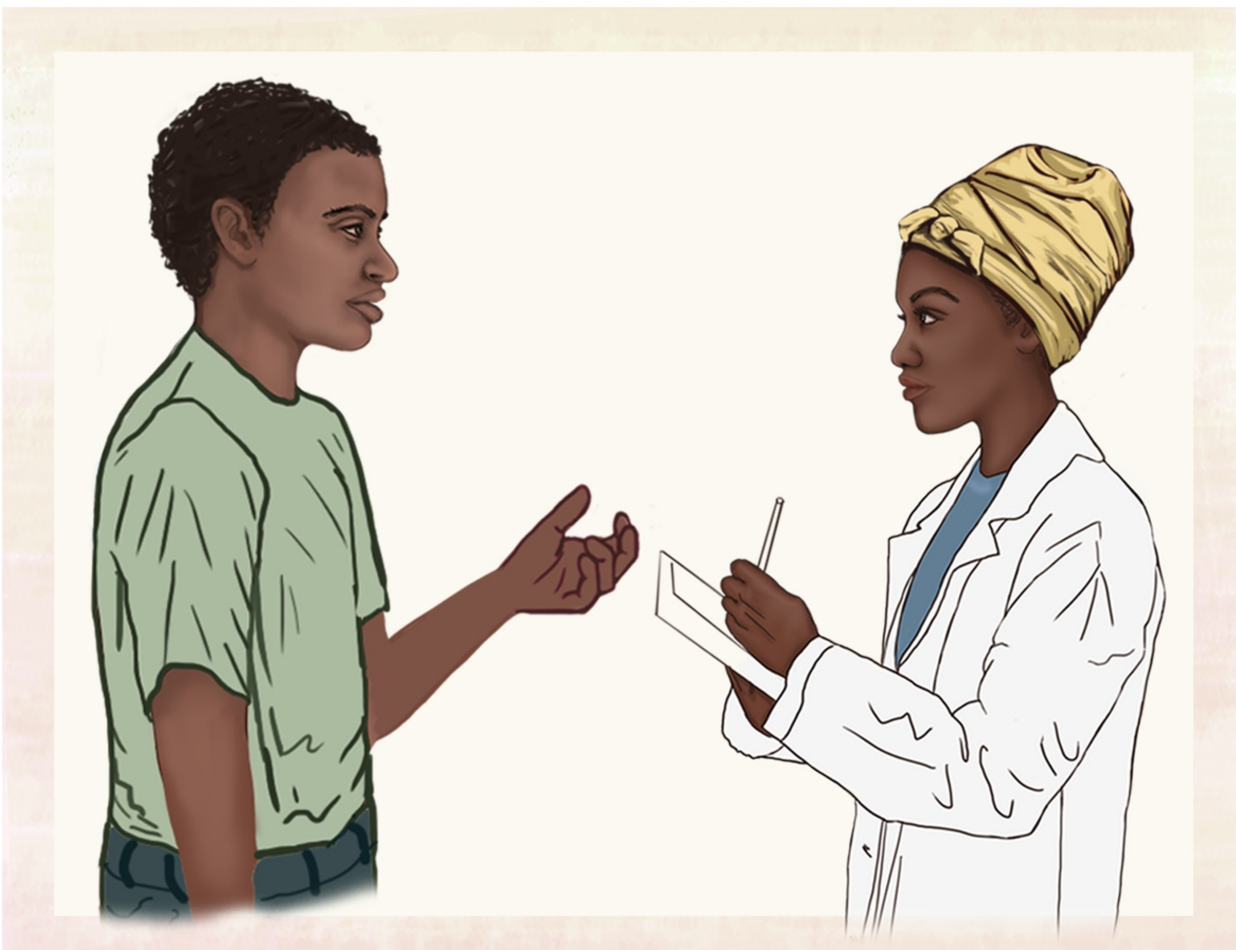
HIV Index Testing and Partner Services: A Training Course for HIV Testing Providers

Facilitator's Guide



The Maternal and Child Survival Program (MCSP) is a global United States Agency for International Development (USAID) initiative to introduce and support high-impact health interventions in 25 priority countries to help prevent child and maternal deaths. MCSP supports programming in maternal, newborn, and child health, immunization, family planning and reproductive health, nutrition, health systems strengthening, water/sanitation/hygiene, malaria, prevention of mother-to-child transmission of HIV, and pediatric HIV care and treatment. MCSP will tackle these issues through approaches that also focus on household and community mobilization, gender integration, and digital health, among others.

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Table of Contents

Acknowledgments

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This LRP was developed as a modular training that can be implemented as one complete training or in modular form over time. The modules and resources in this LRP are adaptable to each county's local context and guidelines. Index testing and partner services, also referred to as index testing or index case testing, is an evolving strategy. It is expected that these documents will be updated over time to integrate best practices and lessons learned.

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Abbreviations

HIVST	HIV self-testing
HTS	HIV testing services
IPV	intimate partner violence
KP	key population
KVP	key and vulnerable populations
LRP	learning resource package
M&E	monitoring and evaluation
MCSP	Maternal and Child Survival Program
PEPFAR	U.S. President's Emergency Plan for AIDS Relief
PLHIV	people living with HIV
USAID	United States Agency for International Development
WHO	World Health Organization

Course Overview

Congratulations on being selected to facilitate the HIV Index Testing and Partner Services course. We are confident that this course will help you assist learners in acquiring the knowledge and skills necessary for competently and confidently providing index testing to reach partners of people living with HIV (PLHIV) with HIV testing services (HTS).

Partner notification is a voluntary process where trained service providers ask HIV-positive index clients about their sexual partners, their drug-injecting partners, and their children. Then, with the consent of the HIV-positive index client, the service provider offers these partners (and children, where applicable) voluntary HIV testing.

This training course is designed for HIV testing providers working in health facilities and community HTS settings. The course builds on each learner's past knowledge and experience, and takes advantage of the individual's high motivation to accomplish the learning tasks in a minimum amount of time. Training emphasizes **doing**, not just knowing, and uses **competency-based evaluation** of performance.

Key features of this course include:

- You may conduct this course at a central site for multiple learners from different locations, or you may conduct this course within a health facility or community HTS site with providers who are only from that site.
- The course content is divided into modules. These modules may be presented as part of a traditional, group-based training course or may be delivered as individual modules over an extended period of time (more information on possible agendas are provided in this Facilitator's Guide).
- Training sessions focus on using a solution-focused model and drawing on practical counseling and communication skills to provide index testing and partner services.
- The model for providing index testing and partner services is presented in eight easy-to-follow steps. The first four steps focus on obtaining partner and child information from the index client, and the last four steps focus on notifying and testing partners and children.
- Progress in learning the recommended steps is documented using the index testing learning guide, performance checklist, and visual checklist during the course sessions and on the job after training.
- Successful completion of the course is based on mastery of both the content and skill components.

Course Modules

The content of this course is presented in modular format so that the course can be tailored to the needs of the training providers. The first four modules are considered the core modules. They cover all of the information that is necessary for a provider to understand and provide index testing to clients. These modules are as follows:

Module 1: Overview of Index Testing and Partner Services
Module 2: Enhanced Communication and Counseling Skills
Module 3: Steps 1–4: Engaging the Index Client
Module 4: Steps 5–8: Notifying and Testing Partners

Additional modules are considered advanced. They cover topics that will need to be addressed as an index testing program expands and as providers have more experience delivering the services. These modules may be helpful for program management staff and providers. These modules include:

Module 5: Gender and Intimate Partner Violence in Index Testing Services
Module 6: Monitoring and Evaluation of Index Testing Programs
Module 7: Quality Improvement for Index Testing Programs
Module 8: Index Testing and Partner Services for Key and Vulnerable Populations
Module 9: Integration of Index Testing and HIV Self-Testing

While all of the modules are tailored to meet the needs of providers who will provide index testing and partner services, Module 1 presents an overview that may be useful on its own for program management staff, providers who will not deliver services but work with clients, support staff, or anyone who would benefit from understanding the importance of reaching partners of PLHIV through index testing and partner services. It can be delivered as a standalone module for this purpose, whereas providers delivering index testing and partner services should complete all modules.

Course Materials and Supplies

The primary materials you will use during this course include:

Materials for learners:

- Learner's Workbook
- Optional job aids for use in clinic:
    - Options for Notifying Your Partner About Your HIV
    - Disclosure Plan for Telling Your Partner about Your HIV

Materials for facilitators:

- Facilitator's Guide
- PowerPoint presentations

Refer to the module plans in this Facilitator's Guide for how these materials are used to conduct each of the course sessions.

Course Evaluation

This course is designed to prepare learners to provide HIV index testing and partner services. Facilitators will determine if an individual is qualified to provide index testing, meaning they have met the requirements of the course in knowledge and skills. Qualification does **not** imply certification. Personnel can only be certified by an authorized organization or agency.

Qualification in this course is based on the learner's achievement in two areas:

- **Knowledge:** Successful completion of the knowledge assessment
- **Skills:** Satisfactory performance of providing index testing and partner services during course role-plays and on the job following training

Key Terms and Definitions

This training course may use terms that are new. Following are a few of the key terms with brief definitions.

