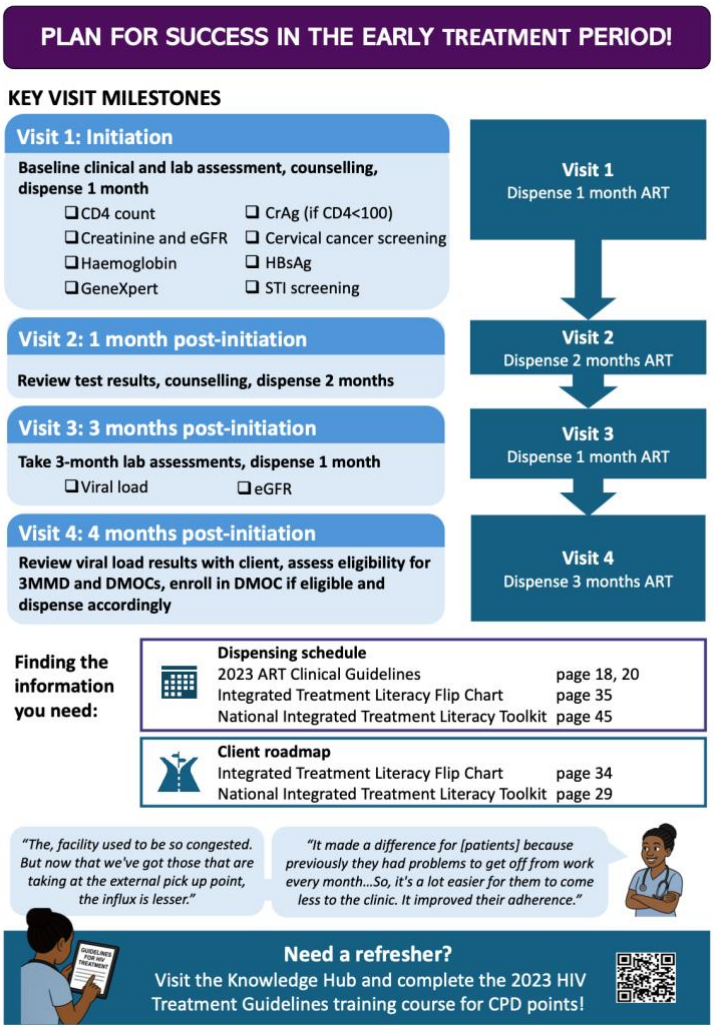
Guideline Job Aid

What is it?

The Guideline Job Aid, also known as Key Visit Milestones, was developed as part of the RETAIN6 BRIDGE Retention Toolkit to help healthcare providers deliver guideline-concordant care during the early stages of antiretroviral therapy (ART). It is a simple, single-page visual summary of South Africa's 2023 ART Clinical Guidelines, highlighting recommended assessments, counselling, laboratory tests, and dispensing milestones during the first four visits.

Designed for use at the point of care, the Job Aid enables providers to quickly check what needs to happen at each visit without needing to consult the full 232-page guideline document. It is available as an A3 desk reference and a vertical poster, with no costs to facilities beyond printing.



Why it matters

The Job Aid is a practical bridge between policy and the consultation room, intended to help providers deliver recommended assessments, counselling and ART dispensing at the appropriate time. It is also intended to help new providers follow the NDoH ART guidelines.

It turns guidelines into practice. Guideline documents are lengthy and may be difficult to consult in a busy clinic. A visual guide makes it easier for providers to know what needs to be done, and when, helping bridge the gap between having a guideline and applying it consistently in practice. It also gives page references to the guidelines and national treatment literacy materials for the dispensing schedule and the client roadmap.

It focuses on the high-risk early treatment period. The first few months on ART are when clients are more likely to disengage from care and when important baseline conditions – such as advanced HIV disease, TB, hepatitis B, kidney disease, sexually transmitted infections and cervical cancer – need to be identified. This period is also when early treatment response and viral suppression are assessed. The 2023 Guidelines introduced several changes to HIV management during this period, which providers may need to reference or refresh their knowledge. The Job Aid is intended to help providers keep track of critical steps.

