There are several useful reports in the KWIC system that can help Local Agency staff understand and organize their daily, weekly, and monthly happenings in the WIC program. This manual will provide guidance on reports to run in KWIC every month to make sure that your WIC program is operating as smoothly and efficiently as possible. Larger agencies may need to run some of the following reports more frequently than once a month. The following list of reports is not intended to be all-inclusive but should provide a good foundation for month end procedures.
# End of Month Reports

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<td>33</td>
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</tbody>
</table>
Clinic Admin procedures to complete in Client Services

1. No Show Management

Description

The No Show Management window is used to document that a client did not show up for a scheduled appointment and to print No Show letters. **This procedure should be run at least weekly or after every clinic day.**

Tab List

There are two tabs in the No Show Management window:

- Appointments
- Print Letters

Outcomes

- Marking the Change to No Show? field will update the outcome of the selected appointment to No Show.
- When a No Show letter is printed, a No Show Letter contact is documented for every client in the group included on the letter.

1.1 No Show Management – Mark Appointment Outcomes Tab

Description

The Mark Appointment Outcomes tab is used to document a No Show outcome for any appointments without an outcome.

Data Display Description

This tab consists of two sections: search criteria and list box. The first section contains search fields for Clinic and No Show Date. The second section contains a list box that returns all appointments scheduled on the Appointment Book tab that fit the selected search criteria.
Display Rules & Exceptions

- The “Change to No Show?” checkbox is used to indicate which records should be processed.
- All fields in the appointment list are read-only except the Change to No Show? field.
- The Change to No Show? field is checked by default.
- The Reprint button reprints the No Show Letters for the selected date that have been previously printed.
- The Update Appointments button saves the information to the database and updates the appointment outcomes; a confirmation message, “Checked appointments changed to no-show!” displays.
- The Print button prints the list of No-Show candidates.
1.2 No Show Management – Print No Show Letters Tab

Description

The Print No Show Letters tab is used to generate No Show Letters for clients who missed their scheduled appointments.

Data Display Description

This tab has two sections: instructions and appointments list. The first section contains instructions on how to use the tab, a print button and selection buttons. The second section contains a list of groups with appointment outcomes of No Show.

Report Functionality – Why should I run No Show Management?

All clinics should complete No Show Management at the end of every week with WIC appointments or at the end of every clinic day. This will let you stay ahead of the clients that missed their appointments and will let you send them a letter or a reminder call to reschedule an appointment. Lowering your No Show rates will raise your participation rates which could impact your funding level.

---

### Groups With No Show Appointments

<table>
<thead>
<tr>
<th>Role Description</th>
<th>Time</th>
<th>Primary Caregiver</th>
<th>Print Letter?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>01:45 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>04:30 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>06:30 am</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>04:45 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>10:30 am</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>11:45 am</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>01:15 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>02:00 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>03:15 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>03:45 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>04:15 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>03:30 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>06:00 pm</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Display Rules & Exceptions

- The “Print Letter?” checkbox is used to indicate which records should be processed.
- Appointments with an outcome of No Show on the selected day are displayed. The outcomes may have been set manually in the Appointment Book or on the Appointments tab.
- All fields in the list are read-only except the Print Letter field.
- The Print Letter checkbox is automatically checked when the list is retrieved, but may be deselected.
- No Show letters are printed by group. The Caregiver will receive one letter for all group members with no show appointments on this day. Therefore, there is only one row for each group, sorted by Primary Caregiver.
- When the Print No Show Letters button is clicked, a confirmation message appears with the option to proceed (OK) or cancel.
- A no show letter is generated for all client groups with Print Letter selected. The no show letter will be printed in Spanish if Print Letters in Spanish is checked on the Demographics Tab.
Reports to run in Local Vendor Management

Reports Menu
1. Vendor Complaints Pending Report

Report Description

The Vendor Complaints Pending Report window is used to generate and print the Vendor Complaints Pending Report. This report lists all complaints against Vendors with no follow-up received before the date selected, sorted by Vendor and complaint date. The report may be run for a specific Vendor or all Vendors. Leaving the Vendor box blank returns all Vendors with complaints pending. This report runs for a selected date.

