



End of Month Procedures & More

August

2011

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.

**A Guide to
End of Month
Reports and
Procedures
to Run in
KWIC**

End of Month Reports

Table of Contents

Clinic Admin procedures to complete in Client Services.....	3
1. No Show Management.....	3
1.1 No Show Management – Mark Appointment Outcomes Tab.....	3
1.2 No Show Management – Print No Show Letters Tab	5
Reports to run in Local Vendor Management.....	7
1. Vendor Complaints Pending Report.....	8
Reports to run in Client Services	11
1. Clinic Actions Report	12
2. No Show and No Rescheduled Appointment Report.....	14
3. Potential Dual Participants Report	16
4. Processing Standards Detail Report	19
5. Certification Ending Report	21
6. Participation Reports	24
6.1 Participation Reports – Caseload Management.....	25
7. WIC Client List for Referral to CSFP Report.....	28
8. Caregiver Complaints Pending Report.....	31
9. Staff Complaints Pending Report	33

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.

Client Services 14.10.14 Seward County WIC Clinic

File Edit Services Client Check Issuance Clinic Admin Utilities Reports Window Help

No Show Management

Appointments Print Letters

Clinic Seward County WIC Clinic

No Show Date 06/29/2011

Find Reprint

Reset Update Appointments

Enter the Site and Date, then press Find to display all appointments with no outcome.

Client Appointments With No Outcome

Seward County WIC Clinic
06/29/2011

Page 1 of 2
06/29/2011 10:37 am

Print

Primary Caregiver	Client	Appt. Time	Type	Role	Change to No Show?
		01:45 pm	CP		<input checked="" type="checkbox"/>
		01:45 pm	CP		<input checked="" type="checkbox"/>
		01:45 pm	CP		<input checked="" type="checkbox"/>
		04:30 pm	NE+		<input checked="" type="checkbox"/>
		08:30 am	CP		<input checked="" type="checkbox"/>
		08:30 am	CP		<input checked="" type="checkbox"/>
		08:30 am	CP		<input checked="" type="checkbox"/>
		04:45 pm	NE+		<input checked="" type="checkbox"/>
		04:45 pm	NE+		<input checked="" type="checkbox"/>
		10:30 am	NC		<input checked="" type="checkbox"/>
		11:45 am	RC		<input checked="" type="checkbox"/>
		11:45 am	RC		<input checked="" type="checkbox"/>
		01:15 pm	RC		<input checked="" type="checkbox"/>
		02:00 pm	RC		<input checked="" type="checkbox"/>
		02:00 pm	RC		<input checked="" type="checkbox"/>
		03:15 pm	RC		<input checked="" type="checkbox"/>

***Note the caregiver and client information has been erased from all report images for privacy reasons**

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.

Client Services 14.10.14 Seward County WIC Clinic

File Edit Services Client Check Issuance Clinic Admin Utilities Reports Window Help

