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.
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.
WIC/WIC Dual Enrollment Report (Clinic/partic/WIC/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.
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 breastpumps and required monthly follow ups.
Client List by Breast Pump Model Issued (clinic/breastpumps/client list by breastpump model issued)	Lists clients issued breastpumps by model.	Use to review signed breast pump release and return receipts.
Client Compliance Log (clinic/participation/client compliance log)	Monitors compliance activities.	Ensure complaints are followed up and resolved promptly.
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.
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 MIWIC access Use to check who has MIWIC 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 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/nut & 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.

MI-WIC Reports for Management Evaluations

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Incoming Referral Work Queue (Clinic/scheduler/Incoming Referral Work Queue)	Review ISD Referrals for timely contact/scheduling	
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.
Administration		
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).
Local Agency Directory (Admin/administration/LA directory)	Lists LA address(es) and contacts	
Hemoglobin Daily Summary Report (clinic/Nutr & health summary/Hgb daily summary report)	Monitor clients who had testing done during specified period-review retest to insure meets LA retest policy.	Assess whether required testing & retesting is completed. NOTE: LA should establish retest policy.
Breast Pump Inventory Summary (clinic/breast pumps/inventory summary)	Monitors Breast Pump inventory	Use to verify breastpump inventory.
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.
Caseload Management Report (clinic/caseload/caseload management report)	Utilize to monitor caseload ≤97% of base caseload.	If migrant caseload assigned look at non-migrant assignment and compare %.
Clients Eligible for Benefits (Clinic/partic/clients eligible for benefits	Contact list for clients with no benefits or ending soon.	Dates=BVT
MIHP Billing Report (clinic/MIHP Billing report)	Monitor # of PG & I clients who received MIHP services in WIC	Assess how agency reflects staff time if MIHP services are performed *in* WIC.
Lead Test Billing Report (clinic/admin/lead testing report)	Monitor clients who had testing done.	Does LA apply reimbursement to WIC program if WIC staff performs testing?
EBT Reports		
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
Certification		
Communications (Print Docs) (At Family level-Miscell/Communications)	Lists what documents were printed for Family by Date	Verifies required documents (NE Plan and VOC) are printed.
Nutrition Education		
Online NE Completed (clinic/education & referrals/online NE completed)	This wichealth.org report identifies clients who completed a wichealth.org lesson.	Observe/Monitor client follow up in NE documentation at time of education or next visit.