LA Caseload Management Assessment

Use this tool to assess your how your local agency handles activities that can impact caseload.

Consider involving staff in the assessment.

Score: 1= rarely or never, 3=most of the time, 5=always

Select one or two items with lower scores to focus on.

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| **Activity** | **1** | **2** | **3** | **4** | **5** | **Notes** |
| Accessibility |
| We offer alternative office hours for certification appointments. (Before 8 a.m., during the noon hour, after 4 pm, on weekends) |  |  |  |  |  |  |
| Phones are staffed by a person able to answer questions. (knowledgeable staff, can reschedule) |  |  |  |  |  |  |
| Phones are answered by a person, rather than an answer machine from at least 8 to 5 most days of the week. |  |  |  |  |  |  |
| Appointments |
| We monitor our no show rates and schedule extra appointments to account for no shows. |  |  |  |  |  |  |
| We have appointments available for rescheduling missed appointments. |  |  |  |  |  |  |
| We use data to plan the number of appointments needed. |  |  |  |  |  |  |
| Our reschedule policy minimizes judgment of WIC families. |  |  |  |  |  |  |
| We monitor the amount of time certifiers are scheduled for activities other than certifying participants. |  |  |  |  |  |  |
| Our walk-in policy allows for most participants to be seen that day. |  |  |  |  |  |  |
| We meet or exceed the processing standards for new appointments. |  |  |  |  |  |  |
| We send reminder post cards, texts or phone calls for appointments. |  |  |  |  |  |  |
| We use the ANSWR system to make appointment reminders. |  |  |  |  |  |  |
| We have staff make personal appointment reminder calls. |  |  |  |  |  |  |
| We have staff call to reschedule missed appointments. |  |  |  |  |  |  |
| Retention of Participants |
| We contact participants without benefits to resolve the problems and issue their benefits. |  |  |  |  |  |  |
| We monitor the percentage not receiving benefits. |  |  |  |  |  |  |
| Staff clearly communicate what types of documents are needed as proofs at certification appointments. |  |  |  |  |  |  |
| Staff understand the policy for alternatives for missing proofs, physical presence. |  |  |  |  |  |  |
| When eligibility is pending, staff clearly explain what is needed, by when and multiple options for providing it (text, email, fax). |  |  |  |  |  |  |
| We call families with eligibility pending before they are terminated. |  |  |  |  |  |  |
| We contact participants whose certification is ending who do not have an appointment scheduled to make an appointment. |  |  |  |  |  |  |
| We contact participants who were automatically terminated, but are still eligible for WIC, to resolve any problems and reactivate or reinstate. |  |  |  |  |  |  |
| Monitoring Caseload Reports |
| We run the Participating Caseload, Certified Caseload and Percent of Assigned Caseload Reports every month to monitor general caseload health. |  |  |  |  |  |  |
| We have a plan for using staff down time for caseload or outreach efforts. |  |  |  |  |  |  |
| Outreach |
| We have completed an outreach plan with staff input and buy-in |  |  |  |  |  |  |
| We have a dedicated staff person to oversee outreach and partnerships |  |  |  |  |  |  |
| We utilize social media |  |  |  |  |  |  |
| We use the WIC logo and branding to provide a unified message. |  |  |  |  |  |  |
| We are aware of and participate in community outreach events |  |  |  |  |  |  |
| We have identified our existing partnerships and have good working relationships with these partners |  |  |  |  |  |  |
| We have identified new partnerships that need to be established.  |  |  |  |  |  |  |

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| Clinic Environment |  |  |  |  |  |  |
| Our reception area is warm and inviting. |  |  |  |  |  |  |
| Our staff are warm and inviting. |  |  |  |  |  |  |
| We have adequate seating. |  |  |  |  |  |  |
| We have books or toys for children. |  |  |  |  |  |  |
| Our posters and signs are up to date and relevant. |  |  |  |  |  |  |
| There clear signage in our clinic. |  |  |  |  |  |  |
| Our clinic is easy to find. |  |  |  |  |  |  |
| We have short wait times. |  |  |  |  |  |  |
| Participants like coming to see us. |  |  |  |  |  |  |