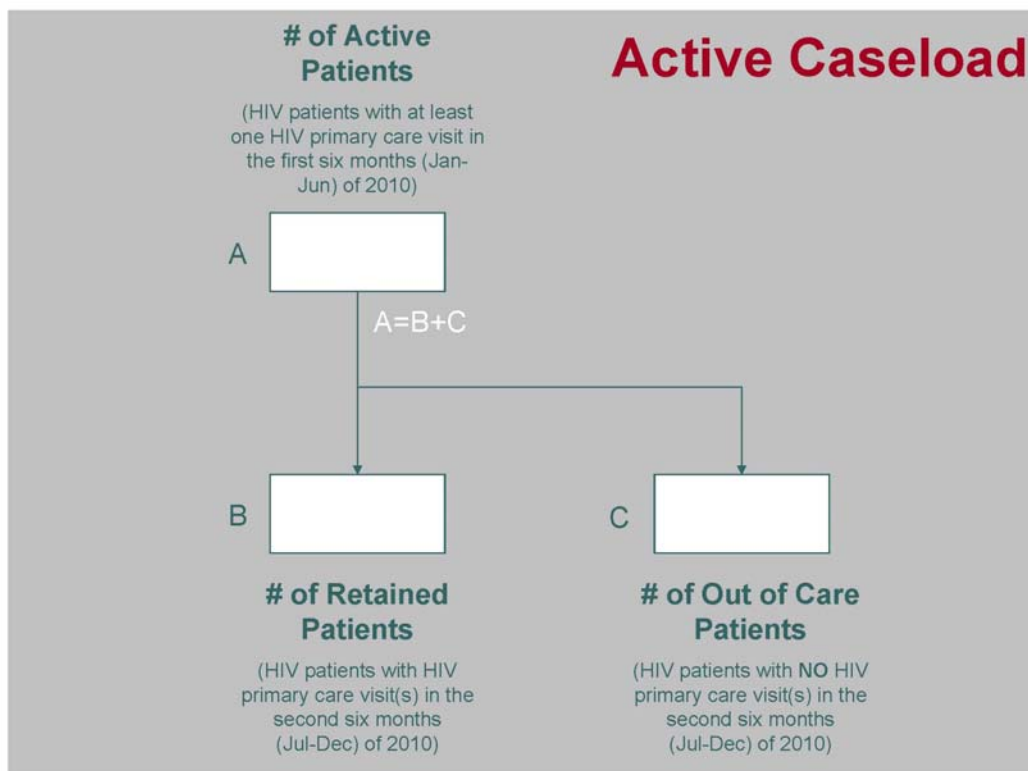




## Retention Follow-up Pool Instruction Sheet

### Step A: Determine Your Active Caseload

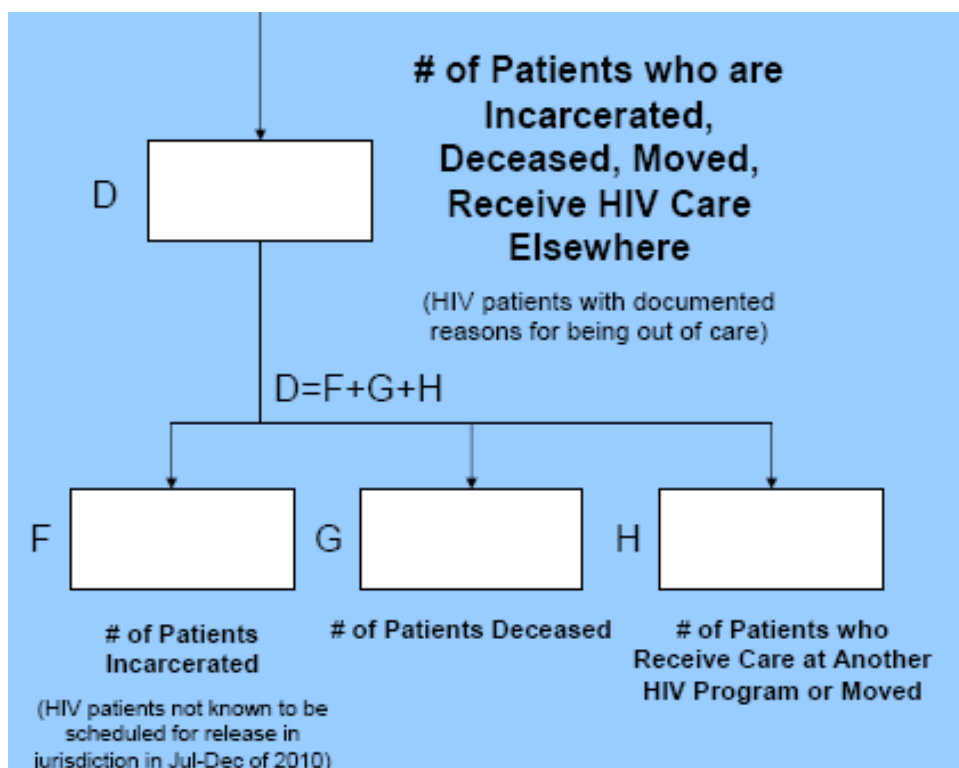
1. To determine '# of Active Patients' count the number of unduplicated HIV patients with at least one HIV primary care visit between Jan. 1, 2010-Jun 30, 2010 and enter into field (A).
2. From this list of active patients count the number of patients with at least one HIV primary care visit in the second half of the year - between Jul 1, 2010-Dec 31, 2010 - enter the number in the '# of Retained Patients' field (B)
3. Count the number of patients who did not have at least one HIV primary care visit in the second half of the year and enter the number in the '# of Out of Care Patients' (C) field. The '# of Out of Care' patients refers to patients not in care *at your site*
4. Ensure that the # of Retained Patients plus # of Out of Care Patients equals the # of Active Patients (A=B+C)





