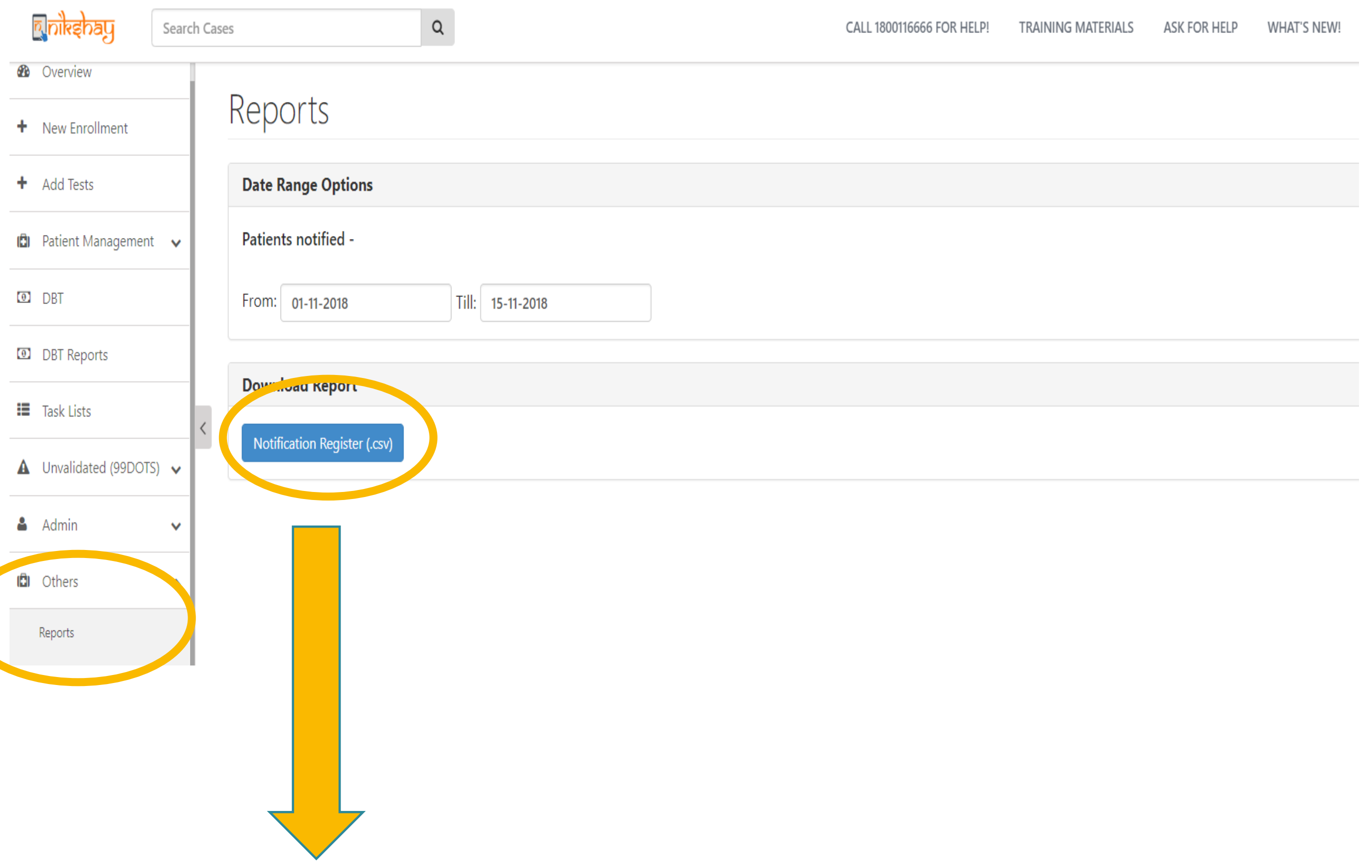
Step 4 – Here you can view adherence calendar of all patients in that hierarchy. You can right-click on the patient name to open the individual patient calendar in a new window.

Adherence Monitoring - Using Patient Page in Web Dashboard



From the patient page in web dashboard, you can view the adherence calendar and also see overall adherence, technology only adherence, the type of adherence technology the patient is using, and you can also mark manual and missed doses.

Adherence Monitoring - Using Notification Report in Web Dashboard



AO	AP	AQ
Adherence Technology	Average Adherence(Tech + Manual)	Average Adherence Tech

Step 1 – From the Web Dashboard, go to Others > Reports option

Step 2 – Enter the date range

Step 3 – Click the Notification Register button to download the report

Step 4 – Open the csv report in excel and view the adherence related columns for each patient

Note that the notification register download option is only available for district, TU, phi, private facility hierarchies. It is not available for State or country logins. You can apply various filters like location specific, private, public patients, etc. to this report.

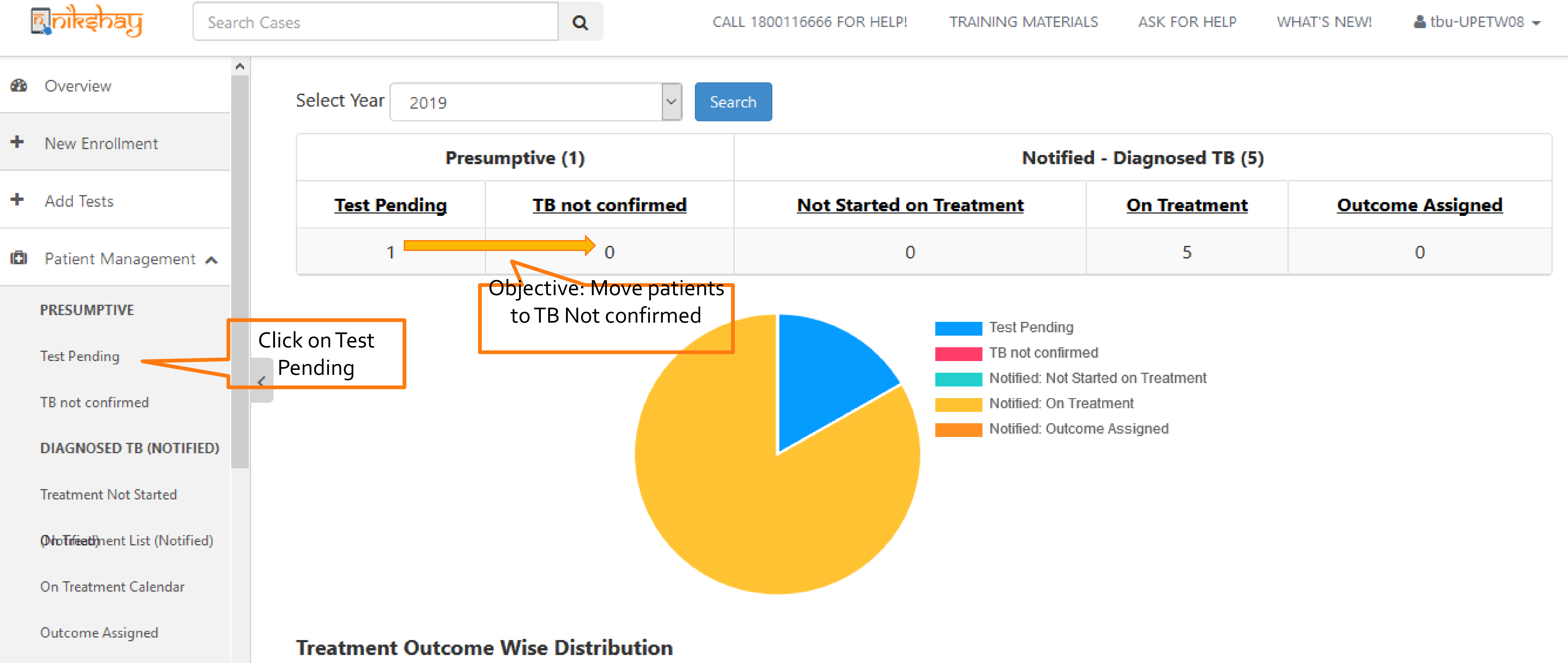
Closing Cases / Assigning Outcomes

- A case record submitted to Nikshay is tracked till a logical end point.
- The type of logical end will depend on whether the case is Diagnosed/Notified and whether treatment was initiated or not
  1. For Cases that are **Test Pending** → convert to TB Not Confirmed
  2. For Cases Treatment has not been started → Assign Notification **Outcome** or the reason for not initiating on treatment
  3. For cases that have stopped/ completed treatment→ Assign Treatment **outcome.**
- Moving a case to its logical end is called **Closing a case**.
- A patient's record may be closed by going to the Close Case tab in the patient management interface.

Closing Test Pending cases

Step 1

Click on Test Pending



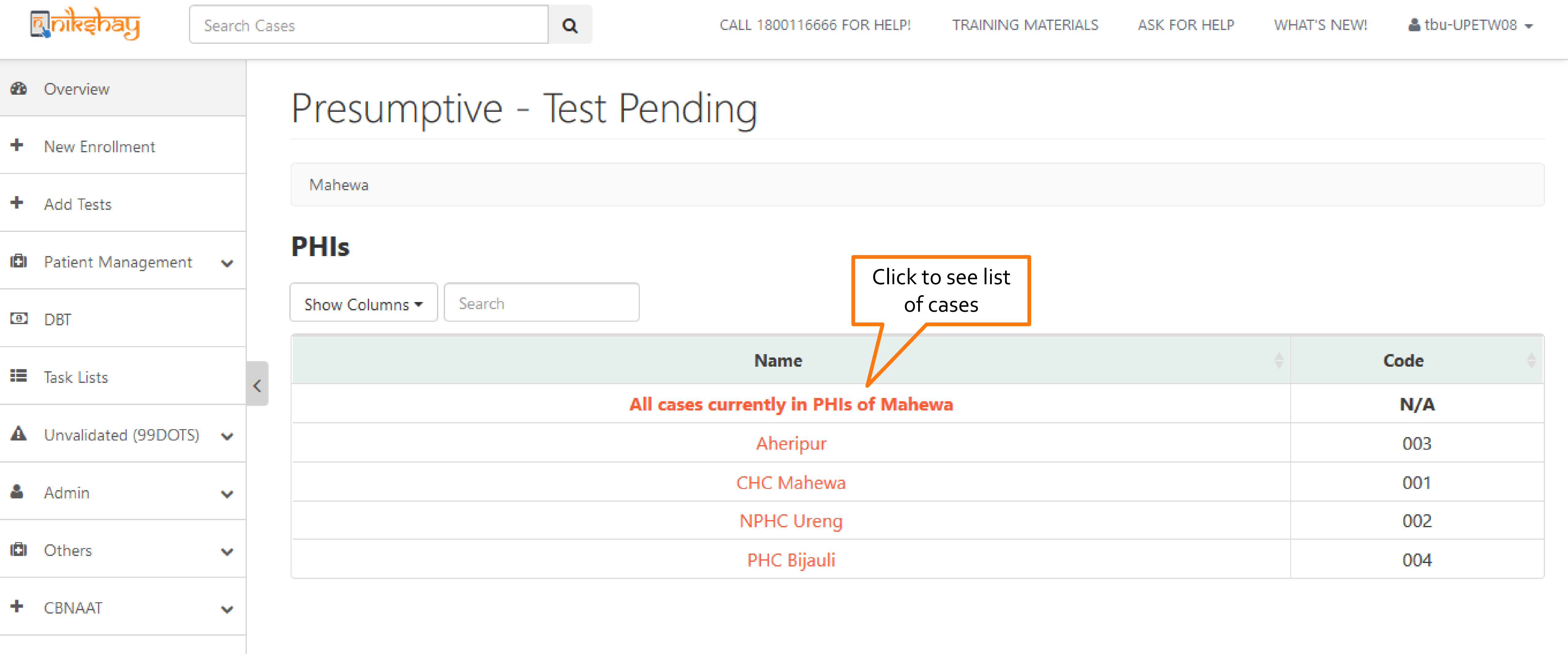
Closing Test Pending cases

Step 1

Click on Test Pending

Step 2

Click on PHI list/All Cases



Closing Test Pending cases

Step 1
Click on Test Pending

Step 2
Click on PHI list/All Cases

Step 3
Click on the Patient Name to assign outcome

Search Cases | CALL 1800116666 FOR HELP! | TRAINING MATERIALS | ASK FOR HELP | WHAT'S NEW! | tbu-UPETW08

- Overview
- New Enrollment
- Add Tests
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others
- CBNAAT
- Active Case Finding

Presumptive - Test Pending

Mahewa

Show Columns | Search

Click on Name

Patient ID	Old Nikshay ID	PHI	Name	Contact #	Current Facility	Enrollment Date
6448137	-	CHC Mahewa	Kallu Kallu	8510847873	CHC Mahewa (316132)	14-01-2019
5598654	-	CHC Mahewa	Krisna Kumar	8750427531	CHC Mahewa (316132)	29-11-2018
5417280	-	CHC Mahewa	Shashi Devi	9761392373	CHC Mahewa (316132)	16-11-2018
5242445	-	NPHC Ureng	Veerpal Singh	9719501063	NPHC Ureng (316133)	01-11-2018
5221771	-	PHC Bijauli	Omnaryana Omnaryana	9917376432	PHC Bijauli (316135)	31-10-2018
4743669	UP-ETW-08-01-18-0096	CHC Mahewa	Ram sheela	9760591467	CHC Mahewa (316132)	19-09-2018
4713008	UP-ETW-08-03-18-0041	Aheripur	Hakim singh		Aheripur (316134)	14-09-2018
4713386	UP-ETW-08-03-18-0042	Aheripur	Ram kumar		Aheripur (316134)	14-09-2018

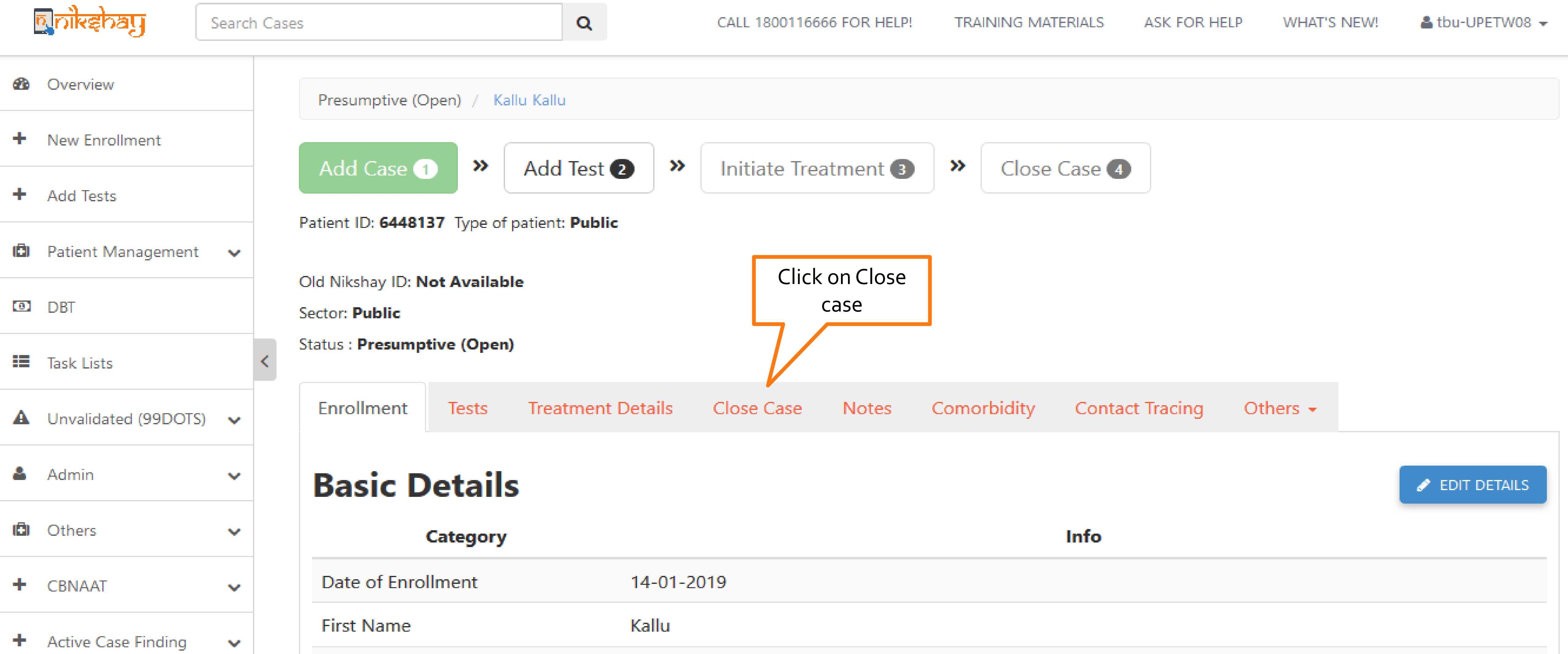
Closing Test Pending cases

Step 1
Click on Test Pending

Step 2
Click on PHI list/All Cases

Step 3
Click on the Patient Name to assign outcome

Step 4
Click on Close Case tab in Patient's Page



Closing Test Pending cases

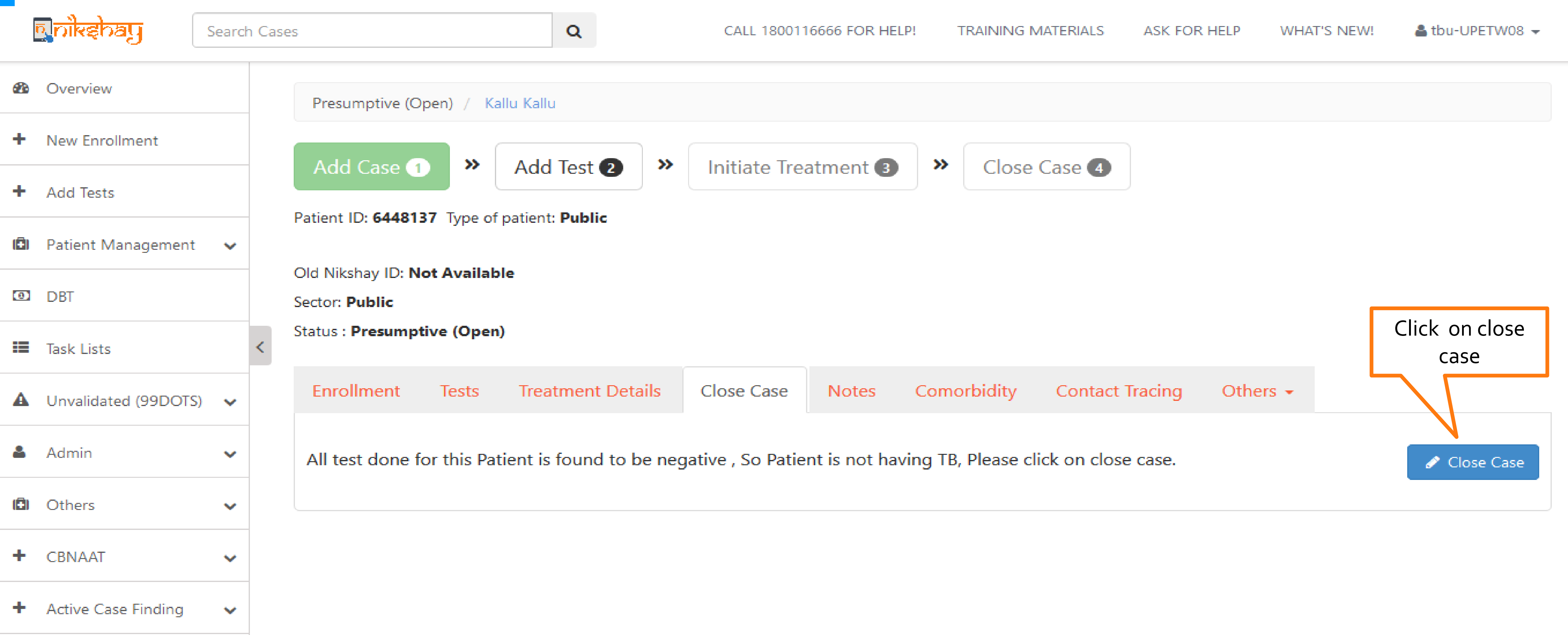
Step 1
Click on Test Pending

Step 2
Click on PHI list/All Cases

Step 3
Click on the Patient Name to assign outcome

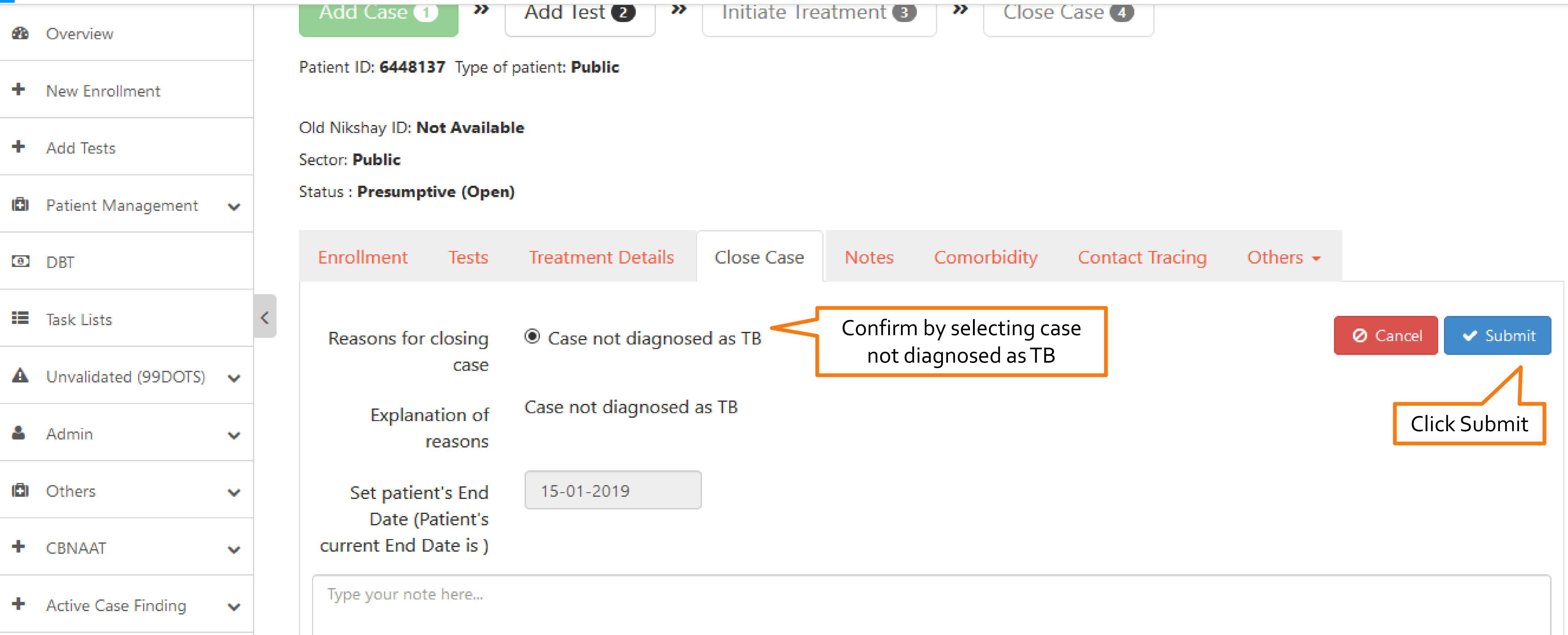
Step 4
Click on Close Case tab in Patient's Page

Step 5
Click Close Case button



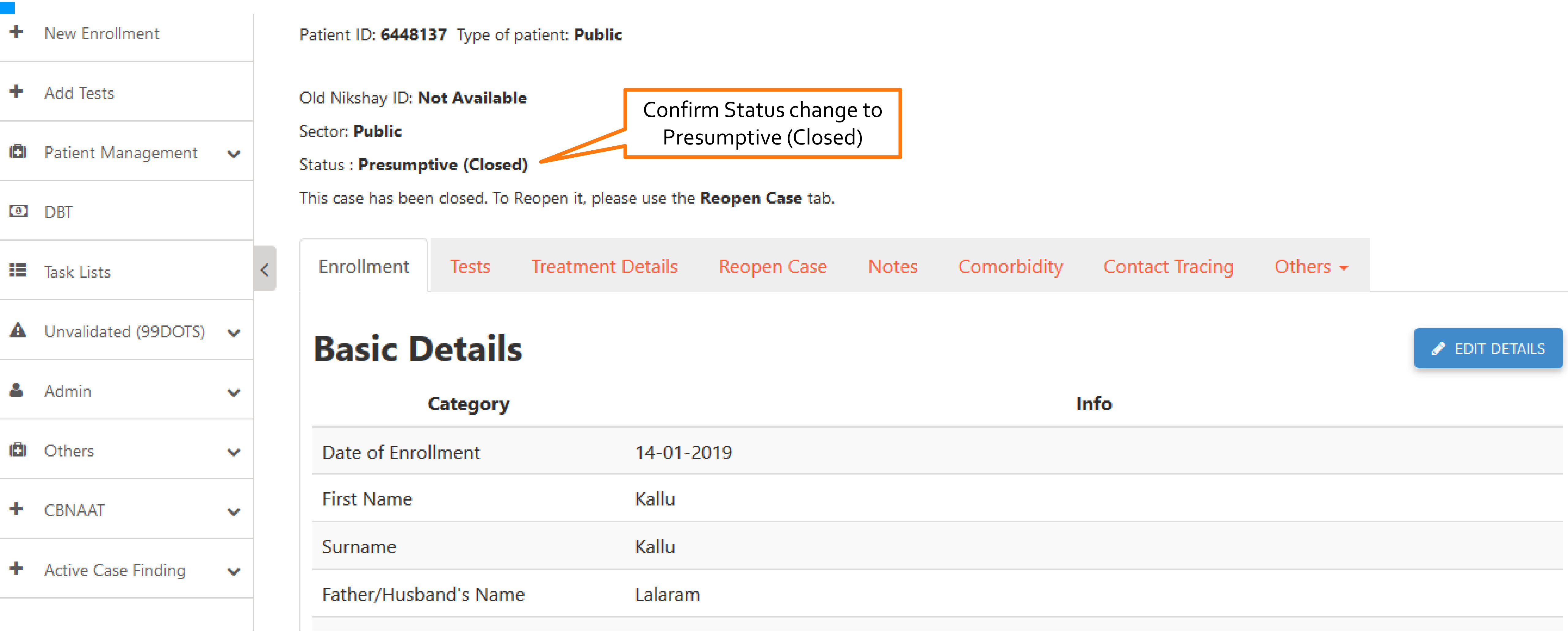
Closing Test Pending cases

1. **Step 1** – Click on Test Pending
2. **Step 2** – Click on PHI list/All Cases
3. **Step 3** – Click on the Patient Name to assign outcome
4. **Step 4** – Click on Close Case tab in Patient's Page
5. **Step 5** – Click Close Case button
6. **Step 6** – Select the reason for closing case and click Submit



Closing Test Pending cases

Verify that the status is changed to Presumptive(Closed)



Closing Notified (Treatment Not started) Cases

nikshay

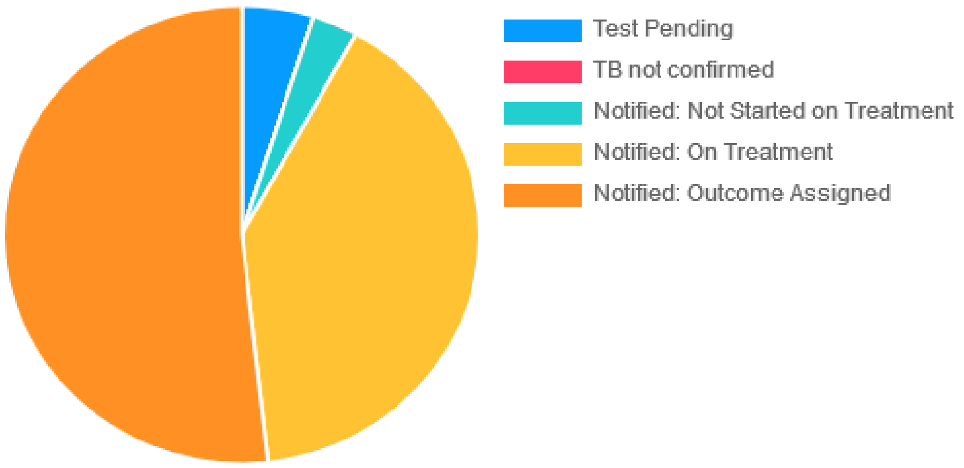
Step 1
Click on Treatment Not Started

- Overview
- New Enrollment
- Add Tests
- Patient Management
  - PRESUMPTIVE
    - Test Pending
    - TB not confirmed
  - DIAGNOSED TB (NOTIFIED)
    - Treatment Not Started
    - (Not Treated) On Treatment List (Notified)
    - On Treatment Calendar
    - Outcome Assigned
  - TRANSFERS

Click Treatment Not started

Select Year 2018 Search

Presumptive (11)		Notified - Diagnosed TB (215)		
Test Pending	TB not confirmed	Not Started on Treatment	On Treatment	Outcome Assigned
11	0	7	91	117



Treatment Outcome Wise Distribution

Cured	Treatment Complete	Treatment Failure	Died	Lost To Follow Up	Not Evaluated	Treatment Regimen Changed

Closing Notified (Treatment Not started) Cases

Step 1
Click on Treatment Not Started

Step 2
Click on PHI list/All Cases

Search Cases

CALL 1800116666 FOR HELP! | TRAINING MATERIALS | ASK FOR HELP | WHAT'S NEW! | tbu-UPETW08

- Overview
- New Enrollment
- Add Tests
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others
- CBNAAT
- Active Case Finding

Diagnosed - Treatment not started

Mahewa

PHIs

Show Columns | Search

Click to get list of patients

Name	Code
All patients currently in PHIs of Mahewa	**N/A**
Aheripur	003
CHC Mahewa	001
NPHC Ureng	002
PHC Bijauli	004

Closing Notified (Treatment Not started) Cases

Step 1
Click on Treatment Not Started

Step 2
Click on PHI list/All Cases

Step 3
Click on the Patient Name to assign outcome

Search Cases

CALL 1800116666 FOR HELP! TRAINING MATERIALS ASK FOR HELP WHAT'S NEW! tbu-UPETW08

- Overview
- New Enrollment
- Add Tests
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others
- CBNAAT
- Active Case Finding

Diagnosed - Treatment not started

Mahewa

Show Columns | Search

Click on Patient Name

Patient ID	Old Nikshay ID	PHI	Name	Current Facility	Patient Type	Contact #	Diagnosed Date	ART Center
2182989	UP-ETW-02-10-17-0001	Aheripur	ADESH	Aheripur (003)	Public	8006409141	14/09/2017	N/A
3234355	UP-ETW-01-02-18-0186	CHC Mahewa	Deepa	CHC Mahewa (001)	Public	8939862911	05/06/2018	N/A
1961271	UP-ETW-08-04-17-0025	PHC Bijauli	Sham Bihari	PHC Bijauli (004)	Public	9756367742	10/07/2017	N/A
3245803	UP-ETW-08-01-18-0053	CHC Mahewa	Ramsewak	CHC Mahewa (001)	Public	9058898334	04/06/2018	N/A
5414150	-	Aheripur	Putti Lal Putti Lal	Aheripur (003)	Public	7500219069	15/11/2018	N/A

