Weekly Caseload Management Schedule

Week 1:

- Review **Show Rate** reports [located in Appt. Scheduler module in Outputs: Various show rate reports on both individual and group appointment show history]. Compare to previous months for assessment and planning;
- **Caseload Reports** available on the second of each month [in Ops/Management: Certified Caseload – 12 month History; Participating Caseload – 12 month History; Percentage Not Receiving FIs]
- Share and discuss caseload numbers with staff.
- Print & mail **Term** letters for <u>categorically</u> ineligibles. These are saved to 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.
- Check **Auto Scheduler** reports [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] & staff leave requests – adjust & apply templates for next mo. for ind. appts & classes;
- Look at **Unfilled Appt Report** again & cp. to **Proj. Ind. Requests Report** to be sure adequate appt. slots – adjust schedule if needed

Week 2:

- Set up auto scheduler run requests and next day check **Auto Scheduler Unable to Sched.** report and make any corrections [To use this 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.
- Review Outreach plan.
- Print and mail auto **term/ineligible** letters weekly or monthly.
- Print and mail **appt. notices** for next month (can do all or 1st half of month or weekly)

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Week 3:

- Run **Rx/HP needed, Register of Clients with Eligibility Pending**, and **Clients with No FIs Reports** –contact clients as needed [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, required proofs, or pick up FIs from a missed 2nd NE contact, e.g.]
- Run **End Cert Client Register–No Appt Report–** check for clients whose cert ends this month but have no appts. scheduled [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.
- Run "**Selected Group NE Class**" report to review class sign-up and adjust class size, number of classes and staff as needed.
- Check appointment availability at main and satellite sites with **Unfilled Appt. Report** – need to adjust or move staff?
- Review **Transaction Report** for current month & cp. to same period last month – look for trending & identify any concerns (This report is in 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.
- Caseload numbers update in End of Day on the 20th

Week 4:

- Review **Show Rate Monthly 2nd NE** Report to identify trends
- Re-run **Client with No FIs** report - FIs still left to pick-up or mail?
- 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.