



## Colorado Nurse Home Visitor Program (NHVP) Caseload Maintenance Guidelines

The following steps have been developed to provide guidance to Colorado NFP supervisors and nurse home visitors in order to assure that contract caseloads are reached and maintained by Colorado NHVP sites. This effort is critical in assuring that contract expectations are achieved and that as many eligible women as possible receive the benefits of the NFP program.

1. Implement transition plans when nurses leave a site: all sites are required to have transition plans in place in order to minimize the amount of client attrition that results when a nurse leaves the program. These plans should be activated as soon as a nurse indicates that she is planning to leave, preferably well before her departure.
2. Assure that new home visitors build caseloads appropriately: supervisors need to “scaffold” new home visitors to meet the NFP recommendation of reaching a full caseload within 7-9 months of hiring
3. Monitor caseloads on a consistent schedule:
  - no less than monthly, supervisors should review with each home visitor his/her Monthly Activity Profile and Summary of Nurse Caseload CIS reports
  - completed plus attempted visits falling below 48-55/month for a fulltime nurse (24-27 for a halftime nurse) according to the Monthly Activity Profile report indicate that there are clients who are not receiving the program according to the recommended schedule
  - the Summary of Nurse Caseload report is used to determine the actual “active” caseload as defined by the CIS and to review the last visit date of each client in the caseload
  - clients not seen in the past 30 days should be specifically discussed with the nurse: reasons why, other contacts made with the client, indications of potential disengagement from the program should be considered and addressed with the nurse
  - clients not seen in 30 days should be discussed at a follow up supervision within 2 weeks and at least every 2 weeks thereafter until a disposition is reached
4. Implement strategies to address “inactive” clients
  - clients not seen in 45 days may continue to be “carried” by the nurse based on individual client circumstances (this does not apply to those clients where the child has reached 2 years of age – they are to be graduated no later than age 25 months; final paper work will be accepted by the CIS up to age 27 months)
  - reasonable efforts can be made to try and reach and re-engage these clients but judgment needs to be exercised in the amount of time devoted to this activity; supervisors need to monitor these activities carefully in every supervision session with the home visitor to assure that time trying to “track down” clients is appropriately spent
  - clients who will be inactive for 60-120 days (temporarily relocate to a non-NFP location, etc.) should be discharged from the program and re-enrolled if and when they return; a new client should be enrolled to take her place when she leaves
  - after a reasonable period of time (no more than 120 days) with no client contact, a Client Activity Status form should be completed and entered into the CIS indicating that the client is no longer participating in the program (use the appropriate CIS attrition code). Under no circumstances should a client reach 180 days with no activity and no Activity Status form submitted; the CIS will automatically close out the client but the client will continue to be shown as “active” forever!
5. Enroll new clients to replace “inactive” ones
  - after 45 days (6 weeks) without a home visit, a new client needs to be enrolled to replace the inactive one
  - continue to use the Monthly Activity Profile as a part of weekly supervision to monitor the number of home visits and the number of clients seen in each month; the guidelines as presented may well mean that home visitors will, at times, have caseloads greater than 25 clients but if some of those clients are not receiving visits according to the recommended schedule the nurse should be able to stay within the 48-55 visit objective

### To summarize:

30 days with no visit: discussion about the client, strategies to reconnect, etc.

45 days with no visit: efforts may continue to reconnect with client but a new client is enrolled

60, 75, 90 days with no visit: monitor nurse efforts to reconnect with client but consider dropping client from program

90-120 days: client should be discharged if no visit made

120-180 days (if not sooner): assure that Client Activity Status form has been completed and entered into the CIS dropping the client from the program