Crossroads Reports Training Webinar Handout

(1) Summary of Actions Due Listing Details

This report lists participants whose certifications expire during the next six months, including those whose expire during the current month.

- 1. From the Crossroads Reports Main Menu screen, select Caseload from the Reports Category dropdown.
- 2. Select Summary of Actions Due Listing Details.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. local agency or clinic report type, and
 - b. local agency or clinic(s)

Note: If the local agency has multiple clinics, and clinic is selected as report type, the report can be generated for one or more clinics. The local agency report type includes all clinics.

- 5. Click View Report.
- 6. The report displays. Number of pages displays. Report can be searched by page and key word.
- 7. To print the report, click the Adobe PDF icon.

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	Report Category Caseload		69
	Reports List		Total Items: 16 🕥
	Report Name Total Participation by Category and Priority Summary of Actions Due Listing Summary Summary of Actions Due Listing Details	Description	Notes
e t	State: North Carolina WIC Pr Local Agency/Clinic: 034 - Forsyth Court	rogram V Report Type: Local Agency V	View Report
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r	4 4 1 of 154 ▶	Find Next	
r	4 4 1 of 154 ▶ ▶	Find Next Summary of Actions Due Listing Details	Report Date: 04/11/2016
r	4 4 1 of 154 ▶ ▶		Report Date: 04/11/2016 Data Updated: 4/11/2016
r	Local Agency(s): 034 - Forsyth County		Report Date: 04/11/2016 Data Updated: 4/11/2016 RDD: 1.7.4.1.11
r	Id 1 of 154 Id Local Agency(s): 034 - Forsyth County	Find Next Summary of Actions Due Listing Details North Carolina WIC Program	Report Date: 04/11/2016 Data Updated: 4/11/2016 RDD: 1.7.4.1.11
r	Id 1 of 154 Id Local Agency(s): 034 - Forsyth County 034-Forsyth County Clinic 034-01-Forsyth - Highland Avenue	Find Next Summary of Actions Due Listing Details North Carolina WIC Program Detail for Overdue and Coming Due Certification End Dates	Report Date: 04/11/2016 Data Updated: 4/11/2016 RDD: 1.7.4.1.11
r	Id 1 of 154 Image: Imag	Find Next Summary of Actions Due Listing Details North Carolina WIC Program Detail for Overdue and Coming Due Certification End Dates Name Action Type Action Due Control	Report Date: 04/11/2016 Data Updated: 4/11/2016 RDD: 1.7.4.1.11
r	I of 154 ▷ ▷I Local Agency(s): 034 - Forsyth County 034-Forsyth County Clinic 034-01-Forsyth - Highland Avenue No. Participant ID Family ID 1 F02000002038 2 F0400000775	Find Next Summary of Actions Due Listing Details North Carolina WIC Program Detail for Overdue and Coming Due Certification End Dates Name Action Type Action Due Overdue 4/1/2016 Overdue 4/1/2016	Report Date: 04/11/2016 Data Updated: 4/11/2016 RDD: 1.7.4.1.11
r	I of 154 I Local Agency(s): 034 - Forsyth County 034-Forsyth County Clinic 034-01-Forsyth - Highland Avenue No. Participant ID Family ID 1 F02000002038 2 F0490000078 3 F049000078	Find Next Summary of Actions Due Listing Details North Carolina WIC Program Detail for Overdue and Coming Due Certification End Dates Name Action Type Action Due Coverdue 4/1/2016 Qverdue 4/1/2016 Qverdue 4/1/2016 Qverdue 4/1/2016 Qverdue 4/1/2016 Action Due Contaction Coverdue 4/1/2016 Action Due Contaction Coverdue 4/1/2016 Action Due Contaction Coverdue 4/1/2016 Action Due Coverdue Action Due Contaction Coverdue Action Due Coverdue Action Due Coverdue Action Due Coverdue Action Due Contaction Coverdue Action Coverdue Coverdue Action Coverdue Coverdue Coverdue Action Coverdue Coverdue	Report Date: 04/11/2016 Data Updated: 4/11/2016 RDD: 1.7.4.1.11

- 8. A new window will open with the PDF document. Print the document if desired.
- 9. Note the information and its meaning:
 - a. No. list number
 - b. Participant ID
 - c. Family ID
 - d. Name of participant
 - e. Action Type "overdue" will be noted if certification has ended; "cert end" denotes that a certification will end
 - f. Action Due the certification end date
 - g. Contact Information family address
- 10. The report lists participants with certifications due during the six month period beginning with the current month.

