

Participation Reports – Caseload Management

What does the report do?

The Caseload Management Report displays the number and percent of clients participating and enrolled during the report period. The % Enrolled Not Participating identifies the percentage of enrolled clients that did not have benefits with a First Use Date (FUD) during the report period. This report is summarized monthly.

How can I use this report?

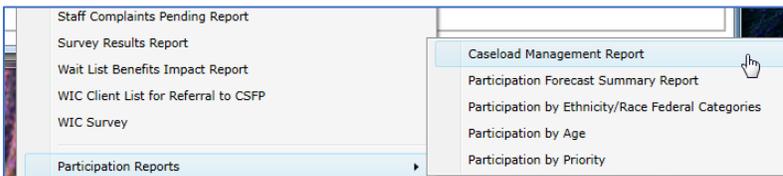
WIC Coordinators are encouraged to review this report with two main purposes in mind:

1. Regularly compare participating numbers to assigned caseload numbers. Are you under caseload?
2. What strategies can you use to increase your participation numbers?

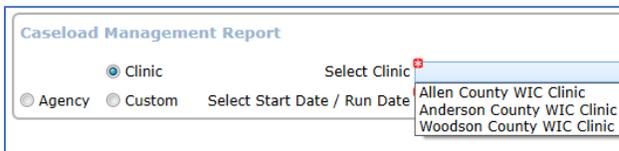
WIC Coordinators can also monitor % Enrolled Not Participating numbers every month. In this report you can see what % of your clients are enrolled but not participating. You might want to monitor this number over time, especially when you are trying a new retention strategy. You might use it in conjunction with the No Show Report and diligently reach out to clients who have missed appointments to get them back in to receive benefits. You can then monitor this percentage each month.

How do I run this report?

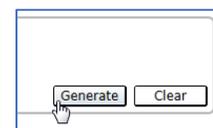
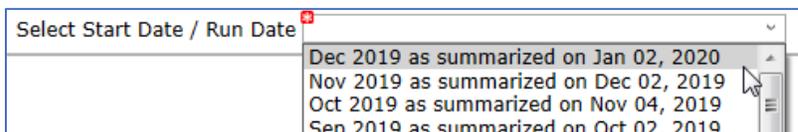
1. Reports > Participation Reports > **Caseload Management Report.**



2. Select **Clinic** or **Agency**.



3. Select the **month** you want the report period to cover. Then **Generate**.



How do I interpret this report?

Kansas WIC Program
Caseload Management Report
For Dec 2019 as summarized on Jan 02, 2020
Clinic: Allen County WIC Clinic

	Participating						Enrolled					
	Received Benefits		No Benefits		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	16	7.0	0	0.0	0	0.0	16	6.9	8	15.4	24	8.5
Fully Breastfeeding	5	2.2	0	0.0	0	0.0	5	2.2	0	0.0	5	1.8
Partially Breastfeeding	4	1.8	0	0.0	0	0.0	4	1.7	0	0.0	4	1.4
Postpartum	17	7.5	0	0.0	0	0.0	17	7.3	5	9.6	22	7.8
Total Women	42	18.4	0	0.0	0	0.0	42	18.1	13	25.0	55	19.4
INFANTS												
Fully Breastfed	3	1.3	3	100.0	0	0.0	6	2.6	0	0.0	6	2.1
Partially Breastfed	6	2.6	0	0.0	0	0.0	6	2.6	0	0.0	6	2.1
Fully Formula Fed	44	19.3	0	0.0	0	0.0	44	19.0	5	9.6	49	16.7
Total Infants	53	23.3	3	100.0	0	0.0	56	24.1	5	9.6	61	21.4
CHILDREN	133	58.3	0	0.0	1	100.0	134	57.8	34	65.4	168	59.2
TOTAL	228	100.0	3	100.0	1	100.0	232	100.0	52	100.0	284	100.0

% Enrolled Not Participating: 18.3

Percentages are calculated vertically for each column heading

Received Benefits: Clients that received benefits
No Benefits: Breastfeeding women and infants that did not receive benefits
Formula - Other Pgm: Clients that were marked as receiving formula from another program
Total Participation: Received Benefits + No Benefits + Formula - Other Pgm
Not Participating: Clients that are enrolled but did not receive benefits
Total Enrolled: All enrolled clients

This number means that **232** clients have benefits with a FUD in the month of the report period. (And exclusively BF infants < 6 months old with no food benefits.) The **52** people not participating in the month means they are enrolled but had no benefits with a FUD in that month.

What does the data mean/where is it pulled from?

Participation is defined as clients who have been issued benefits with a First Use Date (FUD) in the reporting month or who are either an EBFI (Exclusively Breastfeeding Infant) of a WIC mother who receives benefits with a FUD in the reporting month or a client who is no longer receiving benefits but still receives breastfeeding support because she is still breastfeeding her > 6 month old infant but the infant has a Limited Breastfeeding food package.

Categories & Priorities

- Clients are counted by their category and priority for their first active certification in the month being reported. For example, if a woman is on WIC as pregnant on the first day of a month and then recertified as breastfeeding during the month, the report counts actions for her using the category pregnant.
- If a child is on WIC as Priority 5 on the first day of the month and recertified as Priority 3 during the month and at the end of the month receives a follow up contact, on the report, the follow up contact will be counted for a Priority 5 child.
- New clients who are certified during the month are counted as the category and priority they receive at that new certification.

Enrolled Not Participating is the count of all clients **Enrolled** minus those who are **Participating**. Or, in other words, the number of enrolled clients who do not have benefits with a FUD in the month of the report.