Caseload Management Reports in eWIC

Caseload management is as important in the eWIC environment as it was in the voucher world.
Here is an overview of the caseload reports that will be continue to be essential to our caseload efforts as we move through the transition to eWIC and beyond

TWIST REPORT	Description	How should we use the report to monitor caseload in eWIC?
All Agencies		
Certified Caseload -12 Month History Location: Operations Management Module – Output - Caseload	Provides monthly certified (enrolled) caseload counts for all local agencies over a 12 month period. Tracks certified caseload change from the previous reporting month.	**No change**. Review monthly.
Participating Caseload-12 Month History Location: Operations Management Module – Output - Caseload	Provides monthly participating (certified participants who receive benefits or vouchers) caseload counts for all local agencies over a 12 month period. Tracks participating caseload change from the previous month and the percent increase or decrease for the current month.	Participating caseload will now be based on benefit issuance instead of voucher printing. The report will combine and count both benefits issued and vouchers printed during the transition to eWIC. Review monthly to monitor how well the agency is meeting assigned caseload.
Percent of Assigned Caseload – 12 Month History Location: Operations Management Module – Output - Caseload	Provides a 12 month history of all local agency's percent of assigned caseload. This is determined by comparing the participating caseload to the assigned caseload.	Will use combined participating caseload number during eWIC transition. Review monthly to determine if the agency is within 97% to 103% of assigned caseload and to observe trends over a period of time.
Individual Agencies		
Register of Clients with Eligibility Pending Location: Client Processes – Output – Reports - Intake	Lists participants who need to bring in eligibility proofs, type of proof and date due to continue to receive benefits or vouchers.	**No change**. Review periodically throughout the month in order to follow up with participants who have been certified and need to bring in the missing proof to receive future benefits.

TWIST REPORT	Description	How should we use the report to monitor caseload in eWIC?
End Cert Client Register – No Appt Location: Client Processes – Output – Reports - Intake	Provides information on participants who are at the end of their certification but do not have an appointment scheduled.	**No change.** Review at the beginning of each month in order to contact participants for appointment scheduling. Review periodically throughout the month to follow up participants as needed. Note: after an agency has converted, certification periods cannot be extended until the participant is converted.
WIC Counts by Priority/ Category Location: Operations Management Module – Output - Caseload	Shows counts and percentages on the agency or clinic level for certified or participating clients by WIC priorities and categories. This report provides migrant and homeless counts and percent of each by WIC priority and category.	**No change.** This report can provide unduplicated or duplicated counts for certified and participating clients and can be run monthly or for specific date ranges.
Clients with No FIs Report Location: Client Processes – Output – Reports - Intake	Shows the number of participants who have been certified, but have not had vouchers issued in the month of the report (e.g. missed a second nutrition education appointment).	Will continue to work while your agency still has participants who are not converted. Will be replaced with new report "Participants with No Benefits Issued" (see below). Track this information together with the "Participant with No Benefits Issued" report during the transition from vouchers to eWIC.
NEW TWIST REPORTS		
Participants with No Benefits Issued Number: CP166R Location: Client Processes – Output – Reports - Intake	Shows the number of participants who have been certified, are eligible for benefit issuance that month but have not had benefits issued.	Replaces the "Clients with No FIs" report. Review in the middle of the month in order to determine what action is needed so each participant receives their benefits that month. Track this information together with the "Clients with No FIs" report during the transition from vouchers to eWIC.