Monthly Caseload Management Calendar for WIC Coordinators (Full-time)

Mon	Tue	Wed	Thu	Fri
		1	2	3
		Review **Show Rate Monthly Individual** (8) report for last month	**Caseload Reports** available (1) Share caseload numbers with staff.	Print & mail **Term** letters for <u>categorically</u> ineligibles (3)
6	7	8	9	10
Check **Auto Scheduler** reports (2) & staff leave requests – adjust & apply templates for next mo. for ind. appts & classes	Look at **Unfilled Appt Report** (2) & cp. to **Proj. Ind. Requests Report** to be sure adequate appt. slots – adjust sched if needed	Set up auto scheduler run requests	Check **Auto Scheduler Unable to Sched.** report and make any corrections (4) - can re-run auto sched if needed.	Review Outreach plan. Print and mail auto term/ineligible letters weekly or monthly.
13	14	15	16	17
Print and mail **appt. notices** for next month (can do all or 1st half of month or weekly)	Run **Rx/HP needed, Register of Clients with Eligibility Pending**, and **Clients with No FIs Reports** – contact clients as needed (5)	Run **End Cert Client Register–No Appt Report–** check for clients whose cert ends this month but have no appts. scheduled (6)	Check appt. at main & satellite sites with **Unfilled Appt. &"Selected Group NE Class"(**9) reports – need to adjust or move staff or NE classes?	Review **Transaction Report** for current month & cp. to same period last month – look for trending & identify any concerns (7)
20	21	22	23	24
Caseload numbers update in End of Day	Re-run **Clients with No FIs** report to see if any names left on list	Run "**Group Appt Sign Up List**" for past class dates this month & contact "no shows"		
27	28	29	30	31
Review **Show Rate Monthly 2nd NE** Report to identify trends	Re-run **Client with No FIs** report - FIs still left to issue?	Re-run **End Cert Report** to I.D. clients who will be termed at end of this month	Look at **Transaction Report** again– Look at trends for the month for recerts, news, terms	Auto -Terminations occur in TWIST the night of last day of each month.

Key Terms for Calendar:

Note: Coordinator needs to assure these tasks occur but does not need to be the one to do all of them. See "Caseload Management Reports" document for more information on how, when and why to run these reports:

(1) Caseload reports (in Ops/Management): Certified Caseload – 12 month History; Participating Caseload – 12 month History; Percentage Not Receiving FIs

(2) Appt. Scheduler Reports (In Appt. Scheduler): Projected Number of Individual Appt. Requests; Register of Clients to Schedule Manually (if not all clients are auto-scheduled); Unfilled Appointment Report by Date and Clinic; Group Appt Sign Up List

(3) Termination Notices for Auto and Manual Terms: These are kept in a .PDF file on Internet. Can view, print and mail weekly. Must do at least monthly. Go to internet site: http://famnet.hr.state.or.us and select notices to print.

(4) Auto Scheduler Unable to Schedule Report: Select run date you want to review and look at both "Unable to Sched" and "Not Processed" tabs for clients who were not scheduled. Make corrections as needed in Daily Clinic Schedule and re-run auto scheduler, or manually schedule clients who were not auto-scheduled.

(5) These reports all identify clients who are potentially eligible to receive FIs but for various reasons have not received FIs in the current month. These clients may need to be contacted to bring in required Rx's or required proofs or be scheduled for 2nd NE or FI pickup.

(6) End Cert, No Appt Report (in Client Processes): This report shows clients who have a cert end date for the current month, have not yet been recertified, and either do not have a scheduled recert appt. in TWIST or have failed a recert appt. earlier that month. This report should be run mid-month and a few days before the end of the month.

(7) Transaction Report (Ops/Mgmt): gives a 12-month history of certs, recerts, reinstates, terms, transfers and migrants. May want to run mid-month or even weekly if closely monitoring caseload.

(8) Show Rate reports: Located in Appt. Scheduler module in Outputs. Various reports on both individual and group appointment show history. Compare to previous months for assessment and planning.

(9) Selected Group NE Class: in Client processes- Outputs – Reports – Nutrition Education – Group Nutrition Education classes. Lists all scheduled GE classes for selected time period with number booked as of date report is run.