It supports standardized, quality care. A shared guideline reference is intended to help ensure that clients receive a consistent core package of care, regardless of the facility or provider. Cues in the Job Aid reinforce recommendations for comprehensive counselling, laboratory assessments, and differentiated models of care (DMOC) eligibility assessment.

It encourages ongoing learning. By linking the tool to the NDoH Knowledge Hub, providers are encouraged to access training and CPD points, complementing existing continuing professional development strategies.

What it contains

Key visit milestones	Questions answered	Specific contents	Intended result
Four-visit checklist	*"What must I do at this visit?"*	A summary of key assessments, laboratory investigations, counselling activities, and review of results across the first four visits.	Helps providers identify the key activities required at each visit and reduces the risk of overlooking essential steps.
Dispensing pathway	"How much ART should I dispense, and when should the dispensing interval change*?"*	A visual pathway showing recommended ART dispensing intervals and their progression during early treatment, alongside considerations for monitoring and differentiated models of care (DMOC).	Provides a quick reference for dispensing decisions during early treatment.
Guideline references and related resources	*" Where can I find more detailed guidance?*	Page references to relevant sections of the 2023 ART Clinical Guidelines and related resources, including the Client Roadmap.	Helps providers locate additional information when they need more detail than the Job Aid provides.
Testimonials and additional learning	*"Why does this work, and how do I learn more?"*	Evidence of real-world benefits drawn from user interviews and access to NDoH accredited refresher training	Shares peer perspectives and provides access to further learning and professional development.

Availability

The Guideline Job Aid was developed in English and made available in two formats: a one-sided A3 desk reference and a vertical poster for display in consultation rooms. Both formats were intended to make the information readily accessible during patient consultations. Download the A3 version of the Job Aid.

How it was developed

The Guideline Job Aid was developed using South Africa's 2023 ART Clinical Guidelines as its primary source. The team identified key clinical and service-delivery milestones across the first four ART visits, including assessments, laboratory investigations, counselling, review of results, and ART dispensing. These were condensed into a single-page reference designed for use during clinical consultations.

The Job Aid incorporated a “Finding the information you need” section with page references to facilitate use of the full guidelines document and literacy toolkit. A link to the NDoH Knowledge Hub's 2023 ART Guidelines course was included to connect the reference tool with an existing training resource and support providers interested in further learning and professional development. Following consultations with providers and field teams, the final tool was produced in English as a one-sided A3 desk reference and a vertical poster for display in consultation rooms.

Implementation experience

The Guideline Job Aid was introduced during an 11-week pilot at six primary healthcare facilities in Gauteng and KwaZulu-Natal provinces. The study team intended for posters to be placed at eye-level, adjacent to the consulting desk in consultation rooms for clear visibility and access. Most sites were able to display posters in their consultation rooms and place the tool on clinicians’ desks, but some sites experienced challenges with displaying posters due to limited wall space in the consultation rooms.

Provider responses

Twenty-nine healthcare providers were interviewed about the BRIDGE retention toolkit, with questions covering each component separately. Their responses to the Guideline Job Aid were mixed. Some providers described the tool as a useful reference for conducting consultations and monitoring required blood