Selection Criteria

- The Report Complaints Pending On date defaults to today’s date.
- If no Vendor is selected the report runs for all Vendors.
- If a specific Vendor is selected the text “Listing Complaints Pending on (report date) for Vendor = (selected Vendor)” appears in title.

Mandatory Selection Fields

Report Complaints Pending On (date)
This Report Contains

- Pending Complaints Against Vendors
- Complaint Date
- Vendor Name, Street and Mailing Addresses, and Phone Number
- Complaint Submitted By/Site
- Note indicator
- Complaint Nature(s)

Display Fields

- Listing Complaints Pending on (report date) for Vendor = (selected Vendor)” – Title appears when specific vendor is selected.
- Complaint Date – The date of the complaint as user entered in the Vendor Complaint Recording window.
- Vendor Name/Addresses/Phone – The name, street (S) address, mailing (M) address, and phone number of the selected vendor.
- Submitted By/Site – Identifies who submitted the complaint: Client/Caregiver, Clinic Staff, Vendor, or Other (data field provided to input specific information, i.e. name of person).
- Note Indicator – An “X” will appear in this column if there is a note associated with a specific Complaint Nature(s).
- Complaint Nature(s) – The specific complaint(s) made against the vendor.

Report Functionality – Why should I run the Vendor Complaints Pending report?

This report will show you if you have any complaints in the KWIC system related to a vendor that have not been resolved. You can then go into complaints management and select a resolution for the complaint.
<table>
<thead>
<tr>
<th>Complaint Date</th>
<th>Vendor Name / Addresses / Phone</th>
<th>Submitted By / Site</th>
<th>Note</th>
<th>Complainant Nature(s)</th>
</tr>
</thead>
</table>
| 09/27/2009     | Dillon Store # 30 (5) 7707 S Central
Wichita, KS 67208-2100 (M) | Cashier / Caregiver
Stanley WIC Clinic-Sedgwick Co
(316) 651-2700 |    | Cashier would not allow product |
| 02/20/2009     | Dillon Store # 33 (5) 4747 E Broadway
Wichita, KS 67216-1738 (M) | Client / Caregiver
Rene County WIC Clinic
(328) 694-2000 | X  | Cashier would not allow product
Would not allow Jujube juice shelf concentrate. When given the food list, she said it wasn't good because this Oct 2007 and the new one began Jan 2008. She wished she had a food list |
| 04/17/2009     | Dillon Store # 25 (5) 3211 E Seneca
Wichita, KS 67217-3348 (M) | Cashier / Caregiver
Colvin WIC Clinic-Sedgwick Co
(316) 680-7444 |    | Cashier will not allow authorized food item |
| 10/02/2009     | Wal*Mart Supercenter # 1221 (5) 6110 W Kellogg
Wichita, KS 67209-0000 (M) | Client / Caregiver
Main WIC Clinic-Sedgwick Co
(316) 650-7444 |    | Cashier will not allow authorized food item |
| 03/25/2010     | Wal*Mart Supercenter # 1221 (5) 6110 W Kellogg
Wichita, KS 67203-0000 | Client / Caregiver
Main WIC Clinic-Sedgwick Co
(316) 650-7444 |    |  |
Reports to run in Client Services

Reports Menu
1. Clinic Actions Report

Report Description

The Clinic Actions Report provides information about the services being provided for a selected timeframe. All client contact types (Clinic Actions) are listed, with the number and percent of clients in each client category who received each contact, and the total clients for each contact type. This report runs for a clinic, agency, or custom cluster for a selected range of months. Users determine whether the report summarizes the data for the selected months or averages the data for the selected months.

Selection Criteria

This report is generated by selecting a Clinic or Agency and From/To Dates. Users also select whether the data is summarized or averaged.

Selecting “Summarize Month” will sum up all of the totals for each category listed for the date range selected.

Selecting “Average Month” will give you the average number for each category listed for the date range selected.

Mandatory Selection Fields

- Select Clinic
- From Date
This Report Contains

- Count and percent of clients by category for:
  - All Clinic Actions provided during the report period (client contact types)
  - Total and percent of participating clients for each clinic action

Report Functionality – why should I run this report monthly?
This report will detail key contacts you had with clients during the report month. It will allow you to monitor your actions to see if you are missing certain components of a WIC certification. It will also allow you to see how many certifications and mid certifications you had during the report month.

