

MI-WIC Reports for Management Evaluations

Report title/source	Purpose	Review/Comments
Active Record Review		
Clients by Cert End Date (Clinic/partic/clients by cert end date)	Identify clients who will be completing a cert period soon for record review.	Date range should be in future. Dates are cert ending dates.
WIC Ineligible Client Report (Clinic/participation/WIC ineligible client report)	Monitor if clients are receiving Ineligibility Notice when determined ineligible.	Report based if ineligibility status is assigned on Client Info screen or Cert Action. Review quarterly. Date of Ineligibility.
Expiring Short Certs Report (Clinic/participation/expiring short certs)	Monitor clients who were short certified to follow-up on required documentation.	Enter Termination Dates. Do regularly-wkly/bi-wkly/ monthly for reminder phone calls.
Local Agency/State User Roles Report (admin/Roles Reports/ Local Agency-State User Roles)	Lists staff with MI-WIC access. Use to check who has MI-WIC access and credentials for CPA & RD.	Review restricted roles for credential and training requirements per Policy 1.07.
Formula Usage Report (Clinic/participation/Formula Usage)	Identify clients who have been assigned a Class I, II, or III formula food pkg for record review.	Previous month and use last button: All Class I (excluding infants), II & III. Review Monthly/bimonthly
High Risk Report (Clinic/nutr & health summary/High risk report)	Identify clients who are high risk/received high risk services for record review. Determine if clients are being consistently offered/provided RD services. For Care plan monitoring, select records with different risks and categories, with CP Open Date recorded and CP Not Needed Date is blank.	CP Open Date -when Care Plan is documented. CP Not Needed Date -date box is checked and rationale in Assessment. CP Closed Date -when the RD checked box w/ rationale on Follow-up tab. Declined - client declined RD services. Non-WIC RD - client is seeing other RD.
WIC Dual Enrollment Report (Clinic/partic/WIC Dual Enrollment)	Identifies potential dual (WIC/WIC) enrollees for review and follow up.	Review to determine if agency resolves within 45 days of identification of dual enrollment.
Client Compliance Log (Clinic/participation/client compliance log)	Monitors compliance activities.	Ensure complaints are followed up and resolved promptly. Date of complaint.
Overdue Loaner Breast Pump Report (Clinic/breast pumps/overdue loaner BP Report)	Monitors Breast Pumps due back to agency and allows for follow up.	Monitor overdue multiuser breast pumps and required monthly follow ups.
Client List by Breast Pump Model Issued (Clinic/breastpumps/client list by breastpump model issued)	Lists clients issued breast pumps by model.	To review signed breast pump release and return receipts and 1-2 day follow-up on pump.
Administration		
10/20 DAY REPORT (Clinic/Scheduler/Outside 10/20-day report)	For cert/Pcert clients, indicates whether scheduled within required time period for cert.	Dates: Appt date range Review at least monthly. Original appt listed.

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Incoming Referral Work Queue (Clinic/scheduler/Incoming Referral Work Queue)	Review ISD Referrals for timely contact/scheduling.	
Formula Acceptance & Action Log (Miscellaneous/Formula Acceptance-Action Log)	Review returned formula storage, log completion, & Review Notes	Verify flagged lines are routinely reviewed (check Pending Review).
Breast Pump Inventory Details (Admin/Breast Pumps/Inventory Details)	Review if completing quarterly breast pump inventory.	By pump model.
Hemoglobin Daily Summary Report (Clinic/Nutr & health summary/Hgb daily summary report)	Monitor clients tested during specified period to insure retest if <8 µg/dL.	Assess whether required testing & retesting is completed. NOTE: State retest policy <8 µg/dL.
Single Certifier Report (admin/reports/roles reports/single certifier report)	Report lists clients who were certified by a single staff member.	Monitor 100% IFF/IBP and 20% of remaining records for required scanned documents.
Lead Test Billing Report (Clinic/admin/lead testing report)	Provides list of clients who had Lead testing done in WIC.	Does LA apply reimbursement to WIC program if WIC staff performs testing?
MIHP Billing Report (Clinic/MIHP Billing report)	List PG & I clients who received MIHP & WIC services during same visit for MA billing.	Assess how agency reflects staff time if MIHP services are performed <i>in</i> WIC. Must check box.
Caseload Management Report (Clinic/caseload/caseload management report)	Utilize to monitor caseload.	If migrant caseload assigned look at non-migrant assignment and compare %.
Certification		
Communications (Print Docs) (At Family level-Miscell/Communications)	Lists what documents were provided for Family by Date.	Verifies required documents (Client Agreement, NE Plan and VOC) are provided.
Outreach & Referrals		
Families Count by Primary Language (Clinic/partic/families count by language)	Number whose primary language is not English for determining need for interpreters.	Requires input of primary and secondary languages.
Local Agency Directory (Admin/administration/LA directory)	Lists LA address(es) and contacts.	
Recordkeeping and Accountability		
Benefit Over-Issuance Detail Report Admin/EBT Reports/benefit over issuance	Monitor clients who received additional benefits.	Check if reason documented.
Benefit Re-Issuance Admin/EBT Reports/benefit re-issuance by staff	Monitor clients who have been re-issued benefits by staff name.	Monthly
Clients Eligible for Benefits (Clinic/partic/clients eligible for benefits)	Contact list for clients with no benefits or ending soon.	Dates=BVT
Online NE Completed (Clinic/education & referrals/online NE completed)	Identifies clients who completed a wichealth.org lesson during dates entered.	Resource for issuing benefits after education completed.