No Show Management

Appointments Print Letters

1. Click the Print Letter box to cancel letter printing for the group.
2. Press the Print No Show Letters button.

Print No Show Letters
Select All Clear All

Groups With No Show Appointments

Seward County WIC Clinic
06/29/2011

Page 1 of 1
06/29/2011 10:40 am

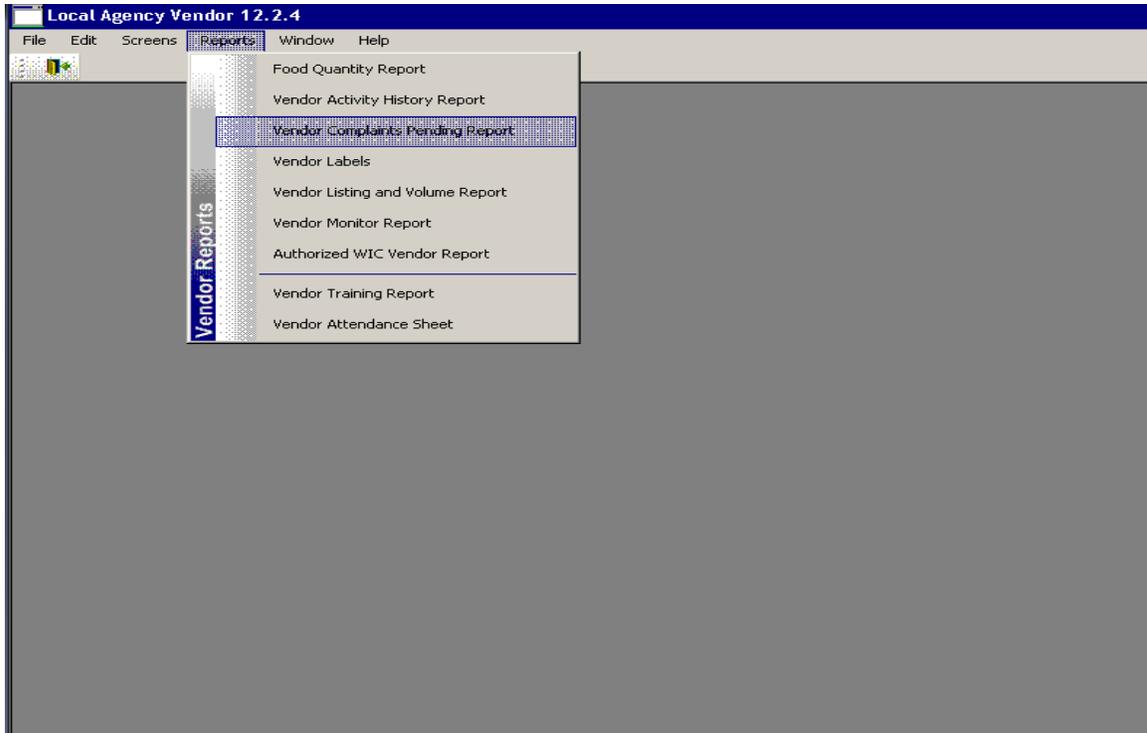
Role Description	Time	Primary Caregiver	Print Letter?
	01:45 pm		<input checked="" type="checkbox"/>
	04:30 pm		<input checked="" type="checkbox"/>
	08:30 am		<input checked="" type="checkbox"/>
	04:45 pm		<input checked="" type="checkbox"/>
	10:30 am		<input checked="" type="checkbox"/>
	11:45 am		<input checked="" type="checkbox"/>
	01:15 pm		<input checked="" type="checkbox"/>
	02:00 pm		<input checked="" type="checkbox"/>
	03:15 pm		<input checked="" type="checkbox"/>
	03:45 pm		<input checked="" type="checkbox"/>
	04:15 pm		<input checked="" type="checkbox"/>
	03:30 pm		<input checked="" type="checkbox"/>
	05:00 pm		<input checked="" type="checkbox"/>

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)

Complaint Date	Vendor Name / Addresses / Phone	Submitted By / Site	Note	Complaint Nature(s)
09/27/2006	Dillion Store # 20 (S) 7707 E Central Wichita, KS 67206-2100 (M) 316 / 651-2700	Client / Caregiver Stanley WIC Clinic-Sedgwick Co (316) 660-7444		Cashier would not allow product
02/20/2008	Dillion Store # 33 (S) 4747 S Broadway St Wichita, KS 67216-1739 (M) 316 / 529-9030	Client / Caregiver Reno County WIC Clinic (620) 694-2900	X	Cashier would not allow product Would not allow Juicy Juice shelf concentra the food list she said it wasn't good because and the new one began Jan 2008... She wis food list.

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?