### Kansas WIC Program
**Clinic Actions Report**
Sedgwick County WIC Agency
**For May 2011**

### Program Contact Person
- [Name]
- [Title]

### Contact Information
- [Phone]
- [Email]

### Report Image

---

**This Report Contains**

- Count and percent of clients by category for:
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### Kent County WIC Program
**Clinic Actions Report**
Sedgwick County WIC Agency
**For May 2011**

### Program Contact Person
- [Name]
- [Title]

### Contact Information
- [Phone]
- [Email]

### Report Image

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Sedgwick County WIC Agency
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### Kent County WIC Program
**Clinic Actions Report**
Sedgwick County WIC Agency
**For May 2011**

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### Contact Information
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**Clinic Actions Report**
Sedgwick County WIC Agency
**For May 2011**

### Program Contact Person
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**Clinic Actions Report**
Sedgwick County WIC Agency
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**Clinic Actions Report**
Sedgwick County WIC Agency
**For May 2011**

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- [Title]

### Contact Information
- [Phone]
- [Email]

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### Kent County WIC Program
**Clinic Actions Report**
Sedgwick County WIC Agency
**For May 2011**

### Program Contact Person
- [Name]
- [Title]

### Contact Information
- [Phone]
- [Email]

### Report Image
2. No Show and No Rescheduled Appointment Report

Report Description

The No Show and No Rescheduled Appointment Report lists all clients that missed an appointment on a selected day or date range that has not been rescheduled by the date the report was run. For all appointments missed during the selected period, the caregiver name, address and phone number, the client name(s), category, missed appointment date and time, appointment type and clinic are listed. The report is sorted alphabetically by caregiver last name.

Selection Criteria

This report is generated by entering From and To dates and selecting a Clinic.

Mandatory Selection Fields

- From Date

![No Show and No Rescheduled Appointment Report]

<table>
<thead>
<tr>
<th>Caregiver</th>
<th>Client</th>
<th>Category</th>
<th>Missed Appointment</th>
<th>Type Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>WDC PP</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
<tr>
<td>WDC I</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>RD</td>
</tr>
<tr>
<td>WDC C</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
<tr>
<td>WDC PG</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
<tr>
<td>WDC BF</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
<tr>
<td>WDC C</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
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</tr>
<tr>
<td>WDC I</td>
<td></td>
<td></td>
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<td>WDC PG</td>
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<tr>
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<tr>
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<td></td>
<td></td>
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</tr>
<tr>
<td>WDC PG</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
<tr>
<td>WDC BF</td>
<td></td>
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<tr>
<td>WDC C</td>
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<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
<tr>
<td>WDC PG</td>
<td></td>
<td></td>
<td>06/22/2011 10:30 am</td>
<td>FAU</td>
</tr>
</tbody>
</table>

Kansas WIC Program
No Show and No Rescheduled Appointment Report
Missed Appointments between 06-01-2011 and 06-27-2011
Main WIC Clinic-Sedgwick Co
This Report Contains

- Caregiver Name, Address, and Phone Number
- Client Names
- Client Category
- Time of missed appointments
- Type of appointments
- Clinic where appointments were scheduled

Report Functionality – Why should I run this report monthly?

The report will provide you with information on the clients that have missed their appointments and do not have a rescheduled appointment. The list can be used to contact clients to get them a new appointment. This will help lower your no show rates that will in turn raise your participation, which could in turn help raise your funding level. This report may need to be run weekly for larger agencies.