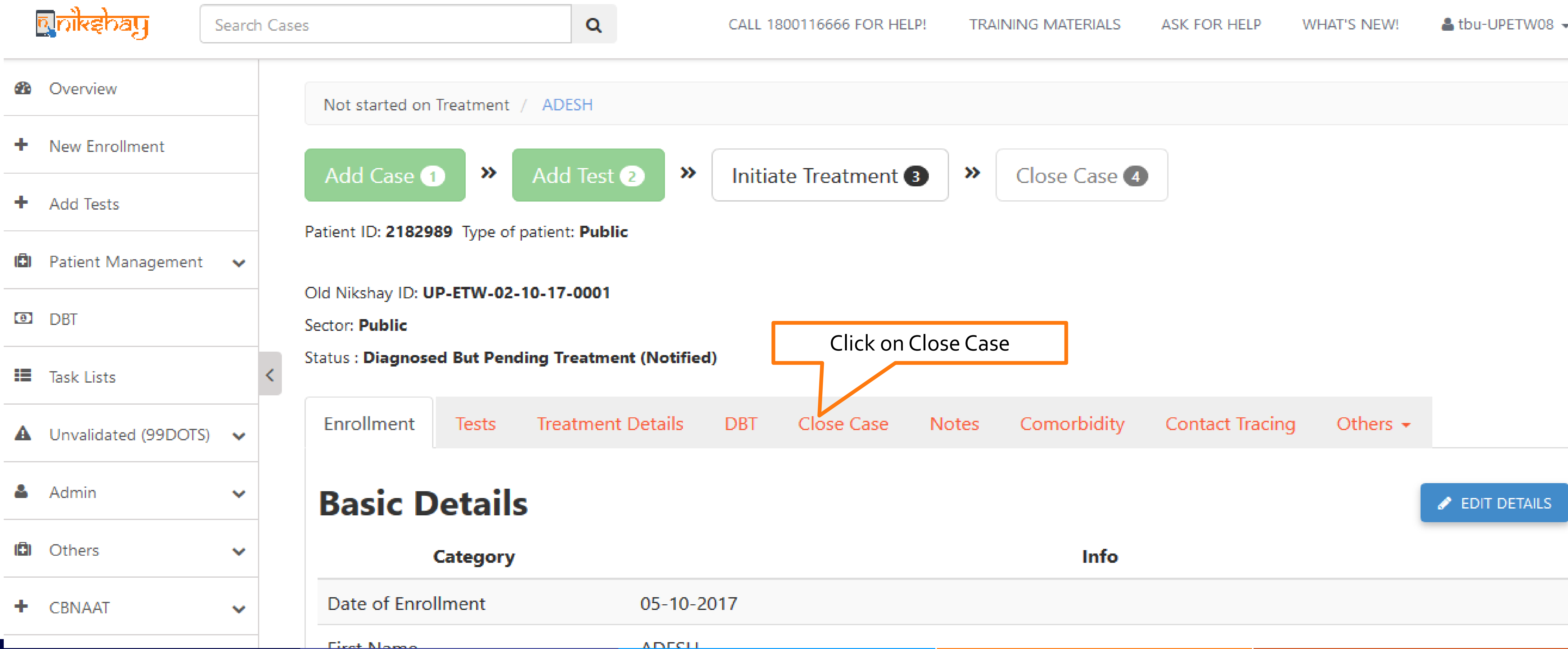
Closing Notified (Treatment Not started) Cases

Step 1
Click on Treatment Not Started

Step 2
Click on PHI list/All Cases

Step 3
Click on the Patient Name to assign outcome

Step 4
Click on Close Case tab in Patient's Page



Closing Notified (Treatment Not started) Cases

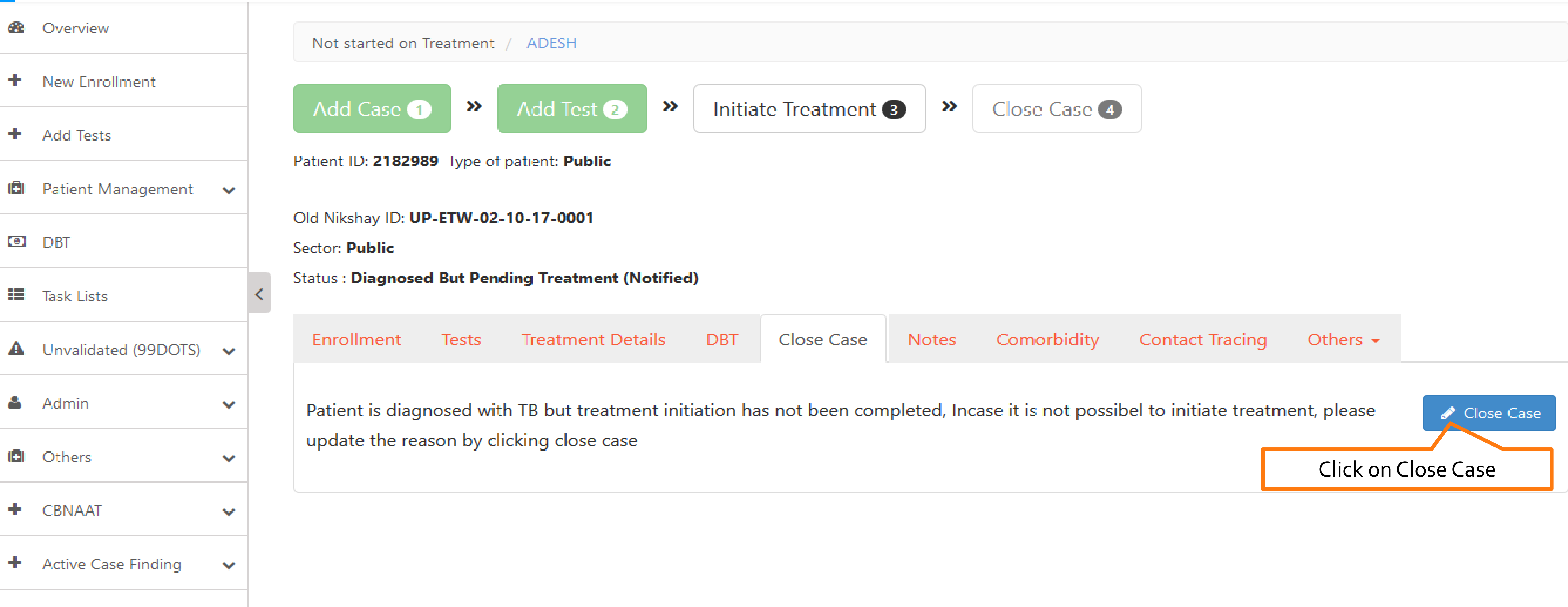
Step 1
Click on Treatment Not Started

Step 2
Click on PHI list/All Cases

Step 3
Click on the Patient Name to assign outcome

Step 4
Click on Close Case tab in Patient's Page

Step 5
Click Close Case button



Closing Notified (Treatment Not started) Cases

Step 1 Click on Treatment Not Started

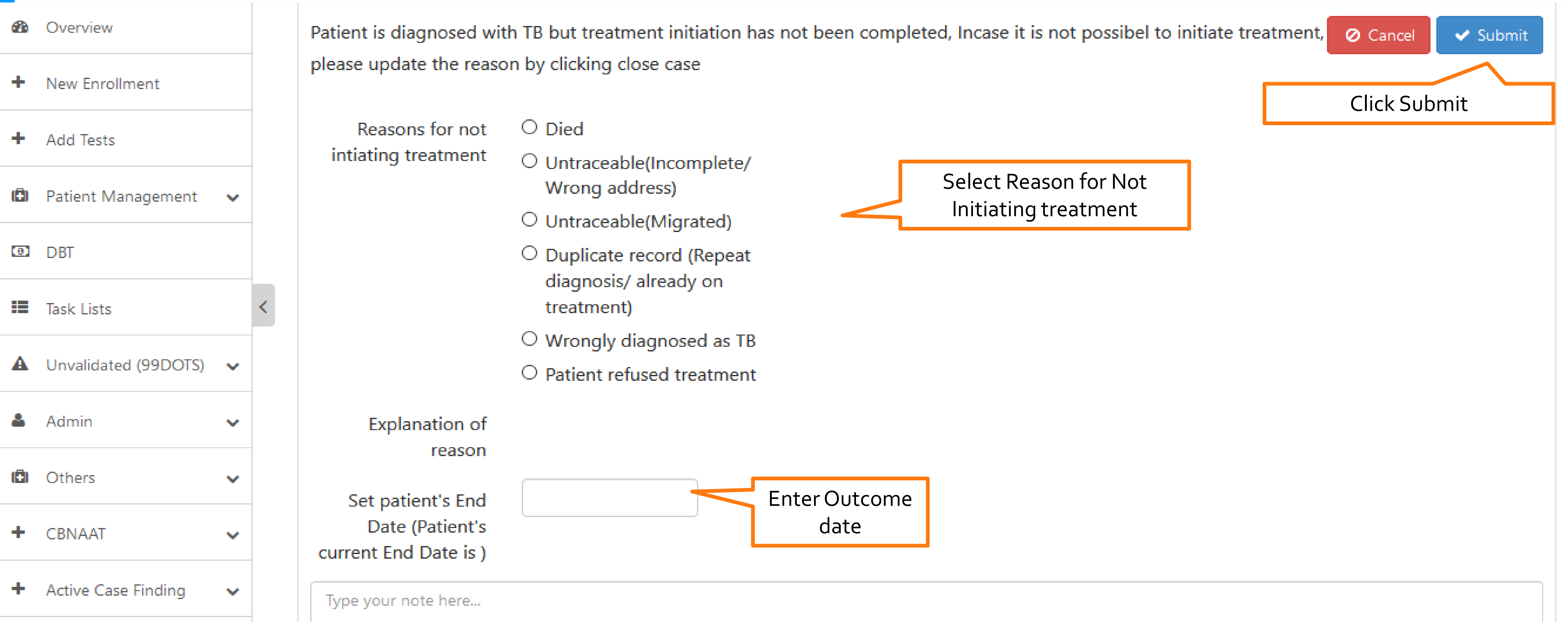
Step 2 Click on PHI list/All Cases

Step 3 Click on the Patient Name to assign outcome

Step 4 Click on Close Case tab in Patient's Page

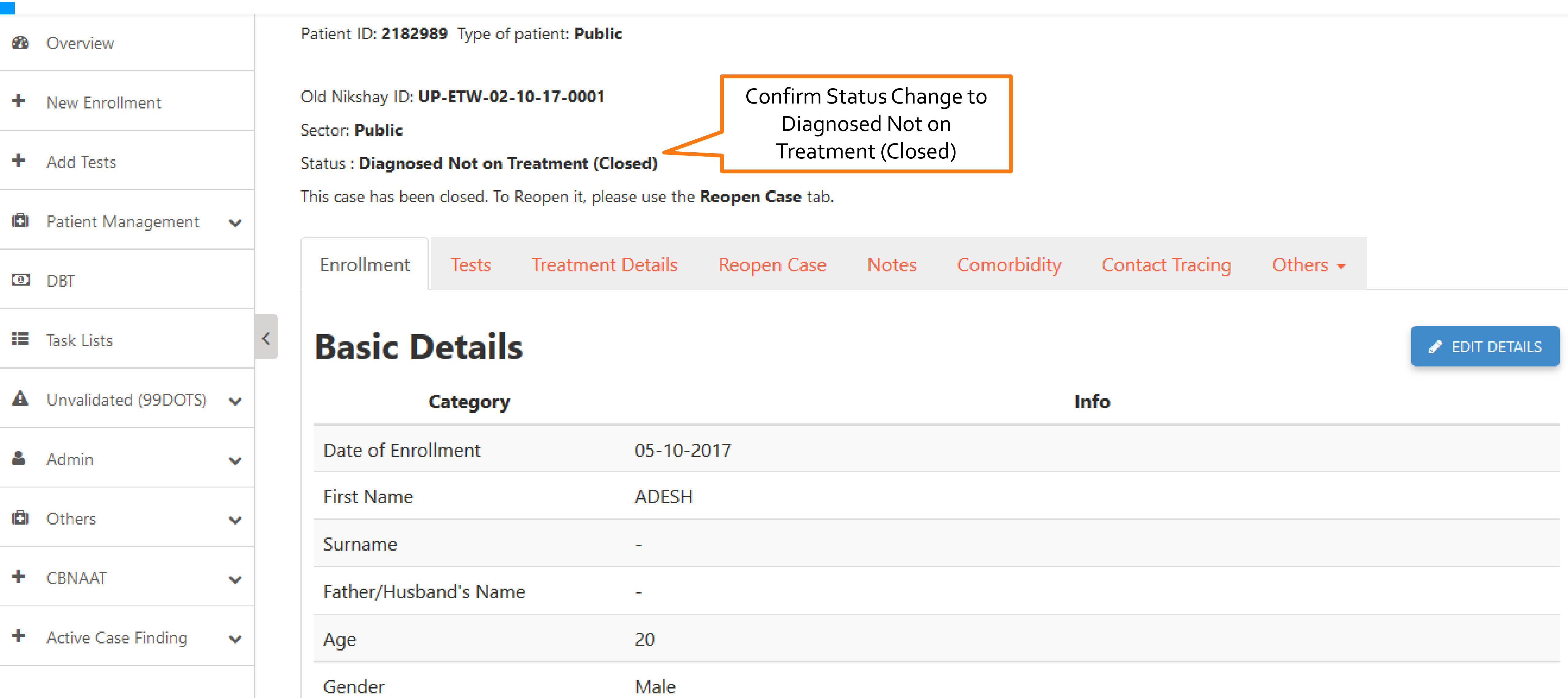
Step 5 Click Close Case button

Step 6 Select the reason for closing case and click Submit



Closing Notified (Treatment Not started) Cases

Verify that the status is changed to Diagnosed Not on Treatment (Closed)

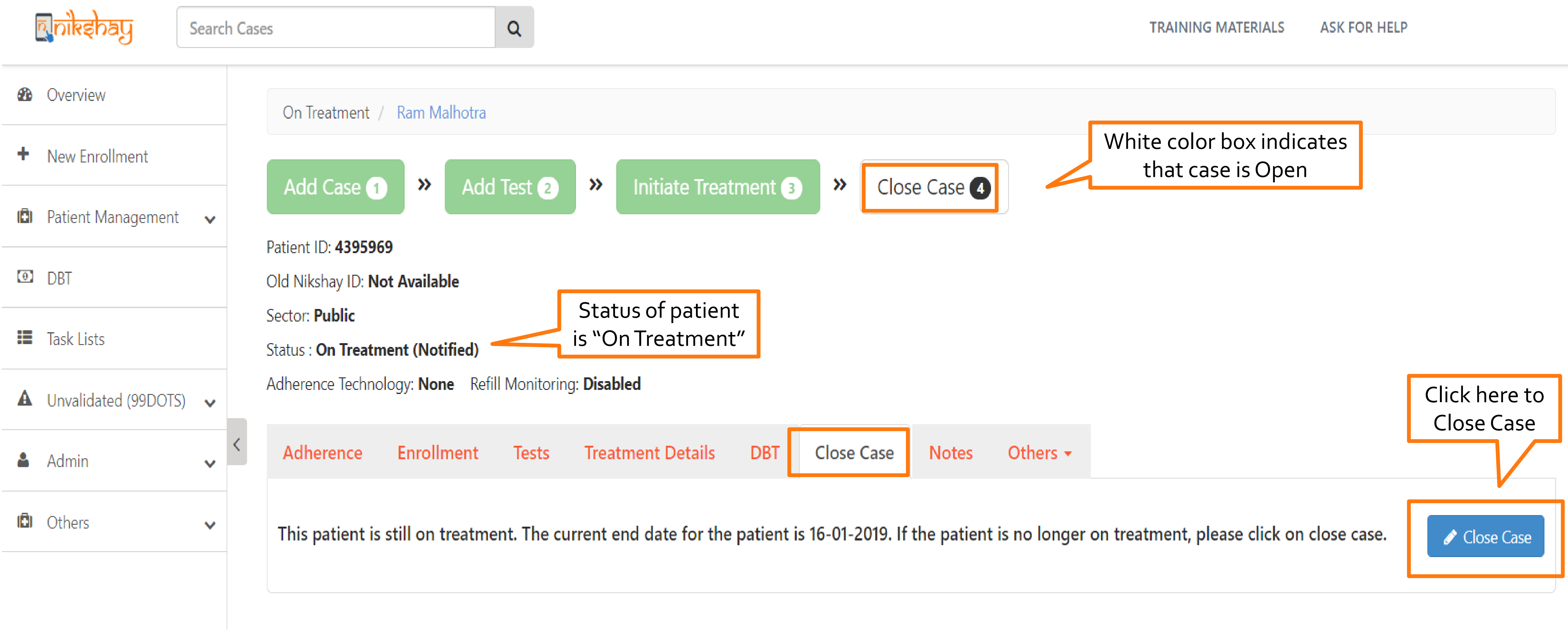


Assign Treatment Outcome

Step 1
Open the Patient's Page

Step 2
Click on the Close Case Tab

Step 3
Click Close Case Button



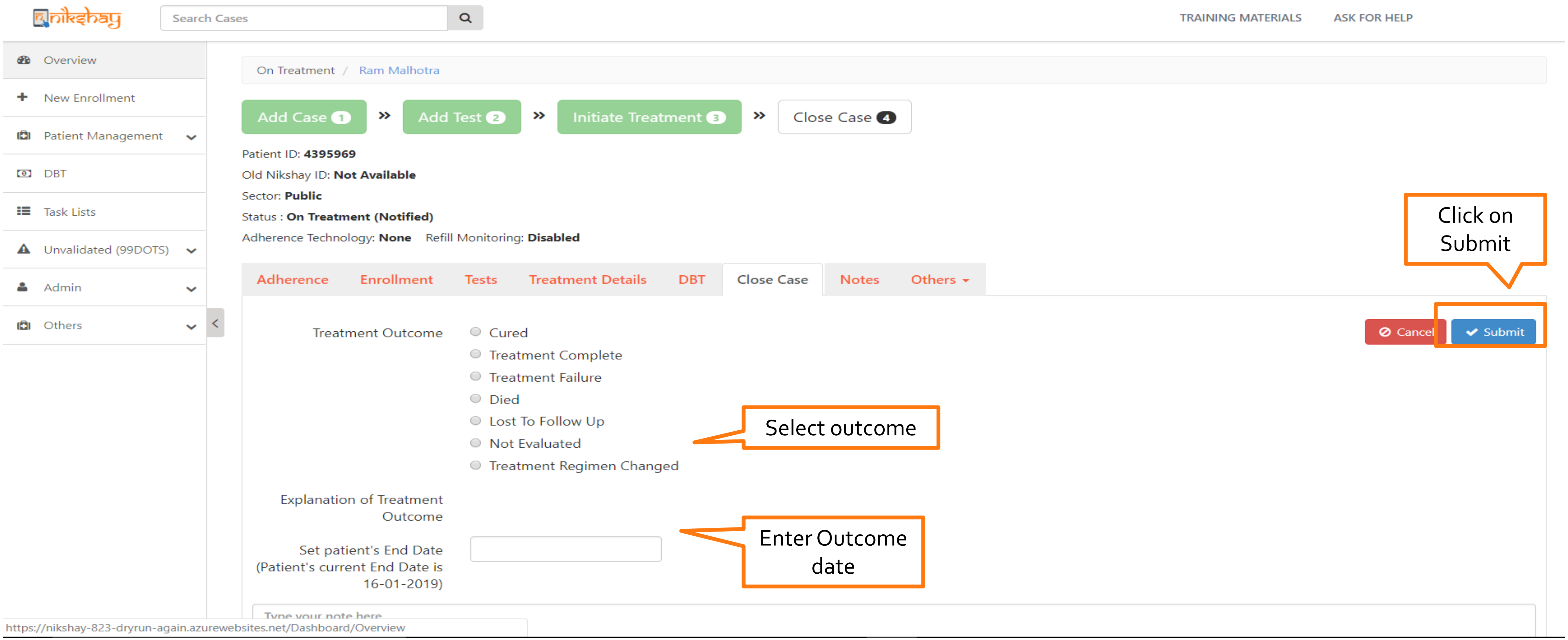
Assign Treatment Outcome

Step 1
Open the Patient's Page

Step 2
Click on the Close Case Tab

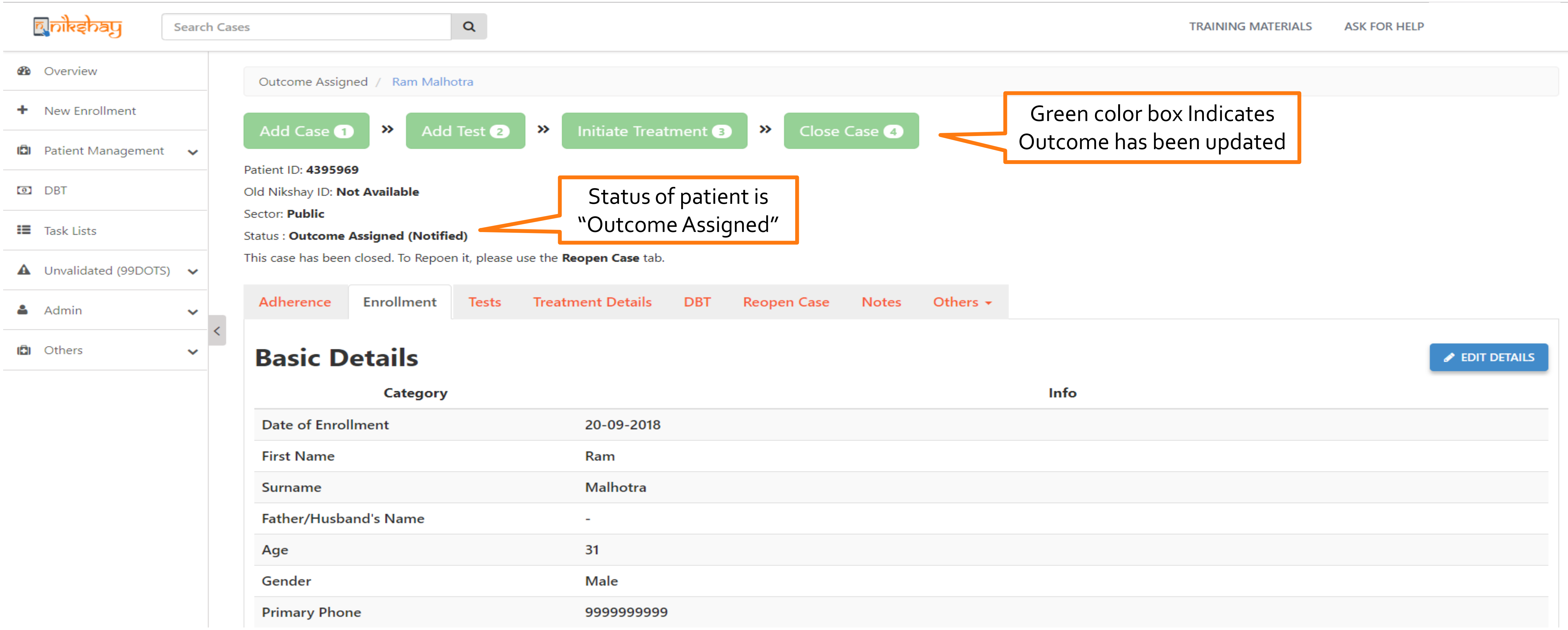
Step 3
Click Close Case Button

Step 4
Select the reason for closing case and click Submit



Assign Treatment Outcome

Verify that the status is changed to Outcome Assigned(Notified)

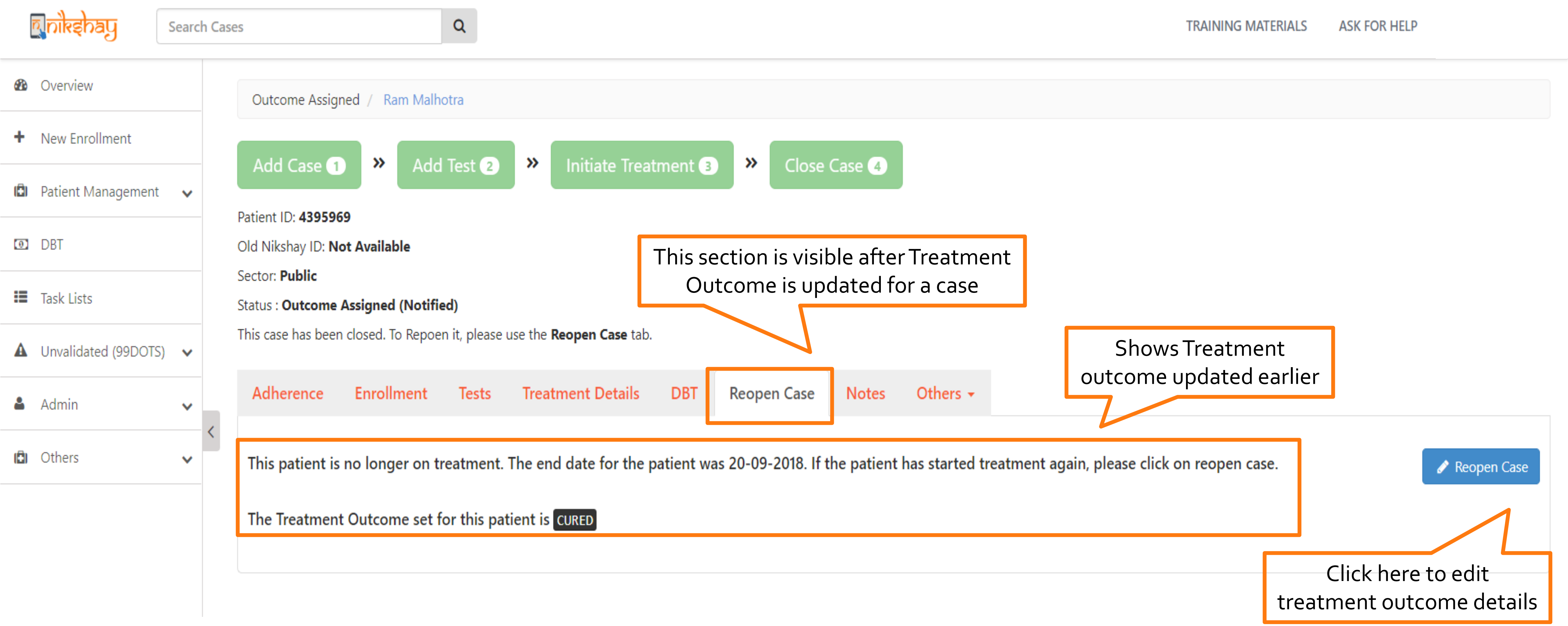


Edit Treatment Outcome date

Step 1
Open the Patient's Page

Step 2
Click on the Reopen Case Tab

Step 3
Click Reopen Case Button



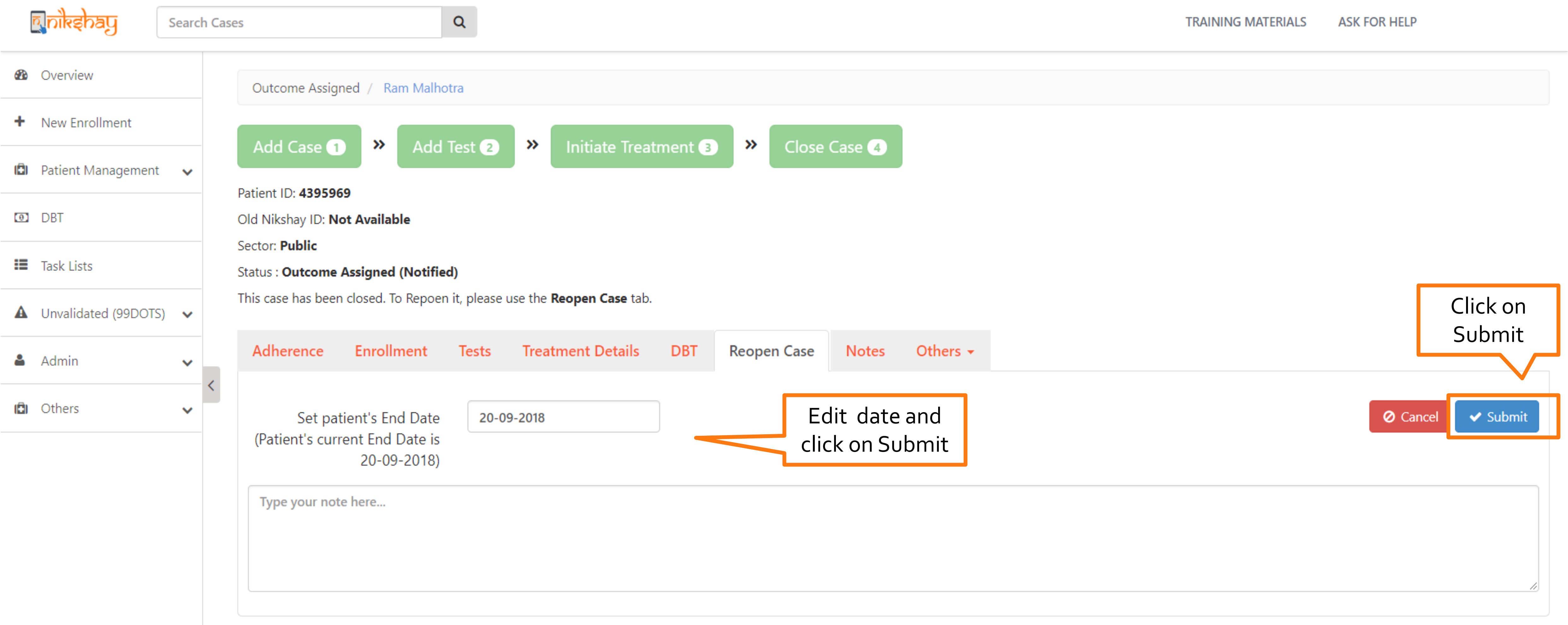
Edit Treatment Outcome date

Step 1
Open the Patient's Page

Step 2
Click on the Reopen Case Tab

Step 3
Click Reopen Case Button

Step 4
Select the End Date for that Patient and click Submit



Re-Initiating a Case on New Episodes

Re-initiating a case on new episode

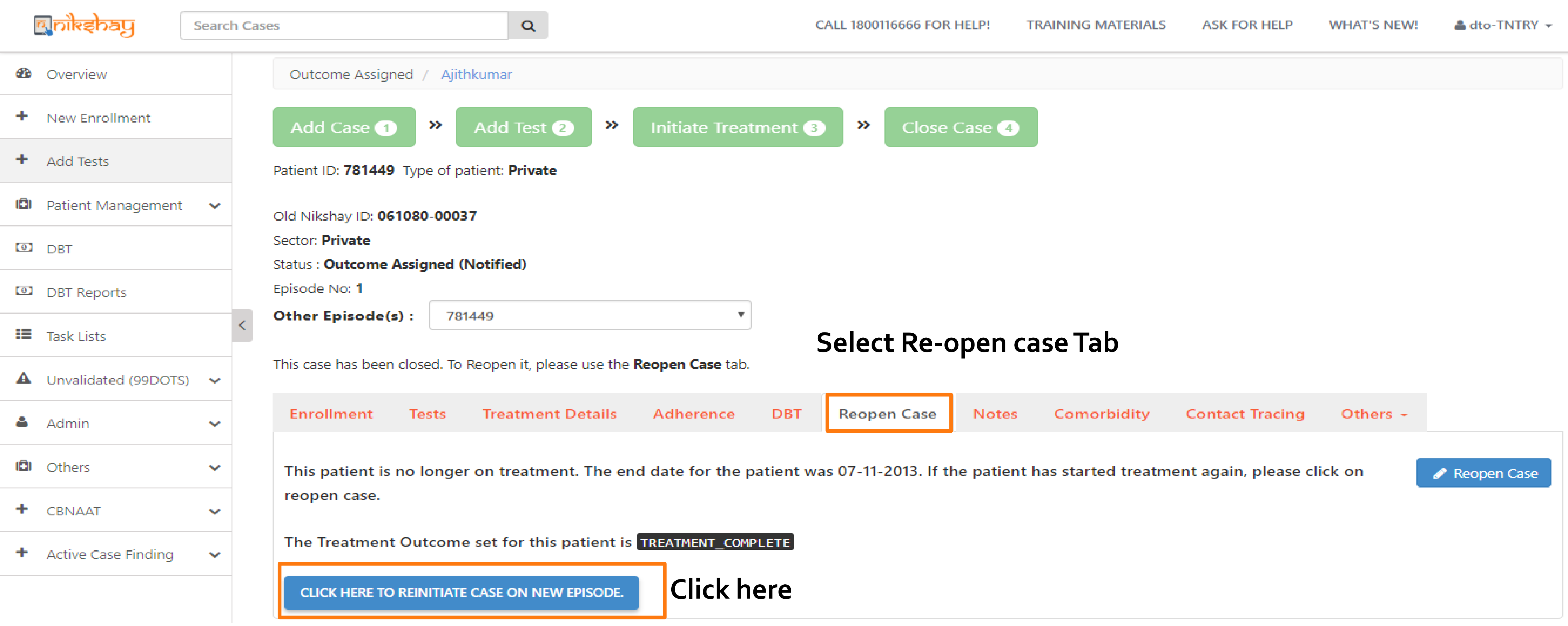
- This feature allows to add multiple episodes for a patient. User can re-initiate an outcome assigned case.
- Using this option, we can retain the enrolment details for the same patient.
- Using this option we can view previous episodes for the same patient in the Patient Management Page.