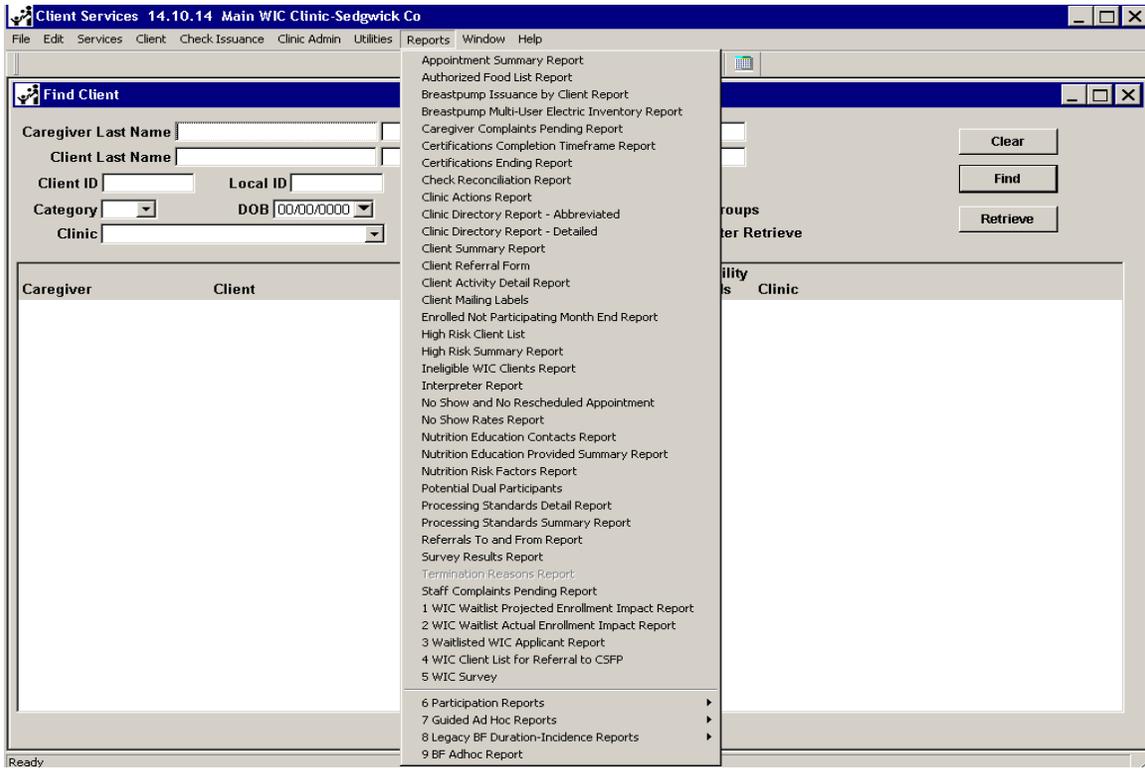
This report will show you if you have any complaints in the KWIC system related to a vendor that have not been resolved. You can then go into complaints management and select a resolution for the complaint.

Report Image

Kansas WIC Program				
Vendor Complaints Pending Report				
Listing Complaints Pending on 06/29/2011				
Complaint Date	Vendor Name / Addresses / Phone	Submitted By / Site	Note	Complaint Nature(s)
09/27/2006	Dillon Store # 20 (S) 7707 E Central Wichita, KS 67206-2100 (M) 316 / 651-2700	Client / Caregiver Stanley WIC Clinic-Sedgwick Co (316) 660-7444		Cashier would not allow product
02/20/2008	Dillon Store # 33 (S) 4747 S Broadway St Wichita, KS 67216-1739 (M) 316 / 529-9030	Client / Caregiver Reno County WIC Clinic (620) 694-2900	X	Cashier would not allow product Would not allow Juicy 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.
04/17/2008	Dillon Store # 65 (S) 3211 S Seneca St Wichita, KS 67217-3348 (M) 316 / 522-4404	Client / Caregiver Colvin WIC Clinic-Sedgwick Co (316) 660-7444		Cashier will not allow authorized food item
10/02/2009	Wal-Mart Supercenter # 1221 (S) 6110 W Kellogg Wichita, KS 67209-0000 (M) 316 / 945-2800	Client / Caregiver Main WIC Clinic-Sedgwick Co (316) 660-7444		Cashier will not allow authorized food item
03/05/2010	Wal-Mart Supercenter # 1221 (S) 6110 W Kellogg Wichita, KS 67209-0000	Client / Caregiver Main WIC Clinic-Sedgwick Co (316) 660-7444		

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

**Kansas WIC Program
Clinic Actions Report**

CLINIC ACTIONS	Preg	%	BrFeed	%	PostP	%	Total Women	%	Total Infants	%	Child Pri 3	%	Child Pri 5
----------------	------	---	--------	---	-------	---	-------------	---	---------------	---	-------------	---	-------------

Preg + BrFeed + PostP = Total Women
Children Pri 3 + Children Pri 5 + Other Children = Total Children
Total Women + Total Infants + Total Children = Total Partic

Printed 08/01/2011 12:25 pm

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.