Report Image

<table>
<thead>
<tr>
<th>Caregiver</th>
<th>Client</th>
<th>Missed Appointment</th>
<th>Type Clinic</th>
</tr>
</thead>
<tbody>
<tr>
<td>WIC PP</td>
<td></td>
<td>06/20/2011 10:30 am</td>
<td>FAU Main WIC Clinic-Sedgwick Co</td>
</tr>
<tr>
<td>WIC I</td>
<td></td>
<td>06/20/2011 10:30 am</td>
<td>RC</td>
</tr>
<tr>
<td>WIC C</td>
<td></td>
<td>06/28/2011 02:00 pm</td>
<td>FAU Main WIC Clinic-Sedgwick Co</td>
</tr>
<tr>
<td>WIC PO</td>
<td></td>
<td>06/06/2011 02:00 pm</td>
<td>RC</td>
</tr>
<tr>
<td>WIC BF</td>
<td></td>
<td>06/27/2011 10:16 am</td>
<td>CP</td>
</tr>
<tr>
<td>WIC C</td>
<td></td>
<td>06/27/2011 10:16 am</td>
<td>RC</td>
</tr>
<tr>
<td>WIC I</td>
<td></td>
<td>06/27/2011 10:16 am</td>
<td>CP</td>
</tr>
<tr>
<td>WIC PP</td>
<td></td>
<td>06/24/2011 09:45 am</td>
<td>CP</td>
</tr>
<tr>
<td>WIC C</td>
<td></td>
<td>06/24/2011 09:45 am</td>
<td>RC</td>
</tr>
<tr>
<td>WIC I</td>
<td></td>
<td>06/21/2011 09:00 am</td>
<td>NE= Main WIC Clinic-Sedgwick Co</td>
</tr>
<tr>
<td>WIC C</td>
<td></td>
<td>06/21/2011 09:00 am</td>
<td>NE= Main WIC Clinic-Sedgwick Co</td>
</tr>
<tr>
<td>WIC I</td>
<td></td>
<td>06/21/2011 09:00 am</td>
<td>NE= Main WIC Clinic-Sedgwick Co</td>
</tr>
</tbody>
</table>
3. Potential Dual Participants Report

Report Description

The Potential Dual Participants Report displays a list of clients and matches with a Dual Participation Status of “unknown”.

Selection Criteria

None

Mandatory Selection Fields

None

This Report Contains

- For clients with a dual participation status of “Unknown”:
  - Test Date
  - Client ID
  - Client Name
• Gender
• Date of Birth
• Caregiver
• Clinic

Display Fields

• Test Date – date the unknown status was identified in Dual Participation Test
• Client ID – client’s ID number
• Client Name – name of client
• Gender – client’s gender (male, female)
• Date of Birth – client’s birth date
• Matched Client ID – ID number of the matching client
• Client Name – name of the matching client
• Date of Birth – birth date of matching client
• Caregiver Name – primary caregiver’s name for each client
• Served at – WIC Clinic name and address for each client
• Match by – Staff person who performed the Dual Participation Test
• at – WIC Clinic where the Dual Participation Test was run
• Note – Notes made for the Dual Participation Test resolution

Report Functionality – Why should I run this report monthly?

This report will show you if you have any unresolved potential dual participants on your program. Ideally, this report would always be blank, because staff has resolved any issues as they occur. If there is a client on the report then you will need to resolve the situation immediately. Clients are not allowed to be on the WIC program in more than one location at a time. If a name does appear on the report it will need to be determined if the individual is actually a dual participant.
Report Image

<table>
<thead>
<tr>
<th>Test Date</th>
<th>Client ID</th>
<th>Client Name</th>
<th>Date of Birth</th>
<th>Matched Client ID</th>
<th>Client Name</th>
<th>Date of Birth</th>
</tr>
</thead>
</table>

Served at: Stanley WIC Clinic-Sedgwick Co
Street Address
Mailing Address

Note: already been resolved.
4. Processing Standards Detail Report

Report Description

The Processing Standards Detail Report displays a list of appointments that are outside of the federal Processing Standards, the client(s) the appointment is for, and the reason the appointment was scheduled outside of processing standards.

Selection Criteria

Clinic
Time frame (dates From and To)
Reason Outside Processing Standards

Mandatory Selection Fields

Clinic
From (date)

<table>
<thead>
<tr>
<th>Appointment Date/Time</th>
<th>Client Name</th>
<th>Client ID</th>
<th>Reason Scheduled Outside of Processing Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/07/2011 8:00am</td>
<td></td>
<td></td>
<td>Appointment within processing standards not available</td>
</tr>
</tbody>
</table>
This Report Contains

A list of clients scheduled appointments during the report period that are outside of processing standards, and the reason the appointment was scheduled outside of processing standards.