Using this Report: Use this report monthly to identify and contact participants whose subsequent certification is overdue. This is a best practice to help maintain participation. Printing the report consistently near the end of each calendar month may produce a more useful report.

			Summary of A North Ca	ctions Due Lis rolina WIC Pro	ting Details ogram	S Report Date: 04/11/2 Data Updated: 4/11/2							
Local Agency(s): 034 - Forsyth County													
34-F	34-Forsyth County												
Clinic	034-01-Forsyth - Hi	ghland Avenue	Detail for Overdue and Coming	Due Certification 8	Ind Dates								
No.	Participant ID	Family ID	Name	Action Type	Action Due	Contact Information							
	1 952991628L	F0200002038		Overdue	4/1/2016								
	2 9534359995	F0490000078		Overdue	4/1/2016								
	3 953982007N	F04900001275		Overdue	4/1/2016								
	4 9534421305	F04900003070		Overdue	4/1/2016								
	5 952990483P	F04900003241		Overdue	4/1/2016								
	6 9523411450	F04900004075		Overdue	4/1/2016								
	7 953492328L	F04900004594		Overdue	4/1/2016								
	8 953598519L	F04900004649		Overdue	4/1/2016								
	9 9534218135	F04900005354		Overdue	4/1/2016								
	10 952412925Q	F04900008087		Overdue	4/1/2016								
	11 953171555Q	F04900006148		Overdue	4/1/2016								
	12 953982296N	F04900007090		Overdue	4/1/2016								
	13 953981658L	F04900007139		Overdue	4/1/2016								
	14 9492998860	F04900008074		Overdue	4/1/2016								
	15 9539831460	F04900001526		Overdue	4/2/2016								
	16 953979351N	F04900002197		Overdue	4/2/2016								
	17 952867643K	F04900002982		Overdue	4/2/2016								
	18 953460698R	F04900006156		Overdue	4/2/2016								
	19 9539875437	F04900008943		Overdue	4/2/2016								
	20 953963464N	F04900007494		Overdue	4/2/2018								
	21 953995191R	F04900000959		Overdue	4/3/2016								
	22 953984941L	F04900001521		Overdue	4/3/2016								
	23 953990524T	F04900006482		Overdue	4/3/2016								
	24 9539847557	F04900007665		Overdue	4/3/2016								
	25 053000005	E05100000117		Overdue	4/3/2016								

(2) Detail and Summary Participants Who Failed to Pick Up Benefits

This report lists participants who are due to pick up benefits but have not yet been issued to.

- From the Crossroads Reports Main Menu screen, select Caseload from the Reports Category dropdown.
- Select Detail and Summary Participants Who Failed to Pick Up Benefits.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. local agency or clinic report type,
 - b. local agency or clinic(s), and
 - c. reporting month.
- 5. Click View Report.
- 6. The report displays. Number of pages is displayed. The report is searchable by page number and key word.
- 7. To print the report, click the Adobe PDF icon.

								Reports Main Men
<u>H</u> ome	Eamily Services	<u>S</u> cheduling	<u>V</u> endor	<u>Operations</u>	Finance	Administration	Help	
* Bour	0115							
Repor	rt Categor							
nep	LIJU	Report	Name			A	Description	Notes
and the owner water of the owner	Migrant Deport	•						
Annual	nigranercepore							
Annual Detail a	and Summary Participa	nt Wait List						
Annual Detail a Detailed	and Summary Participa d and Summary Certif	nt Wait List ied Participant W	ait List					
Annual Detail a Detailed	and Summary Participa d and Summary Certif d and Summary Partic	int Wait List ied Participant Wi ipants Who Failed	ait List d to Pick Up B	Benefits 🔶		_		



- 8. A new window will open with the PDF document.
- 9. Print the report using the print icon on the tool bar.

