Summary Local Agency Review Reports

A. Preparing for the local agency review:

1) Staff Schedule AS390R

2) Selected group education AS460R

B. Chart Reviews:

1) LA Chart review OM380R

2) High risk participant CP800R

3) Participant use of food code FI090R

C. Caseload:

1) Certified caseload, 12 month history OM020R

2) Participating caseload, 12 month history OM090R

3) Percent of assigned caseload OM091R

4) Register of Clients with eligibility pending CP170R

5) End cert client register-no appt CP300R

6) Clients with no Fis CP165R

7) WIC counts by priority, category OM191R

8) FI management/local agency caseload plan FM150S

D. Program Management:

1) Non-english spoken language OM060R

2) Racial ethnic report OM075R

3) Participant summary by WIC category OM010R

E. Clinic Operations:

1) Modules completed OM290R

2) Processing standard compliance OM870

3) Appointment needed waiting list summary AS410R

4) Non-WIC nutrition education client list CP470R

5) LA refusal rate for 2nd NE AS270R

6) ANSWR extract settings (table)

7) Local agency monthly group education show AS310R

8) Local agency monthly second nutrition education show rate AS320R

9) Monthly individual appointment show rate AS330R

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
A. Preparing for the local agency review			
A 1.Staff schedule report **Number:** AS390R **Location:** Appointment Scheduler➔ Outputs ➔staff schedule report	Provides schedules for specific staff or specific clinics (i.e. satellite clinics).	N/A	1. To locate when various staff are on the schedule. 2. To identify staffing patterns. 3. Can help plan reviewer's schedule.
A 2. Selected Group Nutrition Education **Number:** AS460R **Location:** Appointment Scheduler➔ Outputs ➔ Selected Group Nutrition Education Class	Shows the schedule for LA group classes. *(Note: Formatting of this report is not ideal)*	Sort selection: 1)Month of review to determine NE provided during scheduled visit 2)Several months to assess variety of groups offered; If a specific clinic is not selected all clinics will be listed.	1. For preparation for LA review, use to identify what group classes are offered for the month of the review. 2. A larger date range sort selection will reveal the variety of class topics for different categories.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
B.Chart reviews			
B 1.Local Agency Chart Review **Number:** OM380R **Location:** Operations Management➔ Outputs ➔ LA Chart Review	Provides a random sampling of participants for chart review. Lists WIC ID, client name, clinic, category, and cert start and end dates. The final column Indicates the search criteria used to randomly select the participant: category of participant; type of formula (FM = medical formula); non-English language (SPN = Spanish); High Risk Appt (HR + type of appt); Group Education Appt (GE + category of client in class)	Enter date range 2-3 months in recent past. Leave clinic blank if want to run for entire agency, or select a specific clinic. Multiple runs can pull in additional participants if needed.	Review records entered by a variety of LA staff and of different participant categories listed below. This report randomly selects participants who are active during the entire date range selected, so that each time you run it, you will get a different sampling of participants to review. The report provides 4 participants from each of the following categories: WP= Woman Pregnant WN= Woman not breastfeeding WE= Woman fully breastfeeding WB=Woman Some or Mostly breastfeeding TN= Temporary Newborn IN=Infant not breastfeeding IE= Infant fully breastfeeding IB= Infant Some or Mostly breastfeeding C1=Child 12-23 months C2= Child 24-60 months

