

Caseload Reports: Transaction Report

What this report tells you:

Shows the number of transactions (enrollments, reinstates, reactivates, recerts, changes, and terminations) that occurred in TWIST during a given month.

Why use this report:

This is a comprehensive report that shows how many participants from different categories are being added and terminated from your agency. It can be used to predict scheduling needs and to see categories of participants to target for outreach.

How to run this report:

Operations Management- Outputs- Clinic Non-Caseload Reports. Enter last month and year.

When to run this report:

Run on the 2nd of each month.