- Default sort order is number of days late.
- Address and phone number are listed to assist in contacting clients.
- Future appointment date, which indicates a scheduled appointment, and certification end date are useful information when deciding whether to contact.
- Investigation of family record is required. Investigating records of participants who are late will identify those who need to come for issuance and thus help increase participation.
- Run the report for the most recently past month, or current month if near month end.

			De	etaile	d and Summary Participar North Carolin Reporting Mo	nts Who Failed a WIC Program onth: Mar 2016	d to Pick Up E n S	Benefits							Report Date Data Update RD	e: 04/11/2016 ed: 4/11/2016 D: 1.7.4.1.10
Clinic(s): (007 / 007-01 - Be	eaufort - Washi	ngton													
Local Agen	cy: 007 - Beauf	ort County														
Clinic: 007	-01 - Beaufort -	Washington														
		Categ	ory Summation													
		Category		Total												
		Women - P		29												
		Women - N		13												
		Women - B		40												
		Children		2/												
		Total		201												
		Total		510]											
						F	articipant Details	5								
No. of Days Late	Family ID	Participant ID	Participant Name		Malling Address	Telephone	Email Address	Pref. Meth. of Contact	Do Not Contact	WIC Cat	Birth Date	FDTS	LDTS/ Spend Prev Fi	Previous Apt. Date	Future Apt. Date	Cert End Date
13 Days	F00400001147		·					Mail	N	с	10/12/2011	02/29/2016	03/29/2016	09/09/2015		10/05/2016
13 Days								Mail	Ν	с	09/04/2013	02/29/2016	03/29/2016	09/09/2015		09/29/2016
13 Days	F00400004121							Mall	Ν	P	08/02/1990	02/29/2016	03/29/2016	01/06/2016		05/29/2016
13 Days								Mali	Ν	с	10/25/2012	02/29/2016	03/29/2016	09/30/2015		09/29/2016
13 Days	F00400004171							Mali	N	P	12/19/1995	02/29/2016	03/29/2016	12/30/2015		08/30/2016
13 Days	F00400004176							Mal	N	P	04/03/1998	02/29/2016	03/29/2016	12/30/2015		07/02/2016
14 Days	F00400000948							Mail	N	c	09/14/2012	02/29/2016	03/28/2016	10/14/2015		10/13/2016
i= Days								renani	r¥	'	uar16/2015	02/29/2016	03/20/2016	10/14/2015		uar 14/2010
14 Days	F00400003861							Mali	N	с	12/20/2014	02/29/2016	03/28/2016	12/22/2015		12/21/2016
Run Date/Ti	me: 4/11/2016 3:2	26:20 PM					-								F	Page 1 of 29

(3) Detail and Summary Issuance Due Report

This report lists participants who are or were due for issuance during the selected date range.

- 1. From the Crossroads Reports Main Menu screen, select Redemption from the Reports Category dropdown.
- 2. Select Detail and Summary Issuance Due Report.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. dates to cover the desired time period,
 - b. local agency or clinic report type, and
 - **c.** local agency or clinic(s)
- 5. Click View Report.
- 6. The report displays. Number of pages is displayed. The report is searchable by page or key word.
- 7. To print the report, click the Adobe PDF icon.

		Reports Main Menu
Home Family Services Scheduling Vendor Operations Finance A	dministration <u>H</u> elp	
* Reports		
Report Category Redemption Reports List		
Report Name	Description	Notes
Bank Posting Report	This report tracks discrepancies between the bank transactions and the data recorded in the WIC system.	

From Date	1/1/2016	To Date:	1/31/2016	View Report
State:	North Carolina WIC Program 🔽	Report Type:	Clinic	
Local Agency/Clinic:	094 / 094-01 - MT			
II I I	of 25 ▷ ▷ □ ↔	F	ind Next	