### Step B: Determine Your Out of Care Pool

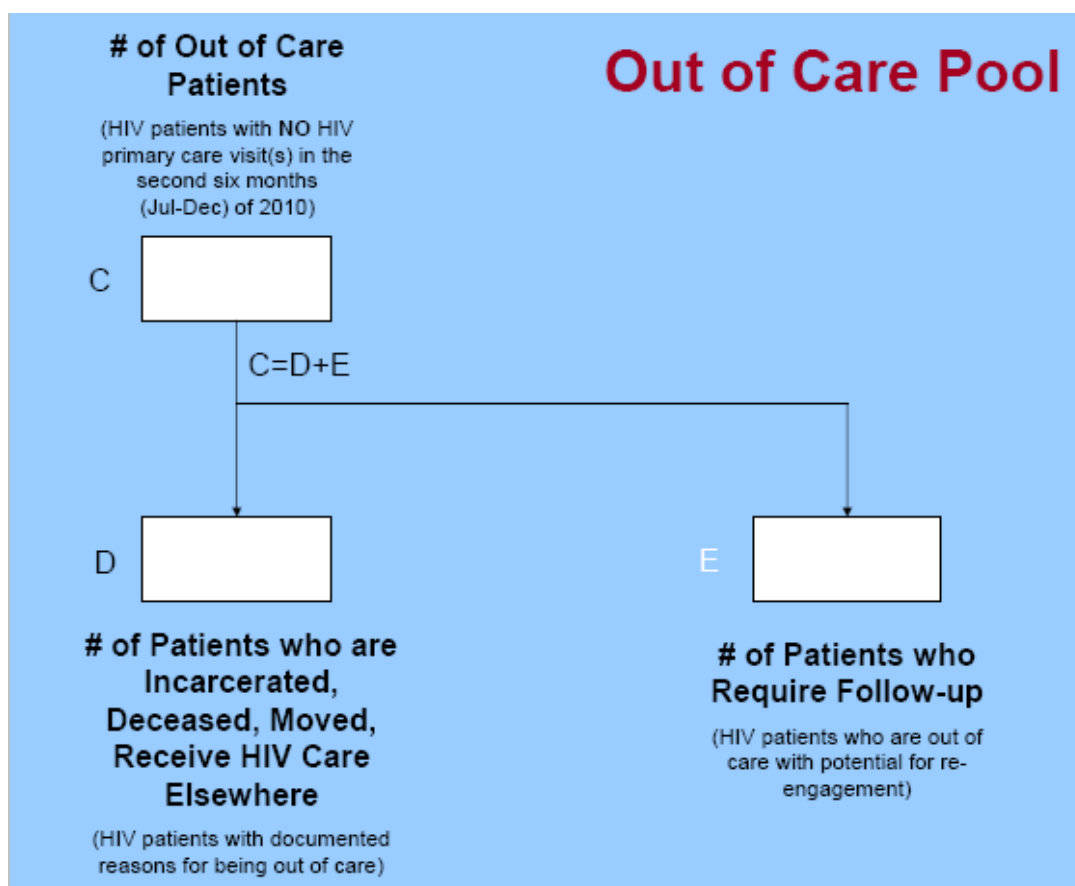
5. From the list of ‘Out of Care Patients’ count the number of patients who fit into the following categories, and enter them in to their appropriate fields:
  - Incarcerated (must be currently incarcerated for a period of at least 3 months, and must not be known to be scheduled for release in jurisdiction in period of Jul 1, 2010 – Dec 31, 2010) (**F**)
  - Deceased (**G**)
  - Moved (based on a change of permanent address to a location outside of your organization’s reach), or receives HIV care from another site (during the second six month period) (**H**)
6. Add the numbers in **F**, **G**, and **H**. Enter this number into the ‘# of Patients who are Incarcerated, Deceased, Moved, Receive HIV Care Elsewhere’ field (**D**)





### Step C: Determine Your Retention Follow-up Pool

- From the list of 'Out of Care Patients' (C) count the number of patients remaining after removing patients who counted towards the '# of Patients who are Incarcerated, Deceased, Moved, Receive HIV Care Elsewhere' field (D) and enter this number into the '# of Patients who Require Follow-up' field (E)





8. From the 'Patients who Require Follow-up' count the number of patients who are not in care for known reasons for being out of care other than those incarcerated, deceased, moved, receive HIV care elsewhere' and enter this number into the '# of Patients with Known Reasons for Being Out of Care Other than those Incarcerated, Deceased, Moved, Receive HIV Care Elsewhere' field (**J**)

(Example of a 'Known Addressable Reason': Patient has in the past, communicated problems with acquiring effective transportation to and from site of care.)

9. From the 'Patients who Require Follow-up' count the number of patients who are not in care for unknown reasons and enter this number into the '# of Patients with Unknown Reasons for Being Out of Care' (**I**)

10. Ensure that the number of patients in **I** and **J** add up to **E**