Report Image

Kansas WIC Program																		
Clinic Actions Report																		
Sedgwick County WIC Agency For May 2011																		
CLINIC ACTIONS	Preg	%	BrFeed	%	PostP	%	Total Women	%	Total Infants	%	Child Pri 3	%	Child Pri 5	%	Total Children	%	Total Partic	%
Apply for WIC	174	24.1	22	3.0	50	6.9	246	34.0	112	15.5	122	16.9	96	13.3	365	50.5	723	0.9
Assign Food Package	811	10.4	401	5.2	631	8.1	1,843	23.7	2,047	26.3	1,930	24.8	1,695	21.8	3,901	50.1	7,791	9.6
Assign Risk Factor	657	14.0	268	5.7	323	6.9	1,248	26.6	823	17.6	1,375	29.3	1,074	22.9	2,616	55.8	4,687	5.8
Breast Pump Issuance	0	0.0	19	90.5	2	9.5	21	100.0	0	0.0	0	0.0	0	0.0	0	0.0	21	0.0
Change Birth Date	2	15.4	1	7.7	1	7.7	4	30.8	6	46.2	3	23.1	0	0.0	3	23.1	13	0.0
Change Due Date	90	100.0	0	0.0	0	0.0	90	100.0	0	0.0	0	0.0	0	0.0	0	0.0	90	0.1
Change Location	124	48.6	13	5.1	38	14.9	175	68.6	29	11.4	18	7.1	17	6.7	51	20.0	255	0.3
Change Pregnancy End Date	0	0.0	2	100.0	0	0.0	2	100.0	0	0.0	0	0.0	0	0.0	0	0.0	2	0.0
Change WIC Category PP/BF/PP	0	0.0	9	8.3	100	91.7	109	100.0	0	0.0	0	0.0	0	0.0	0	0.0	109	0.1
Check Pickup	755	11.1	340	5.0	575	8.4	1,670	24.5	1,661	24.3	1,705	25.0	1,565	22.9	3,499	51.2	6,830	8.4
Class Attended	2	50.0	2	50.0	0	0.0	4	100.0	0	0.0	0	0.0	0	0.0	0	0.0	4	0.0
Client Survey	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	1	100.0	1	0.0
Complete Mid-Certification	0	0.0	27	9.2	0	0.0	27	9.2	268	90.9	0	0.0	0	0.0	0	0.0	295	0.4
Complete WIC Certification	338	12.9	147	5.6	179	6.9	664	25.4	349	13.4	770	29.5	728	27.9	1,599	61.2	2,612	3.2
Correct Anthropometric Measure	0	0.0	0	0.0	0	0.0	0	0.0	6	100.0	0	0.0	0	0.0	0	0.0	6	0.0
Create New Client Group	1	4.0	1	4.0	5	20.0	7	28.0	5	20.0	2	8.0	8	32.0	13	52.0	25	0.0
Determined Risk Ineligible	0	0.0	0	0.0	3	100.0	3	100.0	0	0.0	0	0.0	0	0.0	0	0.0	3	0.0
Dual Participation Modification	0	0.0	0	0.0	1	100.0	1	100.0	0	0.0	0	0.0	0	0.0	0	0.0	1	0.0
Dual Participation Test	383	12.3	189	6.1	199	6.4	771	24.7	682	21.8	778	24.9	760	24.3	1,673	53.5	3,126	3.9
Health Interview	682	13.2	363	7.0	355	6.9	1,400	27.0	1,332	25.7	1,139	22.0	1,096	21.2	2,445	47.2	5,177	6.4
Identify Mother of WIC Infant	0	0.0	0	0.0	0	0.0	0	0.0	107	62.9	35	20.6	14	8.2	63	37.1	170	0.2
Immunization Status	0	0.0	0	0.0	0	0.0	0	0.0	1,150	31.3	1,200	32.7	1,158	31.6	2,519	68.7	3,669	4.5
Issue WIC Card	6	9.2	4	6.2	9	13.9	19	29.2	23	35.4	11	16.9	8	12.3	23	35.4	65	0.1
Make Referrals	943	17.9	306	5.8	483	9.2	1,732	32.8	426	8.1	1,497	28.4	1,438	27.3	3,117	59.1	5,275	6.5
Nutrition Education	1,138	11.9	637	6.6	690	7.2	2,465	25.7	1,923	20.0	2,485	25.9	2,397	25.0	5,209	54.3	9,597	11.8
Nutrition Education - RD	65	20.1	3	0.9	10	3.1	78	24.2	59	18.3	173	53.6	1	0.3	186	57.6	323	0.4
Presume Eligible	11	100.0	0	0.0	0	0.0	11	100.0	0	0.0	0	0.0	0	0.0	0	0.0	11	0.0