Re-initiating a Case on New Episode

Step 1
Open the Patient's Page

Step 2
Click on the Reopen Case Tab

Step 3
Click "CLICK HERE TO REINITIATE CASE ON NEW EPISODE"



Re-initiating a Case on New Episode

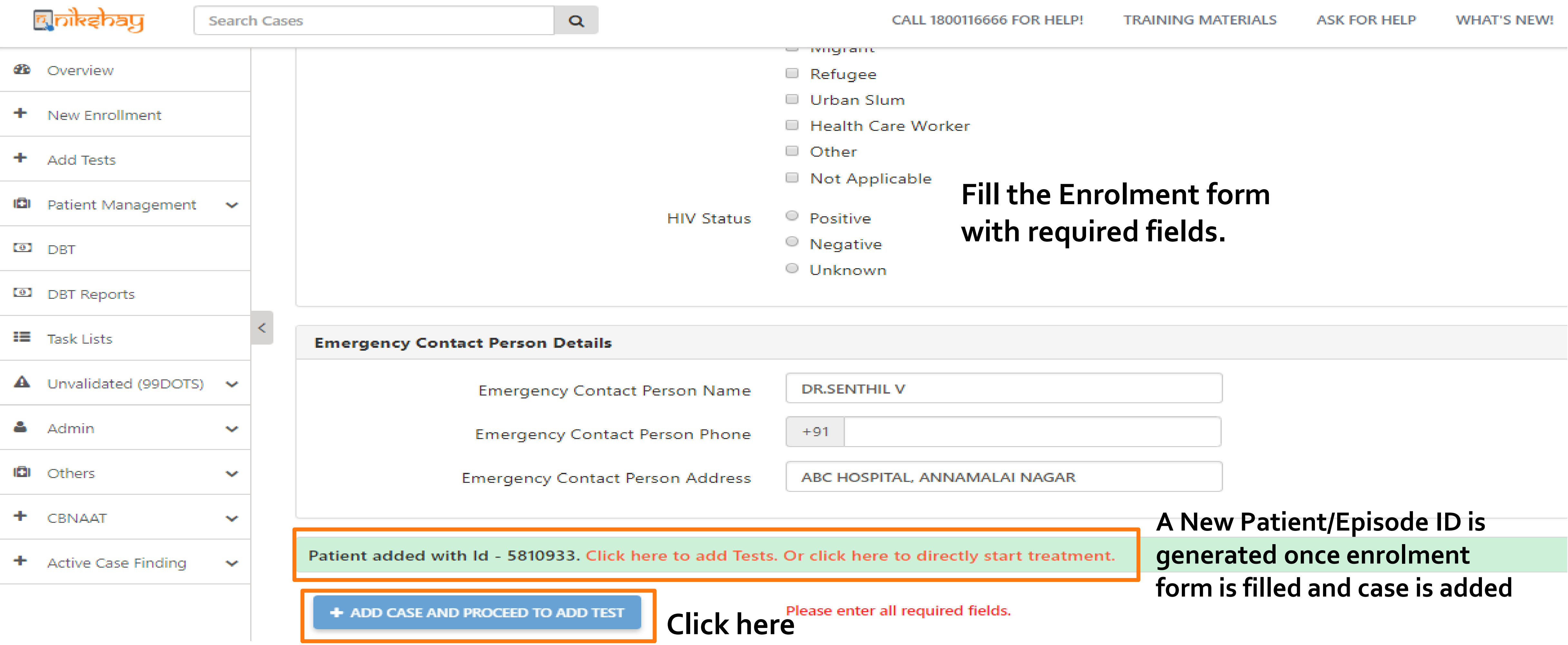
Step 1
Open the Patient's Page

Step 2
Click on the Reopen Case Tab

Step 3
Click "CLICK HERE TO REINITIATE CASE ON NEW EPISODE"

Step 4
Fill the Enrolment form with required fields

Step 5
Click "+ADD CASE AND PROCEED TO ADD TEST"



Fill the Enrolment form with required fields.

A New Patient/Episode ID is generated once enrolment form is filled and case is added

Click here

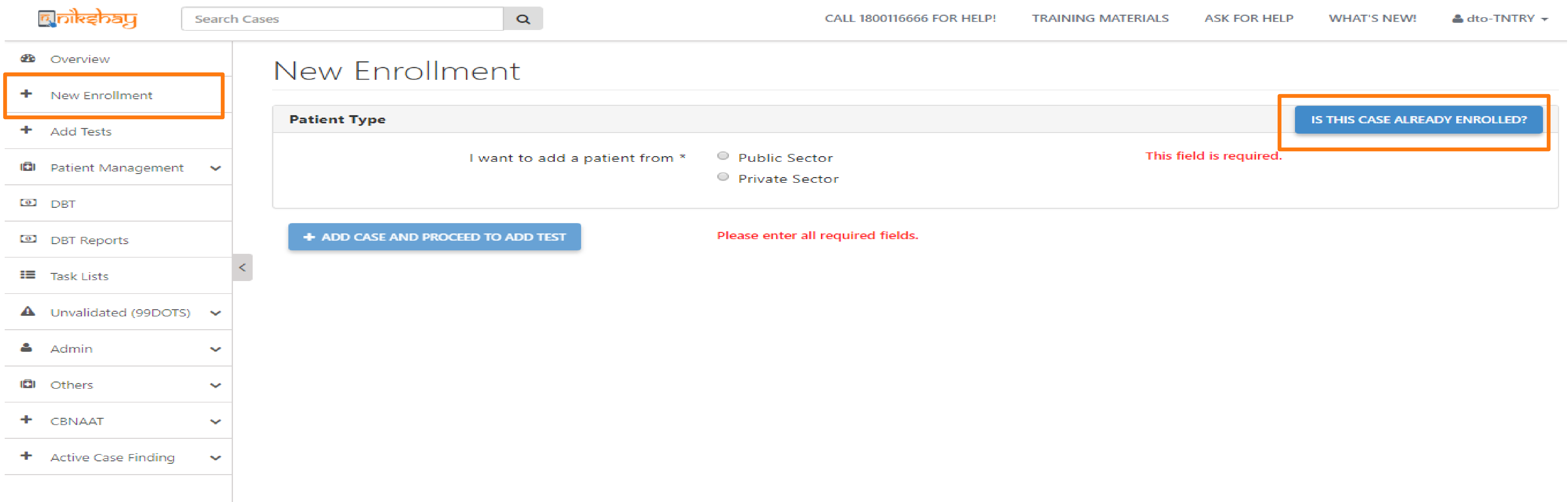
Re-initiating a Case on New Episode

Step 1

Click "+New Enrollment"

Step 2

Click "IS THIS CASE ALREADY ENROLLED?"



One can also add a new episode to the patient by using the "+New Enrollment" tab in the home page, once you click that tab in the right corner click "IS THIS CASE ALREADY ENROLLED?"

Re-initiating a Case on New Episode

Step 1

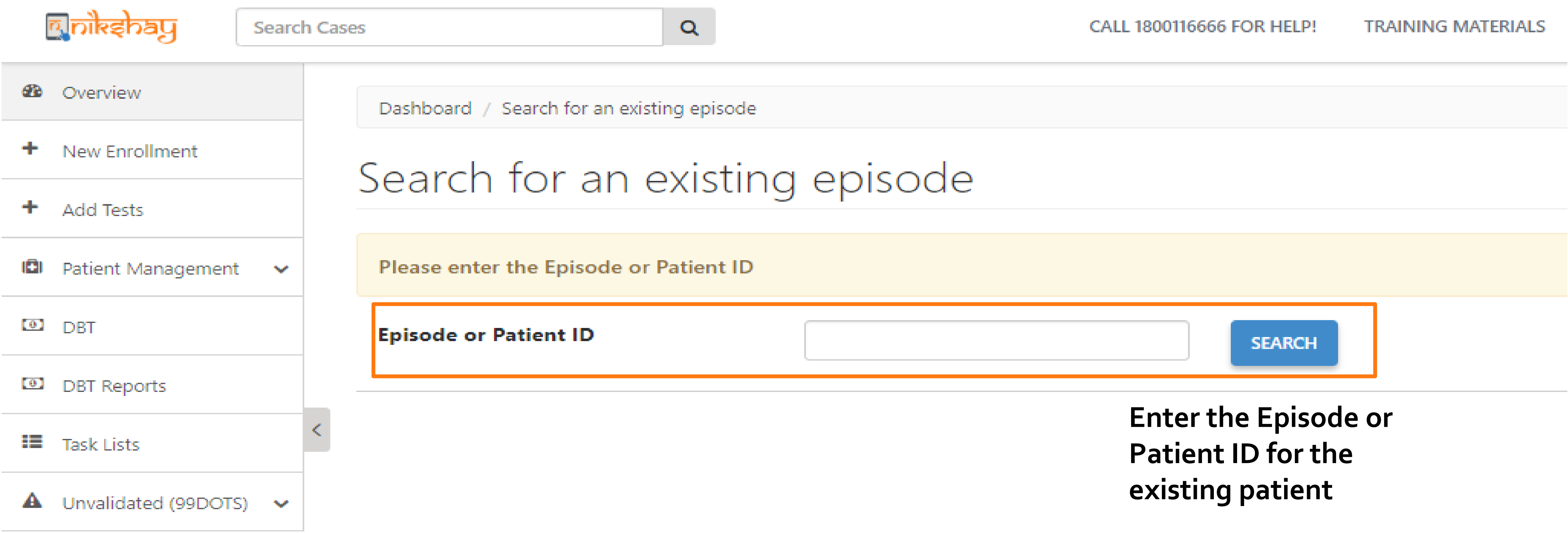
Click "+New Enrollment"

Step 2

Click "IS THIS CASE ALREADY ENROLLED?"

Step 3

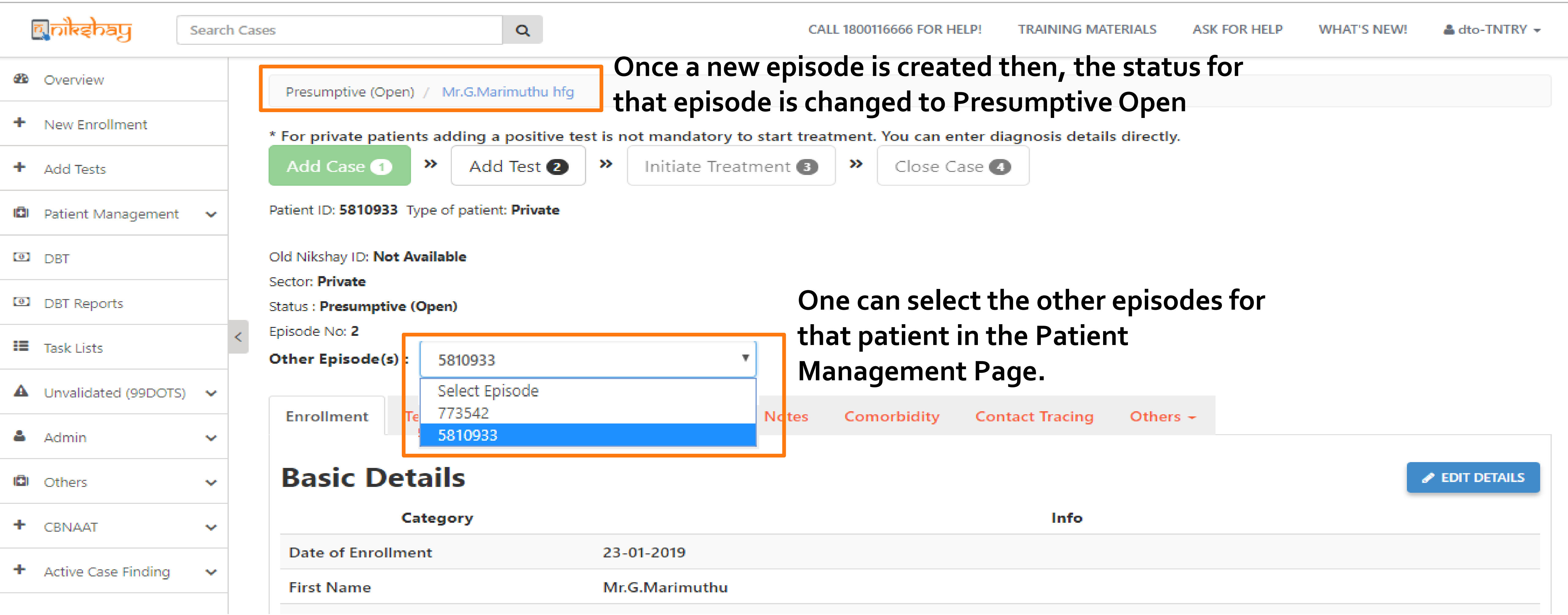
Enter the Episode or Patient ID



Enter the Episode or Patient ID for the existing patient

After Entering the Patient or Episode ID, the enrolment form will open and the user can enter required fields and can click Add Case to generate a new Patient or Episode ID

Re-initiating a Case on New Episode



Once a new episode is created then, the status for that episode is changed to Presumptive Open

One can select the other episodes for that patient in the Patient Management Page.

In a Patient Management Page an user can toggle between the various episodes added for that patient.

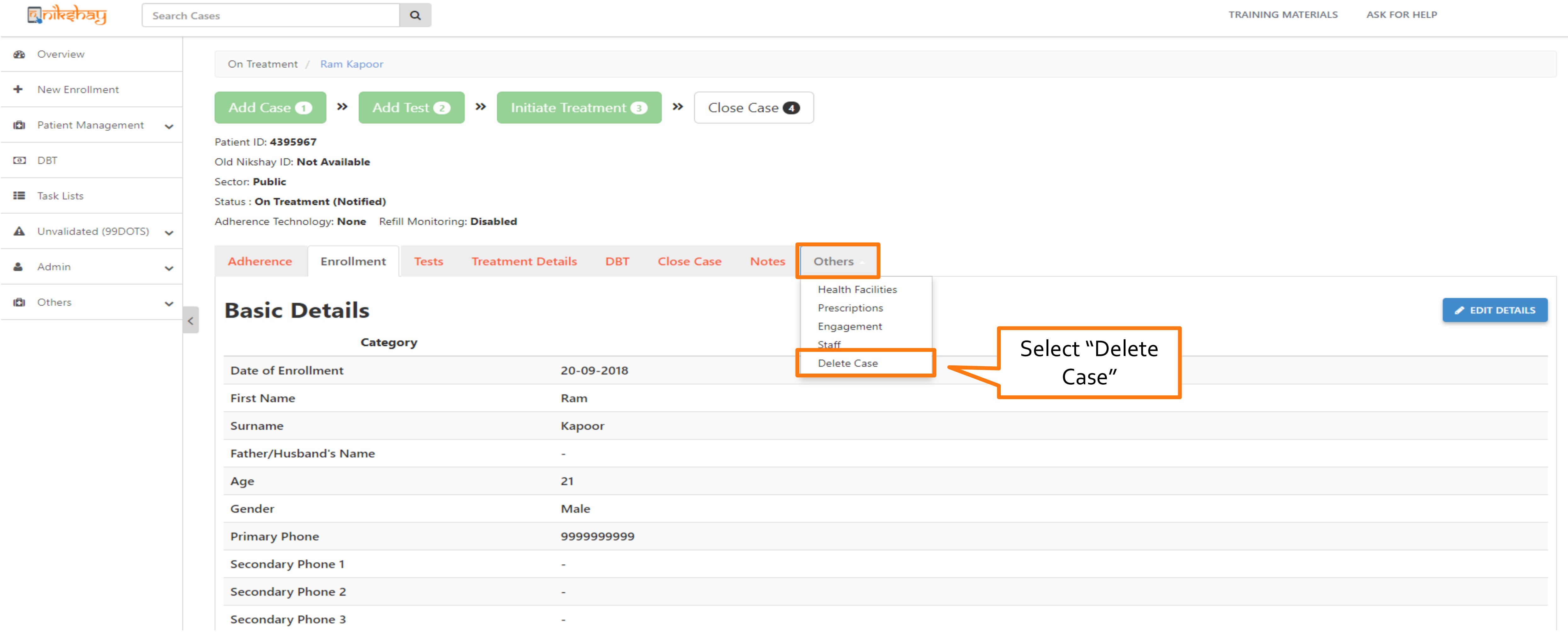
Delete a Case

- Before deleting a case, users should be careful because, “deletion” can not be undone.
- While deleting, the user needs to select the reason for deletion
- The Audit Trail of deleted cases will be available with Nikshay Technical Team and can be extracted and shared with CTD if required.
- The deleted case will not be visible to users (in the Application or in the Reports/Registers)

Delete Case

Step 1

Click on "Others" Section



Select "Delete Case"

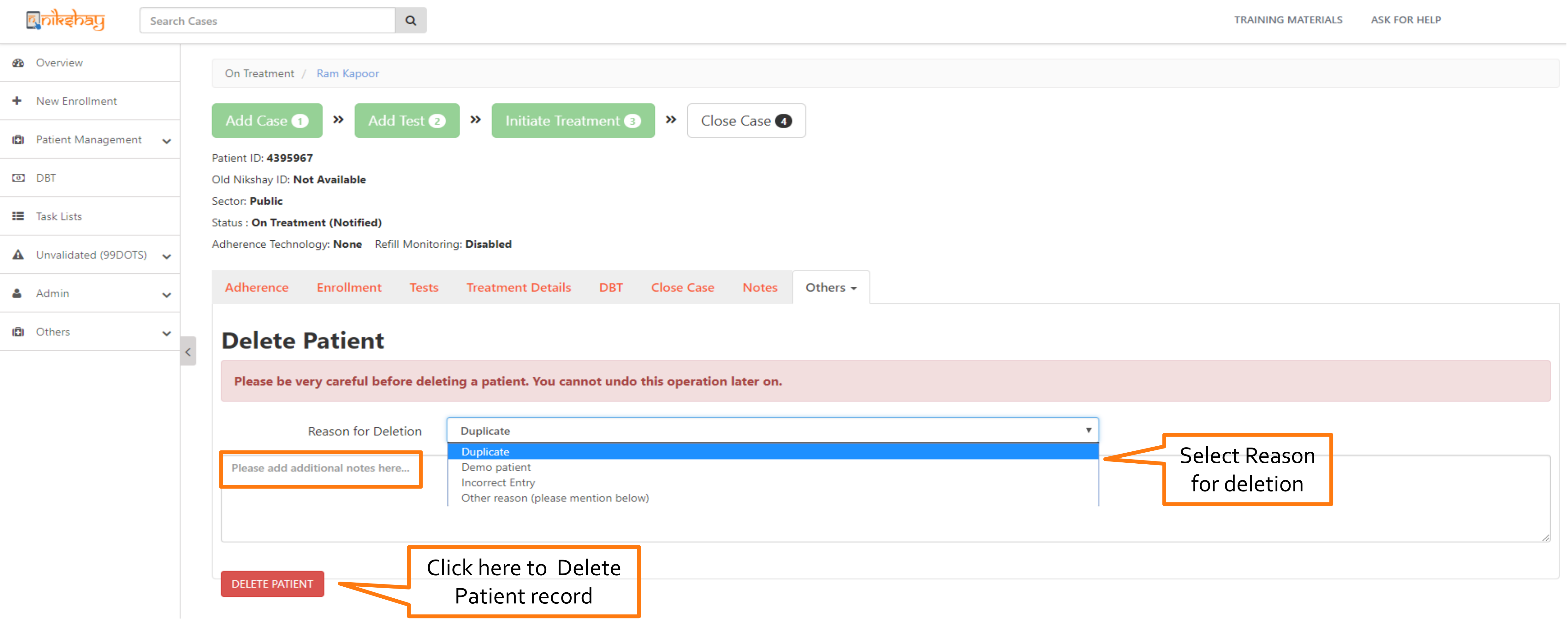
Delete Case details

Step 1

Click on "Others" Section

Step 2

Select Reason for Deletion



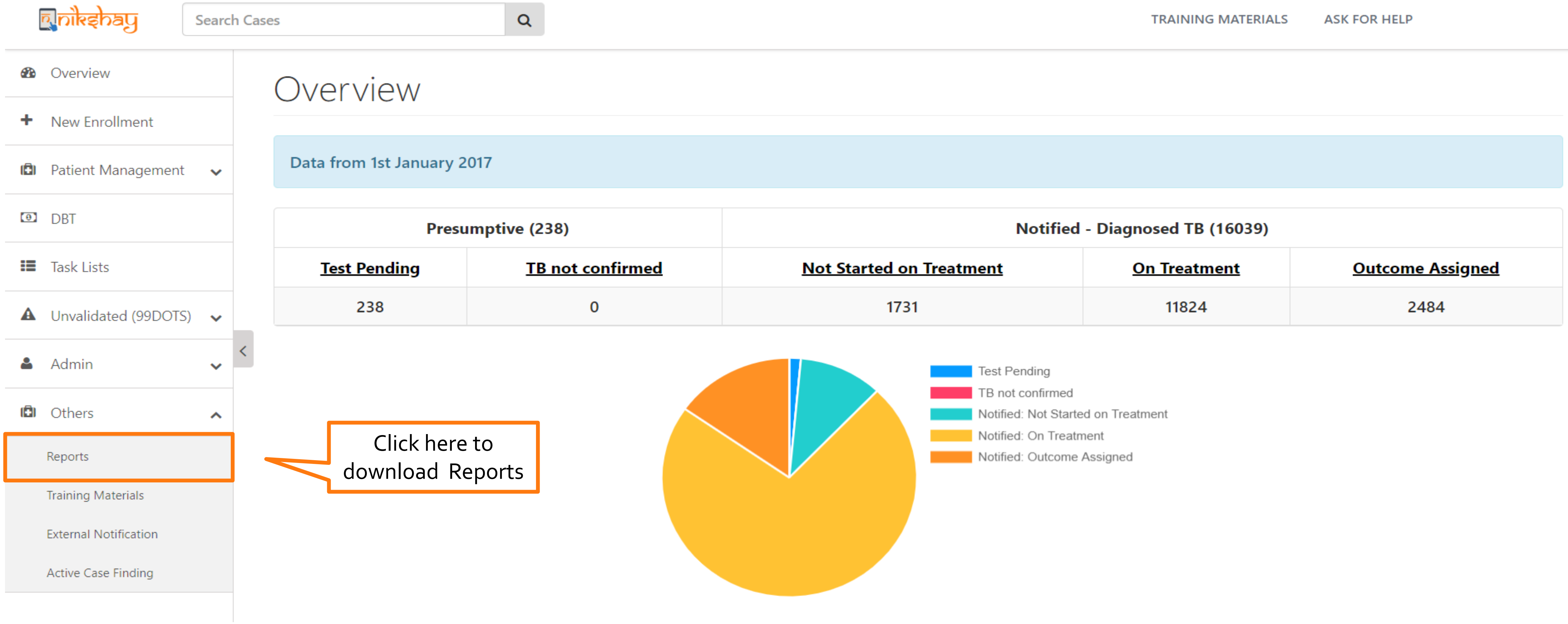
Reports

- At present the following two Dashboards are available:
  - Patient Overview Dashboard – This Dashboard is visible to the user on Home Page and provides Patient Treatment Status wise breakup and Treatment Outcome wise break up.
  - DBT Dashboard – This Dashboard is visible to TU and DTO level users as user clicks on “DBT” in the Menu bar. This Dashboard provides “Beneficiary Status wise” and “Benefit Status wise” breakup
- At present, the Notification Register is available for download in CSV format

Reports

Step 1

Click on Reports



Click here to download Reports

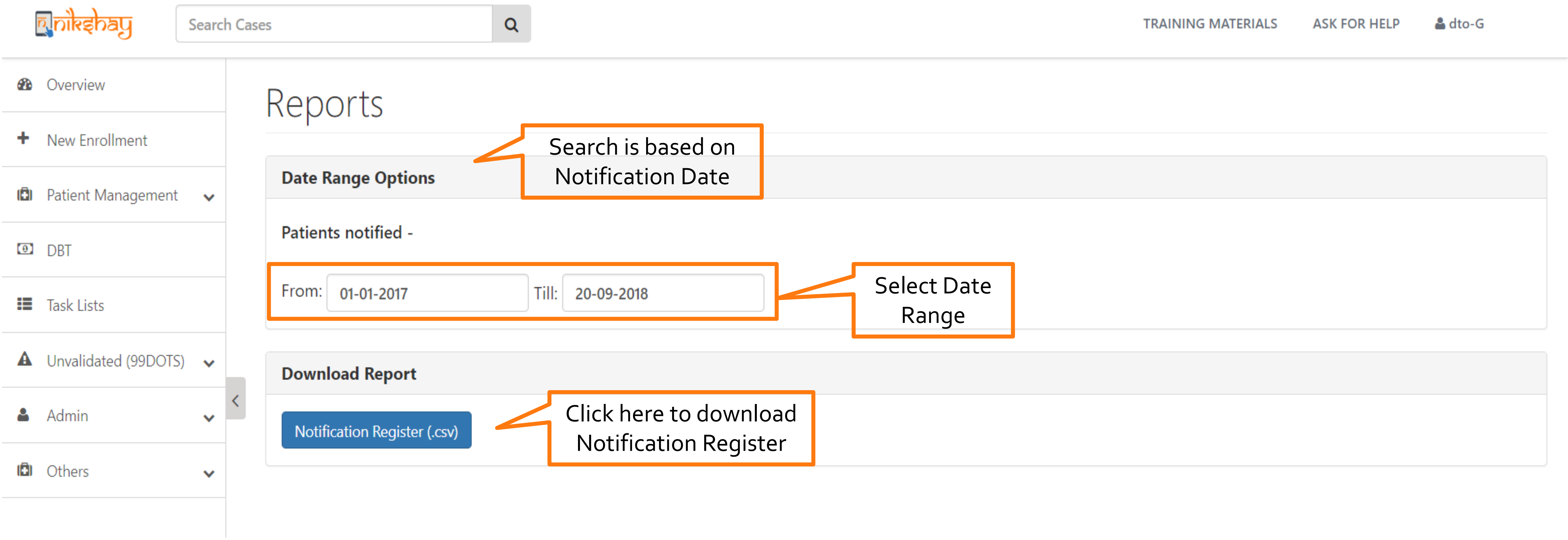
View Notification Register

Step 1

Click on Reports

Step 2

Generate Report



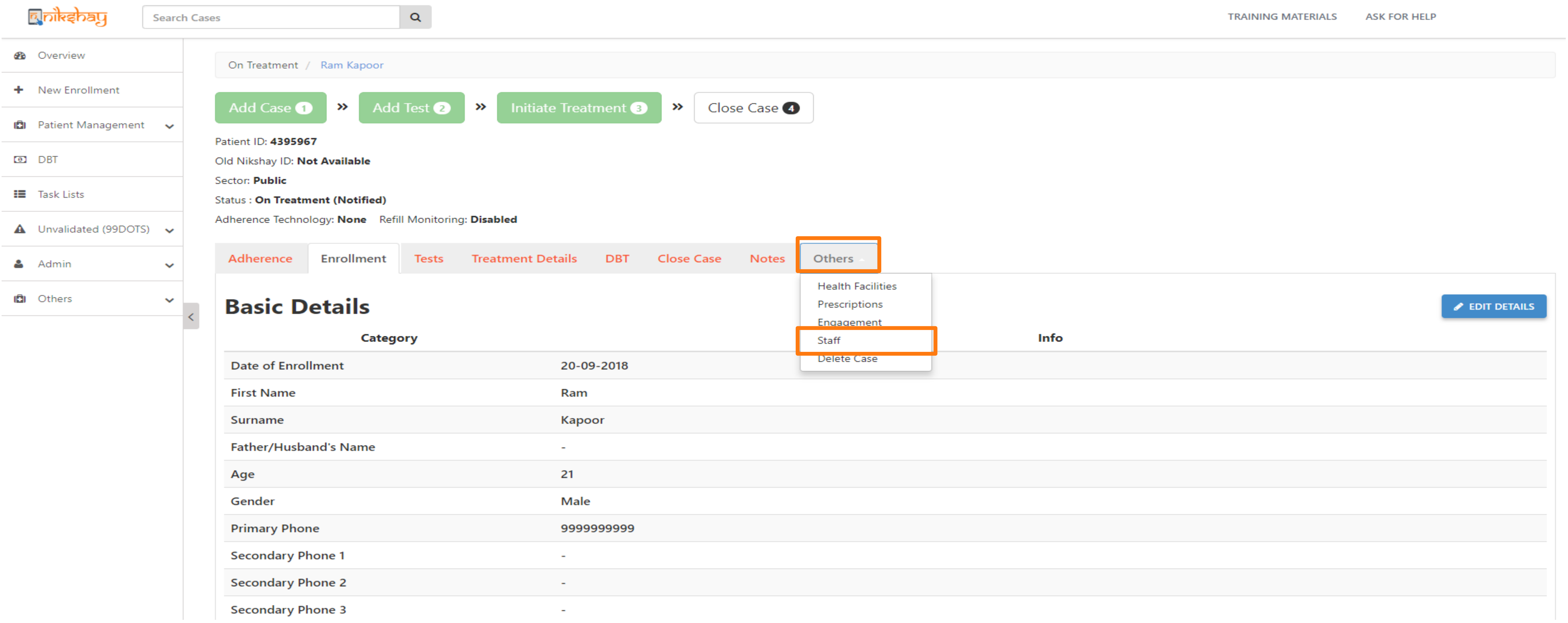
Add or Update Staff Details

- Based on the PHI under which a Patient is registered, staff such as, TBHV, STS, STLS and DTO get associated (mapped) to the patient.
- However, users can add or update staff mapping details manually, if required