Display Fields

- Appointment Date and Time
- Caregiver
- Client Name(s)
- Client ID
- Reason Scheduled Outside of Processing Standards

Report Functionality – Why should I run this report monthly?

This report allows you to select a timeframe and generate a list of clients that had an appointment outside of processing standards and the reason why. Running this report on a monthly or even weekly basis will show you whether or not your WIC clinic is within processing standards. Then you can determine if more staff is needed or just more staff time to get within processing standards.

Report Image

![Report Image]
5. Certification Ending Report

Report Description

The Certifications Ending Report contains a list of all clients whose certifications end this month, and do not have a future appointment scheduled. This report allows clinic staff to ensure that clients are not falling through the cracks by reporting on the previous month and to plan for the upcoming month. This report runs for a clinic, for the previous month and the current month, grouped by month.

The report also includes clients who may not be eligible for recertification like PP women and Children who turn five during the report month, so you might have to sort through the report to see which clients are eligible for recertification.

Selection Criteria

This report is generated by selecting a Month and a Year. The report defaults to the current month and year.

Mandatory Selection Fields

- Month
- Year

<table>
<thead>
<tr>
<th>Caregiver</th>
<th>Client</th>
<th>Category</th>
<th>Most Recent Completed Appointment</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>C</td>
<td>06/27/2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>I</td>
<td>01/03/2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>C</td>
<td>03/14/2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>I</td>
<td>12/16/2010</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>PG</td>
<td>10/14/2010</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>I</td>
<td>02/18/2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>C</td>
<td>03/21/2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>PP</td>
<td>03/26/2011</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>I</td>
<td>03/24/2011</td>
<td></td>
</tr>
</tbody>
</table>
This Report Contains

- For certifications that end during the report period:
  - Caregiver
  - Client
  - Category
  - Most Recent Completed Appointment
  - Phone Number
  - Notes

Display Fields

- Caregiver – Caregiver Name
- Client – Client Name
- Category – Client Category
- Most Recent Completed Appointment – The most recent appointment completed
- Phone Number – The client’s phone number
- Notes - The printed report has an area for handwritten notes.

Report Functionality – Why should I run this report monthly?

This report will list the clients whose certification is ending in the month of the report. It will show you when the client’s last completed appointment was. You can then determine if the client has been recertified during the month of the report or if the client needs to be recertified so there is not a break in service.
<table>
<thead>
<tr>
<th>Caregiver</th>
<th>Client</th>
<th>Category</th>
<th>Appointment</th>
<th>Telephone</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>06/27/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>01/02/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>03/14/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>12/16/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PG</td>
<td>10/14/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>02/19/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>03/21/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PP</td>
<td>03/28/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>03/24/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>07/01/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>03/09/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>04/13/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PG</td>
<td>11/11/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>12/30/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>05/06/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PP</td>
<td>03/03/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PP</td>
<td>05/05/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PP</td>
<td>12/09/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>12/14/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>06/14/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
6. Participation Reports

The following Participation Reports located in the reports menu of Client Services:

- Caseload Management
- Legacy Caseload Management Report
- Participation Forecast Summary
- Federal Ethnic/Race List Report
- Participation by Age Report
- Participation by Priority Report
6.1 Participation Reports – Caseload Management

Report Description

Local Agencies are contracted to serve an authorized participating caseload. The Caseload Management Report helps Local Agency staff stay apprised of actual caseload, and evaluate possible caseload allocation changes.

The Caseload Management Report displays the number of clients by category who were enrolled, received checks, were breastfeeding infants without a food package, or were participating, and calculates the number and percent of clients enrolled but not participating.

Selection Criteria

This report is generated by selecting Clinic as well as a summarized Start Date/Run Date.

Mandatory Selection Fields

- Select Clinic.
- Select Start Date/Run Date
This Report Contains

Rows displayed on the report include:

All Client Categories

- Women
  - Pregnant
  - Fully Breastfeeding
  - Partially Breastfeeding
  - Postpartum
- Infants
  - Fully Breastfed
  - Partially Breastfed
  - Fully Formula Fed
- Children

Total rows for each Women and Infants

- Total Women – calculated by adding columns Pregnant, Fully Breastfeeding, Partially Breastfeeding, and Postpartum.
- Total Infants – calculated by adding columns Fully Breastfed, Partially Breastfed, and Fully Formula fed.

