Enrolled Not Participating Report

What does this report do?

This report lists all Active clients who do not have any current benefits, or whose last issued benefits will expire before the end of the month.

How can I use this report?

Use this report to contact clients and schedule an appointment to come in to receive benefits. These clients are Active, all they need is an appointment to receive benefits again and a simple call from you might help remind them. Using this report regularly can also help your Enrolled Not Participation % on the Caseload Management report.
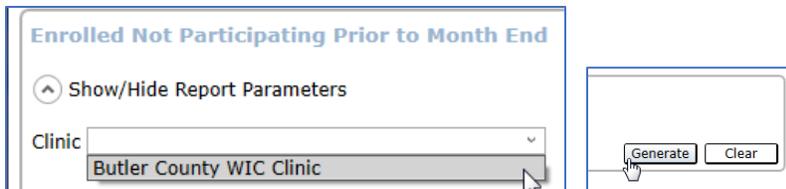
To be useful, run this report monthly and prioritize calling clients whose benefits will expire soon. Try to call a few days prior to benefits expiring to give the client an opportunity to get into the clinic.

How do I run this report?

1. Reports > **Enrolled Not Participating Prior to Month End Report**.
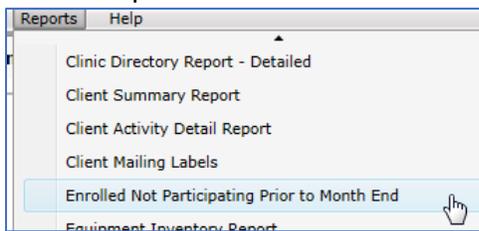
2. Select **Clinic**. Then **Generate**.

How do I interpret this report?

Call the caregiver and schedule a new appointment.

See how long it's been since they received benefits and how much longer is in their certification period.

Kansas WIC Program
Enrolled Not Participating Prior to Month End
Butler County WIC Clinic

Caregiver	Client Name	Client ID	Cat	Eligibility End Date	Latest First Use	Notes
(316) 4521714		121596	PP	5/31/2020	1/5/2020	
(316) 4521714		1215128	I	11/30/2020	1/5/2020	
		10359855	C	9/30/2020	11/26/2019	

TIP! You may choose to **Save As** Excel so that you have the ability to **Sort.** You might want to sort by Last Issuance Date and contact the most recent ones first. You will want to delete several columns to make it easier to read! The Excel spreadsheet also shows if the client has an appointment in the future (very last column), whereas the generated one you **print** does not. You can also print more clients on a page with the Excel spreadsheet than you can if you just print the report in KWIC.

EligibilityEndDate	LastIssuanceDate	NextAppointmentDate
5/31/2020	1/14/2020	
2/29/2020	1/16/2020	
4/30/2020	1/16/2020	04/09/2020 1:30:00 PM
12/31/2020	1/18/2020	
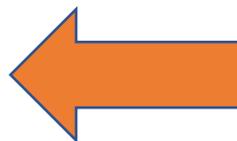
What does the data mean/where is it pulled from?

This report pulls all clients who are currently Active clients as of the date the report is run who do not have current benefits issued or whose last issued benefits will expire before the end of the month the report was run. If you want to know if the client has an appointment scheduled, you would need to save the report as Excel and look at the last column, Next Appointment Date.

2/24/20