View staff details

Step 1

Click on Staff



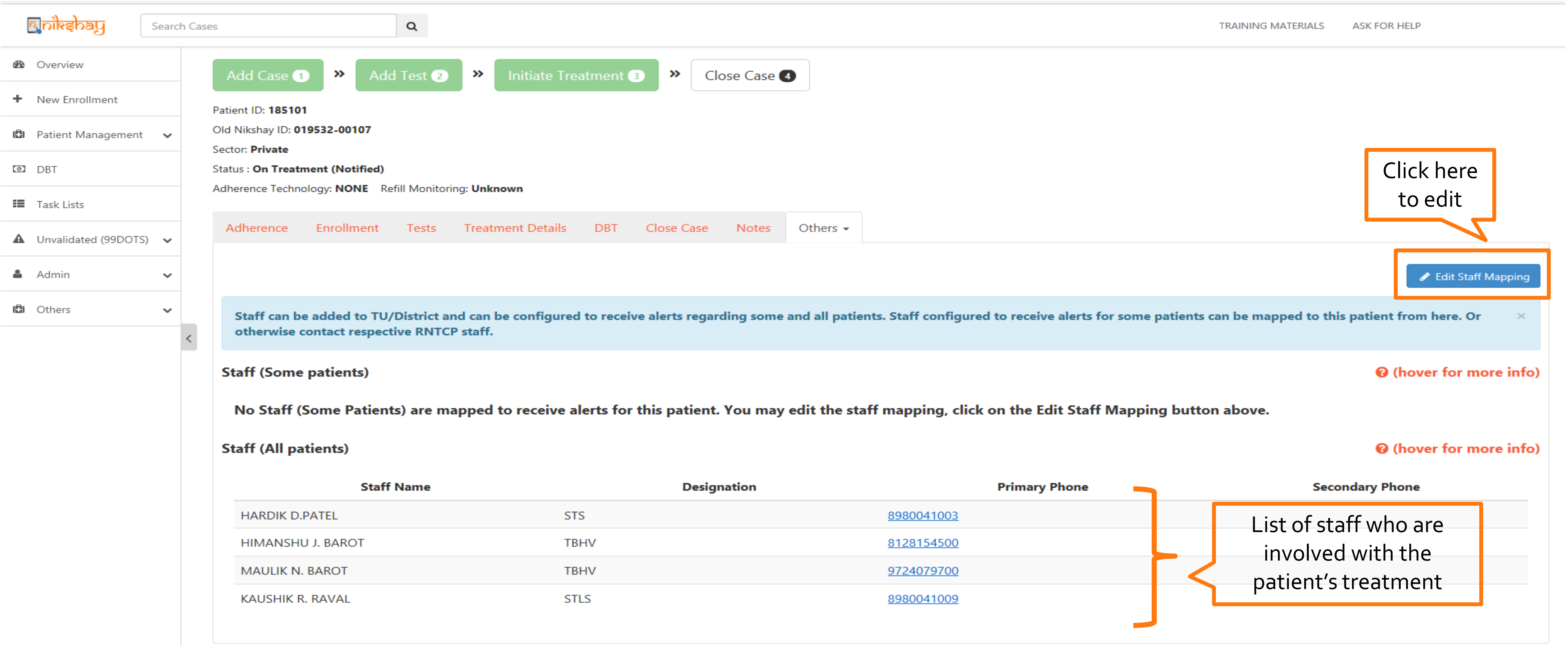
Add or Update staff details

Step 1

Click on Staff

Step 2

View existing Staff Mapping

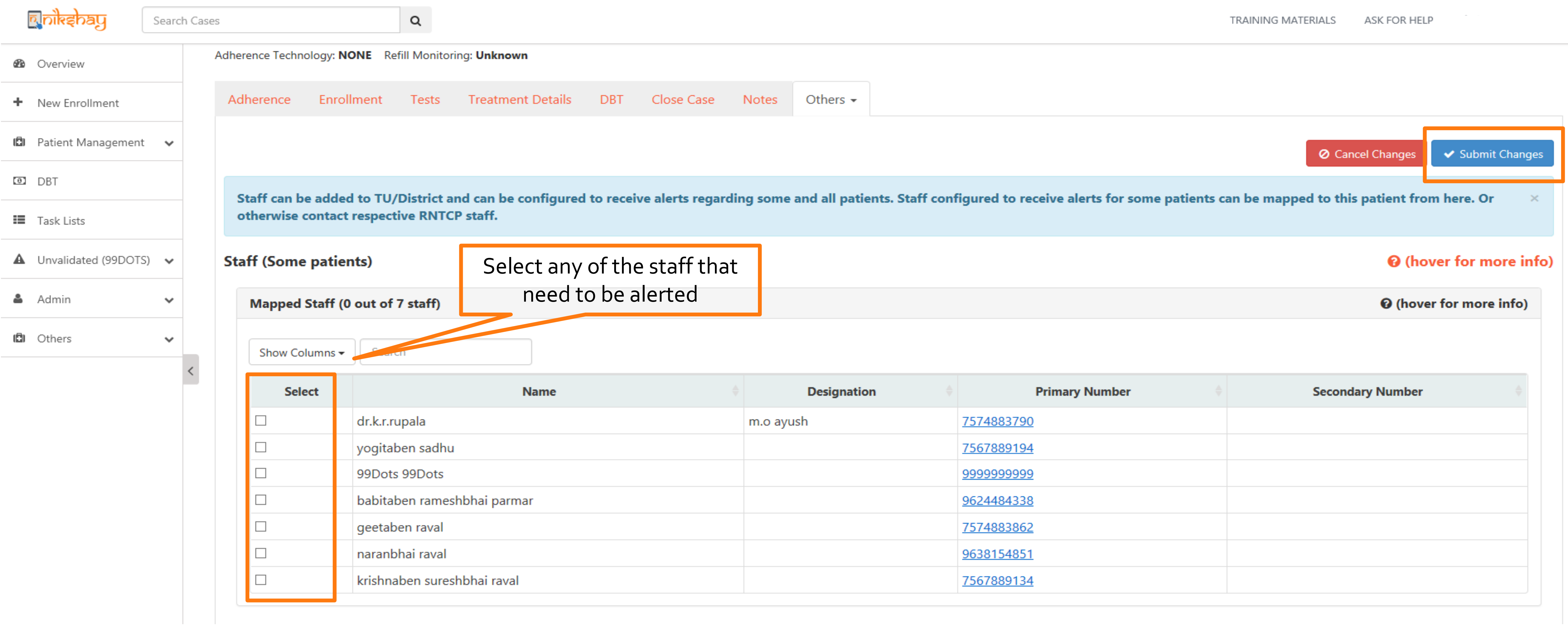


Add or Update staff details

Step 1: Click on Staff

Step 2: View existing Staff Mapping

Step 3: Edit Staff Mapping



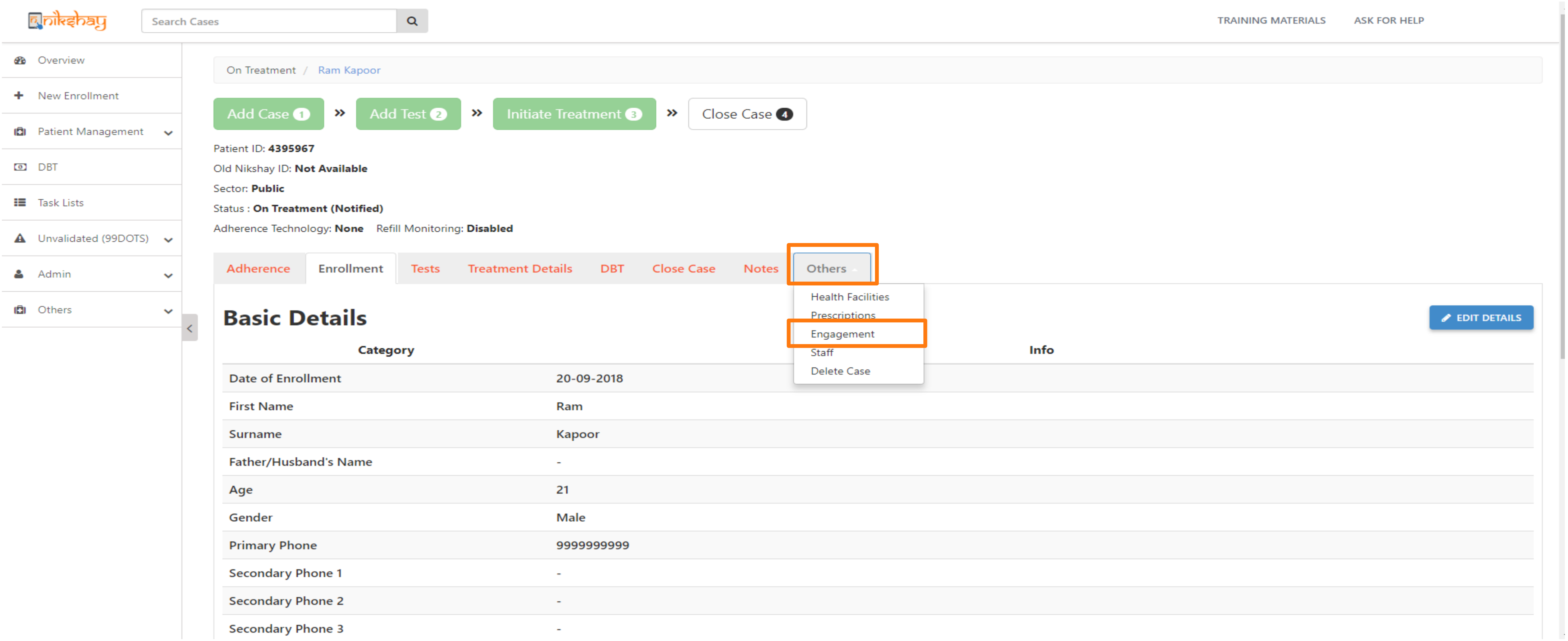
Update Patient Engagement Details

- The National TB Program engages with Patients in three ways:
  - Automated patient SMS's are sent
  - Call Centre calls the patient for Counselling / Asking for Adherence details
  - Household visit to the Patient’s residence by RNTCP staff
- Users can change the preference of the patient (if required), using the “Engagement” option.

Patient Engagement Details

Step 1

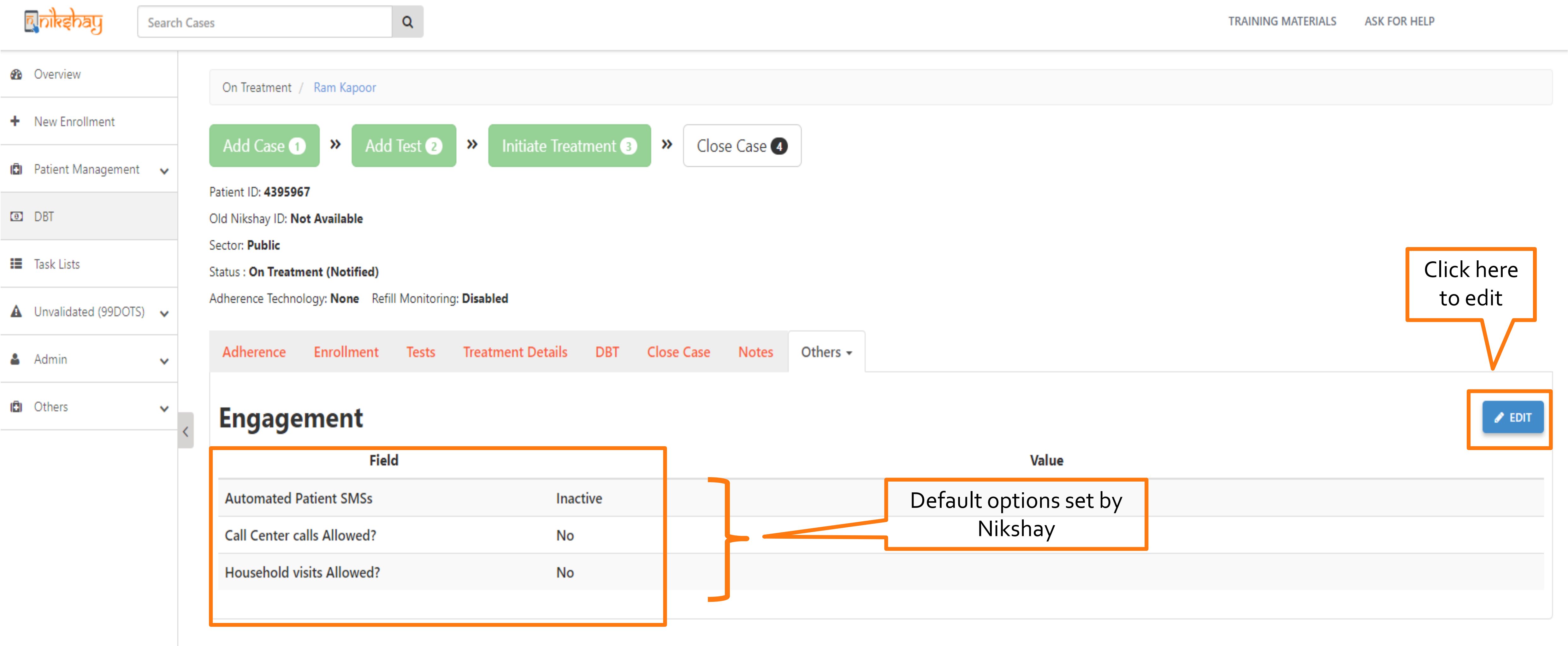
Click on Engagement



Patient Engagement Details

Step 1

Click on Engagement



Field	Value
Automated Patient SMSs	Inactive
Call Center calls Allowed?	No
Household visits Allowed?	No

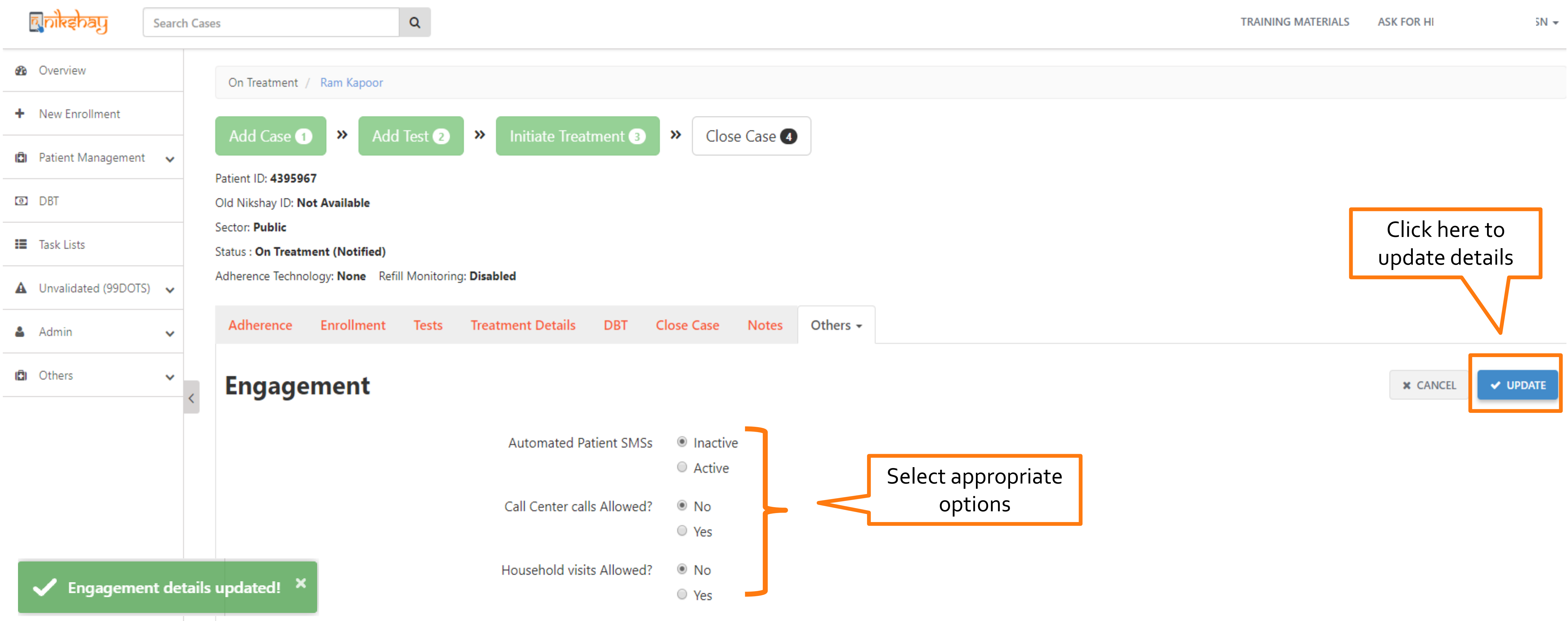
Click here to edit

Default options set by Nikshay

Patient Engagement Details

Step 1

Click on Engagement



Click here to update details

Select appropriate options

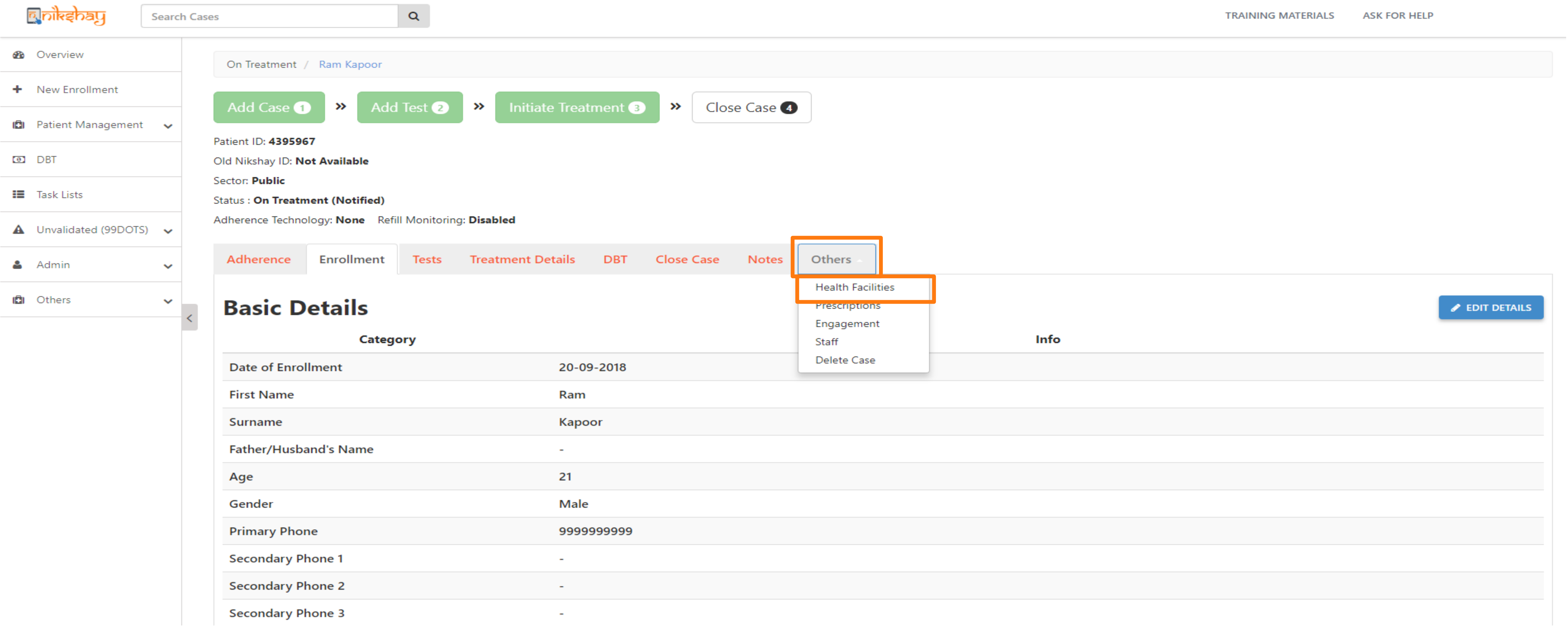
Update / View patient Health Facility details

- The following Health Facilitates associated with the patient are visible in this section:
  - Enrolment Facility
  - Diagnosing Facility
  - Current Facility (can be edited)
  - Residence Facility
  - ART Facility (if any)
  - DR TB Facility (if any)

Update / View patient Health Facility details

Step 1

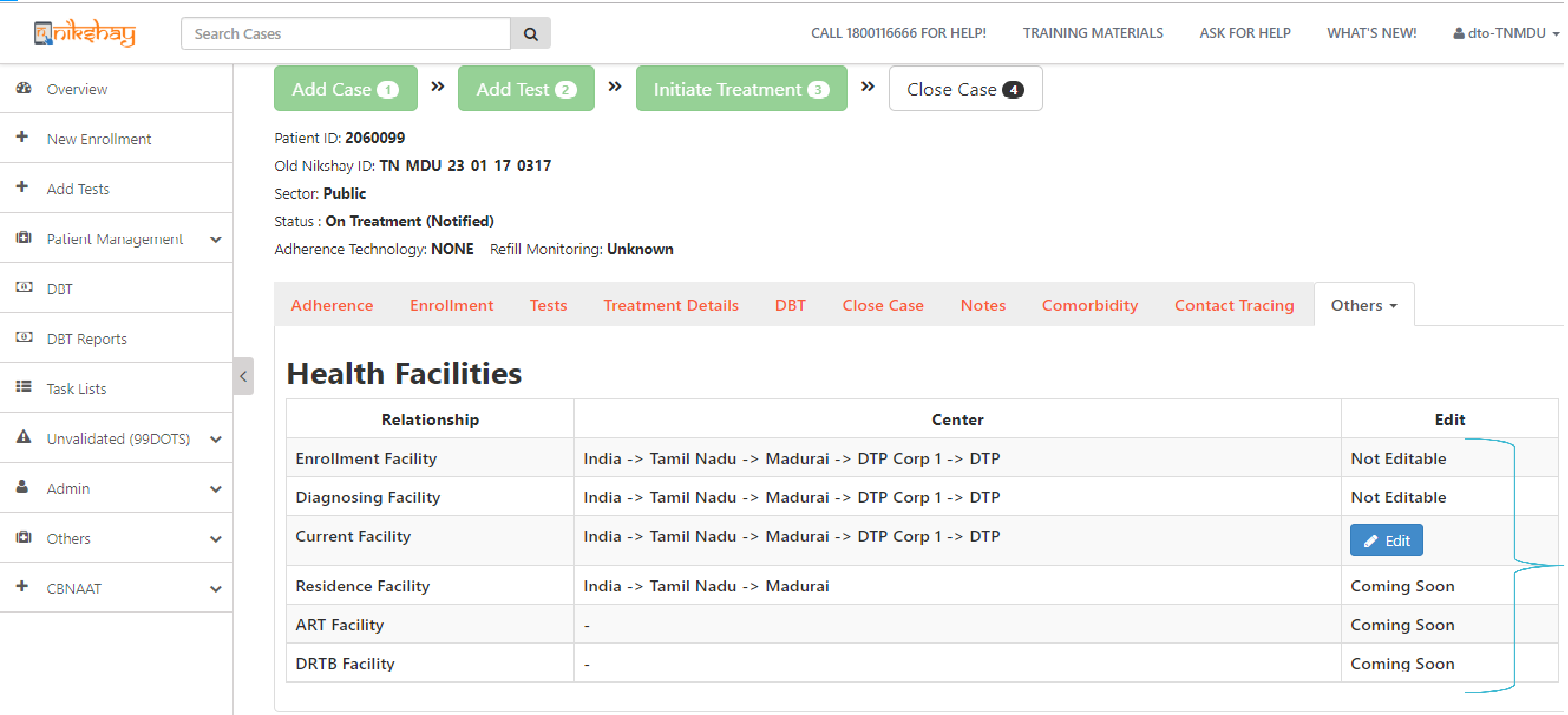
Click on Health Facilities



Update / View patient Health Facility details

Step 1

Click on Health Facilities



The Health Facilitates associated with the patient are displayed here

Transferring a Patient

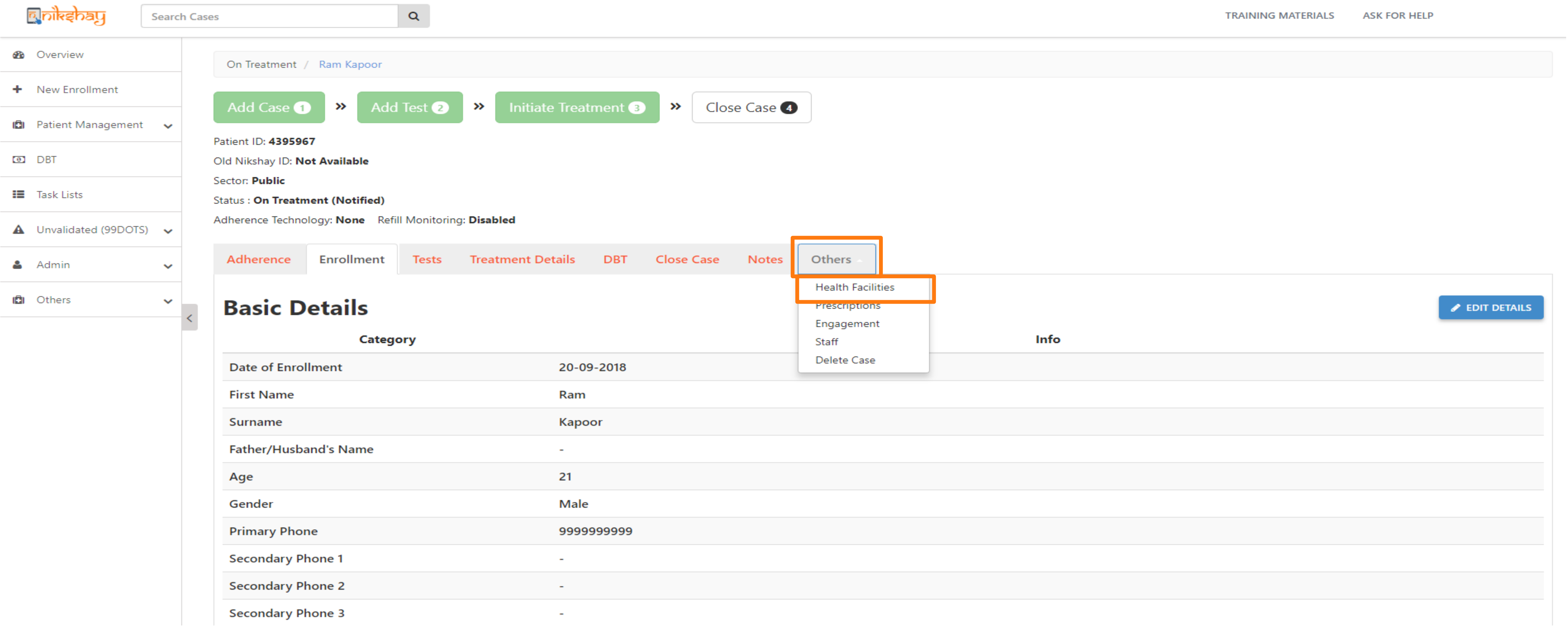
Transferring a Patient

- Patients can be transferred from one PHI to another by clicking on "Health Facilities" in "Others" tab in patient management module.
- When a Patient is transferred to a new PHI then the DBT details for that patient will also move to the new PHI.
- A patient can be transferred to any State, District, TU and PHI across the country.

Transferring a Patient

Step 1

Click on Health Facilities



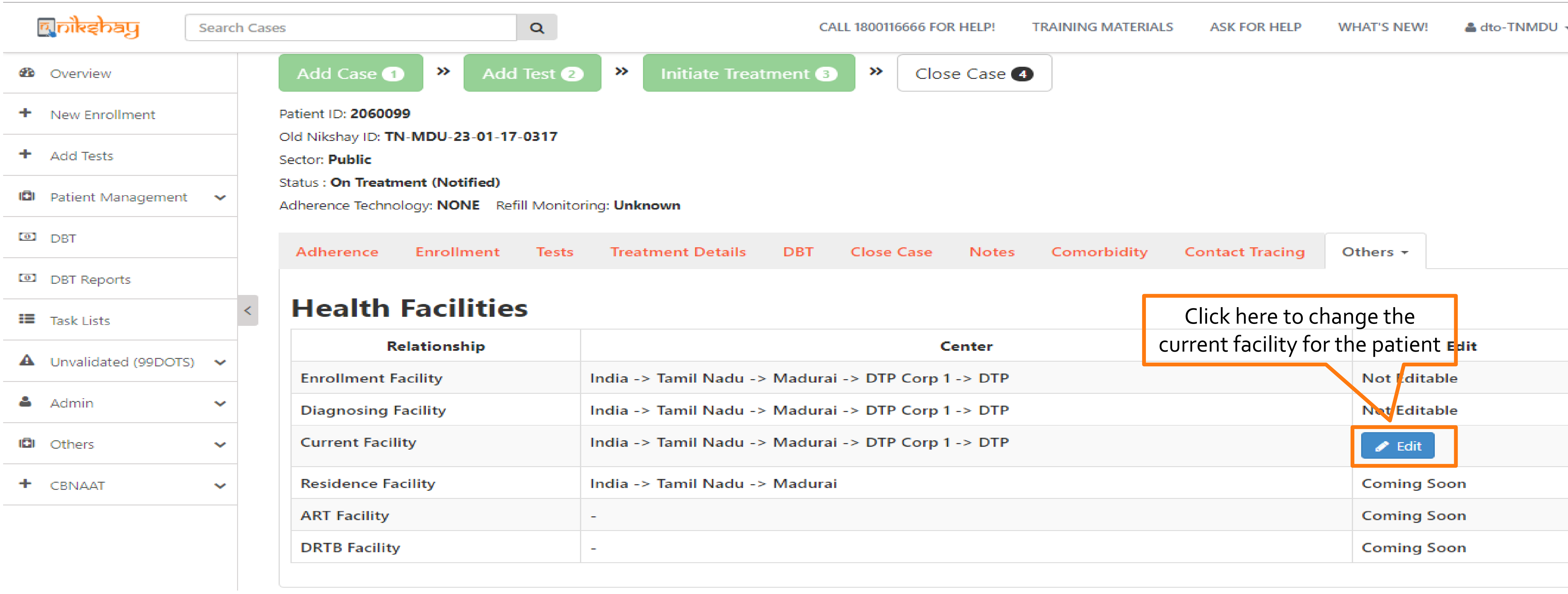
Transferring a Patient

Step 1

Click on Health Facilities

Step 2

Click Edit in the Current Facility Row

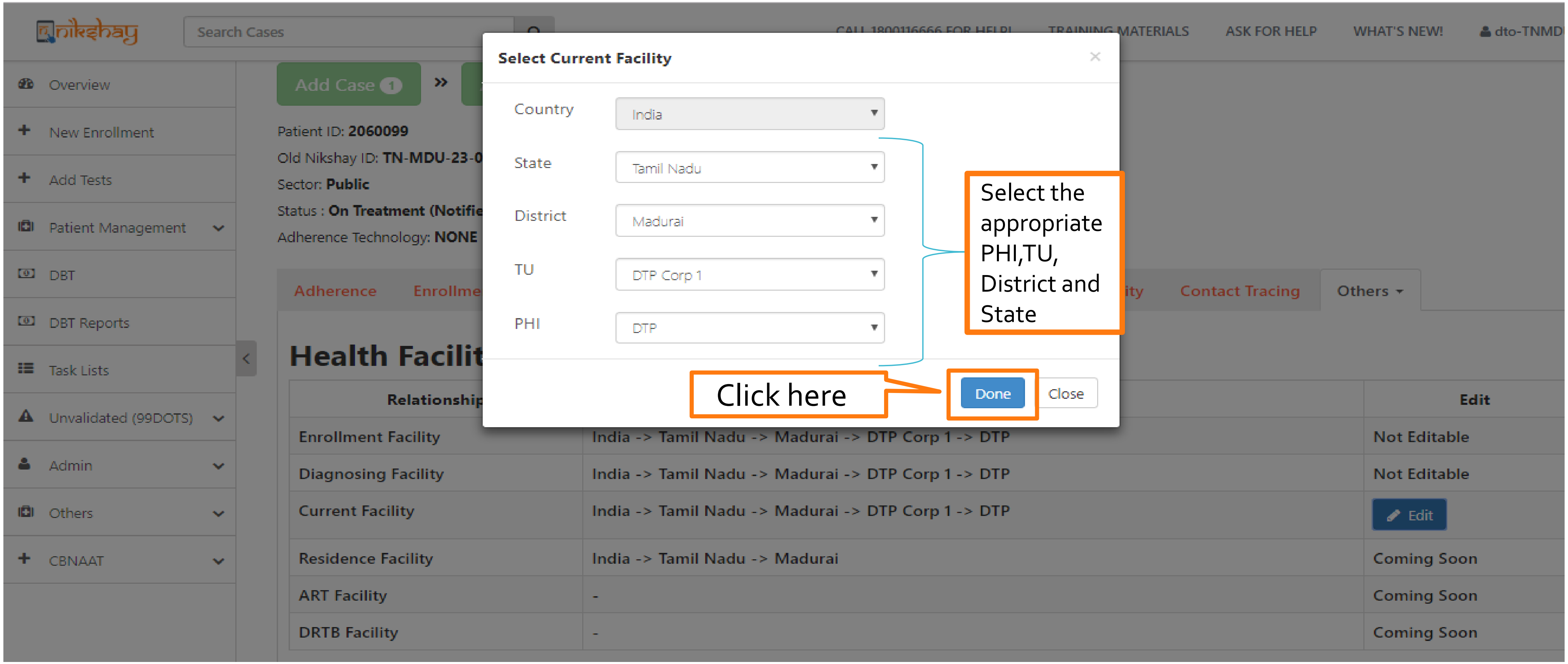


Transferring a Patient

Step 1
Click on Health Facilities

Step 2
Click Edit in the Current Facility Row

Step 3
Select the appropriate PHI, TU, District and State



Direct Benefit Transfer

- Nikshay enables Direct Benefit Transfer of incentives into Bank Account of Beneficiaries under various schemes
- The various schemes under which benefits can be processed are:
  - Nikshay Poshan Yojana / TB Patient Incentive to TB Patients for nutrition support (FEATURE AVAILABLE)
  - Treatment supporters incentive (COMING SOON)
  - Tribal TB patients (COMING SOON)
  - Private Practitioners incentives for Notification (COMING SOON)