Preg + BrFeed + PostP = Total Women
 Children Pri 3 + Children Pri 5 + Other Children = Total Children
 Total Women + Total Infants + Total Children = Total Partic

Printed 06/27/2011 08:54 am Page 6 of 10

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

Client Services 14.10.14 Main WIC Clinic-Sedgwick Co					
File Edit Services Client Check Issuance Clinic Admin Utilities Reports Window Help					
No Show and No Rescheduled Appointment Report					
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					
Caregiver	Client	Category	Missed Appointment	Type	Clinic
		WIC C	06/20/2011 04:15 pm	NE+	Main WIC Clinic-Sedgwick Co
		WIC PP	06/22/2011 10:30 am	F/U	Main WIC Clinic-Sedgwick Co
		WIC I	06/22/2011 10:30 am	RD	
		WIC C	06/08/2011 02:00 pm	F/U	Main WIC Clinic-Sedgwick Co
		WIC PG	06/08/2011 02:00 pm	RC	
		WIC BF	06/27/2011 10:15 am	CP	Main WIC Clinic-Sedgwick Co
		WIC C	06/27/2011 10:15 am	RC	
		WIC I	06/27/2011 10:15 am	CP	
		WIC PG	06/24/2011 09:45 am	RC	Main WIC Clinic-Sedgwick Co
		WIC C	06/24/2011 09:45 am	CP	
		WIC I	06/21/2011 09:00 am	NE+	Main WIC Clinic-Sedgwick Co
		WIC C	06/21/2011 09:00 am	NC	
		WIC C	06/21/2011 09:00 am	NC	
		WIC C	06/27/2011 09:45 am	NE+	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

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				
Caregiver	Client	Category	Missed Appointment	Type Clinic
		WIC C	06/20/2011 04:15 pm	NE+ Main WIC Clinic-Sedgwick Co
		WIC PP	06/22/2011 10:30 am	F/U Main WIC Clinic-Sedgwick Co
		WIC I	06/22/2011 10:30 am	RD
		WIC C	06/08/2011 02:00 pm	F/U Main WIC Clinic-Sedgwick Co
		WIC PG	06/08/2011 02:00 pm	RC
		WIC BF	06/27/2011 10:15 am	CP Main WIC Clinic-Sedgwick Co
		WIC C	06/27/2011 10:15 am	RC
		WIC I	06/27/2011 10:15 am	CP
		WIC PG	06/24/2011 09:45 am	RC Main WIC Clinic-Sedgwick Co
		WIC C	06/24/2011 09:45 am	CP
		WIC I	06/21/2011 09:00 am	NE+ Main WIC Clinic-Sedgwick Co
		WIC C	06/21/2011 09:00 am	NC
		WIC C	06/21/2011 09:00 am	NC
		WIC C	06/27/2011 09:45 am	NE+ Main WIC Clinic-Sedgwick Co
		WIC I	06/24/2011 09:45 am	NE+ Main WIC Clinic-Sedgwick Co

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

The screenshot shows a software window titled "Potential Dual Participants Report". The menu bar includes "File", "Edit", "Services", "Client", "Check Issuance", "Clinic Admin", "Utilities", "Reports", "Window", and "Help". The main area has a date range selector set to "From 04/01/2011 to 06/27/2011" with "Generate", "Clear", and "Print" buttons. The report content is titled "Kansas WIC Program Potential Dual Participation Report" and "Caseload Sedgwick County WIC Program". It features a table with columns: "Test Date", "Client ID", "Client Name", "Date of Birth", "Matched Client ID", "Client Name", and "Date of Birth". Below the table, it states "Served at: Stanley WIC Clinic-Sedgwick Co" with fields for "Street Address" and "Mailing Address". A note reads "Note: already been resolved." The footer shows "Report Date: 06/27/2011 10:04 am" and "Page 1 of 1".

