
WHO guidance on TB surveillance (2024)

Chapter 3: Definitions

TB Monitoring, Evaluation and Strategic Information Unit
Global Tuberculosis Programme

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Consolidated guidance on tuberculosis data generation and use. Module 1:

Tuberculosis surveillance

<https://iris.who.int/handle/10665/376612>



Consolidated guidance on
tuberculosis data generation and use
Module 1

Tuberculosis surveillance



Chapter summary

The chapter provides the definitions for all the terms used in the rest of the document (especially in Chapter 4 and Chapter 5).

All definitions are aligned with the most recent WHO clinical guidelines for TB.

Terms are divided into two main groups:

- **terms that relate to people with or at risk of TB disease or infection, and their contacts, further subdivided according to the pathway of prevention and care.**
- **terms that relate to data and their flow through the health system**

Chapter contents

Chapter 3 is divided in two major sections:

Section 3.1 Definitions related to people with or at risk of TB disease or TB infection, and their contacts

Section 3.2 Data, data flow and the health system

Summary of updated terms (no change in definition)

Old term	New term	Definition	Reason for update
Relapse case	Recurrent case	A person with TB disease who has previously been treated for TB, was declared <i>cured or treatment completed</i> at the end of their most recent course of TB treatment and is now diagnosed with a new episode of TB. Same as previously	Better alignment with case definitions commonly used in clinical trials.
Retreatment	Re-registered (for treatment)	A person with TB disease who has been notified previously as a TB case, who started treatment and took TB drugs for at least 1 month but who was not declared <i>cured or treatment completed</i> , and is now being started on a new course of TB treatment. Same as previously	More accurate descriptor for people who start a new regimen.
New or relapse case	New episode	A person with TB disease who is classified as a new case, a recurrent case or a case with unknown previous treatment history (i.e. any case apart from a re-registered case). Same principle as previously	Simplified and more concise descriptor of people newly diagnosed with TB.

Summary of updated terms (no change in definition)

Old	New	Reason for update
–	Case outcomes	To allow for the assessment of outcomes for all patients registered as a TB case, irrespective of whether they started treatment.
Treatment outcome categories: some definitions were different for DS-TB and DR-TB.	Treatment outcome categories: definitions for DS-TB and DR-TB are now all the same.	It allows for considerable simplification and streamlining of definitions. It is consistent with the outcomes of a WHO consultation convened in 2020.
Change to a different treatment regimen: recorded as “transferred”.	Change to a different treatment regimen: recorded as failed.	Optimal treatment should be identified at the start of treatment. Ensures more accurate assessment of treatment outcomes.

What is a regimen change?

- A change between and two of the following regimens: 6-month, 9-month and long-term individualised regimen.
 - E.g. 6-month to long-term individualised, 6-month to 9-month, 9-month to long-term individualised.
- For long-term individualised treatment: suggested interpretation is change of ≥ 2 medications.

3.1 Definitions related to people with or at risk of TB disease or TB infection, and their contacts

People with or at risk of TB disease or TB infection, and their contacts

Section 3.1.1 provides a list of terms and definitions for the part of the clinical pathway of care related to prevention of and screening for TB disease.

Table 3.2 provides the definitions for the following terms related to [prevention of and screening for TB disease](#):

- Contact person
- Close contact
- Contact investigation (or evaluation)
- Household contact
- Index patient (index case) of TB
- Patient-initiated care
- Person with presumptive TB
- Provider-initiated care
- Risk group
- Screening
- TB infection
- TB preventive treatment (TPT)

People with or at risk of TB disease or TB infection, and their contacts

Section 3.1.2 provides a list of terms and definitions for the part of the clinical pathway of care related to the diagnosis of TB disease. It includes the classification of a person with TB disease by 1) method of diagnosis, 2) anatomical site, 3) history of previous treatment, 4) susceptibility status to TB medicines, and 5) HIV status.

Table 3.3 provides the definitions for the following terms related a **person with TB disease**:

- TB disease
- TB case
- TB patient

Table 3.4 provides the definitions for the following terms related to the **classification of a person with TB disease by method of diagnosis**:

- Bacteriologically confirmed
- WHO-recommended rapid diagnostic test
- Clinically diagnosed

Table 3.5 provides the definitions for the following terms related to the **classification of a person with TB disease by anatomical site**:

- Pulmonary TB
- Extrapulmonary TB

People with or at risk of TB disease or TB infection, and their contacts

Section 3.1.2 (continued) provides a list of terms and definitions for the part of the clinical pathway of care related to the diagnosis of TB disease. It includes the classification of a person with TB disease by 1) method of diagnosis, 2) anatomical site, 3) history of previous treatment, 4) susceptibility status to TB medicines, and 5) HIV status.

