

Caseload Reports:

End Cert Client Register – No Appointment Report

What this report tells you:

Shows participants whose certification ends in a specified month and who do not have a recertification appointment scheduled.

Why use this report:

Contact participants on the report to schedule a recertification appointment. If they are not recertified before the end of the month they will be automatically terminated from the program.

How to run this report:

Client Processes-Output- Reports- Intake. Enter the current month and year. Can filter for clinic, category, and language to make contacting participants easier.

When to run this report:

At the beginning of every month.