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

Kansas WIC Program						
<i>Potential Dual Participation Report</i>						
Caseload Sedgwick County WIC Program						
Test Date	Client ID	Client Name	Date of Birth	Matched Client ID	Client Name	Date of Birth
				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)

Client Services 14.10.14 Main WIC Clinic-Sedgwick Co

File Edit Services Client Check Issuance Clinic Admin Utilities Reports Window Help

Processing Standards Detail Report

Clinic: Main WIC Clinic-Sedgwick Co

From: 06/01/2011 To: 06/27/2011

Reason Outside Processing Standards: Appointment within processing standards not available

Generate Clear Print

Kansas WIC Program
Processing Standards Detail Report
Main WIC Clinic-Sedgwick Co
From 06/01/2011 To 06/27/2011 Appointment within processing standards not available

Appointment Date/Time	Client Name	Client ID	Reason Scheduled Outside of Processing Standards
06/07/2011 08:00am			Appointment within processing standards not available

Printed 06/27/2011 10:10 am Page 1 of 1

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

Kansas WIC Program			
Processing Standards Detail Report			
Main WIC Clinic-Sedgwick Co			
From 06/01/2011 To 06/27/2011 Appointment within processing standards not available			
Appointment Date/Time	Client Name	Client ID	Reason Scheduled Outside of Processing Standards
06/07/2011 08:00am			Appointment within processing standards not available

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

Caregiver	Client	Category	Most Recent Completed Appointment	Telephone
		C	06/27/2011	
		I	01/03/2011	
		C	03/14/2011	
		I	12/16/2010	
		PG	10/14/2010	
		I	02/18/2011	
		C	03/21/2011	
		PP	03/28/2011	
		I	03/24/2011	

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.