- Detail and Summary Issuance Due Report Report Date: 04/12/2016 North Carolina WIC Program Data Updated: 4/12/2016 RDD:1.3.2.1.8 Date Range: 01/01/2016 - 01/31/2016 Clinic(s): 094 / 094-01 - MTW District - Martin Local Agency: 094 - Martin-Tyrrell-Washington Health District Clinic: 094-01 - MTW District - Martin Medical Appointment Date Telephone Number Appointment WIC Last Expiration Documentation Time Family ID Family Name Participant ID Participant Name Date Required Issuance Category F17200003262 Breastfeed 11/19/2015 9/7/2016 No ing F17200003262 Infant 11/19/2015 9/7/2016 No 1/15/2016 3:00PM E1650000002 Child 12/21/2015 10/21/2018 No No 1/20/2016 10:00AM F1650000002 Child 12/21/2015 10/21/2016 F1650000003 Child 12/28/2015 7/26/2016 No F1650000004 Child 12/17/2015 2/15/2017 No 2.00PM E16500000008 1/7/2016 Child 12/8/2015 10/26/2016 No F1650000009 Child 12/9/2015 2/8/2017 No F16500000010 Child 12/22/2015 8/23/2016 No E16500000014 Pregnant 7/5/2014 7/2/2018 No F1650000014 Child 12/5/2015 3/3/2017 No F16500000015 Child 12/17/2015 12/16/2016 No F16500000016 Child 12/10/2015 9/10/2016 No F16500000016 Child 12/10/2015 2/9/2017 No F16500000019 Child 12/19/2015 1/19/2017 Yes F16500000020 1/8/2016 9:00AM Child 12/10/2015 4/12/2016 Yes F1650000021 Child 12/19/2015 1/18/2017 No F1650000022 Child 12/18/2015 1/23/2017 No F1650000023 Child 12/11/2015 5/10/2016 No F1650000024 Child 9/18/2015 7/23/2016 No F1650000025 1/1/2016 8/30/2016 Child No F1650000027 12/20/2015 3/19/2017 Child No F1650000028 Child 12/26/2015 3/24/2017 No Run Date/Time: 4/12/2016 11:24:00 AM Page 1 of 35
- 8. A new window will open with the PDF document.
- 9. Print the report using the print icon on the tool bar.

- Most useful if run for date range including the past 30 days.
- Target participants whose last issuance was more than 3 months in the past.
- Phone number is listed to assist in contacting clients.

(4) Detail Initial Certification Appointments Made Outside of Processing Standards

This report lists appointments that were scheduled outside of processing standards for a selected time frame in the selected local agency or clinic. Results can be sorted in multiple ways. Information is useful in determining if the local agency is experiencing difficulty meeting processing standards and can help decide whether changes in scheduling are needed to meet requirements. This is a companion report to the Pending List.

- From the Crossroads Report Main Menu, select Appointments from the Report Category dropdown. (Alternate path: From the Home screen, go to Scheduling > Reporting > Generate Reports.)
- 2. Select Detail Initial Certification Appointments Made Outside of Processing Standards.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. dates to cover the desired time period
 - b. local agency or clinic report type
 - c. local agency or clinic(s)
 - d. sort order for data on report
- 5. Click View Report.

Note: In the example provided, the report type selected is local agency. Therefore the user is not able to filter by clinic when selecting local agency/clinic. The resulting report will include all clinics in the local agency, and will be divided by clinic.

	• Reports
	Report Category
	Appointments 💌
	Reports List
	Report Name
	Appointment History Report
	Clinic Calendar Report
	Daily Appointments to be Rescheduled Detail
	Octail Clinic Daily Appointment Ochedule
ļ	Detail Initial Certification Appointments Made Outside of Processing Standards
	Detail Nutrition Education Appointment Schedule
	Detail Report of Appointments Made Online
	Participant Appointment Show Rate Report
	Rescheduled Appointments Report (Summary)
	Summary Initial Certification Appointments Made Outside of Processing Standard
	Summary of Appointments by Scheduling Method
	Summary Report of Appointments Made Online
	Waik In Summary Report

From Date: State:	4/1/2015	To Date: Report Type:	4/20/2015	View Report
Local Agency/Clinic:	001 - Alamance Cc	Sort Order:	<select a="" value=""></select>	
	 ✓ 001 - Alamance County ✓ 002 - Alexander County ✓ 004 - Anson County ✓ 007 - Beaufort County 			
	 ✓ 009 - Bladen County ✓ 010 - Brunswick County ✓ 011 - Buncombe County ✓ 011 - Bunce County 			

- 6. The report displays. Number of pages is displayed. The report is searchable by date and key word.
- 7. To print the report, click the Adobe PDF icon. A new window will open with the PDF document. (This step is not shown.)