Table 3.6 provides the definitions for the following terms related the **classification of a person with TB disease by history of previous treatment**:

- New case
- Recurrent case
- Re-registered case
- Unknown previous treatment history
- New episode
- Previously treated case

People with or at risk of TB disease or TB infection, and their contacts

Section 3.1.2 (continued) provides a list of terms and definitions for the part of the clinical pathway of care related to the diagnosis of TB disease. It includes the classification of a person with TB disease by 1) method of diagnosis, 2) anatomical site, 3) history of previous treatment, 4) susceptibility status to TB medicines, and 5) HIV status.

Table 3.7 provides the definitions for the following terms related the **classification of a person with TB disease by susceptibility or resistance to TB medicines**:

- Drug susceptibility testing (DST)
- Drug-resistant TB (DR-TB)
- Drug-susceptible TB (DS-TB)
- Isoniazid-resistant-rifampicin-susceptible TB (Hr-TB)
- Rifampicin-resistant TB (RR-TB)
- Multidrug-resistant TB (MDR-TB)
- MDR/RR-TB
- Pre-extensively drug-resistant TB (pre-XDR-TB)
- Extensively drug-resistant TB (XDR-TB)

Table 3.8 provides the definitions for the following terms related the **classification of a person with TB disease by HIV status**:

- HIV-positive
- HIV-negative
- HIV status unknown

People with or at risk of TB disease or TB infection, and their contacts

Section 3.1.3 provides a list of terms and definitions for the part of the clinical pathway of care related to the initiation to completion of treatment for people diagnosed with TB disease.

Table 3.9 provides the definitions for the following terms related a **treatment types and treatment initiation**:

- First-line TB medicine (or drug)
- Second-line TB medicine (or drug)
- Treatment initiation

Table 3.10 provides the definitions for the following terms related to the **treatment outcomes that apply to all treatment regimens regardless of drug-resistance status, the type of drugs used or the duration of treatment**:

- Cured
- Treatment completed
- Treatment successful
- Treatment failed
- Died
- Lost to follow-up
- Not evaluated

3.2 Data, data flow and the health system

Principles of the guidance document

Section 3.2 provides a list of terms and definitions that relate to the flow of TB data through the health system, to the data this system produces, and how these data are used to guide policy, planning and programmatic action.

Table 3.11 provides the definitions for the following terms related to **data, data flow and the health system**:

- Aggregated data
- Case-based data
- Community care
- Data element
- Digital adaptation kit (DAK)
- Digital health information system
- Programme evaluation
- Health care facility
- Health facility level
- Health information system (HIS)
- Health sector
- Indicator
- Individual-level data

Principles of the guidance document

Section 3.2 (continued) provides a list of terms and definitions that relate to the flow of TB data through the health system, to the data this system produces, and how these data are used to guide policy, planning and programmatic action.

Table 3.11 provides the definitions for the following terms related to data, data flow and the health system (continued):

- Master health facility list
- Monitoring
- National TB programme (NTP)
- Patient monitoring
- People-centred care
- Programme management
- Rights-based care
- Surveillance

For further information or in case of
any questions, contact:
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Links to the guidance on TB surveillance

Consolidated guidance on tuberculosis data generation and use. Module 1: **Tuberculosis surveillance**
<https://iris.who.int/handle/10665/376612>

Web annex A: Commonly observed problems and associated solutions.
<https://iris.who.int/handle/10665/376481>.

Web annex B: Standards and benchmarks for tuberculosis surveillance and vital registration systems: checklist, 2nd ed.
<https://iris.who.int/handle/10665/376483>

Web annex C: Record-linkage exercises.
<https://iris.who.int/handle/10665/376484>

Web annex D: Reporting of aggregated data and calculation of core indicators: templates and formulae.
<https://iris.who.int/handle/10665/376486>

Web annex E: Examples of how to report diagnosis, start of treatment and treatment outcomes.
<https://iris.who.int/handle/10665/376489>

Web annex F: Evaluation of the WHO DHIS2 case-based package for tuberculosis surveillance (TB tracker) in five pilot countries: summary of key findings.
<https://iris.who.int/handle/10665/376490>