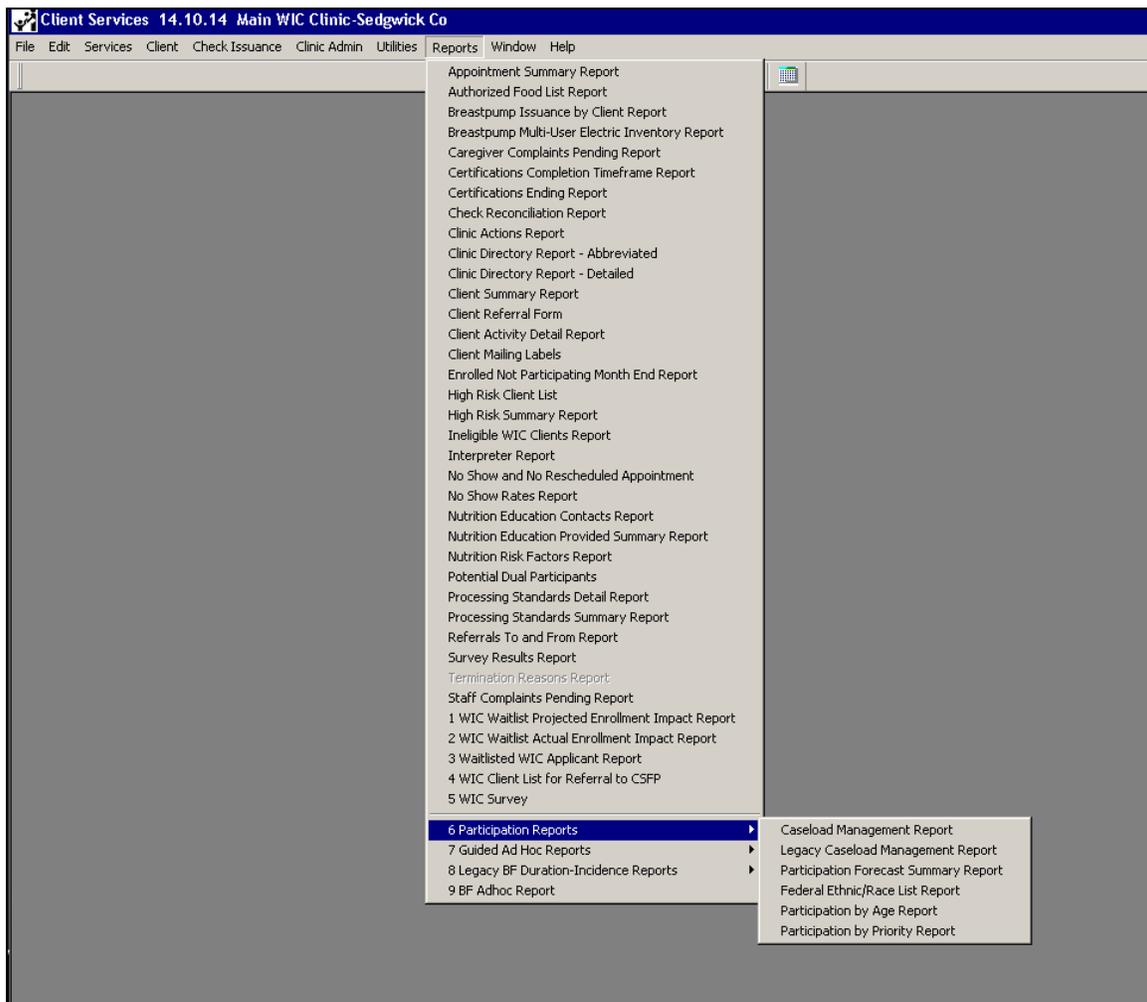
Report Image

Kansas WIC Program Certifications Ending Report Certifications Ending in June, 2011 Main WIC Clinic-Sedgwick Co					
Caregiver	Client	Category	Most Recent Completed Appointment	Telephone	Notes
		C	06/27/2011		_____
		I	01/03/2011		_____
		C	03/14/2011		_____
		I	12/16/2010		_____
		PG	10/14/2010		_____
		I	02/18/2011		_____
		C	03/21/2011		_____
		PP	03/28/2011		_____
		I	03/24/2011		_____
		I	07/01/2010		_____
		C	03/09/2011		_____
		I	04/12/2011		_____
		PG	11/01/2010		_____
		I	12/30/2010		_____
		C	05/06/2011		_____
		C	05/06/2011		_____
		PP	03/30/2011		_____
		PP	06/06/2011		_____
		PP	12/08/2010		_____
		C	12/14/2010		_____
		I	06/14/2010		_____

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

Client Services 14.10.14 Main WIC Clinic-Sedgwick Co

File Edit Services Client Check Issuance Clinic Admin Utilities Reports Window Help

Caseload Management Report

Clinic
 Agency
 Custom

Select Agency: Sedgwick County WIC Agency

Select Start Date/Run Date: May 2011 as summarized on Jun 04, 2011

Generate Print

Kansas WIC Program
Caseload Management Report
 For May 2011 as summarized on 06/04/2011
 Sedgwick County WIC Agency

	Participating						Total Participating		Not Par
	Received Checks		No Checks		Formula - Other Pgm		Number	% of Total	Number
	Number	% of Total	Number	% of Total	Number	% of Total			
WOMEN									
Pregnant	1,751	11.7%	0	.0%	0	.0%	1,751	11.5%	231
Fully Breastfeeding	347	2.3%	0	.0%	0	.0%	347	2.3%	162
Partially Breastfeed	265	1.8%	35	12.9%	0	.0%	300	2.0%	0
Postpartum	1,094	7.3%	0	.0%	0	.0%	1,094	7.2%	247
Total Women	3,457	23.0%	35	12.9%	0	.0%	3,492	22.8%	640
INFANTS									
Fully Breastfed	122	.8%	237	87.1%	0	.0%	359	2.4%	39
Partially Breastfed	391	2.6%	0	.0%	0	.0%	391	2.6%	73
Fully Formula Fed	3,144	20.9%	0	.0%	0	.0%	3,144	20.6%	541
Total Infants	3,657	24.4%	237	87.1%	0	.0%	3,894	25.5%	653
CHILDREN	7,903	52.6%	0	.0%	0	.0%	7,903	51.7%	1,722
TOTAL	15,017	100.0%	272	100.0%	0	.0%	15,289	100.0%	3,015