Process Overview

STEP	DETAILS
1	Update Beneficiary's **Bank Account** details (Bank Name, Account Number and IFSC Code) in Nikshay
2	Beneficiary's Bank details (entered in Nikshay), are sent to Public Finance Management System (PFMS) for **validation/ registration**. This is a one time activity for each beneficiary (provided account details do not change).
3	Based on scheme eligibility criteria, every time a beneficiary is eligible for DBT a **Benefit** is created in the system. Each benefit is tracked till a DBT transaction is successful for the beneficiary.
4	DBT can be made to validated/Registered beneficiaries. For every payment, double check at TU & DTO is required (**Checker /TU – Approver/DTO**). The DTOs approval will initiate payment process after OTP Authentication via registered mobile No.
5	If there is a failure in beneficiary Validation / payment, the reason will be displayed to the users. On rectification of the said errors, the payment process can be re-triggered.
6	Nikshay reflects the **Beneficiary status (**status of registration**)** and **Benefit Status(**status of payment**)** in DBT Module (explained below)

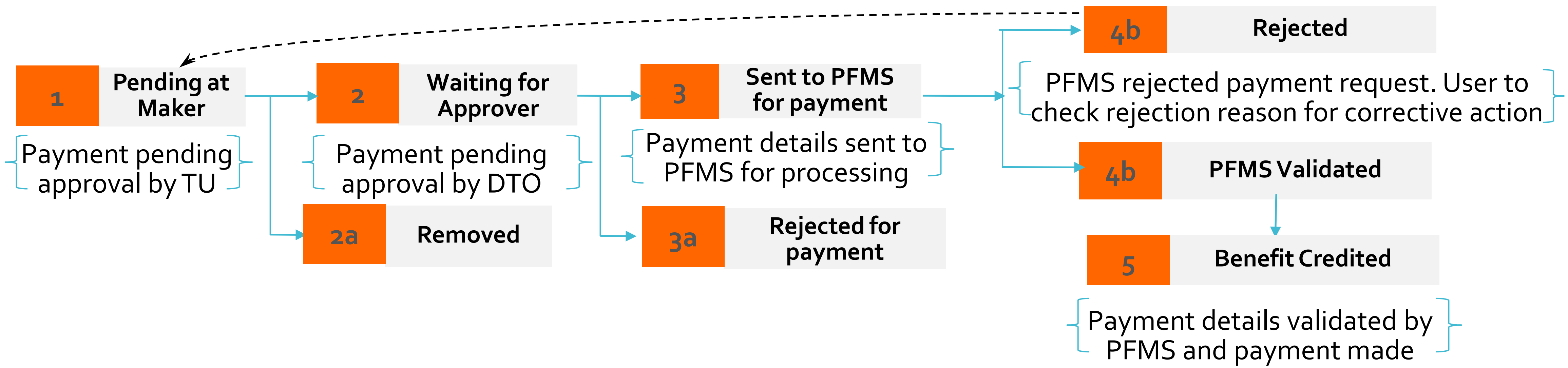
Beneficiary Validation

- To transfer money via Nikshay, “Beneficiary” should be “validated” by PFMS.
- This is a one time activity. Successful Validation indicates that Bank account details of the Beneficiary are valid
- Nikshay automatically sends Beneficiary Bank Account details to PFMS on the same day on which they are entered into Nikshay (End of day at 12 AM)
- If PFMS rejects a Beneficiary for any reason such as, incorrect Bank Account No. or Account Name or IFSC Code, User has to re-enter Correct details in Nikshay so that it can be re-sent to PFMS
- Various Beneficiary Statuses are

1	**Empty**	Bank details not yet entered in Nikshay
2	**Entered**	Bank details entered in Nikshay, pending to be sent to PFMS
3	**Sent to PFMS**	Bank details sent to PFMS for validation; response awaited
4a	**Validated**	Bank details successfully validated by PFMS
4b	**Rejected**	Bank details rejected by PFMS; Check rejection reason & take corrective action

Benefit Credit

- For a validated Beneficiary, TU User (Maker) can check/approve a Benefit payment. At this stage, the status of the Benefit Payment is "Pending at Maker"
- As TU User approves, the Benefit record is visible in "Pending" list of DTO (Approver) & its status is "Pending for Approver"
- As DTO approves, the record is sent to PFMS for payment. If DTO rejects, the record is sent back to TU User (Maker)
- If PFMS validates the payment, Benefit amount gets credited to the Beneficiary. However, if PFMS rejects the payment, it returns to TU User (Maker) for reprocessing.
- Various Beneficiary Statuses are



DBT Dashboard

Step 1

Click on DBT

Step 2

Click on Scheme Name to view Benefit Transactions

Search Cases

TRAINING MATERIALS ASK FOR HELP tbu-MHSTR03

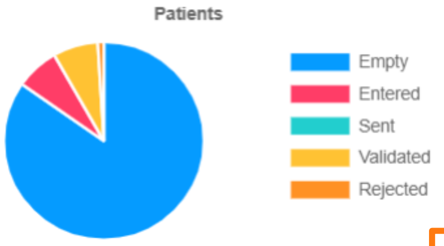
- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Dashboard / DBT

Beneficiary status wise summary

Beneficiary Summary

Beneficiary Type	Empty (bank details not entered)	Entered (bank details entered but not sent to PFMS)	Sent (bank details sent to PFMS for validation)	Validated (bank details validated by PFMS)	Rejected (bank details rejected by PFMS)	Total
Patients	699	58	0	60	8	825



Scheme wise, Benefit Payment status

Schemes

Scheme	Maker Pending	Approver Pending	PFMS Processing	Paid	Removed	Pfms Rejected
Nutritional Support Scheme	0	0	1	0	0	59

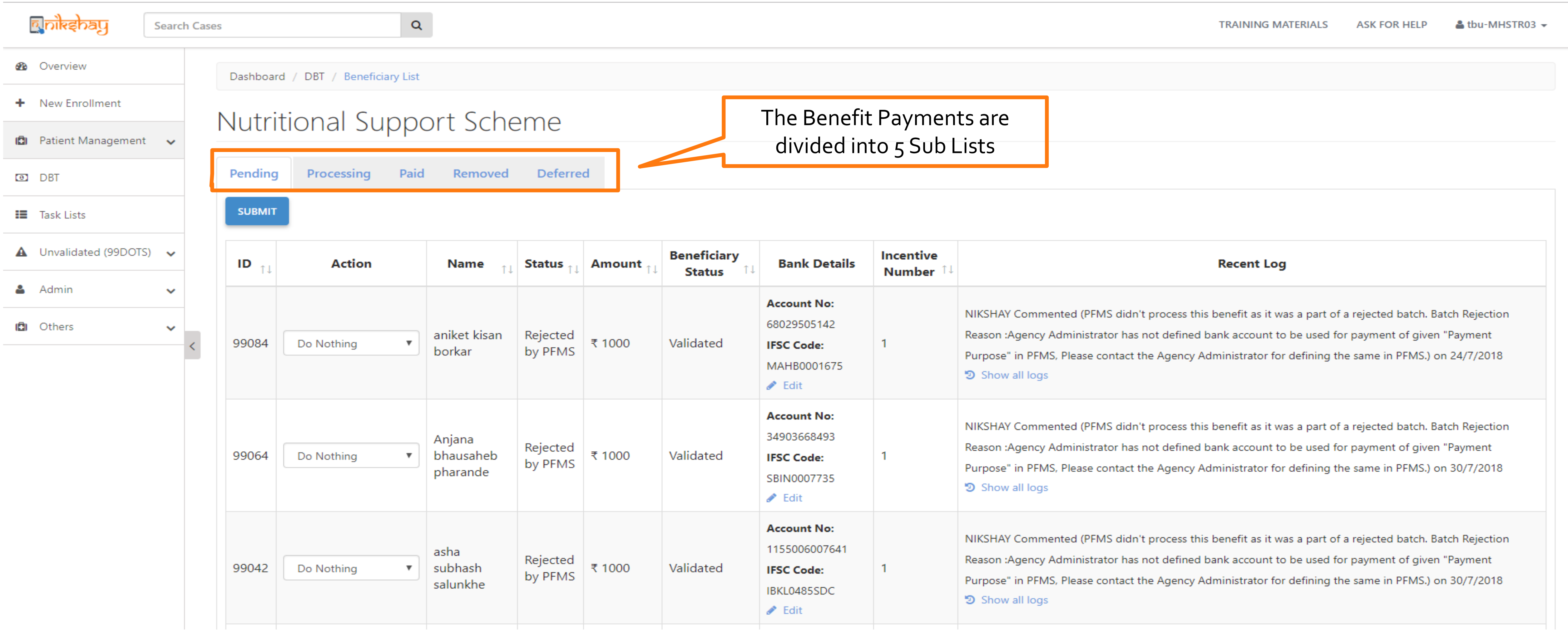
Scheme Management

Step 1

Click on DBT

Step 2

Click on Scheme Name



ID	Action	Name	Status	Amount	Beneficiary Status	Bank Details	Incentive Number	Recent Log
99084	Do Nothing	aniket kisan borkar	Rejected by PFMS	₹ 1000	Validated	**Account No:** 68029505142 **IFSC Code:** MAHB0001675 Edit	1	NIKSHAY Commented (PFMS didn't process this benefit as it was a part of a rejected batch. Batch Rejection Reason :Agency Administrator has not defined bank account to be used for payment of given "Payment Purpose" in PFMS, Please contact the Agency Administrator for defining the same in PFMS.) on 24/7/2018 Show all logs
99064	Do Nothing	Anjana bhausaheb pharande	Rejected by PFMS	₹ 1000	Validated	**Account No:** 34903668493 **IFSC Code:** SBIN0007735 Edit	1	NIKSHAY Commented (PFMS didn't process this benefit as it was a part of a rejected batch. Batch Rejection Reason :Agency Administrator has not defined bank account to be used for payment of given "Payment Purpose" in PFMS, Please contact the Agency Administrator for defining the same in PFMS.) on 30/7/2018 Show all logs
99042	Do Nothing	asha subhash salunkhe	Rejected by PFMS	₹ 1000	Validated	**Account No:** 1155006007641 **IFSC Code:** IBKL0485SDC Edit	1	NIKSHAY Commented (PFMS didn't process this benefit as it was a part of a rejected batch. Batch Rejection Reason :Agency Administrator has not defined bank account to be used for payment of given "Payment Purpose" in PFMS, Please contact the Agency Administrator for defining the same in PFMS.) on 30/7/2018 Show all logs

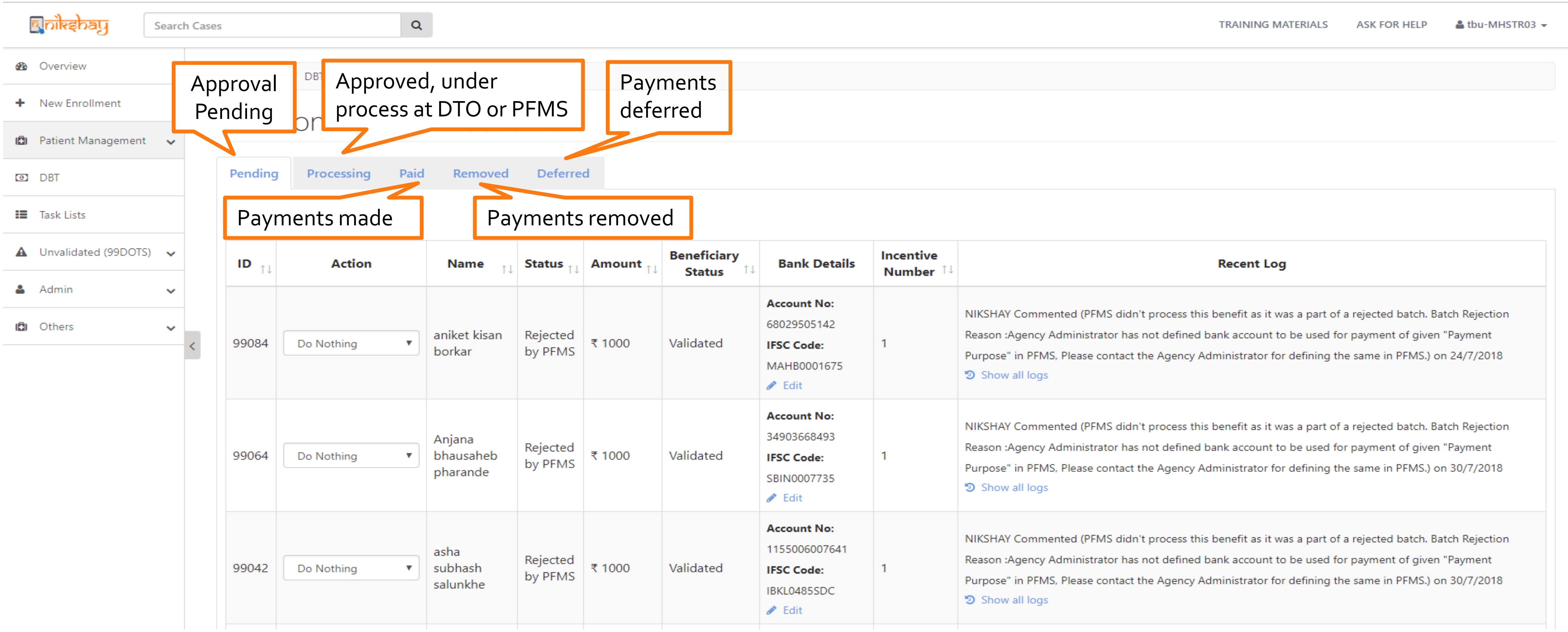
Benefit Lists in within DBT Scheme Management Module

Step 1

Click on DBT

Step 2

Click on Scheme Name



ID	Action	Name	Status	Amount	Beneficiary Status	Bank Details	Incentive Number	Recent Log
99084	Do Nothing	aniket kisan borkar	Rejected by PFMS	₹ 1000	Validated	**Account No:** 68029505142 **IFSC Code:** MAHB0001675 Edit	1	NIKSHAY Commented (PFMS didn't process this benefit as it was a part of a rejected batch. Batch Rejection Reason :Agency Administrator has not defined bank account to be used for payment of given "Payment Purpose" in PFMS, Please contact the Agency Administrator for defining the same in PFMS.) on 24/7/2018 Show all logs
99064	Do Nothing	Anjana bhausaheb pharande	Rejected by PFMS	₹ 1000	Validated	**Account No:** 34903668493 **IFSC Code:** SBIN0007735 Edit	1	NIKSHAY Commented (PFMS didn't process this benefit as it was a part of a rejected batch. Batch Rejection Reason :Agency Administrator has not defined bank account to be used for payment of given "Payment Purpose" in PFMS, Please contact the Agency Administrator for defining the same in PFMS.) on 30/7/2018 Show all logs
99042	Do Nothing	asha subhash salunkhe	Rejected by PFMS	₹ 1000	Validated	**Account No:** 1155006007641 **IFSC Code:** IBKL0485SDC Edit	1	NIKSHAY Commented (PFMS didn't process this benefit as it was a part of a rejected batch. Batch Rejection Reason :Agency Administrator has not defined bank account to be used for payment of given "Payment Purpose" in PFMS, Please contact the Agency Administrator for defining the same in PFMS.) on 30/7/2018 Show all logs

Actions that a TU User / DTO can take from various Lists

List Type	TU Level: Maker Role	DTO Level: Approver Role
Pending	▸ List of benefits pending to be checked and submitted to DTO for approval, or to be removed or deferred by the TU, as generated by Nikshay ▸ TU user has to take action on each record in this list & may either send to approver or Remove or perform No action	▸ List of benefit submitted by the TU and pending at DTO for approval, or to be removed or deferred by the DTO ▸ DTO has to take action on each record in this list and, may either Approve or Reject Remove or Do Nothing
Processing	▸ List of benefits sent to DTO for approval and its status ▸ TU User can only view but not take any action on the records in this list	▸ List of benefits approved by DTO and sent to PFMS for processing ▸ DTO can only view but can not take any action on the records in this list
Paid	▸ List of benefits that were approved and paid by PFMS to the beneficiary ▸ TU User can only view but not take any action on the records in this list	▸ List of benefits that were approved and paid by PFMS to the beneficiary. ▸ DTO can view but can not take any action on the records in this list
Removed	▸ List of beneficiary payments removed from the "Pending" list/ TU user will be visible here ▸ TU User can "Unremove" records upon which, they will move to "Pending" list for approval	▸ List of beneficiary payments removed from the "Pending" list/ TU & DTO user will be visible here ▸ DTO can "Unremove" records upon which, they will move to "Pending" list for approval
Deferred	▸ List of beneficiary payments which have been postponed to be paid along with the benefit next month.	List of beneficiary payments that have been postponed to be paid along with benefit of next month by TU & DTO user.

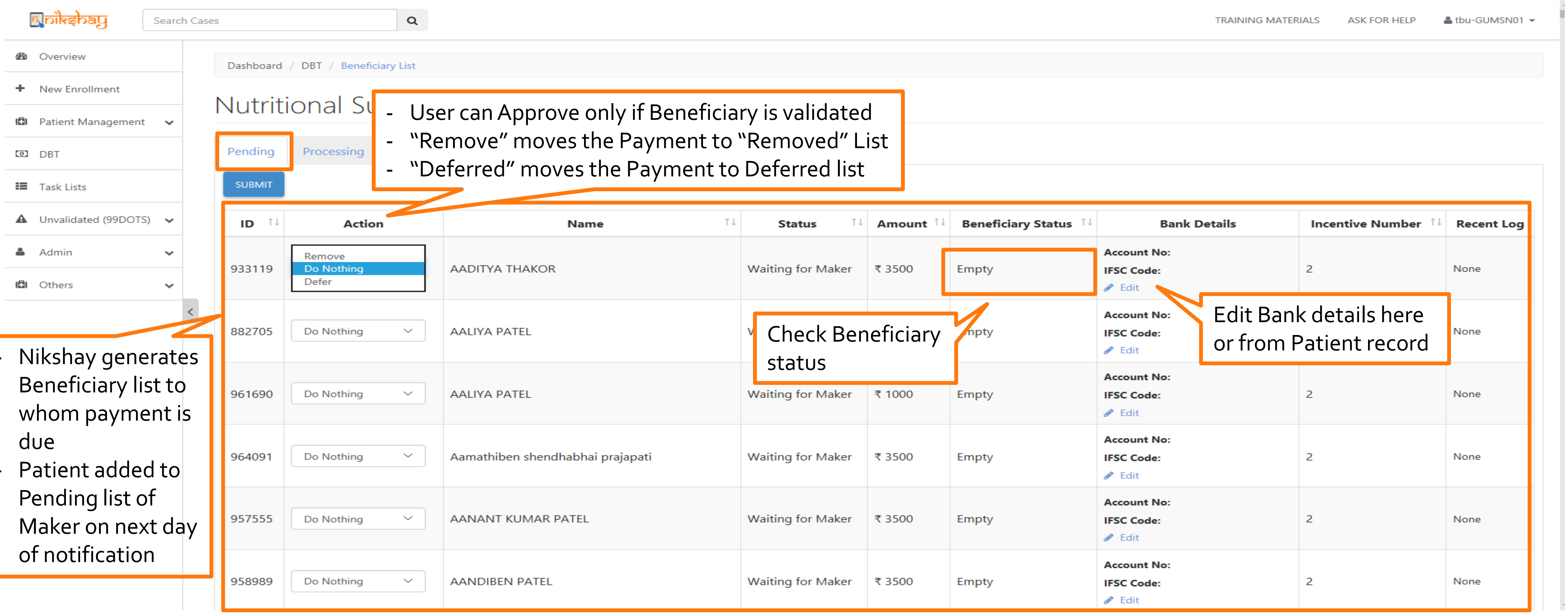
Action to be taken by TU User (Maker)

Step 1

Click on DBT

Step 2

Click on Scheme Name



- User can Approve only if Beneficiary is validated
- "Remove" moves the Payment to "Removed" List
- "Deferred" moves the Payment to Deferred list

Check Beneficiary status

Edit Bank details here or from Patient record

- Nikshay generates Beneficiary list to whom payment is due
- Patient added to Pending list of Maker on next day of notification

Action to be taken by TU User (Maker)

Step 1
Click on DBT

Step 2
Click on Scheme Name

Step 3
Enter Bank Details

Search Cases

TRAINING MATERIALS   ASK FOR HELP   tbu-MHSTR03

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Pending | Processing | Paid | Removed | Deferred

SUBMIT

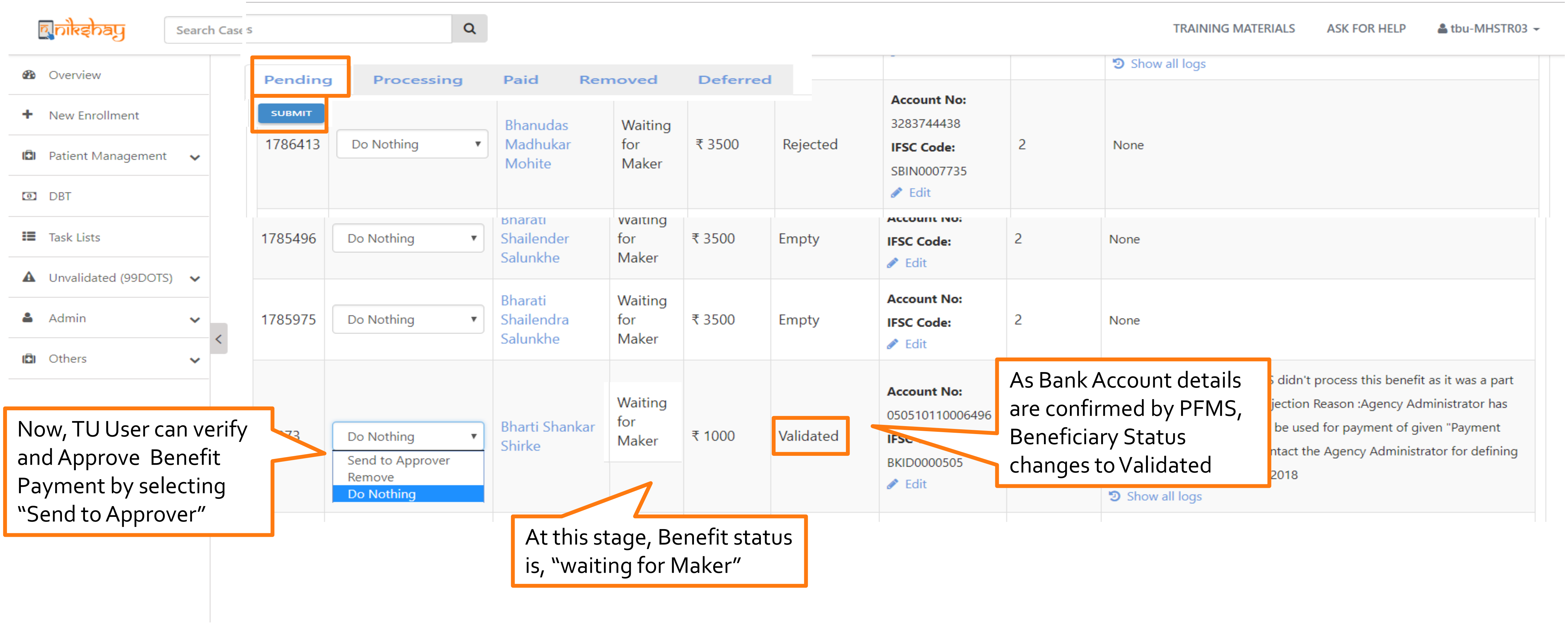
ID	Action	Name	Status	Amount	Beneficiary Status	Bank Details	Incentive Number	Recent Log
1785870	Do Nothing	Hirabai Mahanubhav Manekar	Waiting for Maker	₹ 3500	Empty	**Account No:** **IFSC Code:** Edit	2	None
1786264	Do Nothing	akash ashokrao sankpal	Waiting for Maker	₹ 3500	Empty	**Account No:** **IFSC Code:** Edit	2	None
1786422	Do Nothing (Remove / Do Nothing / Defer)	Akash Bhauso Chavan	Waiting for Maker	₹ 2000	Entered	**Account No:** 68032008699 **IFSC Code:** MAHB0000215 Edit		
1782100	Do Nothing	Akash Bhauso Chavan	Waiting for Maker	₹ 1000	Entered	**Account No:** 68032008699 **IFSC Code:** MAHB0000215 Edit	1	

Beneficiary Status changes as Bank details are entered

At this stage, Beneficiary Details are sent to PFMS

Action to be taken by TU User (Maker)

Step 1	Step 2	Step 3	Step 4
Click on DBT	Click on Scheme Name	Enter Bank Details	Approval by TU User (Maker)



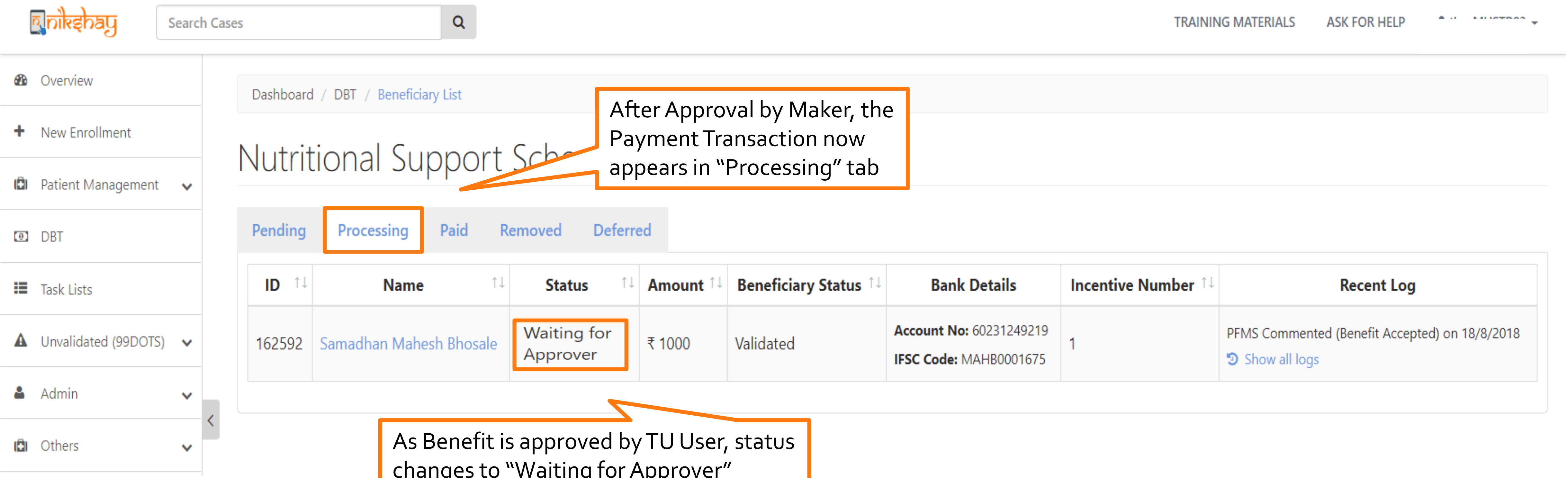
Now, TU User can verify and Approve Benefit Payment by selecting "Send to Approver"

At this stage, Benefit status is, "waiting for Maker"

As Bank Account details are confirmed by PFMS, Beneficiary Status changes to Validated

Action to be taken by TU User (Maker)

Step 1 — Click on DBT → **Step 2** — Click on Scheme Name → **Step 3** — Enter Bank Details → **Step 4** — Approval by TU User (Maker)



After Approval by Maker, the Payment Transaction now appears in “Processing” tab

As Benefit is approved by TU User, status changes to “Waiting for Approver”

Action to be taken by DTO (Checker)

Step 1: Click on DBT → **Step 2**: Click on Scheme Name → **Step 3**: Enter Bank Details → **Step 4**: Approval by TU User (Maker) → **Step 4**: Approval by DTO (Checker)

- Overview
- New Enrollment
- Add Tests
- Patient Management
- DBT
- Admin
- Others

As DTO Approves and Submits, Nikshay asks for OTP

Dashboard / DBT / Beneficiary List

Nutritional Support Scheme

Pending | Processing | Paid | Removed | Deferred

As Benefit is approved by TU User, it is visible in Pending List of DTO

SUBMIT

ID	Action	Name	Status	Amount	Beneficiary Status	Bank Details	TU	Incentive Number	Recent Log
96	Do Nothing (Approve / Reject / Remove / Do Nothing)	ANAND KUMAR	Waiting for Approver	₹ 1000	Validated	**Account No:** 0676001500240672 **IFSC Code:** PUNB0067600 Edit	Patna_DTC	1	tbu-BIPTN01 Sent to DTO on 7/8/2018 Show all logs
737	Do Nothing	ANIL SHARMA	Waiting for Approver	₹ 1000	Validated	**Account No:** 441118210005499 **IFSC Code:** BKID0004405 Edit	Patna_DTC	1	tbu-BIPTN01 Sent to DTO on 7/8/2018 Show all logs

Action to be taken by DTO (Checker)

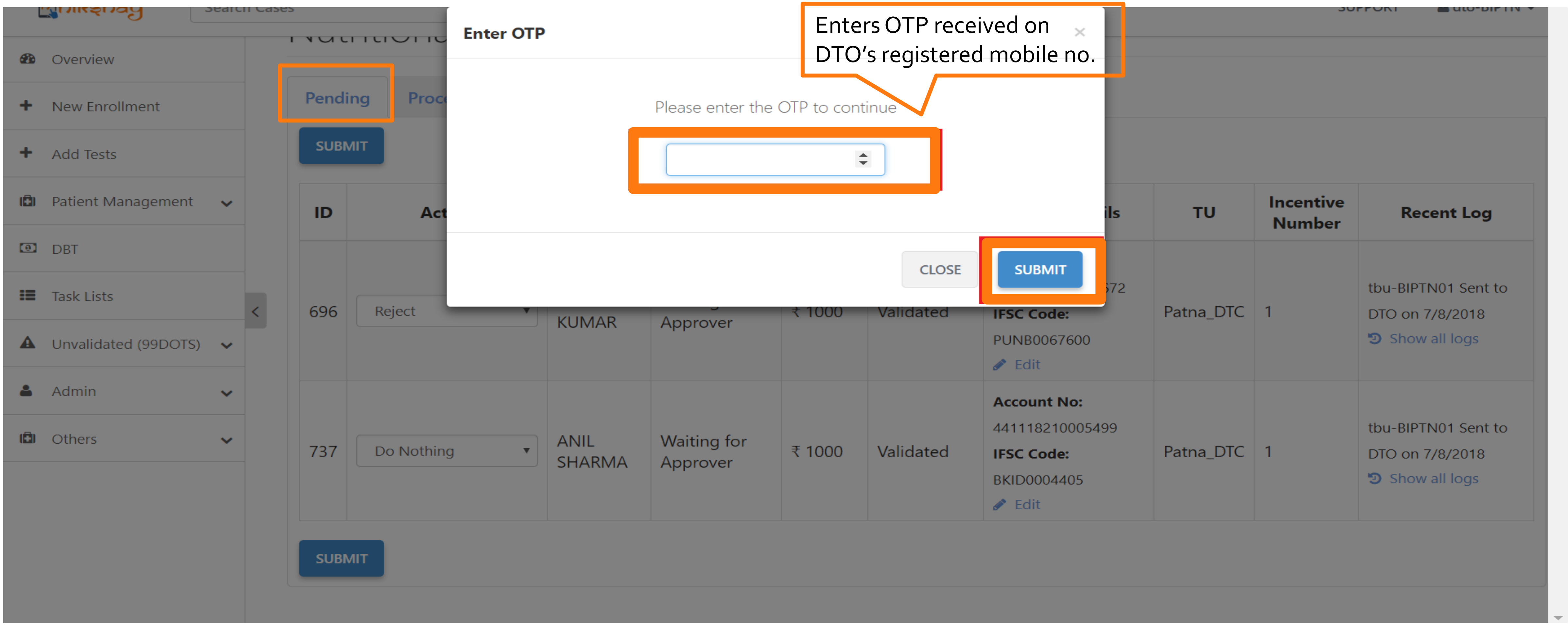
Step 1
Click on DBT

Step 2
Click on Scheme Name

Step 3
Enter Bank Details

Step 4
Approval by TU User (Maker)