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
B 2. High risk participant report **Number:** CP800R **Location:** Client Processes ➔Outputs ➔ Reports ➔Nutrition Education ➔ High Risk ➔High Risk Participant Listing	For high risk participants, provides name, ID#, clinic, category, language & risk codes.	Enter a recent 3- 6 month date range. Note: may need a larger date range for smaller agencies.	1. Identify high risk participants of specific categories for chart review. Other uses: 2. State function: Compare count of high risk to other agencies of similar size. (select 6 month or longer date range for comparison data) 3.Scan risk codes of high risk participants for frequently repeating risk codes, e.g. risk 360 (other medical conditions.) risk 352 (drug-nutrient interaction)
B 3.Name: Participant Use of Food Code report **Number:** FI090R **Location:** Food Instruments ➔Outputs ➔ Food Packages ➔Participant Use of Food Code	Report provides list of all participants who have a particular food code in their food package.	Enter recent 1 month date range. To identify soy beverage for children, run report for SO04, S006 or S008. Look for participants with date of birth within past 5 years.	To identify children on soy beverage to use during chart reviews to assess for appropriate medical documentation on file to support soy beverage food package assignment.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
C.Caseload			
C 1. Certified Caseload - 12 Month History **Number:** OM020R **Location:** Operations Management Module ➔Outputs ➔ Caseload ➔Report Name	Provides monthly certified caseload (The number of clients enrolled in a given month) counts for local agencies for 12 month period. Tracks certified caseload change from previous reporting month..	Automatic, one year	Caseload counts are produced as part of the End of Day process in TWIST on the night of the first day of the month. Caseload counts are also updated as part of the End of Day process on the 20th for the previous month. This update would take into account any voids or cancels that occurred since the first day of the month.
C 2.Participating Caseload -12 Month History **Number:** OM090R **Location:** Operations Management Module ➔Outputs ➔ Caseload ➔Report Name	Provides monthly participating caseload (the number of certified clients who receive vouchers) counts for local agencies for 12 month period. Tracks participating caseload change from previous month and percent of increase or decrease for reporting month. Participating caseload count for reporting month is compared to assigned caseload.	Automatic, one year	Caseload counts are produced as part of the End of Day process in TWIST on the night of the first day of the month. Caseload counts are also updated as part of the End of Day process on the 20th for only the previous month. This update would take into account any voids or cancels that occurred since the first day of the month. Review to determine how agency is meeting assigned caseload.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
C 3.Percent of Assigned Caseload – 12 month History **Number:** OM091R **Location:** Operations Management Module ➔Outputs ➔ Caseload ➔Report Name	Provides a 12 month history of the local agency's percent of assigned caseload. This is determined by the monthly caseload divided by the current assigned caseload for the local agency	Automatic, one year	Review to determine if agency 12 month average is staying between 97% to 103% of assigned caseload and to observe trend overtime.
C 4. Register of Clients with Eligibility Pending **Number:** CP170R **Location:** Client Processes ➔Outputs ➔ Reports ➔ Intake ➔ Register of Clients with Eligibility Pending	Lists clients who need to bring in eligibility proofs, type of proof and date due to continue to receive vouchers.	Past 30 days, applicants still active in TWIST. Longer than previous 30 days, applicants who've been terminated due to missing proof.	To assess number of applicants who have been certified and who only need to bring in the missing proof to receive future month vouchers.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
C 5. End Cert Client Register – No Appt **Number:** CP300R **Location:** Client Processes ➔Outputs ➔ Reports ➔ Intake ➔ End Cert Client Register – No Appt	By clinic, by WIC category, lists the name, ID#, cert start & end date, language, phone type, whether can be contacted by phone, phone number	Enter current month and year	Shows the number of participants at the end of their certification period and who do not have an appt to be recertified.
C 6. Clients with No FIs Report **Number:** CP165R **Location:** Client Processes ➔Outputs ➔ Reports ➔ Intake ➔ Clients with No FIs	For participants with no FIs for the month, provides ID #, client name, guardian, phone, phone type, if "ok" to contact by phone, cert start date and end date. Once report generated, agency is able to print labels from this screen.	For all or select clinic, have the option to enter previous, current or next month.	Shows the number of participants who have been certified, but have not been in to pick up vouchers.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
C 7. WIC Counts by Priority/ Category **Number:** OM191R **Location:** Operations Management Module ➔Outputs ➔ Caseload ➔WIC Counts by Priority/Category	Shows counts and percentages on the state, 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. This report can provide unduplicated or duplicated counts for certified and participating clients and can be requested monthly or for specific date ranges to match both state fiscal year and federal fiscal year.	Enter previous month and year; indicate if want to count duplicates, and whether it should be based on participation or certification.	1. To compare agency percentages with state averages for women, infants and children categories. 2. To assess breastfeeding looking at IE, IB and IN percentages. 3. To determine if agency has a documented homeless or migrant participants.
C 8. Local agency Caseload Plan **Number:** FM150S **Location: Financial Management** ➔Caseload➔Participating Caseload➔Local Agency Caseload Plan	Screen shot which provides caseload data by clinic by month. *Note: Downside of this screen-unable to print.*	Select local agency caseload plan tab; Enter fiscal year (use arrow to tab down to current year)	To determine caseload changes by clinic and by language if clinic schedule is set that way.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
D.Program management			
D 1.Non-English Spoken Language **Number:** OM060R **Location:** Operations Management Module ➜Outputs ➜ Caseload ➜Non-English Spoken Language	Shows number and percent of participants by WIC category who have non-English language in Client Master – can be run for individual clinic or for entire agency.	Enter fiscal year, month. Agency and clinic are optional fields.	1. Useful when reviewing LA materials, forms, and outreach activities. 2. Can be used to evaluate language needs of participants and trends over time or between clinic sites and look at staff non-English language capacity.
D 2.Racial ethnic report **Number:** OM075R **Location:** Operations Management Module ➜Outputs ➜ Caseload ➜Racial ethnic report	Lists #, % of caseload and # Hispanic and total of each of the races certified in the agency or clinic.	Enter fiscal year (e.g. 2010-2011 or 2011-2012), month and clinic (leave blank for agency results).	Consider when reviewing the appropriateness of forms and materials, outreach activities and group nutrition education classes.
D 3.Participation Summary by WIC Category **Number:** OM010R **Location:** Operations Management Module ➜Outputs ➜ Caseload ➜Participation Summary by WIC Category	This report shows a summary of the participating caseload count by WIC category for each local agency. This report also provides the percentages of total for each category.	For month and year selected, mark "Agency" if want list agencies in alphabetical order; mark "Participating" to see counts from lowest to highest agency.	Can be used to determine how many participants in each category when planning for appropriate nutrition education opportunities