Mastery learning: This approach to learning and training assumes that all learners can master (learn) the required knowledge, attitudes, and skills, provided sufficient time is allowed and appropriate learning methods are used. The goal of mastery learning is that 100% of those completing the course will "master" the required knowledge and skills.

Competency-based: Assessment is tied to the course objectives, and learners move through the course after demonstrating that they are competent at performing the required skills.

Coach: A course facilitator assumes the role of a coach when working one-on-one with learners to practice and develop their skills.

Facilitator: A person training or coaching others. Facilitators must have effective communication and presentation skills, and should be subject matter experts in the content being delivered so they can draw on their own experiences during the course.

Knowledge assessment or evaluation: Assessment or evaluation of knowledge during a course to determine the success of learners in achieving the course objectives.

Learning guide: A tool used by course participants for initially learning the steps to provide index testing and partner services.

Performance checklist: A tool used by course participants to facilitate learning the steps to provide index testing and partner services and evaluate skill performance.

Visual checklist: A job aid that contains images and key words for each step in the performance checklist. The visual checklist can be used by the provider when providing index testing and partner services.

Transfer of learning: A process involving specific activities before, during, and after the course to help ensure that learners are able to competently perform specific skills on the job.

Course Description

This course is designed to prepare service providers to provide HIV index testing and partner services. This course may be conducted at a central site (e.g., health facility, training center, or hotel) during a 3-day period. When all learners are in the same geographic area, the course may also be conducted using a modular or low-dose, high-frequency approach at a health facility or community site over a period of several weeks by having learners meet for short periods to review and discuss individual modules.

Course Goal

The goal of this course is to prepare HIV testing providers to deliver high-quality index testing and partner services, which aims to break the chain of HIV transmission by identifying partners of PLHIV who may be at high risk of HIV infection, offering them voluntary HIV testing, and linking them with appropriate treatment, care, support, and prevention services based on their results.

Learning Objectives

By the end of this course, the learner will be able to:

- Introduce index testing and partner services to index clients and partners.
- Demonstrate enhanced communication and counseling skills for talking with index clients and partners.
- Demonstrate the four steps to engage the index client and obtain information about their partners and children.
- Demonstrate the four steps to notify partners and offer them voluntary HIV testing.
- Demonstrate an understanding of the role of gender and intimate partner violence in providing index testing and partner services.
- Monitor and evaluate index testing programs.
- Apply quality improvement processes to index testing programs.
- Provide index testing and partner services for key and vulnerable populations.
- Integrate index testing and HIV self-testing.

Training/Learning Methods

This training course will include use of the following learning methods:

- Interactive presentations
- Demonstrations
- Group discussions
- Individual and group exercises
- Role-plays and simulations
- Case studies
- Coaching during course sessions

Learning Materials

- Learner's Workbook

Learner Selection Criteria

Learners for this course should be trained and certified HIV testing providers or other health care providers who work with HIV-positive index clients in facility- or community-based HIV programs and are responsible for provision of HIV index testing and partner services.

Methods of Evaluation

Learner

- Knowledge assessment within each module (module review questions on presentation slides)
- Knowledge assessment at the conclusion of the course
- Performance assessment and feedback using the performance checklist

Course

- Course evaluation (to be completed by each learner)

Suggested Course Composition

This course is designed for one facilitator for every eight to 10 learners to demonstrate, coach, and assess skill performance during small-group role-plays. Facilitators should aim to have no more than 24 learners in one training course. The larger the group, the more difficult it becomes to have skill practice and monitor learner competence, and the longer it may take to deliver the course.

Course Design

This course is divided into a series of modules, with each module requiring an approximate amount of time to be conducted by one or more facilitators. **Table 1** shows the approximate amount of time required to conduct each of the training modules.

Table 1. HIV index testing and partner services modules

Module	Module Title	Approximate Time to Conduct
1	Overview of Index Testing and Partner Services	125 minutes
2	Enhanced Communication and Counseling Skills	110 minutes
3	Steps 1–4: Engaging the Index Client	155 minutes
4	Steps 5–8: Notifying and Testing Partners	165 minutes
5	Gender and Intimate Partner Violence in Index Testing Services	90 minutes
6	Monitoring and Evaluation of Index Testing Programs	75 minutes
7	Quality Improvement for Index Testing Programs	75 minutes
8	Index Testing and Partner Services for Key and Vulnerable Populations	105 minutes
9	Integration of Index Testing and HIV Self-Testing	120 minutes

Refer to the plans in this Facilitator's Guide for detailed information on how to conduct each session.

The time indicated to present each module is an estimate. The actual time required to present a module will depend upon several factors:

- The number of providers to be trained: Fewer providers mean less time will be required to complete a module.
- The number of providers commuting to the training venue to attend training sessions: When the majority of the providers participating in training are traveling to the site, then it may be more efficient to conduct the training in as few days as possible. When the majority are from the same facility or site, then it may be possible to spread out the training sessions to minimize disruptions in the work environment.
- The number of facilitators conducting training: While all of the modules can be taught by one facilitator, when there are two (or more) facilitators, then it may be possible to complete a module in less time.
- The location of the facilitator(s): When one or more qualified facilitators are from within the facility or site where training will be conducted, then training sessions can be scheduled around the needs of the providers. When the facilitator(s) must travel to the facility or site, then sessions may need to be scheduled around the availability of the facilitator(s).

To conduct the entire course (i.e., complete all nine modules), the facilitator(s) will need to consider several factors:

- **Could the entire course be completed in 3 days?** Possibly, but that would mean a number of providers need to stop their work for several days, which is not always feasible.
- **Could the course be conducted for several hours each week for several months?** Possibly, but taking that long is not effective from a learning perspective.

Course Schedule

Depending on the number and location of the course participants, the facilitator may conduct the course sessions using one of the following schedules:

- Three-day schedule in one location, focusing on completing all nine modules consecutively (see Table 2).
- Three-day schedule in one location, with the 3 days separated by a period of time (e.g., 3 consecutive Saturdays): This option is preferable only when the training is held near the health facility or community site where learners work (see Table 2).
- Using a modular or low-dose, high-frequency approach at a health facility or community site over a period of several weeks by having learners meet for short periods to review and discuss individual modules (see Table 3): This option is preferable when all of the course participants work in the same facility (or immediate area). If you choose to use this schedule, the training will be completed over a 9-week period. This schedule may need to be modified to meet the needs of the providers at a specific facility or site (i.e., scheduling more or less time each week). The course may work best when it is conducted during scheduled periods of time each week (e.g., 2:00-4:00 p.m.). Experience with onsite training tells us that 4–6 hours per week is effective. In most health care facilities or sites, it may be better to conduct the sessions in the afternoon, when client flow is low.

Standard Three-Day Course Schedule

Table 2. Standard three-day course schedule

Day 1	Day 2	Day 3
Course Overview (9:00 a.m.) • Welcome • Introductions • Course Overview, Syllabus and Schedule • Course Materials • Expectations 9:30 a.m.: **Module 1: Overview of Index Testing and Partner Services** 11:00 a.m.: Break 11:15 a.m.: **Module 1: Overview of Index Testing and Partner Services** 11:50 a.m.: **Module 2: Enhanced Communication and Counseling Skills** 1:40 p.m.: **Module 3: Steps 1-4: Engaging the Index Client**	**Warm-up and Day's Agenda** (9:00 a.m.) 9:15 a.m.: **Module 4: Steps 5-8: Notifying and Testing Partners** 11:00 a.m.: Break 11:15 a.m.: **Module 4: Steps 5-8: Notifying and Testing Partners** 12:15 a.m.: **Module 5: Gender and Intimate Partner Violence in Index Testing Services** 1:45 p.m.: **Module 6: Monitoring and Evaluation of Index Testing Programs**	**Warm-up and Day's Agenda** (9:00 a.m.) 9:15 a.m.: **Module 8: Index Testing and Partner Services for Key and Vulnerable Populations** 11:00 a.m.: Break 11:15 a.m.: **Module 9: Integration of Index Testing and HIV Self-Testing** 1:15 a.m.: **Course Closing** • Knowledge Assessment • How will you apply your new knowledge and skills? • Course Evaluation • Closing
Lunch (2:00 p.m.-3:00 p.m.)	Lunch (2:00 p.m.-3:00 p.m.)	Lunch (2:00 p.m.-3:00 p.m.)
3:00 p.m.: **Module 3: Steps 1-4: Engaging the Index Client** 4:00 p.m.: Break 4:15 p.m.: **Module 3: Steps 1-4: Engaging the Index Client** 5:30 p.m.: Summary	3:00 p.m.: **Module 6: Monitoring and Evaluation of Index Testing Programs** 4:00 p.m.: Break 4:15 p.m.: **Module 7: Quality Improvement for Index Testing Programs** 5:30 p.m.: Summary	