Step 4
Approval by DTO (Checker)



Action to be taken by DTO (Checker)

Step 1	Step 2	Step 3	Step 4	Step 5
Click on DBT	Click on Scheme Name	Enter Bank Details	Approval by TU User (Maker)	Approval by DTO (Checker)

Search Cases

TRAINING MATERIALS   ASK FOR HELP   dto-MHSTR

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Dashboard / DBT / Beneficiary List

Nutritional Support Sch

After Approval, transaction moves to Processing List of DTO

As Benefit is sent to PFMS and is acknowledged by it, status changes to "PFMS Accepted"

Pending | Processing | Paid | Removed | Deferred

ID	Name	Status	Amount	Beneficiary Status	Bank Details	TU	Incentive Number	Recent Log
80720		PFMS_ACCEPTED	₹ 1000	Validated	**Account No:** 1029006008807 **IFSC Code:** IBKL0485SDC	Satara	1	PFMS Commented (Benefit Accepted) on 15/7/2018 Show all logs
80723		PFMS_ACCEPTED	₹ 1000	Validated	**Account No:** 092011100002208 **IFSC Code:** ABHY0065055	Satara	1	PFMS Commented (Benefit Accepted) on 15/7/2018 Show all logs
100678	Aabaso Kashinath Thorat	PFMS_ACCEPTED	₹ 1500	Validated	**Account No:** 60190735574 **IFSC Code:** mahb0001029	Patan	1	PFMS Commented (Benefit Accepted) on 24/7/2018 Show all logs

Payment completed by PFMS

Step 1: Click on DBT → Step 2: Click on Scheme Name → Step 3: Enter Bank Details → Step 4: Approval by TU User (Maker) → Step 5: Approval by DTO (Checker) → Step 6: Payment by PFMS

Search Cases

TRAINING MATERIALS ASK FOR HELP

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Dashboard / DBT / Beneficiary List

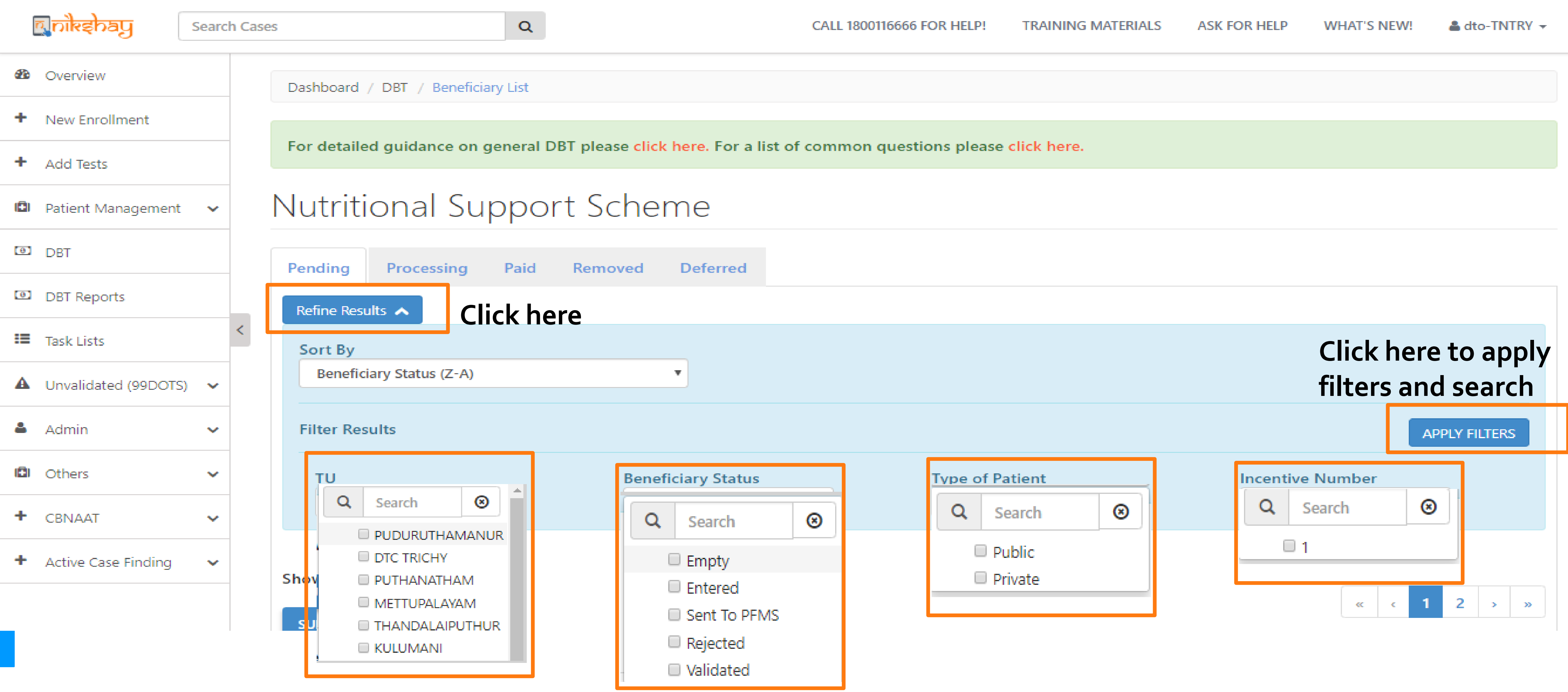
Nutritional Support Schem

On receipt of payment confirmation from PFMS, the Benefit is visible in "Paid section

Pending | Processing | Paid | Removed | Deferred

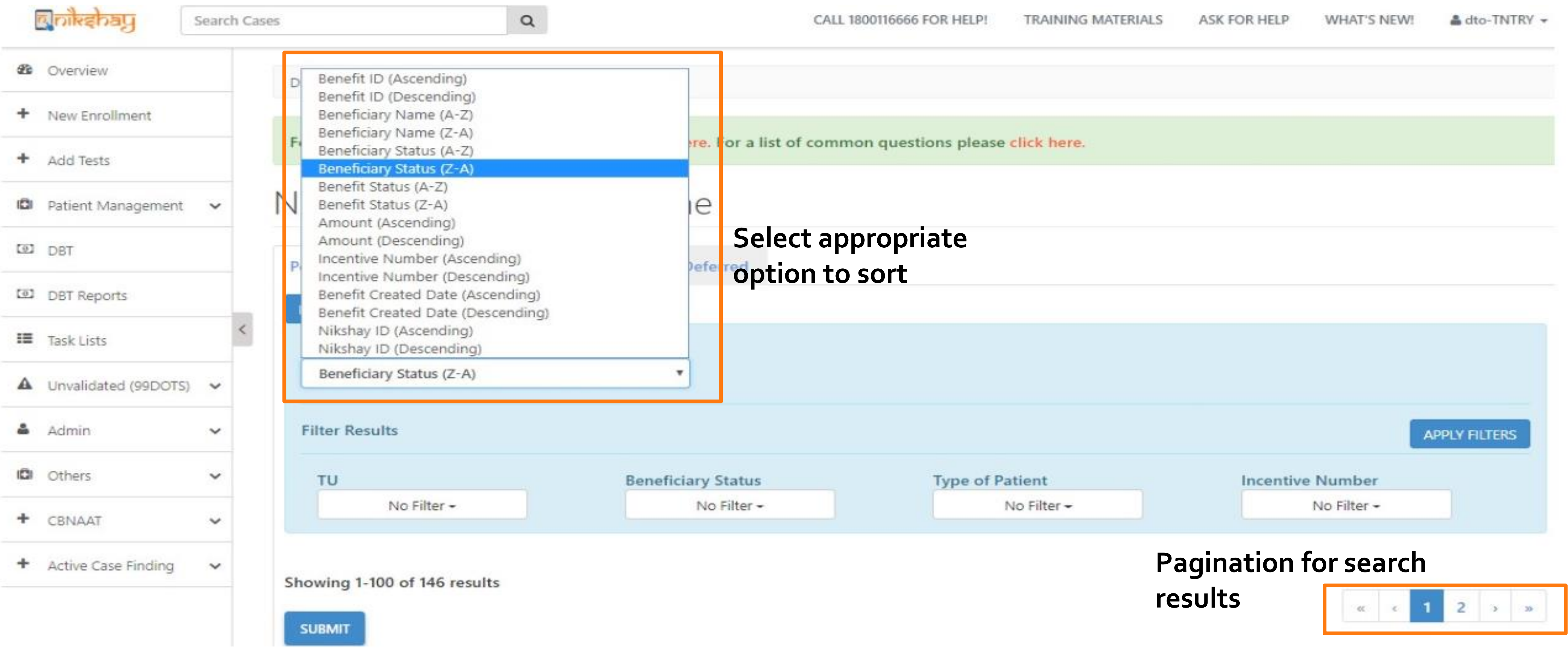
ID	Name	Status	Amount	Beneficiary Status	Bank Details	TU	Incentive Number	Recent Log
80755	Anisulhak Mansur Shaikh	Paid	₹ 1000	Validated	**Account No:** 033801521324 **IFSC Code:** ICIC0000338	Satara	1	PFMS PFMS Response Received (Benefit Credited on 31-07-2018.PFMS Transaction Id - C071808062489) on 15/7/2018 Show all logs
73477	Kalyani Bhimsen Wangade	Paid	₹ 1000	Validated	**Account No:** 0558104000073370 **IFSC Code:** IBKL0000558	Satara	1	PFMS PFMS Response Received (Benefit Credited on 31-07-2018.PFMS Transaction Id - C071807685624) on 14/7/2018 Show all logs
73478	Pratiksha Rajendra More	Paid	₹ 1000	Validated	**Account No:** 60222991467 **IFSC Code:** MAHB0000861	Satara	1	PFMS PFMS Response Received (Benefit Credited on 31-07-2018.PFMS Transaction Id - C071807685625) on 14/7/2018 Show all logs

Sort Facility in DBT Module



Click Refine Results to see various fields that can be sorted and searched in all tabs of DBT section. One can search and sort based on TU/TUs, sort by Beneficiary Status, Type of Patient and Incentive Numbers.

Sort Facility in DBT Module



Select appropriate option to sort

Pagination for search results

Here, apart from the pre-defined fields one can sort based on Benefit ID, Beneficiary Name, Amount, Incentive Number, Benefit Created Date, and Nikshay ID.

Admin Module of Nikshay 2.0

- This Module enables DTOs manage the staff details of their district

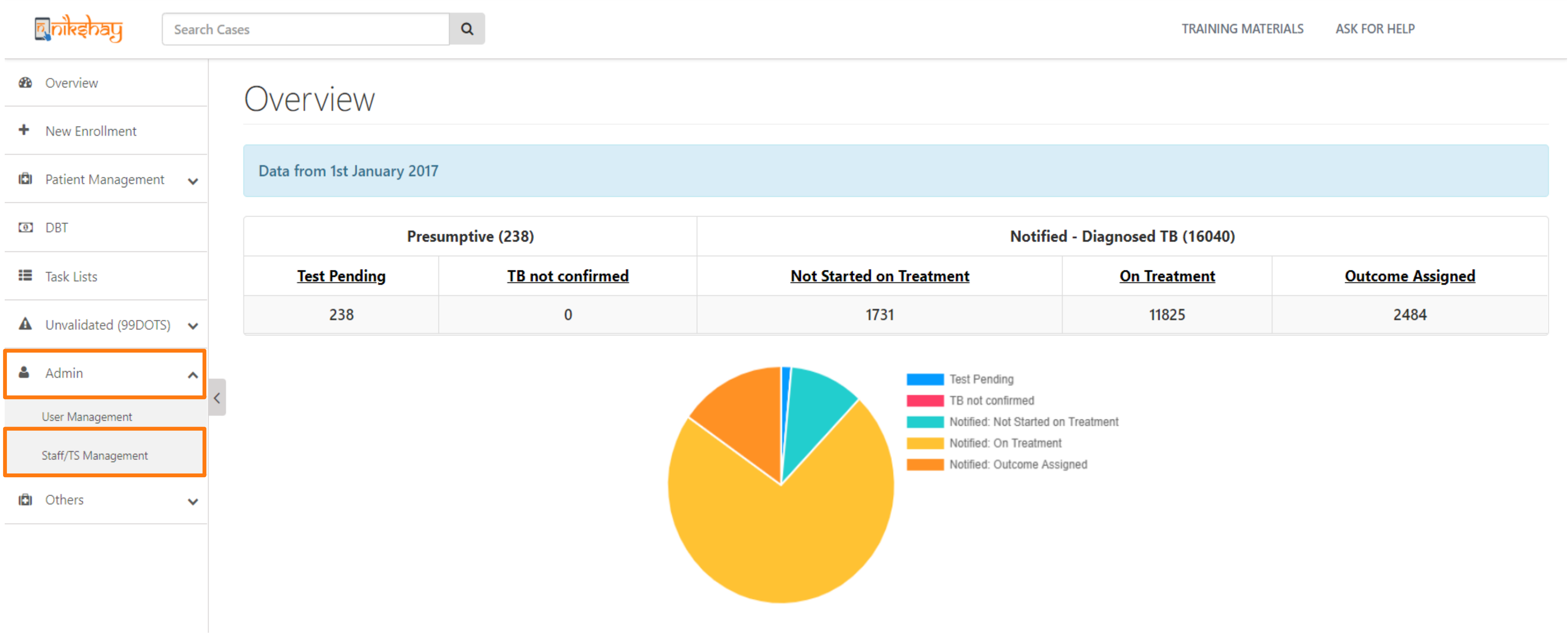
Staff Management

Step 1

Click on Admin

Step 2

Click on Staff/ TS Management



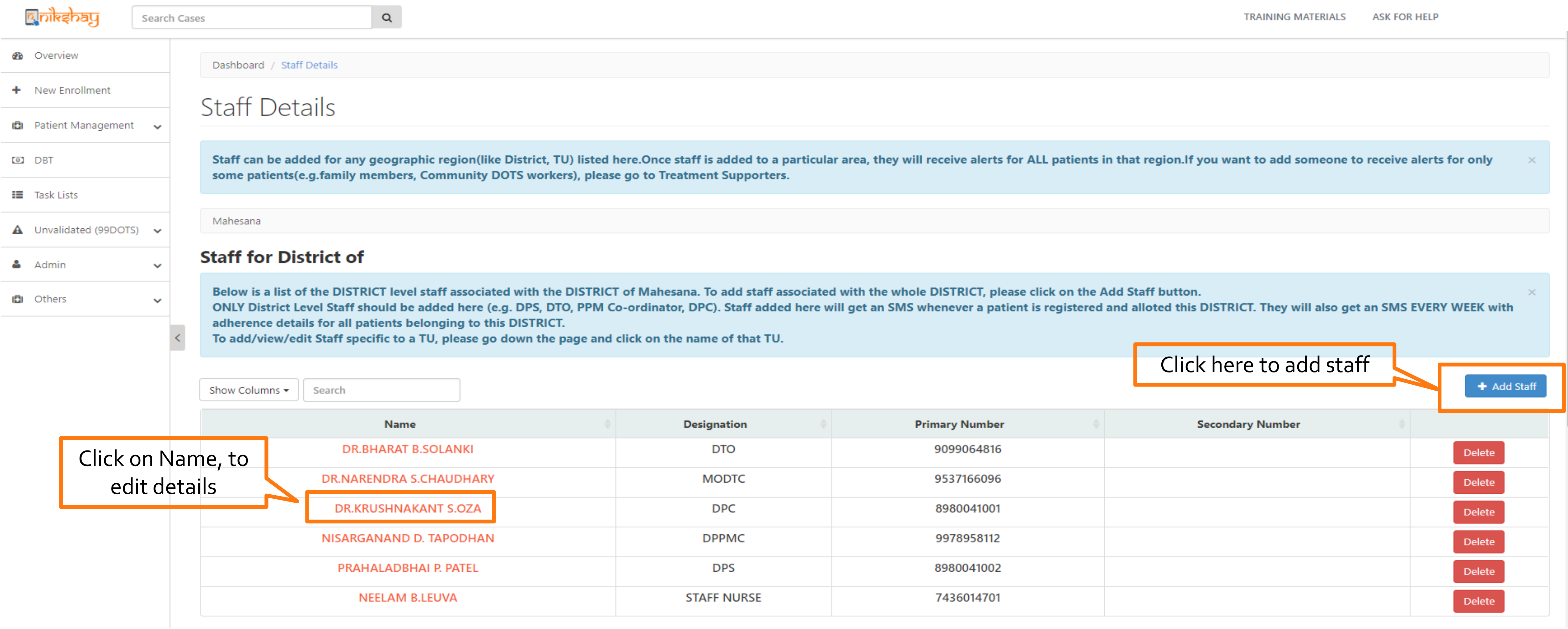
Staff Management

Step 1

Click on Admin

Step 2

Click on Staff/ TS Management



Click here to add staff

Click on Name, to edit details

Staff Management

Step 1

Click on Admin

Step 2

Click on Staff/ TS Management

Search Cases

TRAINING MATERIALS ASK FOR HELP

- Overview
- New Enrollment
- Patient Management
- DBT
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others

Name	Designation	Primary Number	Secondary Number	
DR.BHARAT B.SOLANKI	DTO	9099064816		Delete
DR.NARENDRA S.CHAUDHARY	MODTC	9537166096		Delete
DR.KRUSHNAKANT S.OZA	DPC	8980041001		Delete
NISARGANAND D. TAPODHAN	DPPMC	9978958112		Delete
PRAHALADBHAI P. PATEL	DPS	8980041002		Delete
NEELAM B.LEUVA	STAFF NURSE	7436014701		Delete

List of TUs in Mahesana

Below is a list of all TUs in Mahesana. To add/view/edit staff specific to a TU, please click on the name of that TU.

Show Columns Search

Name	Code	TU Staff Count
Becharaji	09	4
GOZARIYA	11	0
Jotana	10	2
Kadi	04	10
Kheralu	03	2
Mahesana DTC	01	11
Satlasana	07	7
Unjha	08	24
Vadnagar	06	3
Vijapur	05	11
Visnagar	02	6

Click here to add/ edit TU wise staff details

Staff Management

Step 1

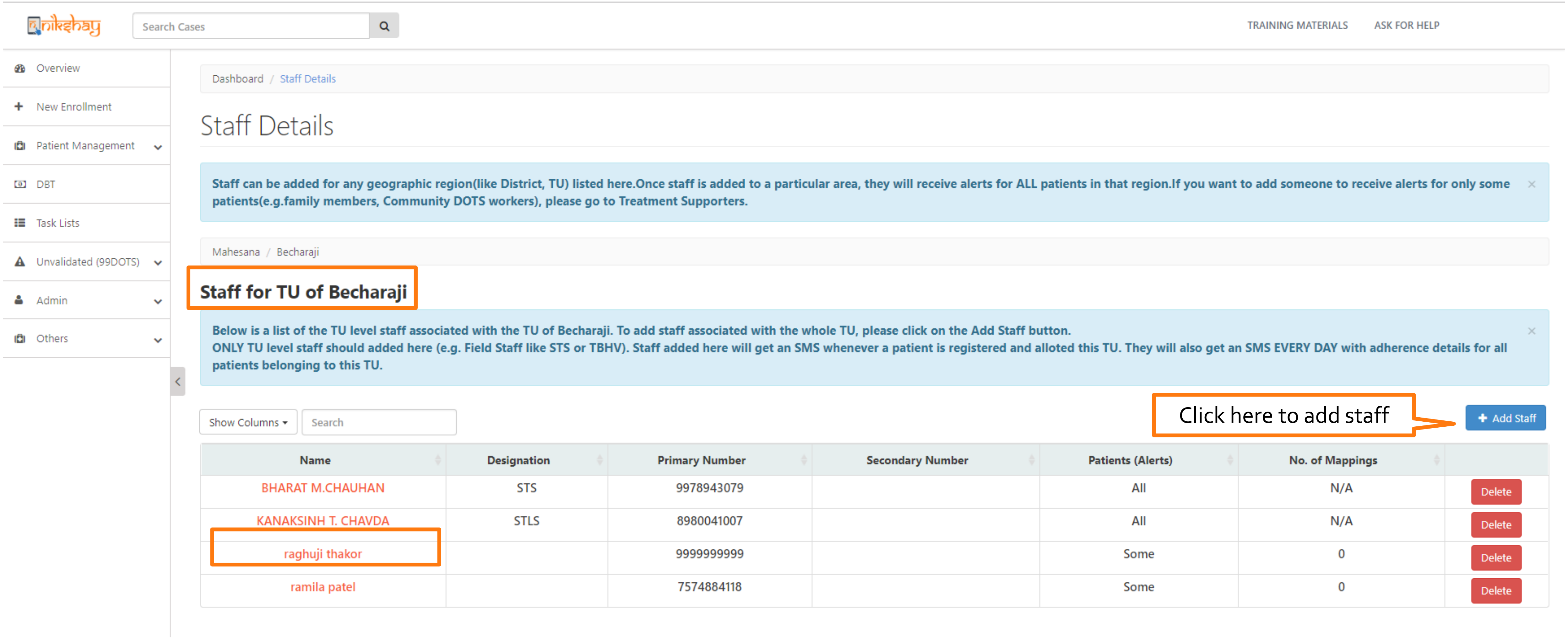
Click on Admin

Step 2

Click on Staff/ TS Management

Step 3

Click on Staff Name to Edit

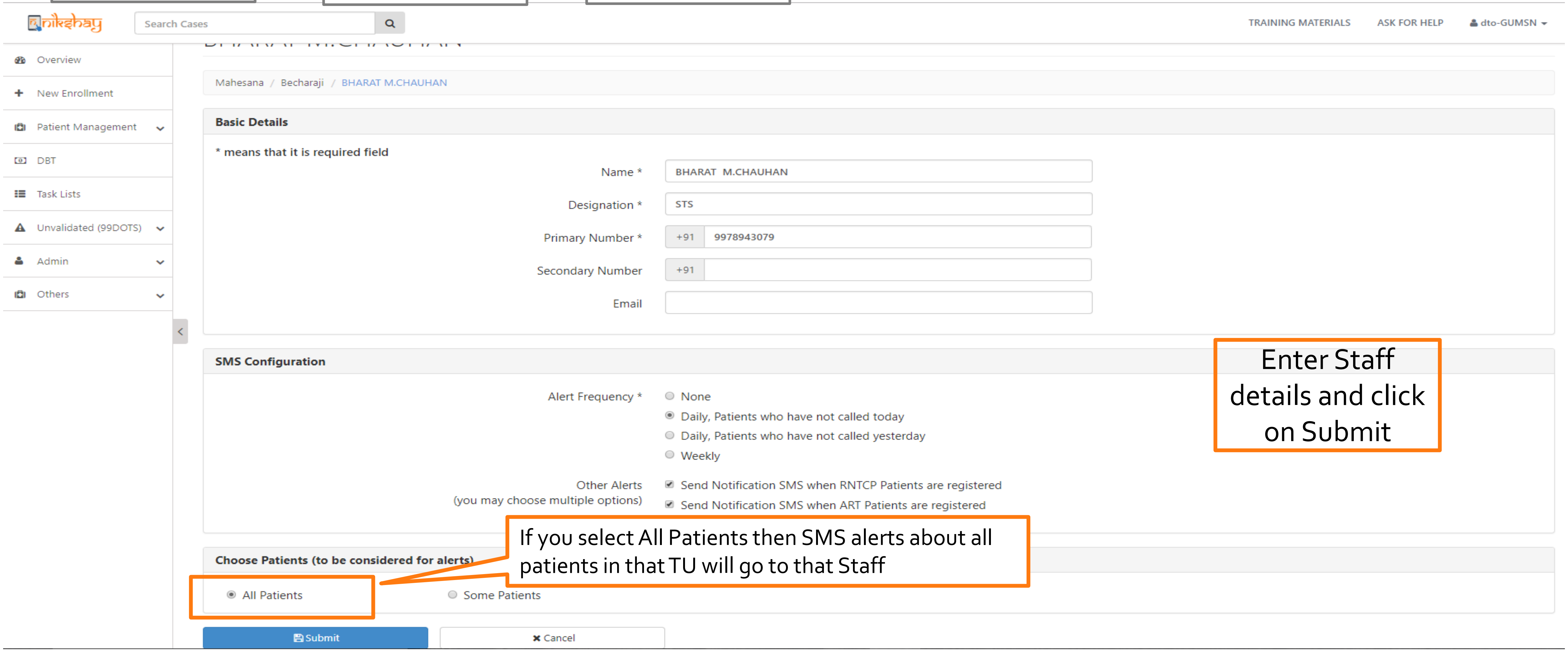


Staff Management

Step 1
Click on Admin

Step 2
Click on Staff/ TS Management

Step 3
Click on Staff Name to Edit



Enter Staff details and click on Submit

If you select All Patients then SMS alerts about all patients in that TU will go to that Staff

Staff Management

Step 1
Click on Admin

Step 2
Click on Staff/ TS Management

Step 3
Click on Staff Name to Edit

Search Cases

CALL 1800116666 FOR HELP! TRAINING MATERIALS ASK FOR HELP WHAT'S NEW!

- Overview
- New Enrollment
- Add Tests
- Patient Management
- DBT
- DBT Reports
- Task Lists
- Unvalidated (99DOTS)
- Admin
- Others
- CBNAAT
- Active Case Finding

SMS Configuration

Alert Frequency *
- None
- Daily, Patients who have not called today
- Daily, Patients who have not called yesterday
- Weekly

Other Alerts
(you may choose multiple options)
- Send Notification SMS when RNTCP Patients are registered
- Send Notification SMS when ART Patients are registered

Choose Patients (to be considered for alerts)

- All Patients
- Some Patients

If you select Some Patients then SMS alerts about the selected patients from the list will be sent to that TU staff

Mapped Patients (8 out of 67 patients)

Show Columns Search

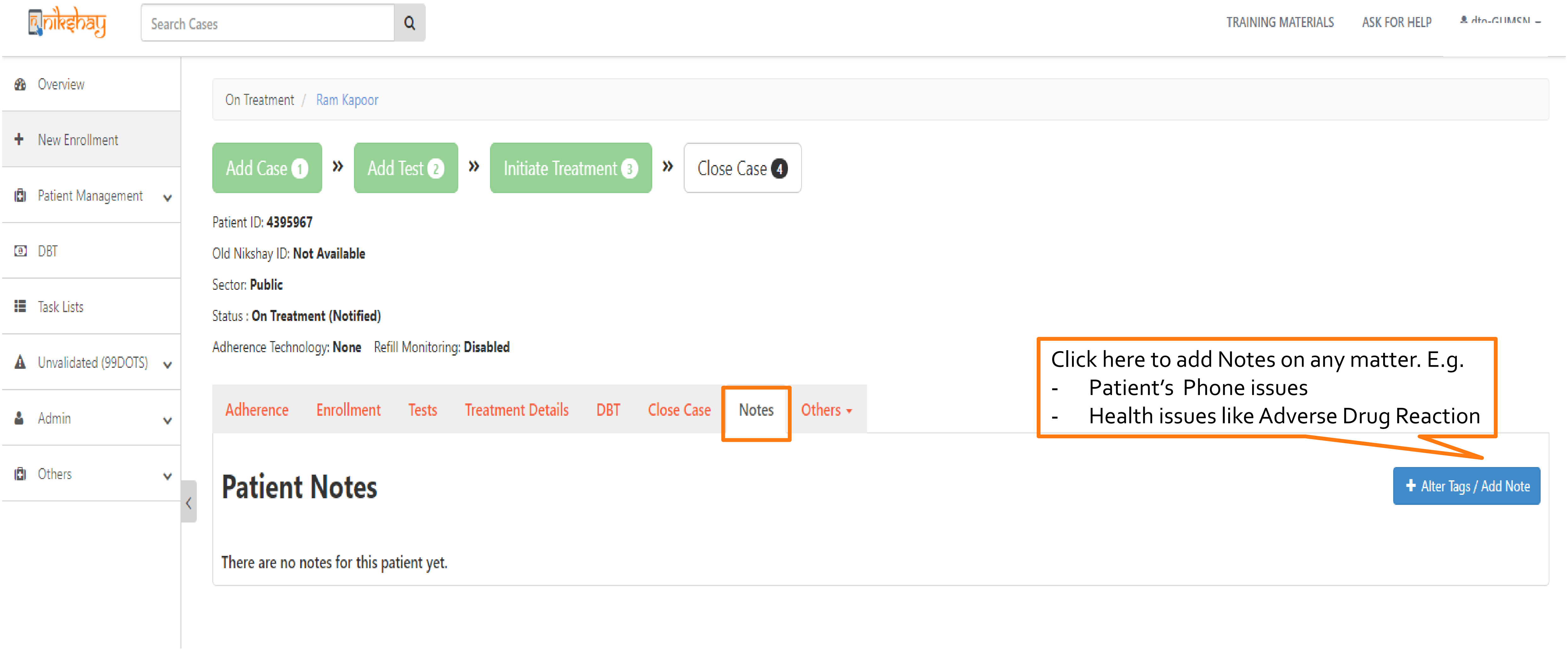
Select	ID	Name	Current Tags	Type	Phone	PHI	Address
☐	98135	sampasivam H/O GOMAT		IndiaTbPublic	8675799940	N/A	44 cudalur village
☑	199494	SHANMUGANATHAN H/O I		IndiaTbPublic	9952763304	N/A	27B EVS ROAD TOWN
☑	218578	Vijaya W/O MANOKARAN		IndiaTbPublic	9159649882	N/A	64 Kavalkaran st Poosampatti
☑	2512374	CHANDRA		IndiaTbPublic	9047878089	Anthanallur	KEELASTREET KOLLUKADU
☑	2672655	mani		IndiaTbPublic		Kulumani	melakadu villlage
☑	2717659	Murugesan		IndiaTbPublic	7402065537	Kulumani	Seerathoppu
☑	2719757	THANGARAJU		IndiaTbPublic		Pettavaithalai	VILLAGE
☐	2881151	shalini		IndiaTbPublic		Anthanallur	anthanallur
☐	2903402	subramani		IndiaTbPublic		Kulumani	village
☑	3117507	Saravanan		IndiaTbPublic		Kulumani	5/93 Kamarajnagar Village

Add or view Patient Notes

- Nikshay enables adding Notes to a Patient’s record so that users can refer to it in future.
- Since multiple people (such as LT, TB HV, STS, SDPS etc.) interact with a patient and access a patient’s records, this is a useful feature to record Notes (Remarks) so that everyone can view

Step 1

Click on Notes



Click here to add Notes on any matter. E.g.