- Number of days past processing standards displays in the column with that name.
- When an applicant is added to the pending list, the user selects a reason for scheduling the appointment outside of processing standards. That reason displays on this report in the Outside of Processing Standards Comment column. If the column is blank, the user may have selected no when prompted to add applicant to the Pending List.
- Investigation of the Family Appointments screen is necessary to determine if the applicant was given more than one Initial Certification appointment, and if the one appearing on this report was subject to processing standards.



Run Date/Time: 4/20/2015 5:14:29 PM

Page 1 of 1

(5)Total Participation by Category and Priority

This report provides monthly participation figures and percentages by category and priority. It can be generated at the local agency or clinic level.

- 1. From the Reports Main Menu screen, select Caseload from the Report Category dropdown.
- 2. Select Total Participation by Category and Priority.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. month
 - b. local agency or clinic report type
 - c. local agency or clinic(s)
- 5. Click View Report.
- 6. The screen refreshes to display the report.

Note: Report type in the illustration is clinic and is for a local agency with three clinics. Therefore the report has a page for each clinic but not a combined report for the agency.

		antak oluza - osta	Month:	Nov 2015 🗸	State :	North Carolina WIC Program 🗸
Home Earnily Services Scheduling Vendor	Operations Finance Ac	dministration <u>H</u> elp	Report Type:	Clinic 🗸	Location:	ord, 081 / 081-02 💙
Reports						🗹 081 / 081-01 - RPM District - Ru
Report Category					-	🗹 081 / 081-02 - RPM District - Po
Caseload 🔻						🗹 081 / 081-03 - RPM District - Mo
						082 / 082-01 - Sampson - Clinto
Reports List						🗆 083 / 083-01 - Scotland - Laurin
Report Name						084 / 084-01 - Stanly - Albemar
Total Participation by Category and Priority		iii				085 / 085-01 - Stokes - Danburg
Summary of Actions Due Lising Summary Summary of Actions Due Listing Details						