Table 3. Sample Modular Schedule

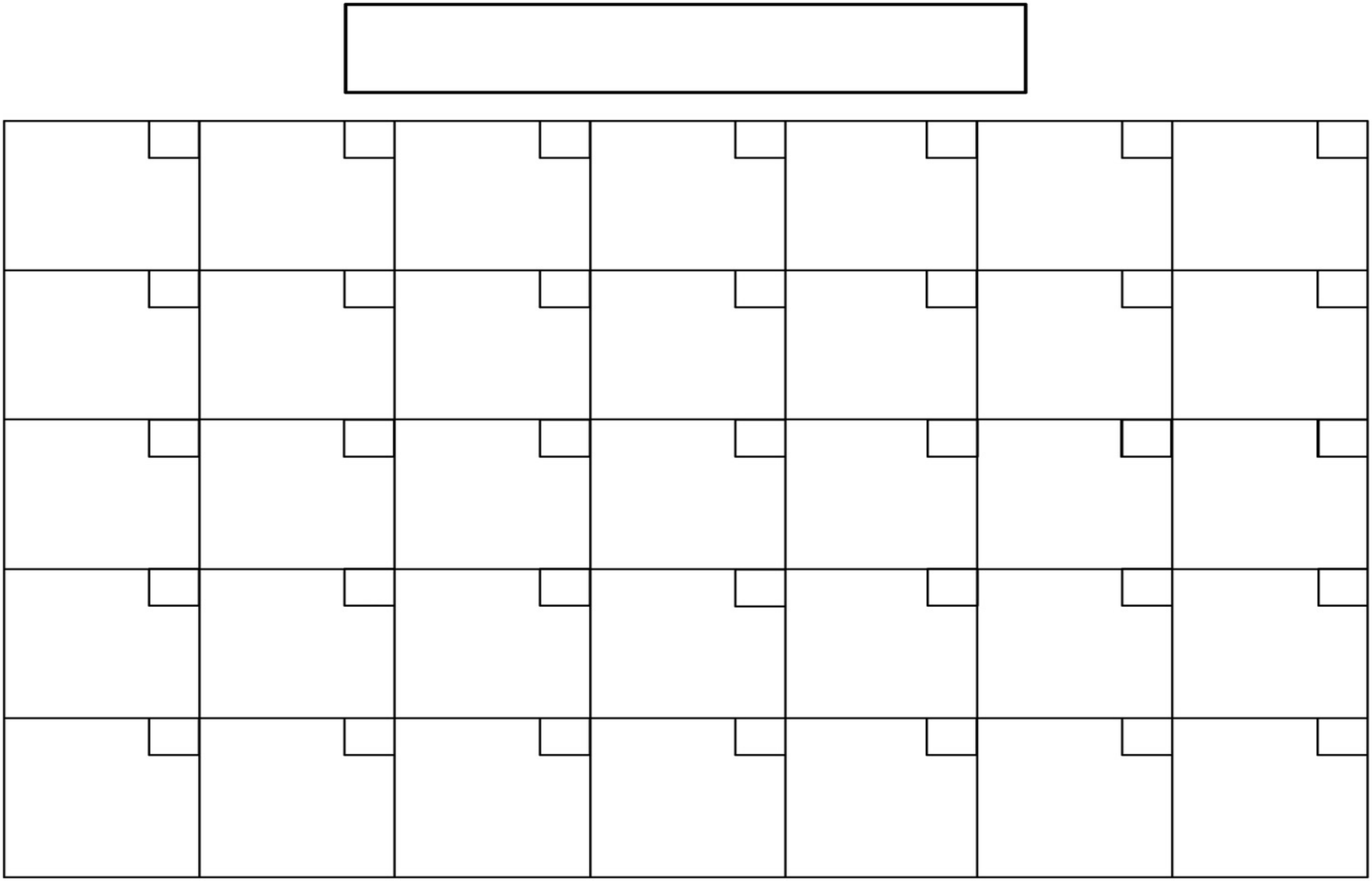
	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6	Module 7	Module 8	Module 9
Week 1	2:00-4:35 p.m.*								
Week 2		2:00-3:50 p.m.							
Week 3			2:00-4:35 p.m.						
Week 4				2:00-4:45 p.m.					
Week 5					2:00-3:30 p.m.				
Week 6						2:00-3:15 p.m.			
Week 7							2:00-3:15 p.m.		
Week 8								2:00-3:45 p.m.	
Week 9									2:00-4:30 p.m.**

* 30 minutes for course overview and 125 minutes for Module 1
** 105 minutes for Module 9 and 45 minutes for course closing

Follow these steps to create the course schedule for your health facility or community site:

1. Conduct a facility or site needs assessment to identify priorities and get input from stakeholders.
2. Consider any organizational priorities (e.g., employment of new workers, training workers from neighboring sites).
3. Work with stakeholders to determine the location and start date for the training.
4. Determine how many days each week training can be conducted. This will depend on your availability as a facilitator to conduct training. This may also be impacted by the number of providers to be trained and the availability of other qualified facilitators. For example, if there is a large number of providers to be trained and several facilitators, then you may decide to conduct training for several days in each week.
5. Use the information in this section to map out your training schedule. There is a blank monthly calendar page at the end of this section that you can copy and use to create your training schedule.

Once the schedule is developed and approved, then you will begin to arrange for providers to attend training sessions. It is essential that accurate records be kept indicating who attends and completes training.



Preparing for This Course

Introduction

A successful training course does not come about by accident, but rather through careful planning. This planning takes thought, time, preparation, and often some study by the facilitator. The course facilitator will use the components of this HIV index testing and partner services learning resource package (LRP) to prepare for and conduct this course.

Review of Course Purpose

This training course is designed to improve HIV testing providers' job performance in providing index testing and partner services. Partner notification is a voluntary process where trained service providers ask those diagnosed with HIV about their sexual partners, their drug-injecting partners, and their children. Then, with the consent of the HIV-positive client, the service provider offers these partners (and children, where applicable) voluntary HIV testing. Improved job performance is accomplished by updating and standardizing essential index testing and partner services information, knowledge, and skills.

Selection of Course Facilitators

In competency-based training, the responsibility for meeting learning objectives is shared by the facilitator and each learner. The role of the facilitator is to manage the learning process. The facilitator guides learners during the course toward the acquisition of new or improved index testing skills and also seeks to influence learner attitudes by serving as a role model. In selecting course facilitators to use this LRP, the following criteria should be considered:

- Demonstrated proficiency in index testing and partner services (i.e., able to competently perform all steps in the learning guide, performance checklist, and visual checklist): The facilitator must have knowledge and skills in the selected areas of index testing taught in this course. The facilitator must have the knowledge and skills to conduct the training sessions for each of the modules in this course. When there is more than one facilitator, then one facilitator may focus on specific modules while another facilitator focuses on others.
- Demonstrated facilitation and training skills: The facilitator must have experience using the mastery learning approach to training, which is conducted according to adult learning principles—learning is participatory, relevant, and practical—and uses behavior modeling, is competency-based, and incorporates humanistic training techniques.

Facilitators for this course must be aware of basic principles of transfer of learning to help the learners transfer the new knowledge and skills in index testing and partner services from the training to their job working with clients.

It is strongly recommended that two facilitators conduct this course. The two facilitators can divide roles and responsibilities according to their expertise, sharing the roles of "coach" and "facilitator" throughout the course.

Facilitators must be aware that in addition to conducting course sessions, they may also be responsible for following up with learners on the job to observe and coach as they apply their new knowledge and skills. The facilitator may also need to assess skill competency on the job, as there may not be sufficient time during the course for all learners to practice and be assessed for competency.

Selection of Learners

Learners for this course should be HIV testing providers working in health facilities and community HTS settings who are responsible for providing HIV index testing and partner services.

This course is designed for one facilitator for every eight to 10 learners to demonstrate, coach, and assess skill performance during small-group role-plays. Facilitators should aim to have no more than 24 learners in one training course. The larger the group, the more difficult it becomes to have skill practice and monitor learner competence.

Consideration should be given to the ratio of facilitators to learners. It is recommended that one facilitator conduct training for eight to 10 learners (i.e., one-to-eight or one-to-10) to demonstrate, coach, and assess skill performance during small-group role-plays. If there are two facilitators, then there can be 16 or up to 20 learners.

Course Materials and Equipment

Materials for learners:

- Learner's Workbook

Materials for facilitators:

- Facilitator's Guide
- PowerPoint presentations
- Personalized copy of the Learner's Workbook (see information in this section on how to personalize the Learner's Workbook)

Refer to the module plans in this Facilitator's Guide for how these materials are used to conduct each of the course sessions.

No additional copies of any printed materials are **required** to conduct this course, but you may choose to make additional copies of the learning guide, performance checklist, course evaluations, knowledge assessments, sample data tools, or other materials that will be used in your local context to tailor the course to your learners' needs. Providing these copies will prevent the learners from having to write on the copies in their workbooks.

To conduct this course, you will also need a computer, projector, and flip chart with paper and markers. Refer to the information later in this section and the module plans for descriptions of how to conduct this course when the audio-visual equipment is not available.