> *“The Key Visit Milestones helps us a lot as healthcare workers so that we can conduct the patient visits well and monitor the blood tests according to the guidelines. It helps a lot. We work with them every day. It helps, yes.”* - KZN Province, Professional Nurse
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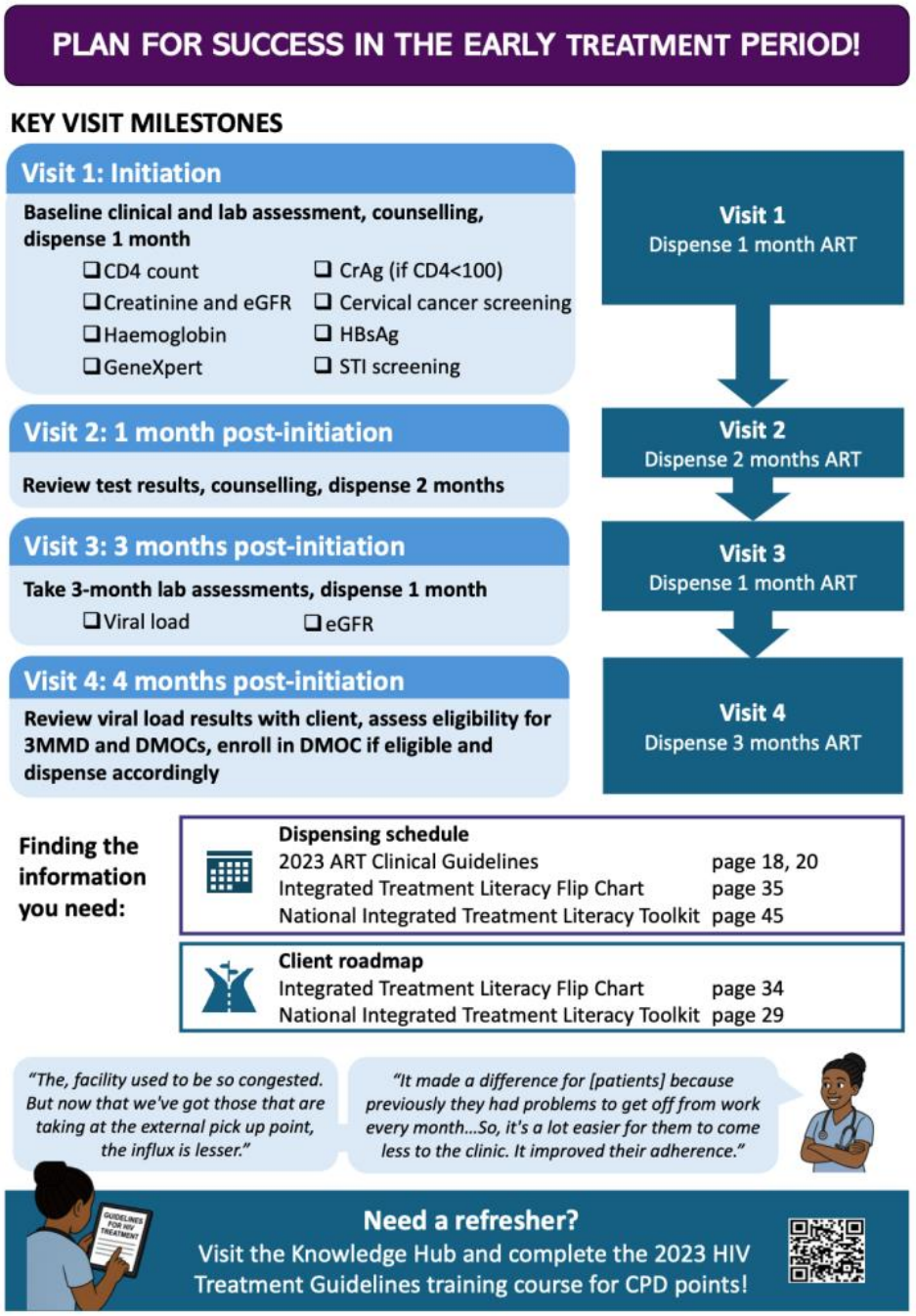
> *“... [I like] the guideline because it's where I start as a nurse. I need to know the guidelines. So, it has been summarized, it's in front of me, so I don't think I'll miss any of the things that is expected from me if I've got a guideline in front of me.” – Gauteng Province, Professional Nurse*

tests, but those interviewed mentioned it less often than other components of the toolkit. The interviews did not establish how consistently the tool was used in practice, nor whether limited mention of it reflected low uptake or its relative lack of novelty, compared to other toolkit components.

Next steps

Further consultation with healthcare workers and policymakers is needed to assess the Guideline Job Aid's value for guideline fidelity, identify any revisions or additions that could improve its usefulness, and explore whether and how it could be disseminated more widely. The Job Aid should also be updated to reflect 2026 ART Guidelines.

For more information or to request access to the Guideline Job Aid, please contact Dr Mhairi Maskew, mmaskew@heroza.org.