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
E.Clinic operations			
E 1.Modules completed report **Number:** OM290R **Location:** Operations Management Module ➔Outputs ➔ NE Training ➔Modules completed report	Use to determine if all staff have completed specific modules in required timeframe.	Date range is not applicable. It is helpful to cross reference reports as documentation may differ from all staff vs. specific staff. For report type, choose: 1.modules completed/not completed (show all staff that have ever worked in the clinic) 2.For specific staff person: in staff field, pick the name of the staff person and run report type: modules completed/not completed	To assess if staff have completed all required training modules (see Policy 440) and are these documented in TWIST. NOTE: There are different requirements for certifiers, clerks, BF peer counselors, training supervisor, and WIC Coordinator.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
E 2.Processing Standard Compliance Report **Number:** OM870 **Location:** Operations Management Module ➔Processing Standards Compliance Report	New report as of 2010 Shows the processing standard for walk-in clients (See Policy 605): 1. 10 day standard for pregnant or migrant farmworker applicants. 2. 20 day standard for all other eligible applicants.	Timeframe: run for 3 months prior to the review. Contact type: choose "walk-in".	The report shows participant category, and the date the participant should have been seen. Follow up on starred charts looking for documentation in the chart as to why the participant was not seen within the required time frame. If no data found, agency may not be recording walk-ins on intake screen.
E 3.Appointment Needed Waiting List summary **Number:** AS410R **Location:** Appointment Scheduler ➔Output ➔ Wait Lists ➔Wait List Summary (Appointment Needed)	Provides a list of all clients on the appt needed waiting list.	Will default to all clinics with the ability to choose one clinic.	It is designed to be used as a "call list" to call and schedule participants needing an appt when there is a cancellation or no-show.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
E 4.Non-WIC Nutrition Education Client List **Number:** CP470R **Location:** Client Processess ➔Outputs ➔Reports ➔Nutrition Education ➔ NE Tracking➔Non-WIC NE Client List	Provides name of non-WIC program who provided the service, class topic , name of participant, ID #, appointment type, class title, show status, class date	6 months- 1 year A longer date range will provide trending information.	Use to determine if agency is using an outside agency to provide WIC nutrition education. Confirm WIC Program has a written agreement with the agency providing nutrition education per Policy 830.
E 5.LA Refusal Rate for 2nd NE **Number:** AS270R **Location:** Appt Scheduler ➔ Outputs ➔ Refusal Rates for Second Nutrition education➔ LA NE Refusal Rate		Recent month and year	Use to determine if there is a trend.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
E 6.ANSWR Extract Settings **Number:** Table, not a report **Location:** Appt Scheduler → Scheduling → ANSWR Extract Settings	Identifies the clinics, appointment types and appointment statuses for which notifications will be sent.	none	Check settings to determine if ANSWR is set up to send future reminders, missed appointment reminders or both.
E 7.Local Agency Monthly Group Nutrition Education Show **Number:** AS310R **Location:** Appt Scheduler → Scheduling → Output → Show Rate Reports →Local Agency Monthly Group Nutrition Education Show	For class location, class topic, class title, date, DOW, and time, report indicates the # scheduled, # showed and % showed.	For all or specific clinic, enter month and year of interest.	If run for different months, provides a sense of the show rate for various classes.

R= reports   S= screens

TWIST Reports which Support Local Agency Reviews

Report name and location (required/optional)	Description	Time frame to run the report and/or Sort Selection	How would I use the report?
E 8.Local Agency Monthly Second Nutrition Ed Show Rate **Number:** AS320R **Location:** Appt Scheduler → Scheduling → Output → Show Rate Reports →Local Agency Monthly Second Nutrition Ed Show Rate Show	By WIC category, provides class topic, risk level, and the # scheduled, #/% showed for group GE , follow-up, individual ED, Non-WIC NE; # Scheduled/% Showed Total by Clinic	Enter month and year of interest. Can tailor to clinic, WIC category, class topic and risk level.	Several months can provide information on trends.
E 9.Monthly Individual Appointment Show Rate **Number:** AS330R **Location:** Appt Scheduler → Scheduling → Output → Show Rate Reports →Monthly Individual Appointment Show Rate	By clinic and risk level, and appointment type, provides # scheduled, # showed, # walk-in, #total showed (incl. walk-in), and % showed (includes walk-in)	For all or specific clinic, all risk levels or specific risk level, indicate month and year of interest.	Use to identify trends.

R= reports   S= screens