Selection and Organization of the Training Area

The room where the training will be conducted should comfortably accommodate the learners and facilitators, and be suitable for all activities. It should meet the following requirements or considerations:

- Tables and chairs organized in "U" shape where all the learners can see the slides as they are projected, the facilitator, and demonstrations
- Sufficient space for conducting role-plays and small-group work
- Table for facilitator's materials
- Light-colored wall for projecting slides
- Space for the audio-visual equipment

The room should have adequate ventilation and lighting. To avoid delays, it is important that facilitators check the room at least 1 day in advance to make sure that the room is set up properly before the training begins.

Consideration should also be given to breaks and meals (if provided).

Personalizing Course Materials

Personalizing materials (e.g., Learner's Workbook, which facilitators may reference when teaching the course) is when facilitators add notes, highlight key points, and add examples, activities, questions, and other information that will help them deliver the course information effectively. As facilitators personalize their materials, this will result in an "outline" of key reminders that the facilitator can glance at and follow when delivering interactive presentations during course sessions.

There are a number of advantages of personalizing the pages of the Learner's Workbook:

- This outline will help keep the facilitator on track and prevents him or her from getting into stories that may be off topic and take up valuable training time.
- This presentation outline will help prevent the facilitator from reading the slide content in the workbook to the learners, which is boring!
- This outline will also help ensure that all key content is addressed.
- Personalized materials are easier to follow during instruction (i.e., glance at the page, see a note, and immediately bring your eyes back to the learners).
- Remember that the personalized notes contain only the major or key points presented in the workbook (or other documents, such as a performance checklist). Do not try and highlight every word.

Follow these steps to personalize the slide pages of the Learner's Workbook:

1. Review the slides (as well as the notes for each slide) that will be presented during the session. Make notes next to slides on the pages of the Learner's Workbook (e.g., examples, important points, where you could ask a question, etc.).
2. Review the module plan. Make any notes from the module plan next to slides on the pages of the Learner's Workbook (e.g., session introduction, activities, session summary, etc.).

When you complete the personalization process, the only document you will need to refer to when conducting the training session is the marked-up Learner's Workbook and the presentation slides projected on a screen. When audio-visual equipment is not available, then the marked-up Learner's Workbook will allow you to glance at key points and maintain eye contact with the learners.

See the sample personalized page from the Learner's Workbook on the following page.

ASK THIS QUESTION. TIME PERMITTING, THE LEARNERS CAN WORK IN PAIRS.

Discussion Question

- What are some ways that a trained provider can use to contact an index client's partner(s)?

Dual Referral

A trained provider accompanies and provides support to HIV-positive index clients when they disclose their status and the potential HIV exposure to their partner(s).

The provider also offers voluntary HTS to the partner(s).

Source: WHO 2016

WHY WOULD SOME CLIENTS PREFER THIS APPROACH?
WHY WOULD SOME NOT PREFER THIS APPROACH?

Conducting Course Sessions

The primary role of the facilitator is to conduct course sessions. In this section, we will look at how the facilitator will:

- Use the module or session plan before and during the course session.
- Deliver interactive presentations.
- Demonstrate a skill using the learning guide, performance checklist, and visual checklist.
- Coach skill development as learners practice during course sessions and on the job.
- Assess skill competency using a performance checklist during course sessions and on the job.

Using the Module Plan

The HIV index testing and partner services course is based on a series of modules. These modules are presented during course sessions. Instructions on how to conduct this course are outlined in a series of module or session plans. In this course, one session is required to present the content in each module. Therefore, for the index testing and partner services course, we will use module plans to outline how to conduct training based on each module.

The module plan is your primary planning and delivery tool. Consider these important steps:

- Review the module objectives.
- Personalize the Learner's Workbook content to be covered during the session.
  - Many of your notes and comments in the personalized content will come from the notes in the PowerPoint slides as well as the module plan (e.g., introduction activity, key points, questions, notes, etc.).
  - If you transfer all notes from the module plan to the marked-up pages of the Learner's Workbook, then you will only need to glance at the workbook during training. Refer to both the module plan and the marked-up pages of the workbook if you need to.
  - Be sure to go over the documents before starting a training session so you feel comfortable glancing at points and then quickly returning your eye contact to the learners.
- Collect any needed supplies and materials to be used during the course session.
- Make sure that each learner has a copy of the Learner's Workbook.

Delivering Interactive Presentations

One of the key responsibilities of the facilitator is to deliver interactive presentations. Being able to effectively interact with learners during a presentation is essential and requires practice. Here are the primary skills you should develop to deliver an effective presentation:

- **Present an effective introduction**. You want to capture the interest of the learners from the first moments of the session. Use a variety of introduction techniques, including:
  - State the objective(s) of the presentation as part of the introduction.
  - Ask a series of questions.

- Relate the topic to a topic covered in a previous session.
- Share a personal experience related to the topic.
- Use a small-group activity (e.g., problem-solving, case study, role-play, game).
- Give a demonstration.
- Use a content expert (e.g., experienced counselor) to share information related to the topic.

- **Refer to notes in the module plan** and a personalized Learner's Workbook (glancing quickly so your eye contact is primarily focused on the learners).
- **Ask questions of the entire group.**
- **Ask questions of individuals.**
- **Ask some easy and some more difficult questions.**
- **Use learners' names.**
- **Provide positive feedback** when learners respond to questions, ask questions, perform a skill very well, etc.
- **Respond to learners' questions.**
- **Maintain eye contact** with learners.
- **Project your voice** so that all learners can hear.
- **Move about the room.**
- **Use a positive sense of humor.**
- **Present an effective summary** at the end of your presentation (e.g., review the main points, ask several questions). Options for your summary include:
  - Ask the learners if they have any questions.
  - Ask the learners questions about the topic.
  - Ask the learners to work in pairs or small groups to develop questions for the other learners.
- **Provide opportunities for practice** of presentation content during the session and on the job.

Demonstrating a Skill

Learners are to develop important index testing and partner services skills during this course. There is a learning guide in the Learner's Workbook to assist in initially performing the steps to provide services. There is also a performance checklist in the Learner's Workbook outlining the key steps in providing index testing and partner services and a visual checklist that learners can use to learn to provide index testing and partner services during the course and on the job.

For the learners to develop the ability to perform a skill, they must first see the skill demonstrated. Here are some suggestions for how to effectively demonstrate a skill:

- Arrange the demonstration area so that learners are able to see each step.
- Present an effective introduction.

- State the objective(s) as part of the introduction.
- Perform the steps in the learning guide as learners follow along. Never demonstrate an incorrect step.
- Ask questions and encourage learners to ask questions.
- Maintain eye contact with learners as much as possible.
- Project your voice so that all learners can hear.
- Provide opportunities for the learners to practice during the course.

Coaching Skill Development

For learners to develop skills, they must practice the steps in the checklists. After the demonstration of the skill, the learners practice in small groups while the facilitator (acting as a coach) observes and provides feedback.

An effective approach is to have the learners practice in groups of three. One learner plays the part of the provider and performs the skill following the steps in the learning guide, while a second learner plays the part of the partner. The third learner observes and provides feedback after the skills practice is complete. Once the first learner performs the skill, then they change roles. The facilitator moves around and observes, asks questions, and provides feedback. As learners get more comfortable performing the steps, they will use only the visual checklist.

An effective approach for letting a learner know how he or she is doing is to use "sandwich" feedback. This means starting and ending the feedback (top and bottom of the sandwich) with positive feedback. Here are the steps to provide sandwich feedback:

- Ask the learner what he or she thinks they did well (focus on the positive).
- Ask the learner what he or she would do differently if he or she repeated the skill performance.
- Share your observations of the steps performed well.
- Offer any additional suggestions for improvement (build on what the learner indicated that he or she would do differently).
- Close with several positive observations.

Assess Skill Competency

The final step in the skill development process is for the facilitator to assess or evaluate each learner using the performance checklist to ensure that the learner can competently perform. When time permits, assessment of skill competency can be done during the course. However, given the limited time for training sessions, formal assessment of skill competency may also be done on the job.

It is important to observe the learner practicing the skill during training. Follow these steps when you and the learner agree it is time for the competency assessment:

- Use the performance checklist to evaluate the learner for skill competency.
- Observe each step and make the appropriate rating in the checklist.
- Provide sandwich feedback, ensuring that the learner first identifies steps performed well and then steps requiring improvement.
- Determine if the learner is competent or needs additional practice in order to try again.

- Record the results of the skill assessment in the official course records.

Facilitator Self-Assessment

Becoming an effective index testing and partner services course facilitator requires practice and feedback on performance. The following pages have checklists summarizing how to deliver an interactive presentation, demonstrate a skill, coach for skill competency, and evaluate skill performance. These tools can be used several ways:

- When there are two facilitators, one can use these tools to observe the other and make appropriate notes. Following the observation, the facilitator can provide feedback, focusing on those areas being done well and offering suggestions for improvement.
- When there is a camera available, record a presentation. Then use these tools for self-assessment.

Presentation Skills: Facilitator Self-Assessment Guide

To what degree are the following statements true of your actions or behaviors when making course presentations?