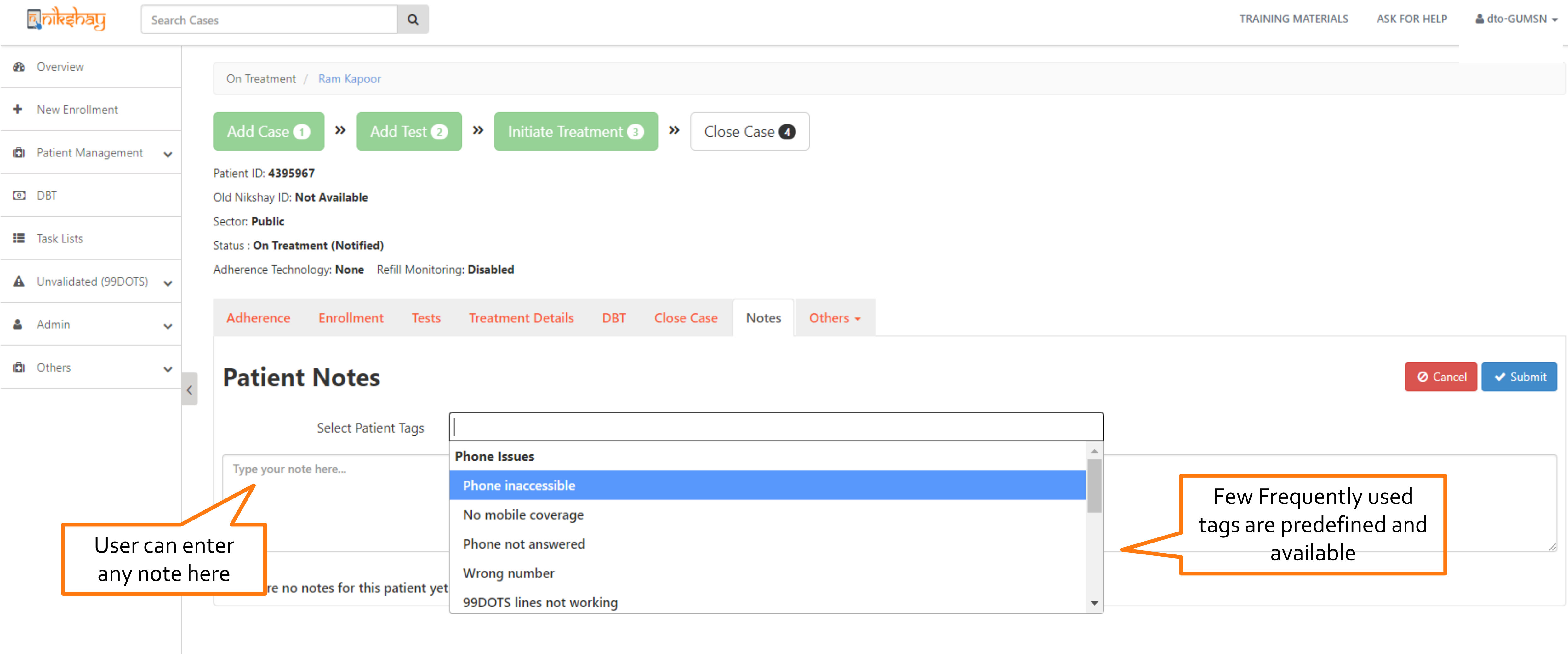
- Patient's Phone issues
- Health issues like Adverse Drug Reaction

Step 1

Click on Notes

Step 2

Enter Note Details



User can enter any note here

Few Frequently used tags are predefined and available

Step 1

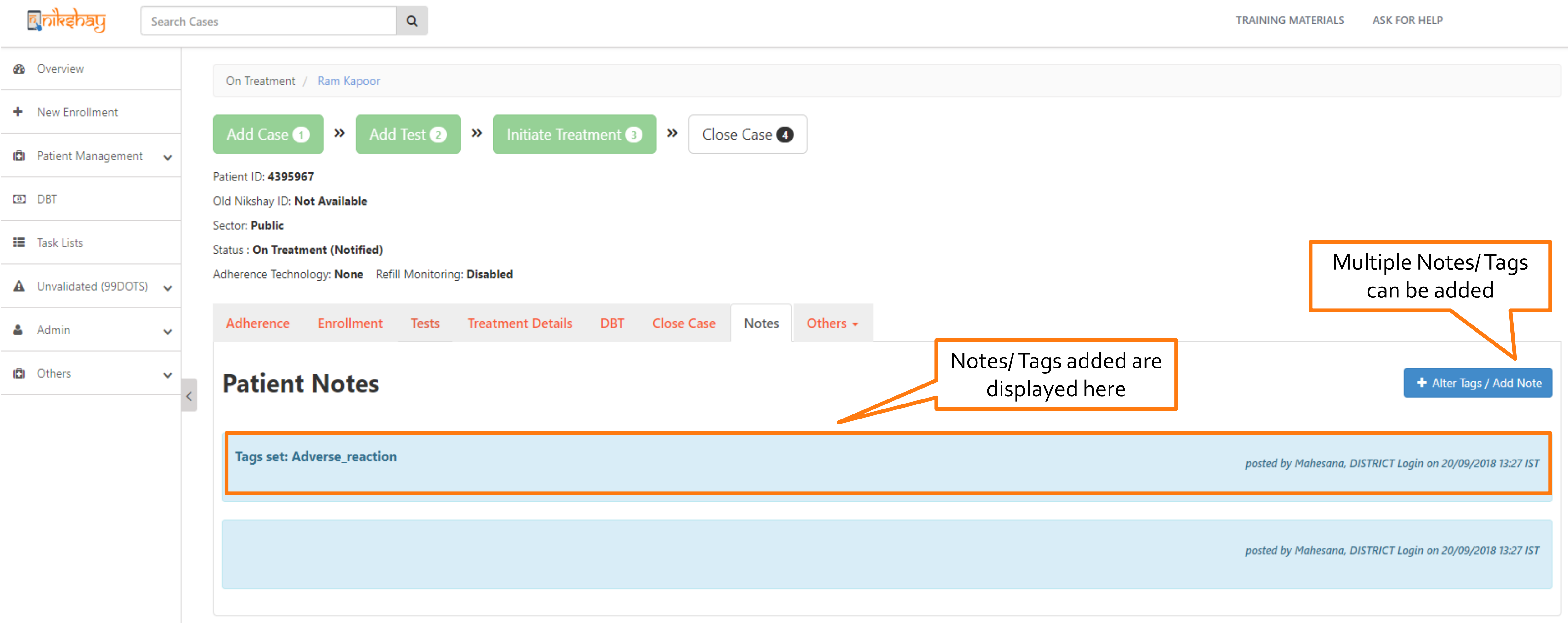
Click on Notes

Step 2

Enter Note Details

Step 3

View Note Details



Private Health Facility Registration

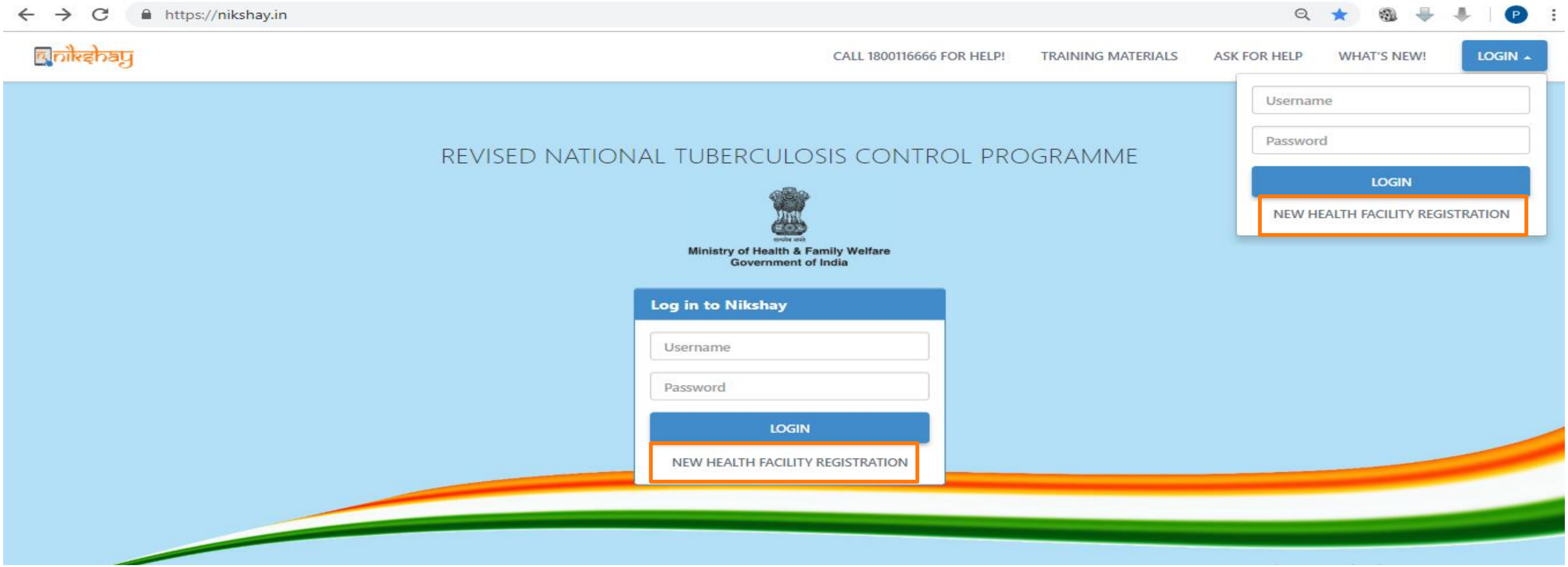
New Health Facility Registration (Private only)

- Now, we have an open form in Nikshay to add a new Health Facility.
- In order to add a private facility it is not necessary to sign in also.

Private Health Facility Registration

Step 1

Click NEW HEALTH FACILITY REGISTRATION



In the nikshay.in page, click NEW HEALTH FACILITY REGISTRATION in the bottom of Login button.

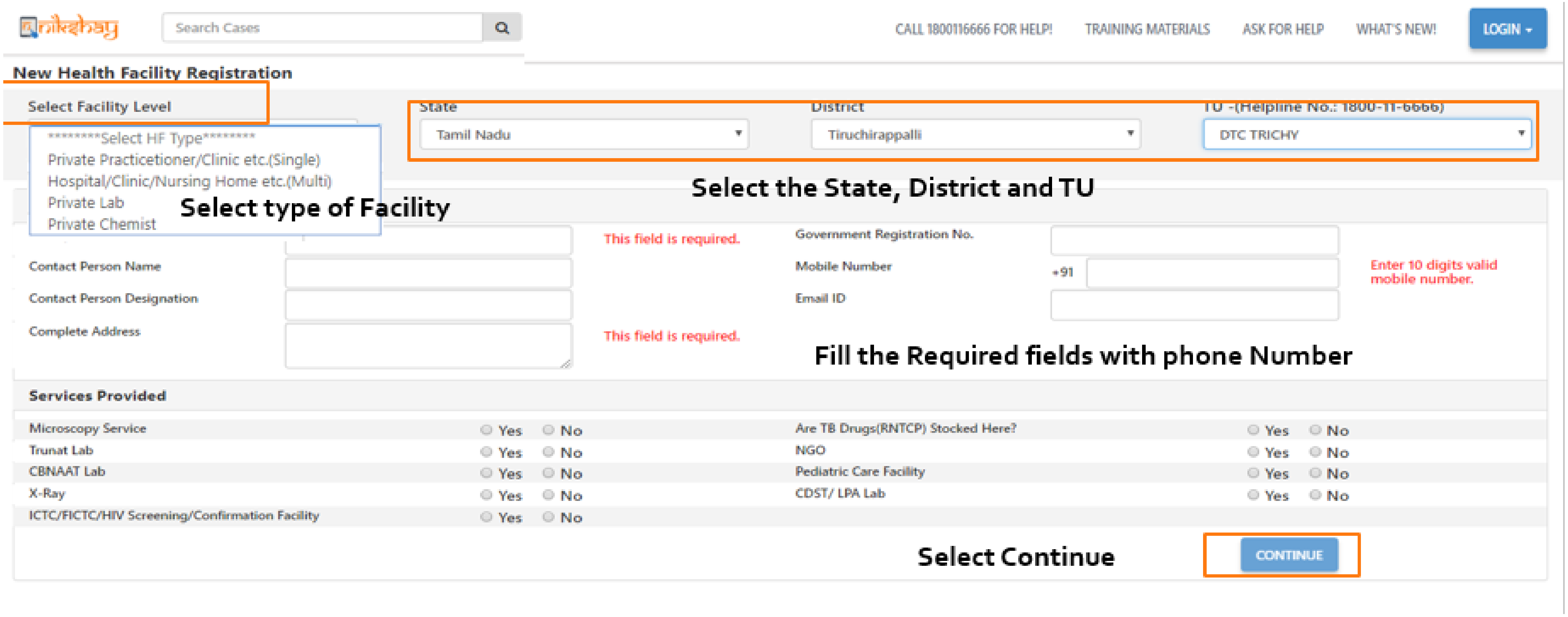
Private Health Facility Registration

Step 1

Click NEW HEALTH FACILITY REGISTRATION

Step 2

Fill out the form with necessary Information



Private Health Facility Registration

Step 1

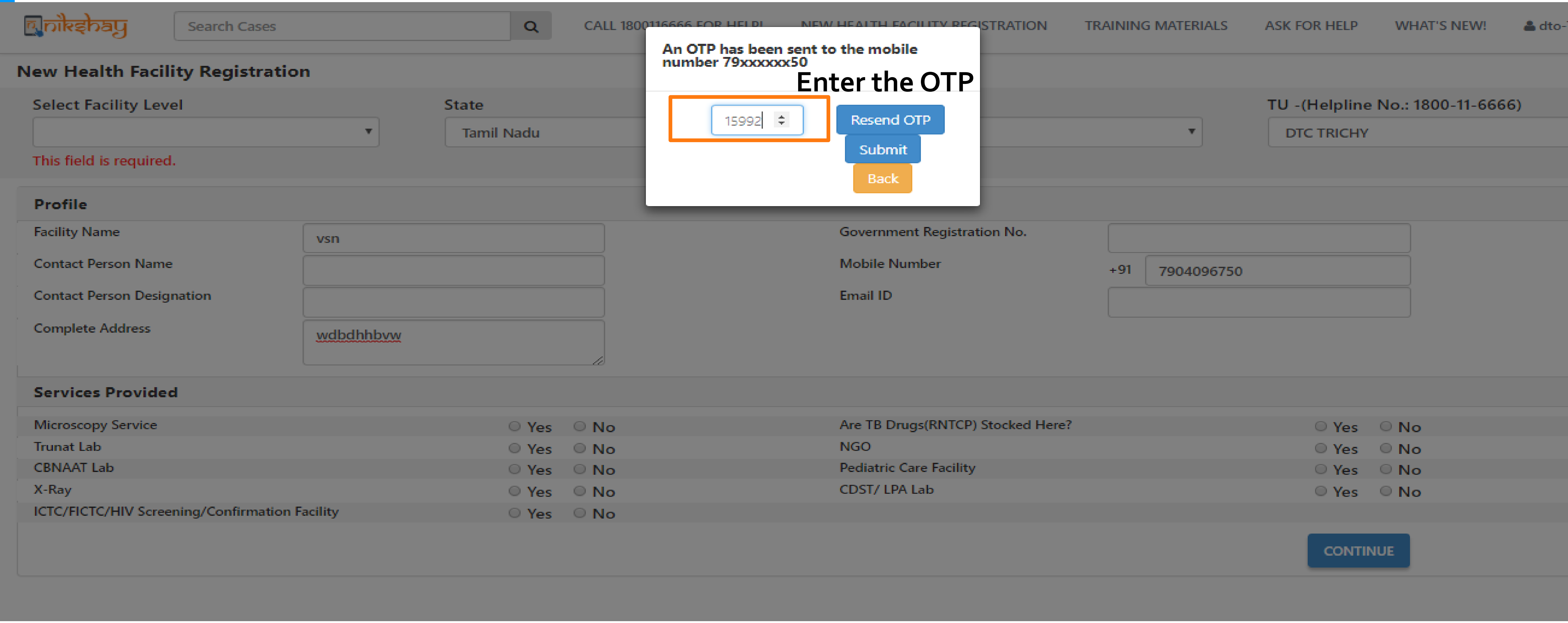
Click NEW HEALTH FACILITY REGISTRATION

Step 2

Fill out the form with necessary Information

Step 3

Enter the OTP



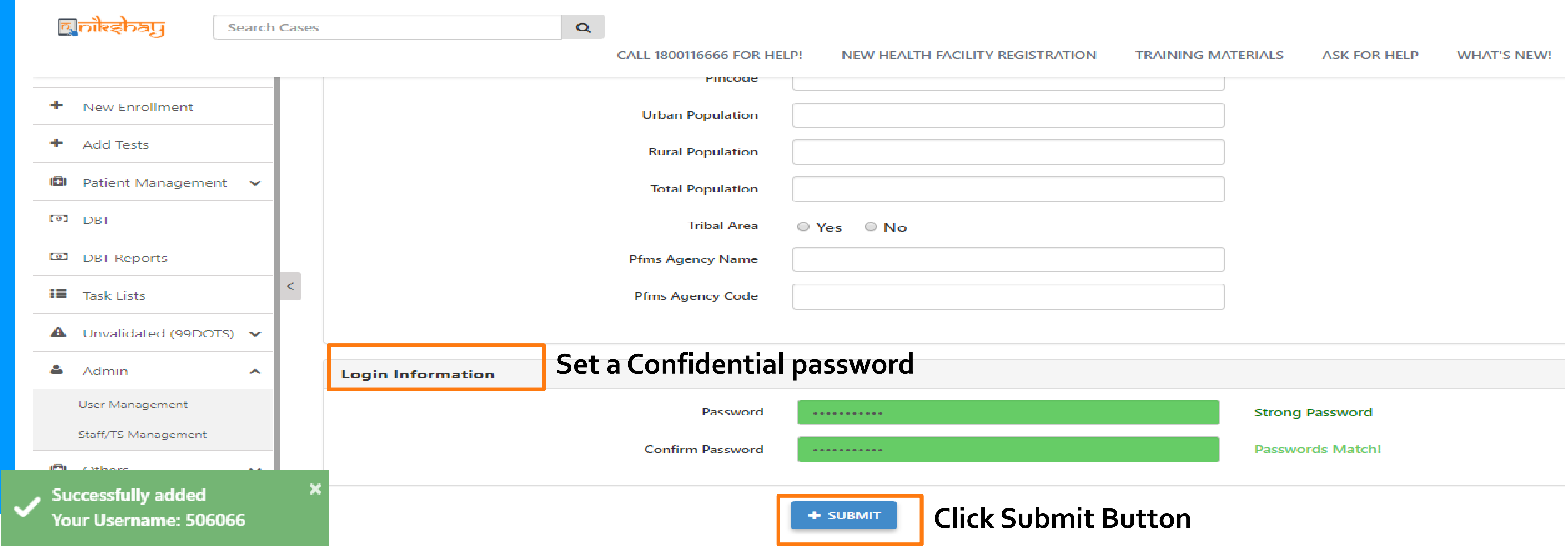
Adding a HF

Step 1
Click NEW HEALTH FACILITY REGISTRATION

Step 2
Fill out the form with necessary Information

Step 3
Enter the OTP

Step 4
Set a Password



Set a Confidential password

Click Submit Button

Enter a password which should be 8 character long and contain alteast, One Caps Letter, One small letter, One Number and One Special Character

Active Case Finding (ACF)

- The Active Case Finding (ACF) of Tuberculosis programme, a national campaign, has been launched to prevent new infections and new cases and thus reduce TB transmission in the community.
- The feature of ACF mapping details addition in Nikshay is active now

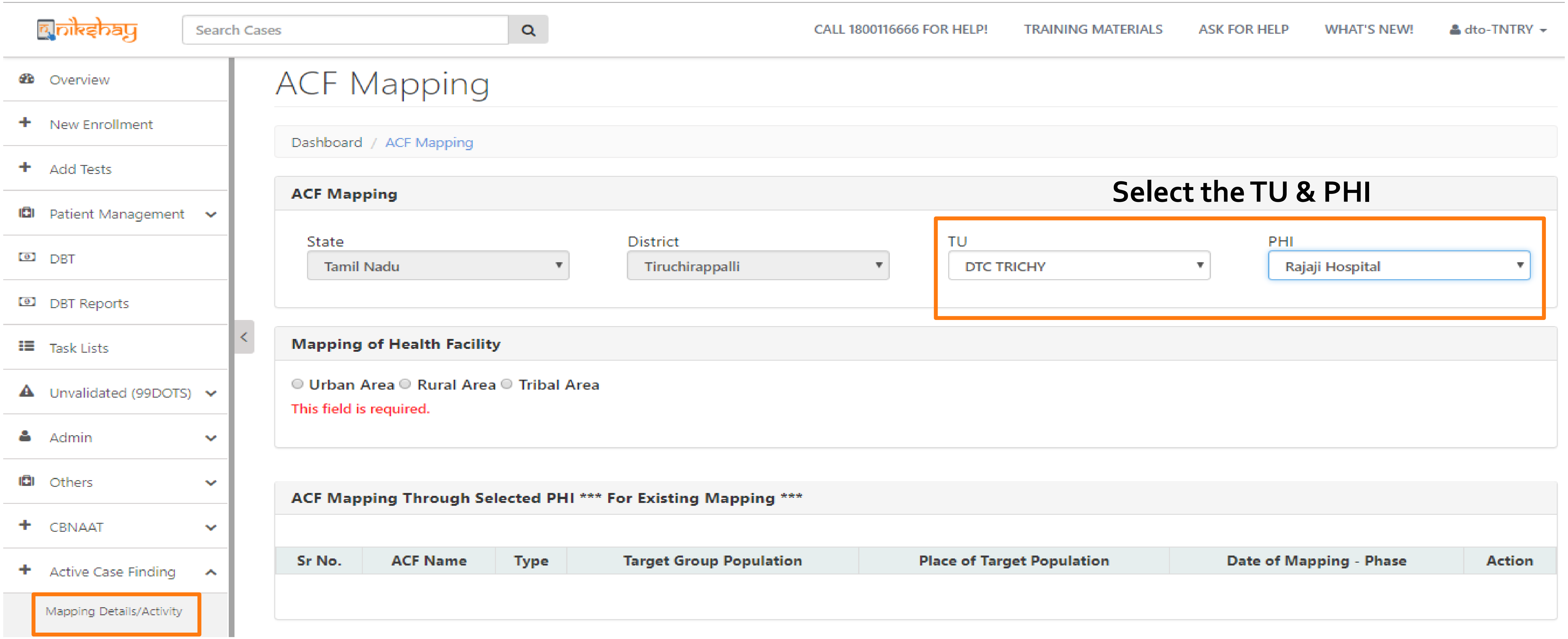
Active Case Finding (ACF)

Step 1

Click Mapping Details/Activity

Step 2

Select the TU & PHI



Active Case Finding (ACF)

Step 1

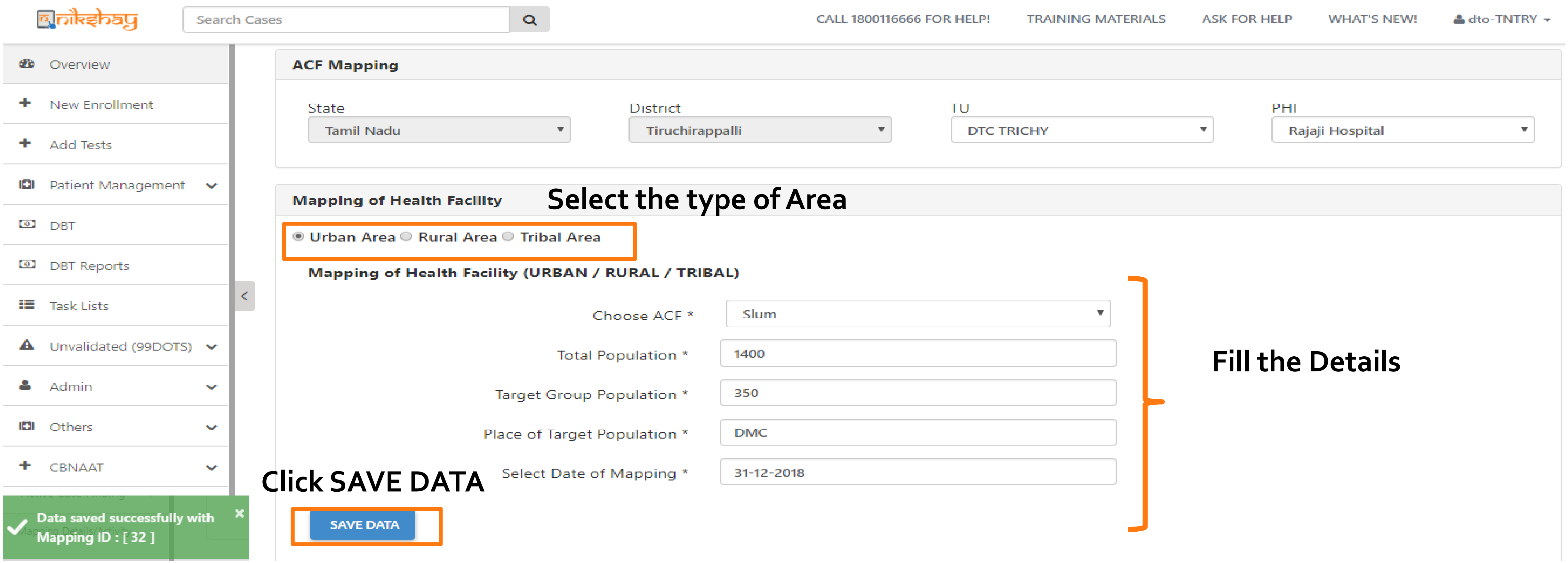
Click Mapping Details/Activity

Step 2

Select the TU & PHI

Step 3

Fill the Form and click SAVE DATA



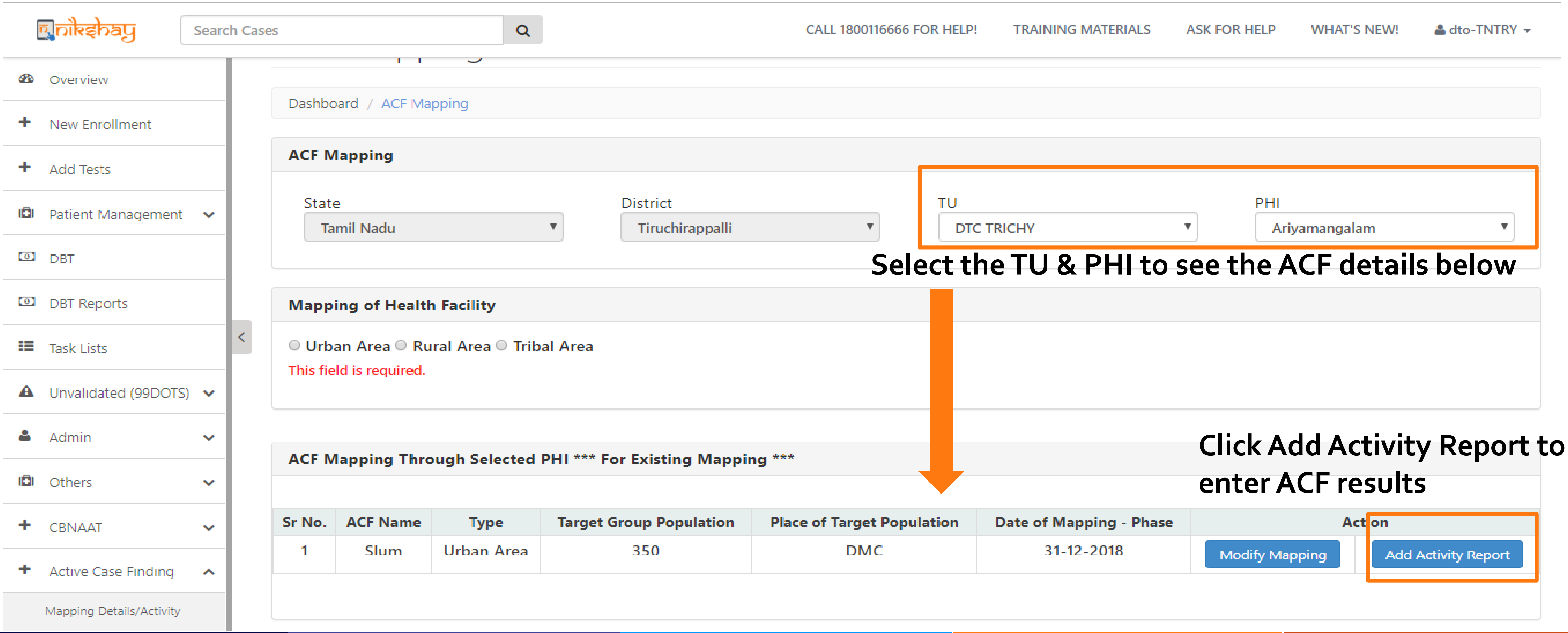
Active Case Finding (ACF)

Step 1
Click Mapping Details/Activity

Step 2
Select the TU & PHI

Step 3
Fill the Form and click SAVE DATA

Step 4
Select the appropriate facility and click Add Activity Report



Select the TU & PHI to see the ACF details below

Click Add Activity Report to enter ACF results

Active Case Finding (ACF)

