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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.
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| 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 |
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| 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.**