Facilitation Skills	Yes	Sometimes	No
1. I present an effective introduction.			
2. I state the objective(s) of the presentation as part of the introduction.			
3. I ask questions of the entire group.			
4. I ask questions of individuals.			
5. I ask easy and more difficult questions.			
6. I use learners' names.			
7. I provide positive feedback.			
8. I respond to learners' questions.			
9. I use a personalized Learner's Workbook to guide my presentations.			
10. I maintain eye contact with learners.			
11. I project my voice so that all learners can hear.			
12. I move about the room.			
13. I use audio-visual materials effectively.			
14. I use a positive sense of humor.			
15. I present an effective summary.			
16. I provide opportunities for application or practice of presentation content.			

Those skills I feel competent using include:

____

____

____

Those skills I would like to improve include:

____

____

____

____

Demonstration, Coaching, and Evaluation Skills: Facilitator Self-Assessment Guide

To what degree are each these statements true of your actions when demonstrating skills to learners, coaching skill development, and evaluating skill performance?

Demonstration Skills	Yes	Sometimes	No
1. I follow the steps in the learning guide.			
2. I state the objective(s) as part of the introduction.			
3. I present an effective introduction.			
4. I arrange the demonstration area so that learners are able to see each step clearly.			
5. I never demonstrate an incorrect step.			
6. I communicate with the client during the demonstration.			
7. I ask questions and encourage learners to ask questions.			
8. I demonstrate appropriate index testing and partner services practices.			
9. I maintain eye contact with learners as much as possible.			
10. I project my voice so that all learners can hear.			
11. I provide opportunities for the learners to practice the skill.			
Coaching Skills	**Yes**	**Sometimes**	**No**
12. I observe and provide feedback when learners are practicing.			
13. I encourage the learners to use the learning guide and visual checklists.			
14. I encourage the other learner(s) in the practice group to provide feedback on performance.			
15. I demonstrate again how to perform steps if necessary.			
Evaluating Skills	**Yes**	**Sometimes**	**No**
16. I use the performance checklist to evaluate each learner.			
17. I involve the learner being evaluated and the other learners in providing feedback.			
18. I determine if the learner is competent, needs additional practice in order to try again, or if the learner is not competent.			

Those skills I feel competent using include:

____

____

____

Those skills I would like to improve include:

____

____

____

____

Module Plans

The training modules for this course are as follows:

- Module 1: Overview of Index Testing and Partner Services
- Module 2: Enhanced Communication and Counseling Skills
- Module 3: Steps 1–4: Engaging the Index Client
- Module 4: Steps 5–8: Notifying and Testing Partners
- Module 5: Gender and Intimate Partner Violence in Index Testing Services
- Module 6: Monitoring and Evaluation of Index Testing Programs
- Module 7: Quality Improvement for Index Testing Programs
- Module 8: Index Testing and Partner Services for Key and Vulnerable Populations
- Module 9: Integration of Index Testing and HIV Self-Testing

The module plans on the following pages offer suggestions for how the facilitator will present the content and facilitate the activities related to each of these modules. The primary sections of the module plan include:

- Date: the date the module is being presented
- Venue: location of the training course
- Duration: the estimated time required to present the content and facilitate the activities related to this module
- Module objective: description of what the learner will know and be able to do after completion of the session
- Learning objectives: description of the knowledge and skills presented in this module that will support the learner in achieving the module objective (also appear on a presentation slide)
- Introduction: suggestions for how to start the module presentation
- Content: suggestions for how to present module content with and without the use of presentation technology
- Practice activity: suggestions for how to facilitate practice and learning activities related to this module
- Summary: suggestions for how to summarize the module presentation

Module 1: Overview of Index Testing and Partner Services (Including Course Overview)

Module Plan

Date:	Venue:	Duration: 155 minutes (125 minutes for course content, plus 30 minutes for course overview)

Module Objective: After completion of this module, the learner will be able to introduce index testing and partner services to index clients and partners.

Learning Objectives: In order to achieve the module objective, the learner will:

- Explain the rationale for implementing index testing and partner services.
- Define index testing and partner services and explain its key characteristics.
- Identify the risks and benefits of providing index testing and partner services.
- Identify the four approaches for delivering index testing and partner services.

Materials/Resources

Note: This first module may also be presented as a standalone module for providers and staff who will be supporting—but not directly implementing— index testing and partner services or to provide general information about index testing to stakeholders.

Preparation:

- Review all presentation slides (**including notes for each slide**).
- Practice providing index testing and partner services according to the steps and tasks in the learning guide and the performance and visual checklists (see Module 3) so that you can confidently demonstrate index testing for the learners. Ensure you feel comfortable providing services using the visual checklist and other learning tools.
- Personalize a copy of the Learner's Workbook.
- Ensure learners have copies of the Learner's Workbook.
- Ensure there is a computer, projector, screen, power cord, and a flip chart or whiteboard with markers.
- If you are unable to use a computer, you will need to refer to your personalized copy of the Learner's Workbook as you and learners review and discuss the content on each slide.

Methods and Activities

Course Overview (30 minutes):

- Welcome the learners to the course.
- Ask each learner to find someone they do not know and interview them asking their name, current position, and experience with index testing and partner services. Ask participants to introduce each other. The facilitators should introduce themselves.
- Refer the learners to their Learner's Workbook and briefly review the:
  - Course overview
  - Course syllabus
  - Course materials
- Ask the learners to share their expectations of the course. Record any expectations on the flip chart or whiteboard (if available).
- Begin Module 1.

Introduction (5 minutes):

- Present the module title.
- Review the module objective and learning objectives.
- Facilitate the small-group activity presented on the slide.

Content (100 minutes):

- Section 1 – approximately 30 minutes
- Section 2 – approximately 50 minutes
- Section 3 – approximately 20 minutes
- Present the information on the slides.
- There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
- Try and ask at least one question per slide.
- Facilitate the small-group activity focusing on alternative testing approaches.
- Present the four case studies (on four slides) and facilitate any discussion based on the situations and responses.

Practice Activity (15 minutes):

- Demonstrate how to introduce index testing and partner services and explain the benefits, drawing on the content that has been presented in this module.
- This may be the first time that learners will see index testing and partner services being introduced, so be sure to demonstrate key messages and reinforce good communication skills.
- The visual checklist and other learning tools will not be needed for this role-play, as you are relying on the content presented earlier in the module.
- Following the demonstration, facilitate a discussion focusing on the four questions presented on the slide.
- Answer any questions on how to introduce index testing and partner services and explain the benefits.
- Stress to the learners that they will learn how to engage index clients and notify partners (using the learning guide and visual checklist) in other sessions in this course.

Summary (5 minutes):

- Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
- Ask learners what questions they have regarding:
    - The rationale for implementing index testing and partner services
    - The key characteristics of index testing and partner services
    - The risks and benefits of providing index testing and partner services
    - The four approaches for delivering index testing and partner services

Module 2: Enhanced Communication and Counseling Skills

Module Plan

<table>
<tr><td>Date:</td><td>Venue:</td><td>Duration: 110 minutes</td></tr>
<tr><td colspan="3">Module Objective: After completion of this module, the learner will be able to demonstrate enhanced communication and counseling skills for talking with index clients and partners.</td></tr>
<tr><td colspan="3">Learning Objectives: To achieve the module objective, the learner will:
• Introduce the solution-focused approach to index testing and partner services.
• Identify essential communication and counseling skills for index testing and partner services providers.
• Identify common barriers to effective communication in index testing and partner services.
• Identify characteristics of successful index testing and partner services providers.</td></tr>
<tr><td colspan="3">Materials/Resources
Preparation:
• Review all presentation slides (including notes for each slide).
• Personalize a copy of the Learner's Workbook.</td></tr>
<tr><td colspan="3">Methods and Activities</td></tr>
<tr><td colspan="3">Introduction (5 minutes):
• Present the module title.
• Review the module objective and learning objectives.
• Ask the question presented on the slide and discuss the responses.

Content (100 minutes):
• Present the information on the slides.
• There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
• Try and ask at least one question per slide.
• Facilitate the discussion activity focusing on counseling skills (see notes on the slide).
• Facilitate the activity focusing on personal experiences with counseling (see notes on the slide).
• Facilitate a brief discussion focusing on the question about getting an HIV test (see notes on the slide).
• Facilitate a brief discussion focusing on barriers to effective communication (see notes on the slide).
• Facilitate the activity focusing on giving advice (see notes on the slide).
• Reinforce the key points for this module (see notes on the slide).