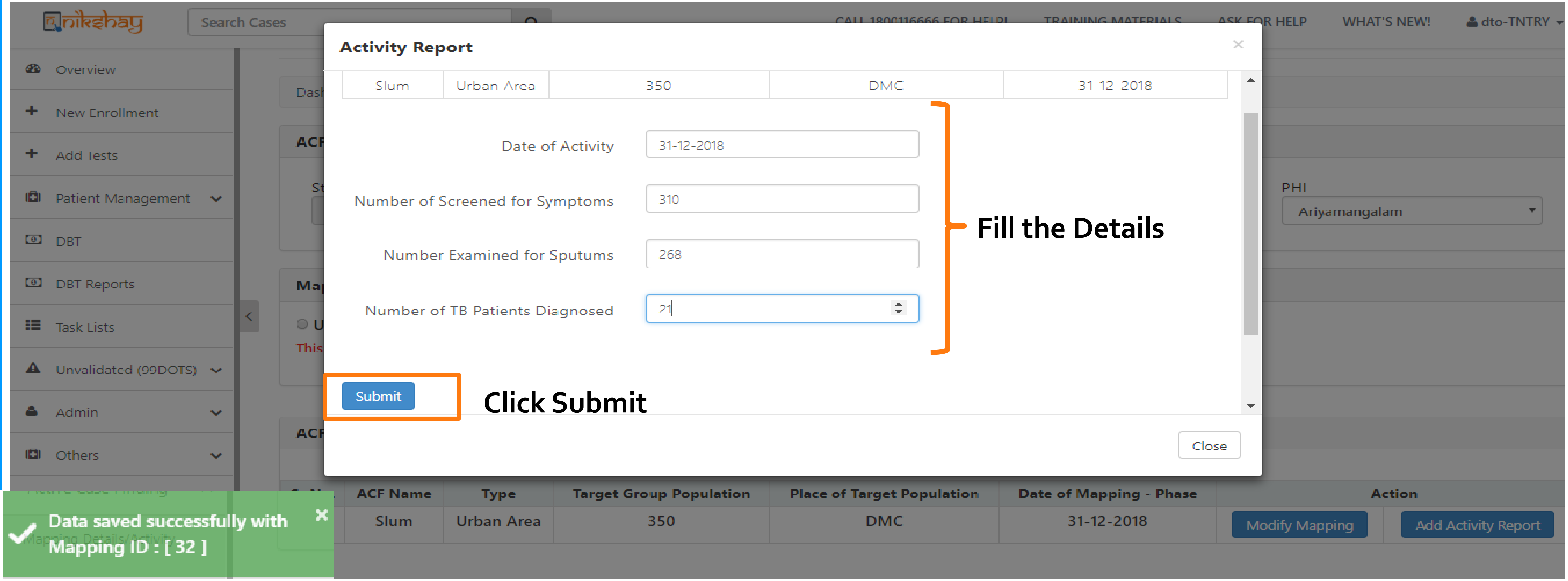
Step 1
Click Mapping Details/Activity

Step 2
Select the TU & PHI

Step 3
Fill the Form and click SAVE DATA

Step 4
Select the appropriate facility and click Add Activity Report

Step 5
Fill the Activity Report Details and click Submit



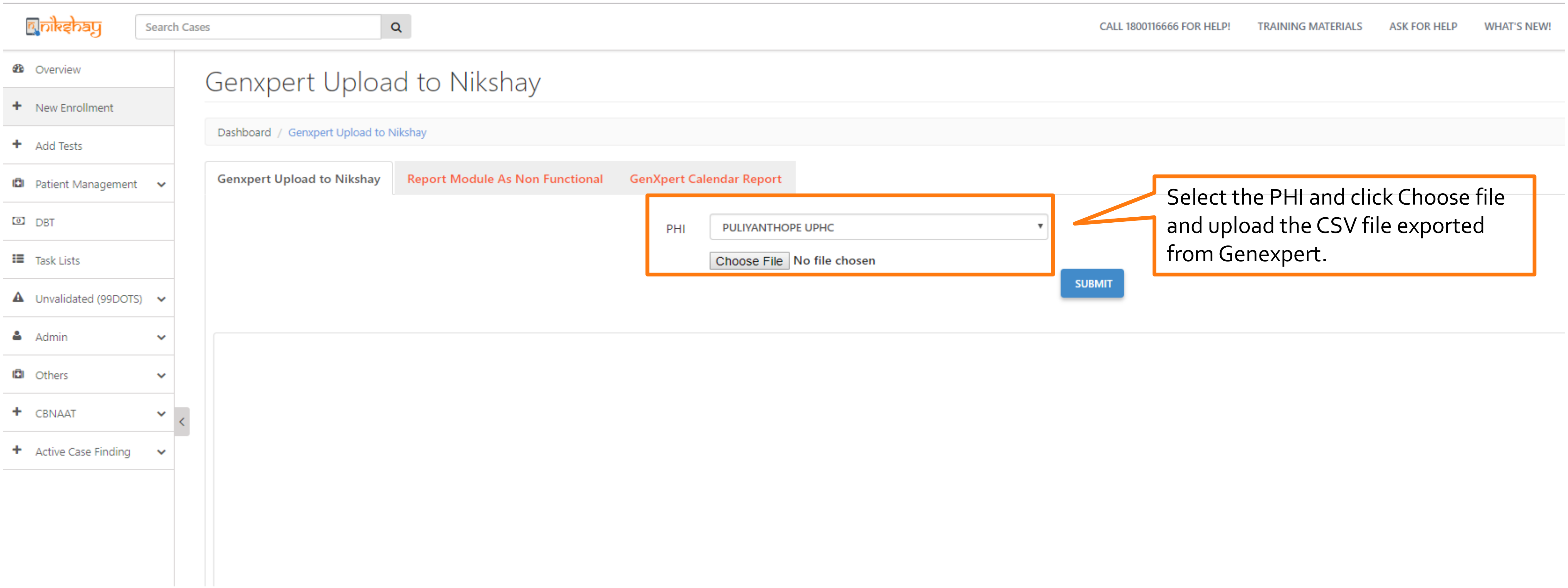
Uploading CBNAAT Test Results to Nikshay

Uploading CBNAAT Test Results to Nikshay

- Central TB division has now provided the function in Nikshay to directly upload CBNAAT results to Nikshay.
- PHIs with CBNAAT facilities will be provided with the ability to upload CBNAAT test details to Nikshay.
- The results need to be exported in bulk from the CBNAAT machine and uploaded to Nikshay on a daily basis by the Lab Technician.
- The test details and the performance of the site are visible through a calendar based report with the details on number of tests performed, MTB detected/not detected and Rif sensitive/resistant patients

For more information on Uploading CBNAAT Test Results to Nikshay, please refer to the document in this link: https://nikshayeverwell.blob.core.windows.net/training-materials-nikshay/Nikshay%20Documents/Uploading%20CBNAAT%20Test%20Results%20in%20Nikshay.pdf

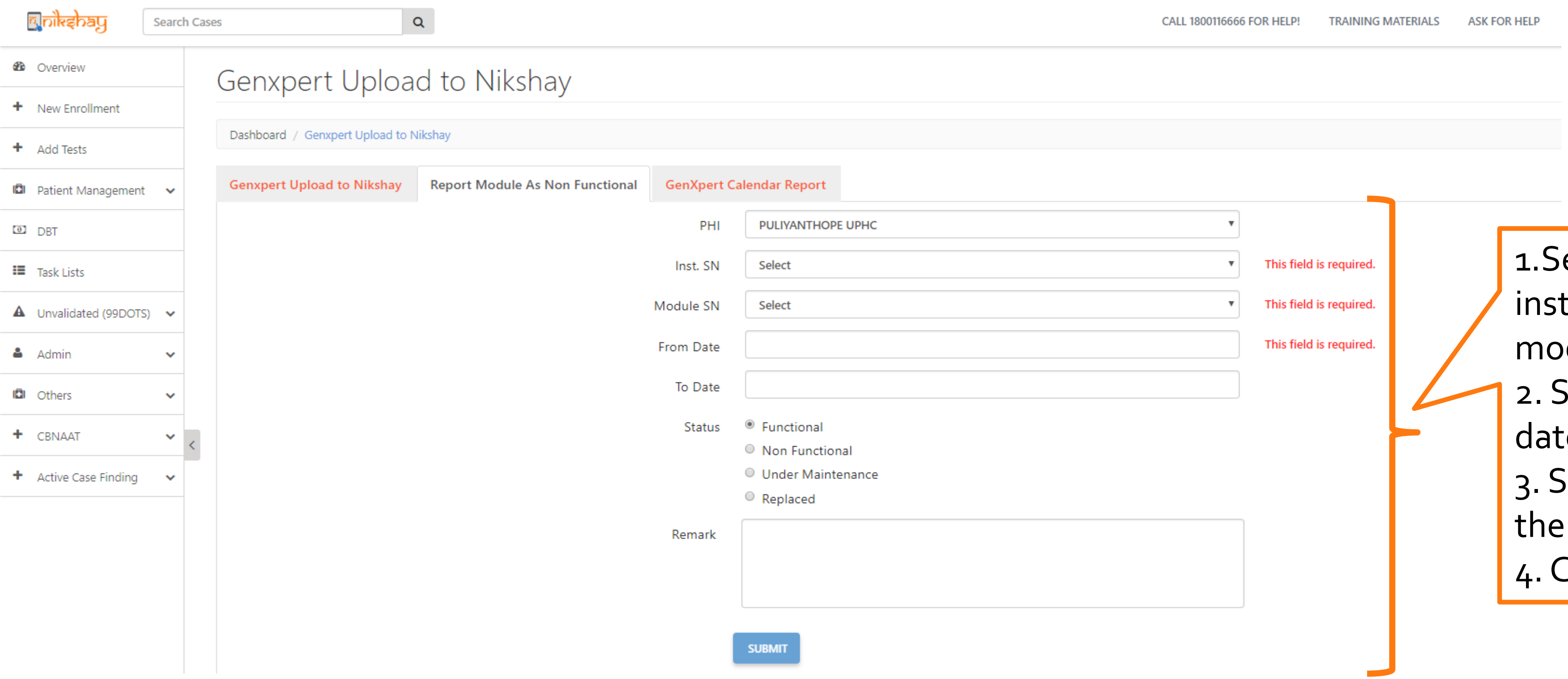
Uploading Genxpert Report to Nikshay



Note:

1. All tests done after 1st of December 2018 are to be uploaded.
2. Tests are to be uploaded daily to Nikshay. Preferably after the last test has been done for the day.

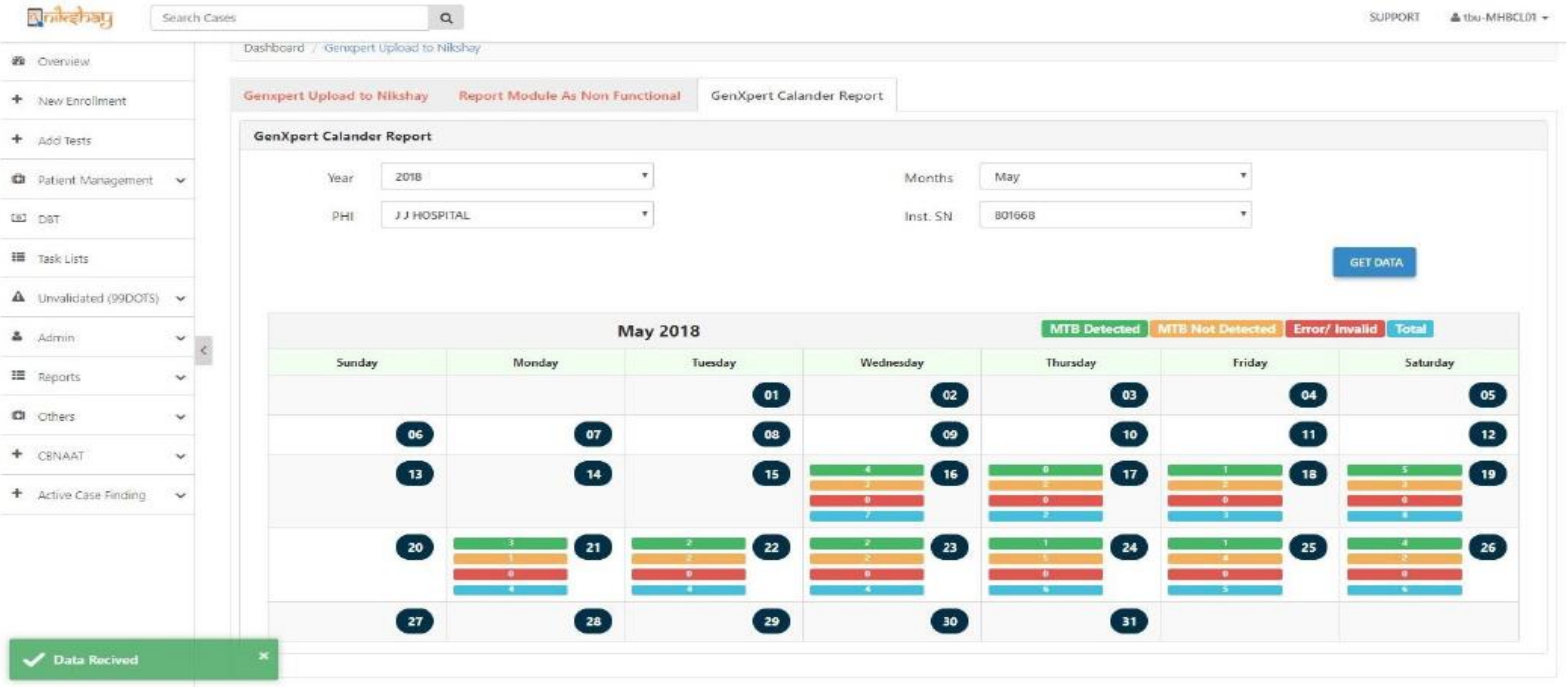
Report Module as Non Functional



1. Select the PHI and the instrument and the module serial number.
2. Select the from and to date for the status
3. Select the status of the module.
4. Click on Submit

If no tests are done, because modules are not functional, then this detail need to be updated in Nikshay.

Viewing Reports based on the Data Uploaded



All the tests uploaded can be viewed on a calendar based on the date of test. Each day a summary based on the type of result is provided

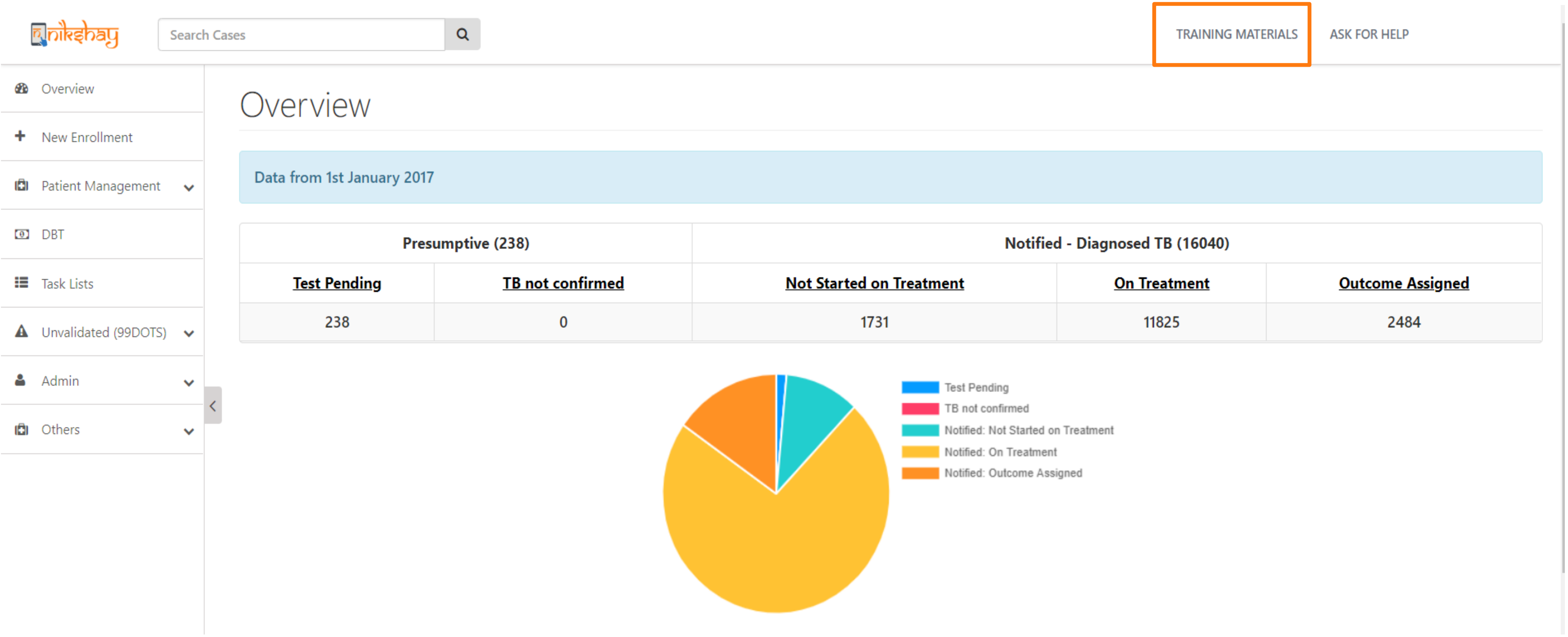
Training Materials

- As we continuously upgrade our training material, kindly ensure you refer to the latest version of the training Material
- The Training Materials are available on the Home Page of Nikshay 2.0

Access latest version of Training Material

Step 1

Click on Training Material



Access latest version of Training Material

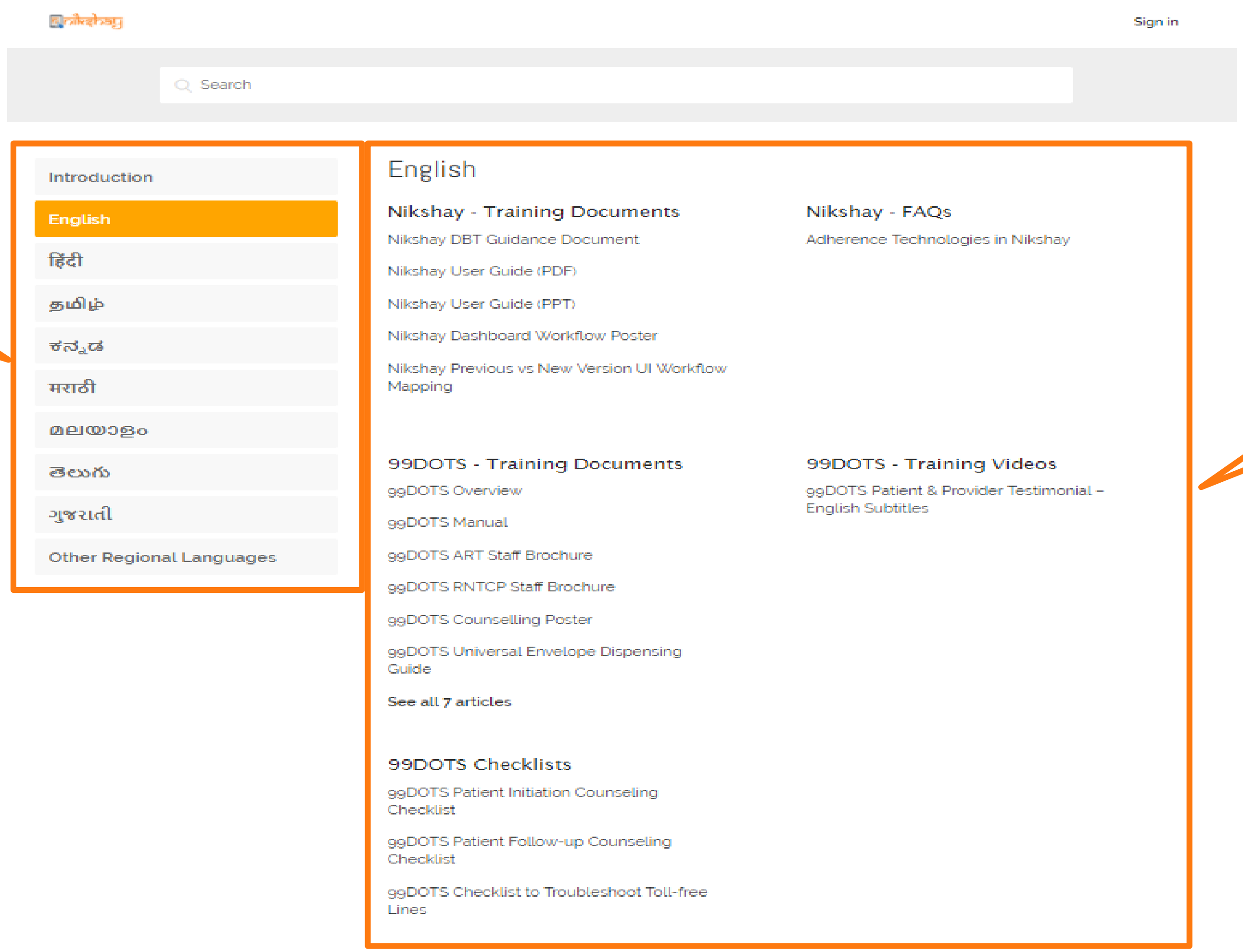
Step 1

Click on Training Material

Step 2

Click to download

Click on language to access training material



Click to download and access the training material

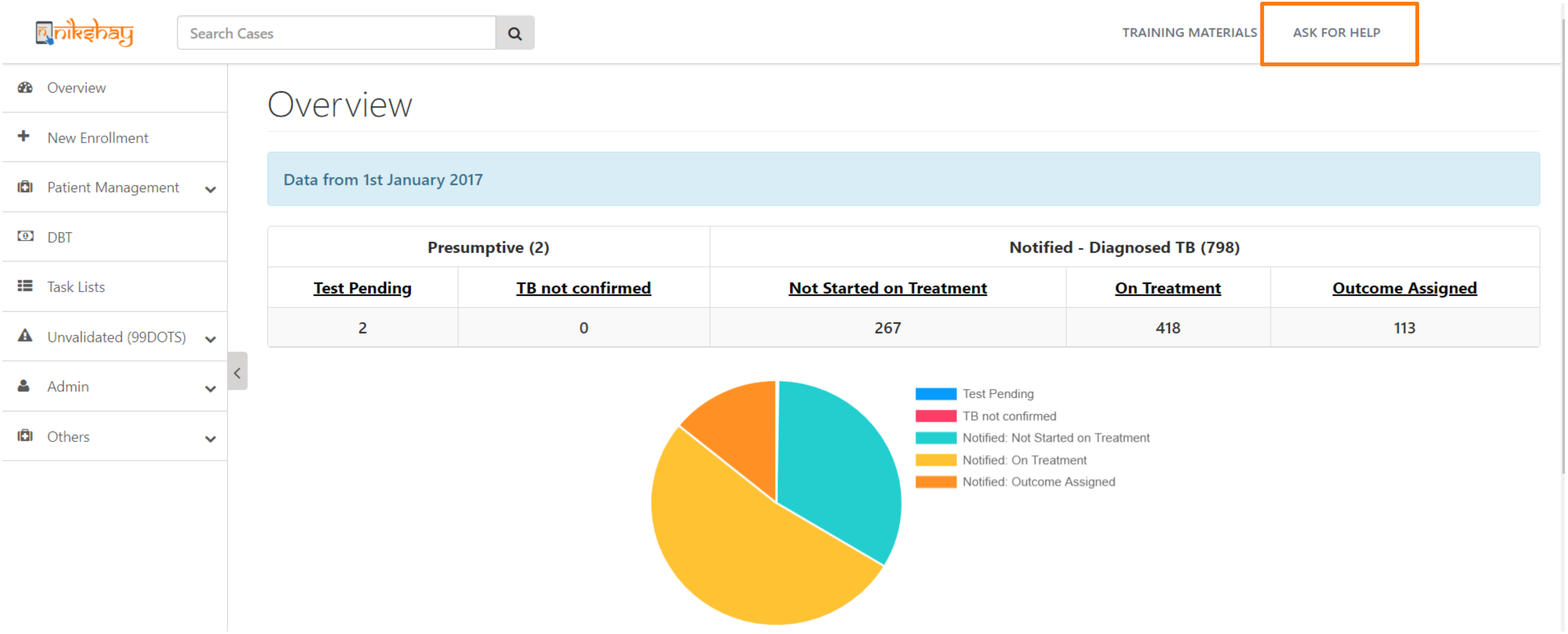
Nikshay 2.0 technical support

- If users have a query or face any issue while using the Application, they can either Call Nikshay Sampark at **1800 11 6666**
- Users can also log a SERVICE Request themselves using the "Ask for Help" option available on the Nikshay Website
- To resolve your queries, please go through the latest training material available on the Nikshay Website

Ask for Help

Step 1

Click on Ask for Help



Categories of calls

Subcategory	Definition	Example
Help with application Training	Queries on Nikshay arising out of knowledge gaps. A user is not requesting a new feature nor is raising a defect in the system	- How do I check patient data? - Where can I monitor adherence?
System Issues/Bug	Any issue that refrains a user from using the system or its function in accordance with the current requirements	- Workflows not working - Dashboard showing incorrect data
Feature Request	Any change to an existing functionality or an additional of a new functionality when compared to current requirements	- Ability to customize notifications on the system - Add additional data fields

Log in into Service Request Portal

Help Center

Nikshay

Welcome! You can raise a Service Desk request from the options provided or email us at support@everwell.org

Sub categories of Service Request

Can be used by users directly

Help with Product Training

Service Request

System Issues/Bugs

Feature Request

Ask us a question about Nikshay but before that please visit the link below:
https://nikshay.zendesk.com/hc/en-us

The form to raise the service request opens here

Raise a Service Request

Help Center

Nikshay

Welcome! You can raise a Service Desk request from the options provided or email us at support@everwell.org

Service Request

System Issues/Bugs

Feature Request

Request for private sector hub account
Request for private sector hub account

Request To Add A New PHI
Fill this form to add a new PHI under your TU in Nikshay

Request To Add A New TU
Fill this form to add a new TB unit under your district in Nikshay

Password Reset
Reset password

À set of standard requests defined by Nikshay

Raise a Bug / Defect

Help Center

Nikshay

Welcome! You can raise a Service Desk request from the options provided or email us at support@everwell.org

Service Request

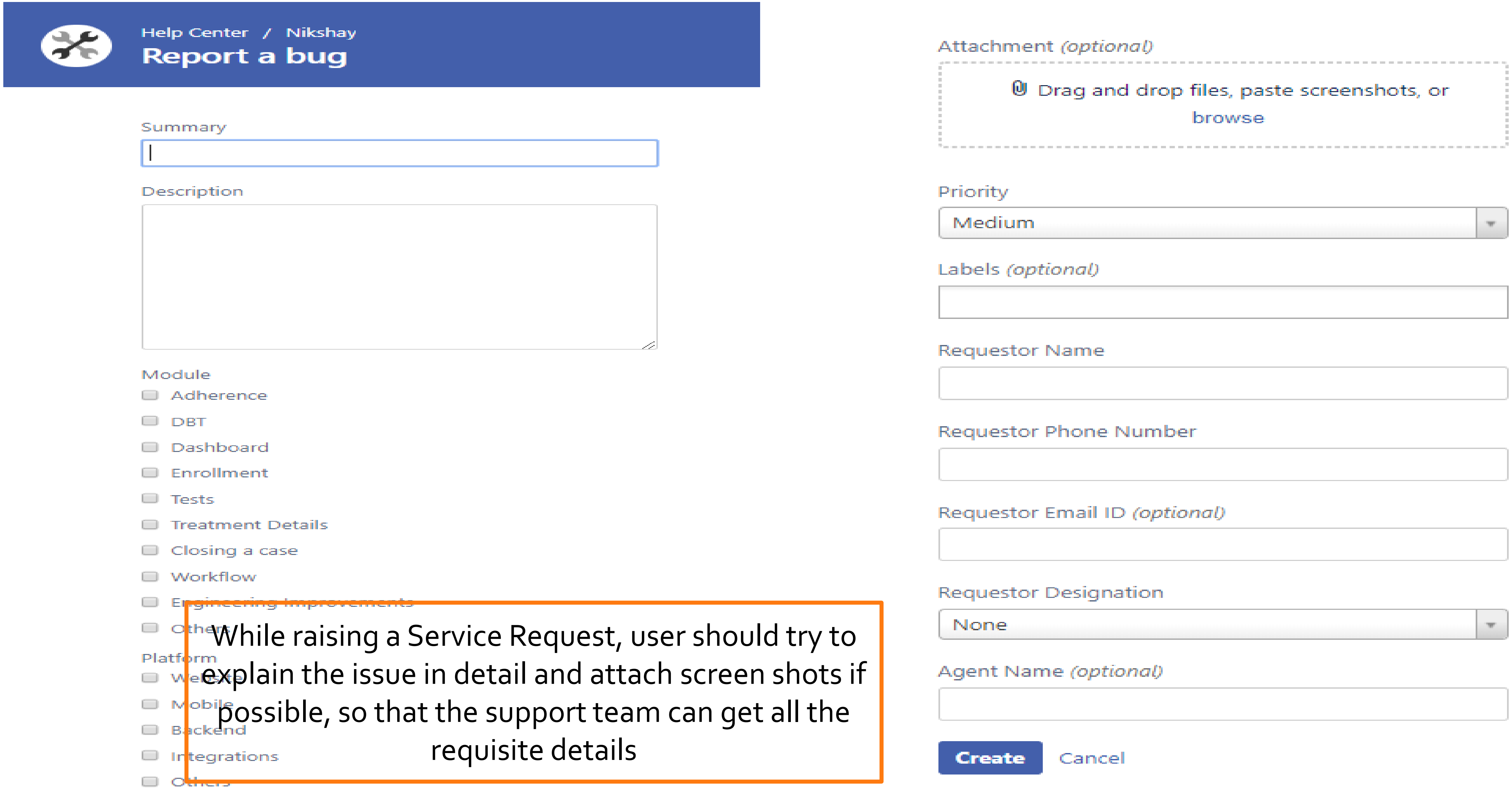
System Issues/Bugs

Feature Request

Report a bug

Any issue that refrains a user from using the system or its function in accordance with the current requirements. Eg

Raise a Bug / Defect



While raising a Service Request, user should try to explain the issue in detail and attach screen shots if possible, so that the support team can get all the requisite details

Raise a Request for a new feature

Help Center / Nikshay

Request a change/new feature

Summary

Description

Platform

- Website
- Mobile
- Backend
- Integrations
- Others

Module

- Adherence
- DBT
- Dashboard
- Enrollment
- Tests
- Treatment Details
- Closing a case
- Workflow
- Engineering Improvements
- Others

Attachment *(optional)*

Drag and drop files, paste screenshots, or browse

Requestor Name

Requestor Phone Number

Requestor Email ID *(optional)*

Requestor Designation

None

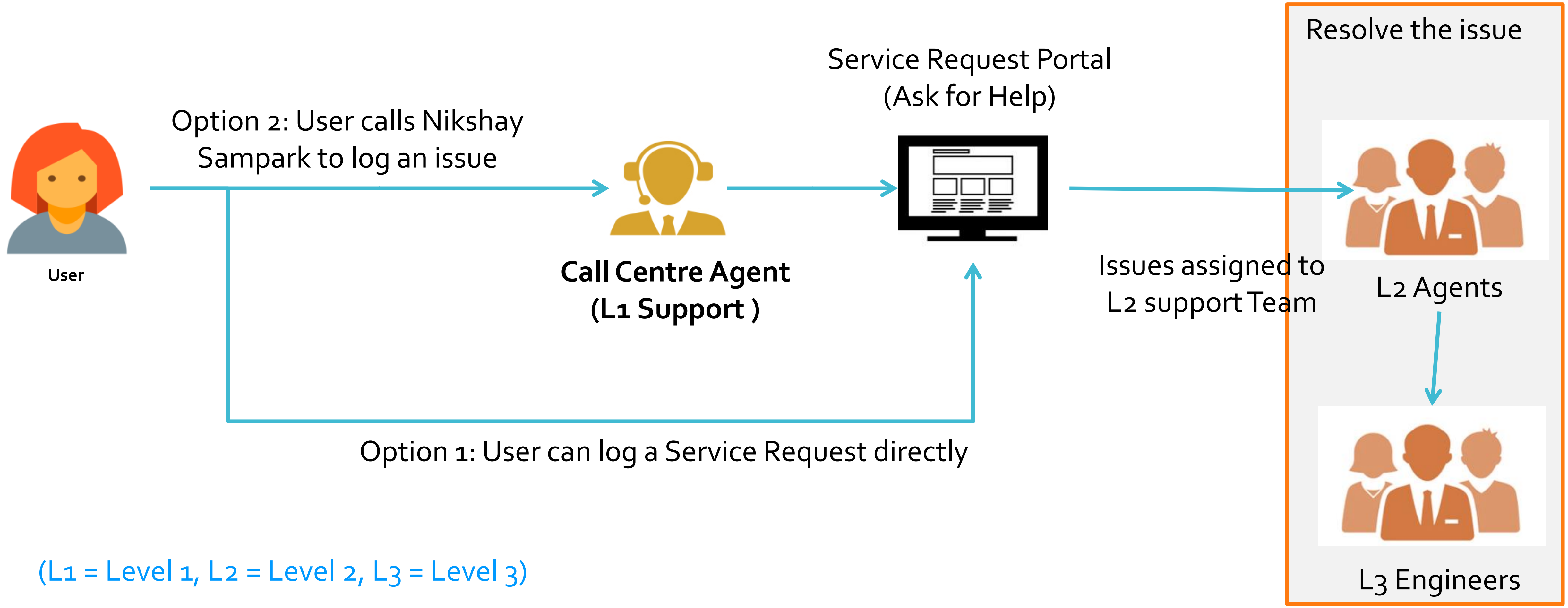
Agent Name *(optional)*

Email confirmation to

email@mail.com

Create Cancel

How the Support team works in the back end



Features under development

Missing Feature in Nikshay 2.0 (as compared to Nikshay 1.0)	Work around
Treatment Co-Ordinator Mapping	No work around as of now. Will add this feature in Nikshay V2 soon
User Management (Adding TUs, PHIs, Reset Password etc.)	User the Jira Service Desk to request the same. https://everwell.atlassian.net/servicedesk/customer/portal/1/group/3
Active Case Finding Mapping Summary	Work Under Progress
DRTB Migration	Data Migration of MDR Patients would happen soon
SMS for Staffs and Patients	Work under Process. Soon Notification SMS for Staffs and Patients would be available.

Thank you