Total row for all client categories of Women, Infants and Children

- Total – calculated by adding Total Women, Total Infant, and Children rows in every column
- Percent (%) for each category – calculated by dividing the category count by the total participation for that category.

Columns displayed on the report include:

- Number of clients that Received Checks by Category
- Percentage of Total clients that Received Checks by Category
- Number of Breastfeeding women with no checks (Partially BF/ no checks)
- Number of Breastfeeding Infants With No Checks (Fully BF Infant/ no checks.)
- Number of clients Participating, calculated by adding Received Checks and Breastfeeding Infants and Women With No Checks
- Percentage of clients participating by category
- Number of clients Enrolled but Not Participating (Not Participating), calculated by subtracting the number of clients Participating from the number of clients Enrolled.

- % Enrolled not Participating

- Total number of clients enrolled by category

- Percentage of clients enrolled by category

Report Functionality – Why should I run this report monthly?

Running this report on a monthly basis will allow you to track your participation on a monthly basis to see if you are gaining or losing participants. A reduction in participation will have an effect on your funding and will determine your outreach activities.

Report Image

<table>
<thead>
<tr>
<th></th>
<th>Participating</th>
<th>Enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>% of Total</td>
</tr>
<tr>
<td></td>
<td>Participating</td>
<td>Not Participating</td>
</tr>
<tr>
<td>Women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pregnant</td>
<td>1,751</td>
<td>11.7%</td>
</tr>
<tr>
<td>Fully Breastfeeding</td>
<td>347</td>
<td>2.3%</td>
</tr>
<tr>
<td>Partially Breastfeeding</td>
<td>365</td>
<td>2.3%</td>
</tr>
<tr>
<td>Postpartum</td>
<td>1,094</td>
<td>7.1%</td>
</tr>
<tr>
<td>Total Women</td>
<td>2,597</td>
<td>17.8%</td>
</tr>
<tr>
<td>Infants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fully Breastfeeding</td>
<td>122</td>
<td>8.1%</td>
</tr>
<tr>
<td>Partially Breastfeeding</td>
<td>391</td>
<td>2.6%</td>
</tr>
<tr>
<td>Fully Breastfeeding</td>
<td>3,144</td>
<td>20.5%</td>
</tr>
<tr>
<td>Total Infants</td>
<td>3,667</td>
<td>24.4%</td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7,908</td>
<td>52.6%</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>15,017</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Report Date: 06/27/2011 15:19 am

- Percentages are calculated vertically for each column heading
- Received Checks: Clients that received checks
- No Checks: Breastfeeding women and infants that did not receive checks
- Formula: Clients that were coded as receiving formula from another program
- Other Pgm: Clients that were not coded as receiving formula from another program
- Total Participation: (Received Checks + No Checks + Formula + Other Pgm)
- Net Participating: Clients that are enrolled but did not receive benefits
- Total Enrolled: All enrolled clients
7. **WIC Client List for Referral to CSFP Report**

For WIC clinics located within a Commodity Supplemental Food Program (CSFP) service area periodically generate and mail this WIC Client List for Referral to CSFP report.

**Description**

The WIC Client List for CSFP Report is used to generate and print a report at the clinic level to be provided to the CSFP Program. This report contains all clients whose WIC Certification has ended, but who are categorically eligible to receive services from the CSFP Program as well as all clients who received a referral to CSFP during the selected month.

**Selection Criteria**

This report is generated for a selected month and year.

**Mandatory Selection Fields**

- Report Month
- Report Year

---

![Image of WIC Client List for CSFP Report](image-url)
This Report Contains

There are three sections in this report:

1. The first section contains all breastfeeding or postpartum clients with a termination date in the selected months that are within 1 year of their delivery date.

2. The second section contains all children turning 5-years old during the selected month.

3. The third section contains a list of clients who received a referral to CSFP during the selected month.

Data Display Description

BF/PP Within 1 year of Delivery
- Client Name – name of BF/PP woman
- Delivery Date – Date the infant was born
- Address – address of client
- WIC Participation End Date

Children over 5 Years
- Client Name – name of the child
- DOB – Date of Birth
- Address – address of client
- WIC Participation End Date

Referred to CSFP
- Client Name – name of the child
- DOB – Date of Birth
- Address – address of client
- WIC Participation End Date

Report Functionality – Why should I run this report periodically?