Summary (5 minutes):
• Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
• Ask learners what questions they have regarding:
    • The solution-focused approach to index testing and partner services
    • Essential communication and counseling skills for index testing and partner services providers
    • Common barriers to effective communication in index testing and partner services
    • Characteristics of successful index testing and partner services providers

Practice Activity:
There are a number of practice activities conducted within the content portion of the session. There is no final practice activity.</td></tr>
</table>

Module 3: Steps 1–4: Engaging the Index Client

Module Plan

<table>
<tr><td>Date:</td><td>Venue:</td><td>Duration: 155 minutes</td></tr>
<tr><td colspan="3">Module Objective: After completion of this module, the learner will be able to demonstrate the four steps to engage the index client and obtain information about their partners and children.</td></tr>
<tr><td colspan="3">Learning Objectives: To achieve the module objective, the learner will:

Review steps 1–8 for index testing and partner services.
Identify process for delivering steps 1–4 of index testing and partner services.
Demonstrate the delivery of steps 1–4 of index testing and partner services.
Demonstrate skills for supporting clients to identify which index testing and partner services approach will work best for them.
</td></tr>
<tr><td colspan="3">Materials/Resources
Preparation:

Review all presentation slides (including notes for each slide).
Personalize a copy of the Learner's Workbook.
Practice delivery of index testing and partner services steps 1–4 using the learning guide and the visual checklist.
Ensure the room is arranged to allow learners to work in small groups for various activities.
</td></tr>
<tr><td colspan="3">Methods and Activities</td></tr>
<tr><td colspan="3">Introduction (5 minutes):

Present the module title.
Review the module objective and learning objectives.
Ask the question presented on the slide and discuss the responses.

Content (85 minutes):

Step 1 slides – approximately 65 minutes
Step 2 slides – approximately 10 minutes
Step 3 slides – approximately 10 minutes
Step 4 slides – approximately 10 minutes
Present the information on the slides.
There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
Try and ask at least one question per slide.
Ensure the learners review the learning guide, visual checklist, and performance checklist, and understand the use of each.
Introduce the sample index testing and partner services data collection tools and ensure participants understand the value of using each of the tools.
Ensure that all learners are involved in the reading of the scripts in the learning guide as each task is presented and discussed.
Refer learners to the index testing and partner services Talking Points for Providers and the Index Client Intake Form (101) at the points indicated during the session.
Facilitate the activity focusing on the case scenarios after introducing step 1. Follow the instructions on the slide and in the slide notes. Allow no more than 5 minutes per case scenario. Depending on time, you may not be able to complete all five scenarios.
Review the remaining tasks within steps 1–4 in the learning guide.
Review the visual checklist. Stress that learning to provide index testing and partner services will begin with the learning guide. Once a learner feels comfortable with the steps and tasks, then transition to using only the visual checklist. The visual checklist will be a valuable job aid when providing services to clients and when helping other providers learn to provide index testing and partner services.
Demonstrate Part 1 (steps 1–4) when directed by the slide (see slide notes for detailed instructions). For this demonstration, use the visual checklist. Learners are to observe while following the tasks presented in the learning guide. Facilitate a discussion based on learner observations.
</td></tr>
</table>

Practice Activity (60 minutes):

- Facilitate the role-plays by following the instructions in the slide notes. During the role-plays, the facilitator(s) should circulate to observe, coach, and provide feedback on performance. Ideally, all learners will have the opportunity to assume the role of the provider. Time permitting, ask one or more the groups to present a role-play to allow for a group discussion.

Summary (5 minutes):

- Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
- Ask learners what questions they have regarding:
  - Steps 1–8 for index testing and partner services
  - Process for delivering steps 1–4 of index testing and partner services
  - The delivery of steps 1–4 of index testing and partner services using the learning guide and visual checklist
  - Skills for supporting clients to identify which index testing and partner services approach will work best for them

Module 4: Steps 5–8: Notifying and Testing Partners

Module Plan

Date:	**Venue:**	**Duration:** 165 minutes

Module Objective: After completion of this module, the learner will be able to demonstrate the four steps to notify partners and offer them voluntary HIV testing.

Learning Objectives: To achieve the module objective, the learner will:

- Review all steps for index testing and partner services.
- Identify tasks for delivering steps 5–8 of index testing and partner services.
- Demonstrate the delivery of steps 5–8 of index testing and partner services.

Materials/Resources

Preparation:

- Review all presentation slides (**including notes for each slide**).
- Personalize a copy of the Learner's Workbook.
- Practice delivery of index testing and partner services steps 5–8 using the learning guide and the visual checklist.
- Ensure learners will have copies of all needed documents and forms for the role-plays.
- Ensure the facilitators will be able to project forms 303 and 404 (spreadsheets). Provide printed copies if available.
- Ensure the room is arranged to allow learners to work in small groups for various activities.
- Time permitting, assess the skill competence of each learner using the performance checklist (in the Learner's Workbook). Arrange for copies of the performance checklist. Follow the directions in this Facilitator's Guide.

Methods and Activities

Introduction (5 minutes):

- Present the module title.
- Review the module objective and learning objectives.
- Ask the question presented on the slide and discuss the responses.

Content (95 minutes):

- Step 5 slides – approximately 50 minutes
- Step 6 slides – approximately 15 minutes
- Step 7 slides – approximately 15 minutes
- Step 8 slides – approximately 15 minutes
- Present the information on the slides.
- There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
- Try and ask at least one question per slide.
- Ensure that all learners are involved in the reading of the scripts in the learning guide and related documents as each task is presented and discussed.
- Review the Tips and Scripts for Telling Your Partner About Your HIV, Referral Slip, and the Notification Outcomes Form (202) in the Learner's Workbook.
- Review the Index Client Intake Form (101), Section 3, in the Learner's Workbook when directed on the slide discussing contract referral.
- Review the Notification Outcomes Form (202), Section 1, when directed on the slide discussing provider referral.
- Review the Script for Partner Notification: Phone Call, Voicemail, and Home Visit when directed on the slide.
- Review the Partner Invitation for Health Services form when directed on the slide.
- Review the Notification Outcomes Form (202), Section 2, when directed on the slide for dual referral.
- Project Register (303) and Monthly Summary Form (404). These spreadsheets are electronic files provided as part of this LRP so that they may be adapted for the providers' context; hard copies are found in the Learner's Workbook.

- Demonstrate Part 2 (steps 5–8) when directed by the slide (see slide notes for detailed instructions). For this demonstration, use the visual checklist. Learners are to observe while following the tasks presented in the learning guide. Facilitate a discussion based on learner observations.

Practice Activity (60 minutes):

- Facilitate the role-plays by following the instructions in the slide notes. During the role-plays, the facilitator(s) should circulate to observe, coach, and provide feedback on performance. Ideally, all learners will have the opportunity to assume the role of the provider. Time permitting, ask one or more the groups to role-play in front of the group to allow for a group discussion.

Summary (5 minutes):

- Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
- Ask learners what questions they have regarding:
    - Steps 1–8 for index testing and partner services
    - Process for delivering steps 5–8 of index testing and partner services
    - The delivery of steps 1–8 of index testing and partner services using the learning guide and visual checklist

Module 5: Gender and Intimate Partner Violence in Index Testing Services

Module Plan

Date:	**Venue:**	**Duration:** 90 minutes

Module Objective: After completion of this module, the learner will be able to demonstrate an understanding of the role of gender and intimate partner violence in providing index testing and partner services.

Learning Objectives: To achieve the module objective, the learner will:

- Demonstrate an understanding of gender dynamics in the context of implementation of index testing and partner services.
- Demonstrate skills for routine screening for intimate partner violence (IPV) as part of index testing and partner services.
- Identify strategies for addressing risk of IPV.

Materials/Resources

Preparation:

- Review all presentation slides (**including notes for each slide**).
- Personalize a copy of the Learner's Workbook.
- Ensure the room is arranged to allow learners to work in small groups for various activities.

Methods and Activities

Introduction (5 minutes):

- Present the module title.
- Review the module objective and learning objectives.
- Ask the learners why IPV can be a concern when providing index testing and partner services.

Content (65 minutes):

- Present the information on the slides.
- There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
- Try and ask at least one question per slide.
- Facilitate the small-group activity (see below for more information).

Practice Activity (15 minutes):

- Facilitate the small-group activity by following the instructions on the slide. During the role-plays, the facilitator(s) should circulate to observe, coach, and provide feedback on performance. Ideally, all learners will have the opportunity to assume the role of the provider. Time permitting, ask one or more the groups to present a role-play to allow for a group discussion.

Summary (5 minutes):

- Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
- Ask learners what questions they have regarding:
  - Understanding gender dynamics in the context of implementation of index testing and partner services
  - Building skills for routine screening for intimate partner violence (IPV) as part of index testing and partner services
  - Identifying strategies for addressing risk of IPV

Module 6: Monitoring and Evaluation of Index Testing Programs

Module Plan

<table>
<tr><td>Date:</td><td>Venue:</td><td>Duration: 75 minutes</td></tr>
<tr><td colspan="3">Module Objective: After completing this module, you will be able to demonstrate an understanding of monitoring and evaluation of index testing programs.</td></tr>
<tr><td colspan="3">Learning Objectives: To achieve the module objective, the learner will:

Demonstrate an understanding of program monitoring
Demonstrate an understanding of program evaluation
Identify index testing tracking indicators
Use cascades to monitor the quality of index testing
</td></tr>
<tr><td colspan="3">Materials/Resources
Preparation:

Review all presentation slides (including notes for each slide).
Personalize a copy of the Learner’s Workbook.
Ensure the room is arranged to allow learners to work in small groups for various activities.
</td></tr>
<tr><td colspan="3">Methods and Activities</td></tr>
<tr><td colspan="3">Introduction (5 minutes):

Present the module title.
Review the module objective and learning objectives.
Ask the question in the notes for Slide #3 and facilitate a brief discussion based on the responses.

