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| Obtain the following reports before you begin completing the Caseload Worksheet. See page 3 for directions on running and printing the TWIST Reports. | | | | | | | | |
| * “Participating Caseload 12 Month History” – run the report for the last completed month * “Projected Number of Individual Appointment Requests” – run the report for first future unscheduled month * “Monthly Individual Appointment Show Rate” – use the percentages for the last completed month * “Transaction Report” – determine the first future unscheduled month and then run the report for the same month one year ago. Use past trending to forecast future trends. | | | | | | | | |
| Caseload Worksheet | | | | | | | | |
| What is my caseload goal? | | | | | | | | |
| **A** | | My assigned caseload goal: See ***“Participating Caseload 12 Month History”*** last column | |  | | participants | | |
| **B** | | My current participating caseload: See ***“Participating Caseload 12 Month History”*** last completed month | |  | | participants | | |
| **C** | | I need to increase my caseload by *(A – B)*: | |  | | participants | | |
| **D** | | I plan to reach my participating caseload goal in how many months: | |  | | months | | |
| **E** | | I need to increase my caseload an average of *(C divided by D)*: | |  | | participants/month | | |
| How many recertifications are needed in a month? | | | | | | | | |
| **F** | | Number of recertifications due each month:  See ***Projected Number of Individual Appointment Requests.*** | |  | | participants/month | | |
| **G** | | My No Show rate for recertification appointments is (*100 minus show rate% = No Show Rate):*  *(e.g. 100 – 65% = 35% or .35)*  See ***Monthly Individual Appointment Show Rate*** | |  | | No show rate (% as a decimal) | | |
| **H** | | I will need to schedule this many additional recertifications each month in order to take my no-show rate for recertifications appointments into account *(F x G)* | |  | | recertification appointments/month | | |
| **I** | | Total number of recertifications appointments I will need per month  (*F + H*): | |  | | recertification appointments/month | | |
| How many new certifications are needed in a month? | | | | | | | | |
| **J** | | The number of new enrollments or new certifications I will need to maintain my caseload is the number of projected terminations. See***Transaction Report* for total number of terminations.** | |  | | Projected terminations =  # of new certifications needed | | |
| **K** | | The number of new certifications I need to increase my caseload is *(E)*: | |  | | new certification appts/month | | |
| **L** | | The total number of new certifications I need to schedule is *(J + K)*: | |  | | new certification appts. | | |
| **M** | | See ***Monthly Individual Appointment Show Rate*** for new appointments (100 minus Show Rate % = No Show Rate %) | |  | | No show rate (% as a decimal) | | |
| **N** | | I will need to schedule this many new certification appointments each month to account for my no-show rate for new appointments (*L x M)*: | |  | | new certification appointments/month | | |
| O | | Total number of new cert appointments I will need each month  (*L + N*): | | |  | appointments | | |
| Total certification and recertification appointments needed in a month | | | | | | | |
| **P** | The total number of certification + recertification appointments I need each month is (*I + O*): | |  | | | | appointments |
|  | | | | | | | |
| Determining the number and length of certifier appointments | | | | | | | |
| **Q** | I will have this many clinic days available for appointments per month:  *(Note: Clinic days do not include office time, meeting time, group education sessions etc. If a clinic day at a satellite clinic has 6 hours for appointments and a main clinic has 8 hours for appointments, count the satellite clinic as .75 [6/8] of a clinic day)* | |  | | | | clinic days |
| **R** | I will average this many certifiers per clinic day during the month: | |  | | | | certifiers |
| **S** | Number of CPA schedules I have per month (Q x R) = | |  | | | | schedules |
| **T** | Certifiers will need to be scheduled to see this many participants each day for certification appointments  *(P ÷ S)*: | |  | | | | certification appts/day/certifier |
| **U** | For the entire day, this many minutes are available for appointments *(Complete #1 & 2 below. Add them together)*: | |  | | | | minutes per day for appointments |
|  | 1. How many minutes do you have for appointments in the morning? | |  | | | | minutes |
| 2. How many minutes do you have in the afternoon for appointments? | |  | | | | minutes |
| **V** | I need to allot an average of this many minutes per certification/recertification appointment for certifiers *(U ÷ T)*: | |  | | | | average minutes per appointment |
| When will scheduling strategies be implemented to meet my caseload goal? | | | | | | | |
| W | I will start having this many certification appointments: | |  | | | | date |

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| How will I monitor progress toward achieving caseload goals? | |
| Review the following TWIST Reports each month.Compare assigned caseload to participating caseloadCompare the percent of assigned caseload to contract requirements of 97 to 103%: | |
| Participating Caseload 12 Month History | Operations Management Module ► Outputs ► Caseload ► Participating Caseload 12 Month History |
| Percent of Assigned Caseload 12 Month History | Operations Management Module ► Outputs ► Caseload ► Percent of Assigned Caseload 12 Month History |

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| How to find the reports needed to complete the worksheet | |
| TWIST Report | Path to the Report |
| Participating Caseload 12 Month History | Operations Management Module ► Outputs ► Caseload ► Participating Caseload 12 Month History |
| Show Rate Report – Show Rate Monthly Individual | Appointment Scheduler ► Outputs ►Show Rate Reports ► Show Rate Monthly Individual |
| Projected Number of Individual Appointment Requests | Appointment Scheduler ► Outputs ►Projected Number of Individual Appointment Requests |
| Transaction Report | Operations Management Module ► Outputs ► Clinic Non-Caseload Reports ► Transaction Report |

**If you need this material in an alternate format, please call (971) 673-0040.**