Running this report will allow you to help CSFP with identifying those clients that were referred to them by WIC. It will allow you to form a business partnership with CSFP organizations within your area to help prevent dual participation between the two programs. It will give the CSFP organization an idea of how many new clients they can expect to receive.
<table>
<thead>
<tr>
<th>Client</th>
<th>Birth Date</th>
<th>Delivery Date</th>
<th>Termination Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8. Caregiver Complaints Pending Report

Report Description

The Caregiver Complaints Pending report contains a list of all the caregiver complaints that are pending and have not been resolved. An action taken against the complaint has not been entered for any complaint that appears on this report. To resolve complaints on this report you must enter an action taken in Manage Complaint – About a Caregiver. This is managed under the Clinic Admin menu.

Selection Criteria

This report is generated by selecting the Generate button

Mandatory Selection Fields

None

This Report Contains

- Complaints against caregivers that have not been resolved
- The Date the complaint was entered in to KWIC
- The Caregiver’s Name
- Who it was submitted by
• Whether there was a note entered
• The Nature of the complaint

Report Functionality – Why should I run this report monthly?

This report will show you if you have any complaints in the KWIC system against a
caregiver that have not had an action taken entered thus leaving them unresolved. If you
have information that appears on this report, you can go into the Clinic Admin menu to
Manage Complaints – About a Caregiver and enter an action taken to close the complaint.
This report only needs to be run periodically.

Report Image

<table>
<thead>
<tr>
<th>Complaint Date</th>
<th>Caregiver Name</th>
<th>Submitted By / Site</th>
<th>Note</th>
<th>Complaint Nature(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/17/2004</td>
<td>Clinic Staff</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td>X</td>
<td>Verbal Abuse at clinic</td>
</tr>
<tr>
<td>10/22/2009</td>
<td>Clinic Staff</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td></td>
<td>Verbal Abuse at clinic</td>
</tr>
<tr>
<td>09/21/2010</td>
<td>Other</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td></td>
<td>Substituted unauthorized foods for WIC foods</td>
</tr>
<tr>
<td>06/18/2010</td>
<td>Clinic Staff</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td></td>
<td>Verbal Abuse at clinic</td>
</tr>
<tr>
<td>12/23/2010</td>
<td>Client / Caregiver</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td>X</td>
<td>Verbal Abuse at clinic</td>
</tr>
<tr>
<td>04/12/2010</td>
<td>Clinic Staff</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td></td>
<td>Failure to return a multi-use electric breastpump</td>
</tr>
<tr>
<td>12/13/2007</td>
<td>Clinic Staff</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td>X</td>
<td>Verbal Abuse at clinic</td>
</tr>
<tr>
<td>08/11/2010</td>
<td>Client / Caregiver</td>
<td>Main WIC Clinic-Sedgwick Co 315 / 860-7444</td>
<td>Substituted unauthorized foods for WIC foods</td>
<td>Verbal Abuse at clinic, Verbal Abuse at clinic</td>
</tr>
</tbody>
</table>
9. Staff Complaints Pending Report

Report Description

The Staff Complaints Pending report contains a list of all the staff complaints that are pending and have not been resolved. An action taken against the complaint has not been entered for any complaint that appears on this report. To resolve complaints on this report you must enter an action taken in Manage Complaint – About a Staff Person. This is managed under the Clinic Admin menu.

Selection Criteria

This report is generated by selecting the Generate button

Mandatory Selection Fields

None

This Report Contains

- Complaints against staff that have not been resolved
- The Date the complaint was entered in to KWIC
- The Staff Person’s Name
- Who the complaint was recorded by
- Whether there was a note entered
The Nature of the complaint

Report Functionality – Why should I run this report monthly?

This report will show you if you have any complaints in the KWIC system against a staff person that have not had an action taken entered thus leaving them unresolved. If you have information that appears on this report, you can go into the Clinic Admin menu to Manage Complaints – About a Staff Person and enter an action taken to close the complaint. This report only needs to be run periodically.

Report Image