Content (40 minutes):

Present the information on the slides.
Be sure to ask the questions and facilitate any discussion based on the question responses.
Try and ask at least one question per slide.
Facilitate the small-group activity (see below for more information).

Practice Activity (25 minutes):

Facilitate the small-group activity by following the instructions on the slide. During the role-plays, the facilitator(s) should circulate to observe, coach, and provide feedback on performance. Ideally, all learners will have the opportunity to assume the role of the observer. Time permitting, ask one or more the groups to present a role-play to allow for a group discussion.

Summary (5 minutes):

Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
Ask learners what questions they have regarding:

Program monitoring
Program evaluation
Tracking indicators
Cascades to monitor quality of index testing

</td></tr>
</table>

Module 7: Quality Improvement for Index Testing Programs

Module Plan

<table>
<tr><td>Date:</td><td>Venue:</td><td>Duration: 75 minutes</td></tr>
<tr><td colspan="3">Module Objective: After completion of this module, the learner will be able to apply quality improvement processes to index testing programs.</td></tr>
<tr><td colspan="3">Learning Objectives: To achieve the module objective, the learner will:
• Identify principles of quality improvement.
• Apply best practices of supportive supervision and mentoring.</td></tr>
<tr><td colspan="3">Materials/Resources
Preparation:
• Review all presentation slides (including notes for each slide).
• Personalize a copy of the Learner's Workbook.
• Ensure the room is arranged to allow learners to work in small groups for various activities.</td></tr>
<tr><td colspan="3">Methods and Activities</td></tr>
<tr><td colspan="3">Introduction (5 minutes):
• Present the module title.
• Review the module objective and learning objectives.
• Ask the questions on Slide #3 and facilitate a brief discussion based on the responses.

Content (30 minutes):
• Present the information on the slides.
• Be sure to ask the questions and facilitate any discussion based on the question responses.
• Try and ask at least one question per slide.
• Facilitate the small-group activity (see below for more information).

Practice Activity (35 minutes):
• Facilitate the small-group activity by following the instructions on the slide. During the role-plays, the facilitator(s) should circulate to observe, coach, and provide feedback on performance. Ideally, all learners will have the opportunity to assume the role of the observer. Time permitting, ask one or more the groups to present a role-play to allow for a group discussion.

Summary (5 minutes):
• Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
• Ask learners what questions they have regarding:
  ◦ The principles of quality improvement.
  ◦ Supportive supervision and mentoring.</td></tr>
</table>

Module 8: Index Testing and Partner Services for Key and Vulnerable Populations

Module Plan

<table>
<tr><td>Date:</td><td>Venue:</td><td>Duration: 105 minutes</td></tr>
<tr><td colspan="3">Module Objective: After completion of this module, the learner will be able to provide index testing and partner services for key and vulnerable populations.</td></tr>
<tr><td colspan="3">Learning Objectives: To achieve the module objective, the learner will:
• Define key and vulnerable populations
• Perform a key population classification assessment
• Identify the unique characteristics of providing index testing and partner services with key and vulnerable populations
• Identify strategies for implementing high-quality index testing and partner services with key and vulnerable populations</td></tr>
<tr><td colspan="3">Materials/Resources
Preparation:
• Review all presentation slides (including notes for each slide).
• Personalize a copy of the Learner's Workbook.
• Ensure the room is arranged to allow learners to work in small groups for various activities.</td></tr>
<tr><td colspan="3">Methods and Activities</td></tr>
<tr><td colspan="3">Introduction (5 minutes):
• Present the module title.
• Review the module objective and learning objectives.
• Ask the questions found in the notes for Slide #3.

Content (75 minutes):
• Present the information on the slides.
• There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
• Try and ask at least one question per slide.
• Facilitate the small-group activity (see below for more information).

Practice Activity (20 minutes):
• Facilitate the small-group activity by following the instructions on the slide. During the role-plays, the facilitator(s) should circulate to observe, coach, and provide feedback on performance. Ideally, all learners will have the opportunity to assume the role of the provider. Time permitting, ask one or more the groups to present a role-play to allow for a group discussion.

Summary (5 minutes):
• Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
• Ask learners what questions they have regarding:
    • Definitions of key and vulnerable populations
    • Key population classification assessment
    • The unique characteristics of providing index testing and partner services with key and vulnerable populations
    • Strategies for implementing high-quality index testing and partner services with key and vulnerable populations</td></tr>
</table>

Module 9: Integration of Index Testing and HIV Self-Testing (Including Course Closing)

Module Plan

Date:	Venue:	Duration: 165 minutes (120 minutes to present Module 9 and 45 minutes for the course closing)

Module Objective: After completion of this module, the learner will be able to integrate index testing and HIV self-testing.

Learning Objectives: To achieve the module objective, the learner will:

- Describe why HIVST is important for closing the testing gap.
- Describe how HIVST can be used to complement index testing approaches.

Materials/Resources

Preparation:

- Review all presentation slides (**including notes for each slide**).
- Personalize a copy of the Learner's Workbook.
- Ensure the room is arranged to allow learners to work in small groups for various activities.

Methods and Activities

Introduction (5 minutes):

- Present the module title.
- Review the module objective and learning objectives.
- Ask what is meant by "closing the testing gap"?

Content and Activities (110 minutes):

- Present the information on the slides.
- There are a number of slides with questions. Be sure to ask the questions and facilitate any discussion based on the question responses.
- Try and ask at least one question per slide.
- Facilitate the small-group activities following the instructions on the slides.

Summary (5 minutes):

- Present the review questions on the slides at the end of the module. Ask learners to work on the answers individually or in pairs. Ask for a learner to share the correct response to each question. Discuss each question to ensure all learners are aware of the correct response.
- Ask learners what questions they have regarding:
  - Why HIVST is important for closing the testing gap.
  - How HIVST can be used to complement index testing approaches.

Course Closing (45 minutes):

- Administer the knowledge assessment following the directions in this Facilitator's Guide.
- Facilitate a brief discussion focusing on how learner's will apply their new knowledge and skills. Ask for potential barriers to providing index testing and partner services and discuss possible solutions.
- Administer the course evaluation following the directions in this Facilitator's Guide.
- Close the course.

Assessment of Knowledge and Skills

Knowledge Assessment

Knowledge assessment or evaluation is an important factor in determining the success of learners in retaining the information presented in the course modules. Knowledge assessment is conducted to:

- Motivate the learner to acquire new knowledge.
- Determine whether the learner has achieved the learning objectives.

The main purpose of the knowledge assessment in the index testing and partner services course is to help each learner and the facilitator assess the learner's progress in mastering the course objectives. Multiple-choice test items are used as a measure of knowledge assessment.

In this course there are two types of knowledge assessment. The first is an informal assessment and includes the review questions found on presentation slides at the conclusion of each module. These review questions afford the learners an opportunity to immediately test their understanding of key content presented in each module.

The second type is a formal knowledge assessment administered at the conclusion of the course. The questions on the knowledge assessment are pulled from the module review questions.

It is suggested that a correct score of 70% or more on the formal knowledge assessment indicates knowledge-based mastery of the material presented in the course. For learners scoring less than 70%, the facilitator should review the results with each learner individually and provide guidance on using the course materials to learn the required information.

The recommended steps to administer the knowledge assessment (found at the end of this section) include:

1. Prepare copies of the knowledge assessment (one for each learner). In the event a copy machine is not available, the facilitator can read each of the questions to the learners and ask that they record their responses on a piece of paper.
2. Explain to the learners that the purpose of the knowledge assessment is to determine if the learners have mastered the course knowledge objectives.
3. Distribute the knowledge assessment to the learners. Ask each learner to write his/her name in the space provided. In cases where the knowledge assessments will be used with more than one group (therefore reducing the number of copies required), number the assessments and ask learners not to write anything on the paper. Learners can then record their responses on a separate piece of paper.
4. Give the learners time to complete the knowledge assessment.
5. Ask that they turn their knowledge assessment face down once they answer all of the questions.
6. Collect the knowledge assessments.
7. The facilitator has several options regarding grading or scoring the knowledge assessments:
    - When there are two facilitators, one of the facilitators will begin to score the knowledge assessments (answer key provided in this section). At the same time, the other facilitator will read each question to the group and ask for volunteers to respond with the answer. After briefly discussing the correct answer, move to the next question. By the time the facilitator has presented and discussed the last question, the other facilitator will have finished scoring the knowledge assessments. Time permitting, the facilitators can then work with those learners scoring less than 70% to ensure they understand the correct answers.

- When there is only one facilitator and time permits, the facilitator can quickly score the knowledge assessments and then review the correct responses with the learners. It is essential that all learners understand the correct answers before leaving the course.