Enrolled Not Participating: 16.5%

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

Kansas WIC Program												
Caseload Management Report												
<i>For May 2011 as summarized on 06/04/2011</i>												
<i>Sedgwick County WIC Agency</i>												
	Participating						Enrolled					
	Received Checks		No Checks		Formula - Other Pgm		Total Participating		Not Participating		Total Enrolled	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
WOMEN												
Pregnant	1,751	11.7%	0	.0%	0	.0%	1,751	11.5%	231	7.7%	1,982	10.8%
Fully Breastfeeding	347	2.3%	0	.0%	0	.0%	347	2.3%	162	5.4%	509	2.8%
Partially Breastfeed	265	1.8%	35	12.9%	0	.0%	300	2.0%	0	.0%	300	1.6%
Postpartum	1,094	7.3%	0	.0%	0	.0%	1,094	7.2%	247	8.2%	1,341	7.3%
<i>Total Women</i>	<i>3,457</i>	<i>23.0%</i>	<i>35</i>	<i>12.9%</i>	<i>0</i>	<i>.0%</i>	<i>3,492</i>	<i>22.8%</i>	<i>640</i>	<i>21.2%</i>	<i>4,132</i>	<i>22.6%</i>
INFANTS												
Fully Breastfed	122	.8%	237	87.1%	0	.0%	359	2.4%	39	1.3%	398	2.2%
Partially Breastfed	391	2.6%	0	.0%	0	.0%	391	2.6%	73	2.4%	464	2.5%
Fully Formula Fed	3,144	20.9%	0	.0%	0	.0%	3,144	20.6%	541	17.9%	3,685	20.1%
<i>Total Infants</i>	<i>3,657</i>	<i>24.4%</i>	<i>237</i>	<i>87.1%</i>	<i>0</i>	<i>.0%</i>	<i>3,894</i>	<i>25.5%</i>	<i>653</i>	<i>21.7%</i>	<i>4,547</i>	<i>24.8%</i>
CHILDREN	7,903	52.6%	0	.0%	0	.0%	7,903	51.7%	1,722	57.1%	9,625	52.6%
TOTAL	15,017	100.0%	272	100.0%	0	.0%	15,289	100.0%	3,015	100.0%	18,304	100.0%

Enrolled Not Participating: 16.5%

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 - Other Pgm: Clients that were marked as receiving formula from another program

Total Participation: Received Checks + No Checks + Formula - Other Pgm

Not Participating: Clients that are enrolled but did not receive benefits

Total Enrolled: All enrolled clients

Report Date: 06/27/2011 11:18 am

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

Client Services 14.10.14 Main WIC Clinic-Sedgwick Co

File Edit Services Client Check Issuance Clinic Admin Utilities Reports Window Help

WIC Client List for CSFP

Report Month Report Year

Kansas WIC Program
WIC Client List for Referral to CSFP
Sedgwick County WIC Program
Report Month: August, 2011

BF/PP Within 1 Year of Delivery

Client	Birth Date	Delivery Date	Termination Date

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.

Report Image

Kansas WIC Program			
<i>WIC Client List for Referral to CSFP</i>			
Sedgwick County WIC Program			
Report Month: August, 2011			
<u>BF/PP Within 1 Year of Delivery</u>			
Client	Birth Date	Delivery Date	Termination Date

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

Complaint Date	Caregiver Name	Submitted By / Site	Note	Complaint Nature(s)
05/17/2004		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444	X	Verbal Abuse at clinic
10/22/2009		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444		Verbal Abuse at clinic
09/21/2010		Main WIC Clinic-Sedgwick Co 316 / 660-7444		Substituted unauthorized fo
08/19/2010		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444		Verbal Abuse at clinic

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

Kansas WIC Program Caregiver Complaints Pending Report <i>Listing Complaints Pending on 08/02/2011</i>				
Complaint Date	Caregiver Name	Submitted By / Site	Note	Complaint Nature(s)
05/17/2004		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444	X	Verbal Abuse at clinic
10/22/2009		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444		Verbal Abuse at clinic
09/21/2010		Other: Main WIC Clinic-Sedgwick Co 316 / 660-7444		Substituted unauthorized foods for WIC foods
08/19/2010		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444		Verbal Abuse at clinic
12/23/2010		Client / Caregiver Main WIC Clinic-Sedgwick Co 316 / 660-7444	X	Verbal Abuse at clinic
04/12/2010		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444		Failure to return a multi-user electric breastpump
12/19/2007		Clinic Staff Main WIC Clinic-Sedgwick Co 316 / 660-7444	X	Verbal Abuse at clinic
08/11/2010		Client / Caregiver Main WIC Clinic-Sedgwick Co		Substituted unauthorized foods for WIC foods Verbal Abuse at store

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

Kansas WIC Program
Staff Complaints Pending Report
Listing Complaints Pending on 08/02/2011

Complaint Date	Staff Name	Recorded By	Note	Complaint Nature(s)
----------------	------------	-------------	------	---------------------

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

Kansas WIC Program			
Staff Complaints Pending Report			
<i>Listing Complaints Pending on 08/02/2011</i>			
Complaint			
Date	Staff Name	Recorded By	Note Complaint Nature(s)