Index Testing and Partner Services Knowledge Assessment

Name: ____

Directions: For each of the following questions, circle the best response or answer. When you are finished, turn the assessment over and wait for instructions from your facilitator.

Module 1: Overview of Index Testing and Partner Services

1. Index testing and partner services should be offered as part of a comprehensive package of testing and care offered to people with HIV on a __________ basis.
   a. required
   b. voluntary
   c. forced

2. Index testing and partner services offers HIV testing to everyone with __________ from an index client.
   a. risk of exposure
   b. communications
   c. information

Module 2: Enhanced Communication and Counseling Skills

3. Which of the following is a recommended approach to establish a good physical presence when counseling a client?
   a. Maintaining eye contact
   b. Leaning away from the client
   c. Crossing your arms to present a closed posture

4. The index testing and partner services counselor must be able to do which one of the following?
   a. Criticize the client for making poor decisions.
   b. Ease tension associated with disclosing HIV status.
   c. Convey respect for the client only if they make the right decision.

Module 3: Steps 1–4: Engaging the Index Client

5. Which one of the following tools is designed for the index testing and partner services provider to use **on the job** during counseling sessions?
   a. Index testing and partner services Learning Guide
   b. Index testing and partner services Performance Checklist
   c. Index testing and partner services Visual Checklist

6. There are four options for contacting the partners of HIV-positive clients. Which one of the following is the provider and client working together to notify the partner(s) and offer voluntary HTS?

   a. Dual referral

   b. Provider referral

   c. Contract referral

7. Step 2 when providing index testing and partner services is to obtain a list of all partners who may be __________.

   a. available

   b. at risk

   c. related

Module 4: Steps 5–8: Notifying and Testing Partners

8. Step 7 of the index testing and partner services process is to locate each of the children listed using the agreed approach and __________ them for HIV.

   a. test

   b. counsel

   c. train

9. Step 8 of the index testing and partner services process is to complete which one of the following requirements?

   a. List of only the index clients

   b. List of all children under age 16

   c. Completion of index testing and partner services data recording and reporting forms

10. What is an example of an **adverse event** that should be tracked by the provider in case it is reported at any time after index testing and partner services are provided?

    a. Verbal or sexual abuse

    b. Both partners initiate antiretroviral therapy

    c. Children who are at risk are tested for HIV

Module 5: Gender and Intimate Partner Violence in Index Testing Services

11. Reported social harm and other adverse events following index testing and partner services are __________.

    a. very common

    b. common

    c. rare

12. In accordance with WHO and local Guidelines, sites that conduct index testing and partner services should conduct screening for which one of the following?

    a. Intimate partner violence

    b. Partner separation

    c. Client and partner attitudes

Module 6: Monitoring and Evaluation of Index Testing Programs

13. If an index testing program has the following data cascade for a 6-month period, what is one possible action that should be taken for improving index testing program?

    a. Refresher training for counselors to improve skills for counseling on benefits and importance of index testing

    b. Identify more index clients

    c. Offer index testing to more index clients

14. Why is monitoring and evaluating index testing programs important?

    a. The donor and FMOH require it

    b. Data are needed so salaries can be paid on time

    c. It helps determine if activities need adjustment during the intervention to improve desired outcomes

Module 7: Quality Improvement for Index Testing Programs

15. Which one of the following is used to assess counselors' skills in conducting home visits to reach partners of index clients?

    a. Field visit observation form

    b. Interview observation form

    c. Chalk talk

16. Which one of the following is a best practice when implementing supportive supervision and mentoring?
    a. Using new counsellors to offer index testing
    b. Rotating counsellors experiencing burn-out back to regular counselling duties
    c. Offering only annual opportunities for counsellors to share difficult cases and learn from each other

Module 8: Index Testing and Partner Services for Key and Vulnerable Populations

17. Why is the KP classification tool helpful when providing HIV testing services, including index testing?
    a. It can help providers to normalize language and identify high-risk behaviors in a non-judgmental manner.
    b. It can help providers identify the types of partners to reach with index testing and partner services.
    c. Both a and b.
    d. None of the above.

18. What is a key difference between hotspot testing and index testing?
    a. Index testing is targeted to people with known risk of exposure to HIV, whereas hotspot testing is targeted to a group of people in a location where high-risk behavior is likely to occur.
    b. They are the same.
    c. Index testing is only provided to spouses of index clients, whereas hotspot testing is provided to the entire community.

Module 9: Integration of Index Testing and HIV Self-Testing

19. True or false: HIV self-testing is safe and acceptable?
    a. True
    b. False

20. HIV self-testers with a reactive (positive) result should do which of the following?
    a. Receive further testing from a trained provider.
    b. Immediately begin contacting all of their partners.
    c. Repeat the HIVST until they get a non-reactive (negative) result.

Knowledge Assessment Answer Key

Module 1

1. b
2. a

Module 2

3. a
4. b

Module 3

5. c
6. a
7. b

Module 4

8. a
9. c
10. a

Module 5

11. c
12. a

Module 6

13. a
14. c

Module 7

15. a
16. b

Module 8

17. c
18. a

Module 9

19. a
20. a

Skill Assessment

Well-constructed performance checklists contain only sufficient detail to permit the facilitator to evaluate and record the overall performance of the skill. Using checklists in the index testing and partner services course:

- Ensures that learners have mastered the skills during small-group practice sessions
- Ensures that all learners will have their skills measured according to the same standard
- Forms the basis for follow-up observations and evaluations during service delivery (when possible)

The checklist (found in the Learner's Workbook) may first be used to assess learners' performance during small-group activities or role-plays.

> **Note**: Given the limited time available for the index testing and partner services course, it may not be feasible to individually assess the skill competency of each learner.

Time permitting, the following skill assessment process is recommended for the index testing and partner services provider course:

- As soon as one of the learners appears to be doing well enough during practice sessions, the facilitator will ask the learner to repeat the demonstration of providing index testing and partner services.
- The facilitator will observe and record performance ratings on a checklist (refer to the checklist for an explanation of the rating scale).
- At the conclusion of the demonstration, the facilitator will ask the learner what they did well and what they would do differently next time. The facilitator can then provide specific feedback on performance (using the sandwich feedback technique).
- At this point, the facilitator must make a decision based on the checklist rating system. Is the learner who demonstrated index testing and partner services delivery competent (meaning this person is qualified to provide services), or does the learner need additional practice (i.e., did they receive 0 or – performance ratings for any of the steps/substeps)?
- If the learner is competent, then the facilitator will make this note on the checklist (which should be filed with the course records).
- If the learner is not competent, then the facilitator has several options:
    - In some situations, the learner may recognize the mistake they made and will be asked to repeat the evaluation immediately. If so, the learner will be evaluated again (only repeating the part[s] within the checklist where they experienced problems).
    - Ask the learner to join the large group and then repeat the assessment later.
    - If there are two facilitators, then the other facilitator may take the learner aside for additional practice and coaching. The learner will be evaluated again (only repeating the part[s] within the checklist where they experienced problems).
    - When there are two facilitators and space is available, consider dividing the learners into two groups and conducting skill assessments at the same time. This will cut the time required for the assessments in half.

At the conclusion of the skill evaluation process, in most cases, all of the learners will have demonstrated competency providing index testing and partner services delivery. If for some reason there is a learner who is unable to competently perform the steps to provide index testing and partner services delivery, this learner could be invited to complete the course again in the future.

Course Evaluation

To improve the effectiveness of this index testing and partner services course, it is essential to afford the learners an opportunity to provide feedback. The evaluation form on the following page also appears in the Learner's Workbook.

The facilitator has two options for asking learners to complete this evaluation form at the end of the course:

3. When a copy machine is available, make copies of the form on the next page and ask learners to complete and return the form.
4. When a copy machine is not available, ask learners to remove the form from their Learner's Workbook and then complete and return the form.

Once the course is over, the facilitator(s) should review the course evaluation forms and make notes of any changes that should be made before the course is conducted again.

HIV Index Testing and Partner Services Course Evaluation

Instructions: Read each of the items below. For each item, provide your opinion by circling the appropriate rating number on the 1–5 scale. The scale values are as follows:

5: Strongly Agree **4. Agree** **3. No Opinion** **2. Disagree** **1. Strongly Disagree**

Course Component	Rating
The course objectives were clear.	1 2 3 4 5
The course content is related to my work and will help me to provide index testing and partner services.	1 2 3 4 5
There was sufficient time to practice skills during the course.	1 2 3 4 5
The course facilitator involved me during course sessions.	1 2 3 4 5
The course facilitator clearly demonstrated required skills.	1 2 3 4 5
The course facilitator observed me practice and provided feedback during the course.	1 2 3 4 5
The course materials were helpful in learning the required knowledge and skills.	1 2 3 4 5
The index testing and partner services learning guide, performance checklist, and visual checklist were helpful in learning how to perform the required skills.	1 2 3 4 5
I am now confident in my ability to provide HIV index testing and partner services on the job.	1 2 3 4 5

Additional Feedback: Please respond to these questions:

What did you like the most about this course?

____

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____

What changes could be made (if any) to improve this course?

____

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