				North Carolina WIC Program Month: Nov 2015								e: 04/ ed: 4/ DD: 1
linic:	081-01 RPM Dist	rict - Ruther	ford									
Federal			Women				Infants			Children		
Priority	Pregnant	FBF	PBF	Non BFPP	Total	FBF	PBF	FFF	Total	Total	Totals	
1	179	55	53	0	287	53	44	263	360	16	663	
	93.2%	87.3%	89.8%	0.0%	60.3%	86.9%	93.6%	74.1%	77.8%	1.7%	35.1%	
	0	1	0	0	1	6	3	85	94	0	95	
	0.0%	1.6%	0.0%	0.0%	0.2%	9.8%	6.4%	23.9%	20.3%	0.0%	5.0%	
	0	0	4	152	156	0	0	0	0	700	856	
	0.0%	0.0%	6.8%	93.8%	32.8%	0.0%	0.0%	0.0%	0.0%	73.7%	45.3%	
IV	11	6	2	0	19	1	0	5	6	1	26	
	5.7%	9.5%	3.4%	0.0%	4.0%	1.6%	0.0%	1.4%	1.3%	0.1%	1.4%	
v	2	1	0	0	3	1	0	2	3	233	239	
	1.0%	1.6%	0.0%	0.0%	0.6%	1.6%	0.0%	0.6%	0.6%	24.5%	12.7%	
VI	0	0	0	10	10	0	0	0	0	0	10	
	0.0%	0.0%	0.0%	6.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	
Totals	192	63	59	162	476	61	47	355	463	950	1889	
96	10.2%	3 3%	3 1%	8.6%	25.2%	3 2%	2.5%	18.8%	24 5%	50.3%	10000	
				Total Parti	cipation by	/ Category	and Priority	1			Report Date	: 04/1
				Total Parti No	cipation by rth Carolin Month:	/ Category a WIC Prog Nov 2015	and Priority Jram	,			Report Date Data Update RI	: 04/1 d: 4/1 DD: 1.
linic:	081-02 RPM Distr	rict - Polk		Total Parti No	cipation by rth Carolin Month:	/ Category a WIC Prog Nov 2015	and Priority gram	,			Report Date Data Update Rt	: 04/1 d: 4/1 DD: 1.
linic: Federal	081-02 RPM Distr	rict - Polk	Women	Total Parti No	cipation by rth Carolin Month:	/ Category / a WIC Prog Nov 2015	and Priority gram			Children	Report Date Data Update Rt	: 04/1 d: 4/1 DD: 1.
linic: Federal Priority	081-02 RPM Distr	FBF	Women PBF	Total Parti No	cipation by rth Carolin Month: Total	/ Category a WIC Prog Nov 2015 FBF	and Priority gram	FFF	Total	Children Total	Report Date Data Update Rt	: 04/1 d: 4/1 DD: 1.
linic: Federal Priority	081-02 RPM Distr Pregnant 29	FBF 9	Women PBF 1 10	Total Parti No Non BFPP	th Carolin Month: Total	/ Category a WIC Prog Nov 2015	and Priority gram Infants PBF 8	FFF 29	Total 45	Children Total 5	Report Date Data Update Rt Totals 98	: 04/1 id: 4/1 DD: 1.
linic: Federal Priority	081-02 RPM Distr Pregnant 29 93.5%	FBF 9 100.0%	Women PBF 1 10 100.0%	Total Parti No Non BFPP	th Carolin Month: Total 48 66.7%	y Category a WIC Prog Nov 2015	and Priority gram	FFF 29 65.9%	Total 45 72.6%	Children Total 5 3.8%	Report Date Data Update Rd Totals 98 37.1%	: 04/1 id: 4/1 DD: 1.
linic: Federal Priority I	081-02 RPM Distr Pregnant 29 93.5% 0	FBF 9 100.0% 0	Women PBF 1 10 100.0% 0	Total Parti No Non BFPP 0 0.0% 0	cipation by rth Carolin Month: Total 48 66.7% 0	V Category a WIC Prog Nov 2015	and Priority ram Infants PBF 8 88.9% 1	FFF 29 65.9% 13	Total 45 72.6% 15	Children Total 5 3.8% 0	Report Date Data Update Rt Totals 98 37.1% 15	:: 04/1 d: 4/1 DD: 1.
linic: Federal Priority I	081-02 RPM Distr Pregnant 93 5% 0 0.0%	FBF 9 100.0% 0 0.0%	Women PBF 10 100.0% 0 0.0%	Total Parti No Non BFPP 0 0.0% 0 0.0%	cipation by rth Carolin Month: Total 48 66.7% 0 0.0%	/ Category a WIC Prog Nov 2015 FBF 8 88.9% 1 11.1%	Infants PBF 8 88.9% 1 11.1%	FFF 29 65.9% 13 29.5%	Total 45 72.6% 15 24.2%	Children Total 5 3.8% 0 0.0%	Report Date Data Update Rt Totals 98 37.1% 15 5.7%	:: 04/1 d: 4/1 DD: 1
linic: Federal Priority I II	081-02 RPM Distr Pregnant 93.5% 0 0.0% 0	rict - Polk 99 100.0% 0 0.0% 0	Women PBF 1 100.0% 0 0.0% 0	Total Parti No Non BFPP 0 0.0% 0 0.0% 20	cipation by rth Carolin Month: Total 48 66.7% 0 0.0% 20	/ Category a WIC Prog Nov 2015 FBF 8 88.9% 1 11.1% 0	Infants PBF 8 88.9% 1 11.1% 0	FFF 29 65.9% 13 29.5% 0	Total 45 72.6% 15 24.2% 0	Children Total 5 3.8% 0 0.0% 95	Report Date Data Update Rt Totals 98 37.1% 15 5.7% 115	: 04/1 d: 4/1 DD: 1
linic: Federal Priority I II III	081-02 RPM Distr Pregnant 93.5% 0 0.0% 0 0.0%	FBF 9 100.0% 0 0.0% 0 0.0%	Women PBF 1 10 100.0% 0 0.0%	Total Parti No Non BFPP 0 0.0% 0 0.0% 20 90.9%	tipation by rth Carolin Month: 70tal 48 66.7% 0 0.0% 20 27.8%	r Category a WIC Prog Nov 2015 FBF 8 88.9% 1 11.1% 0 0.0%	and Priority pram	FFF 29 65.9% 13 29.5% 0 0.0%	Total 45 72.6% 15 24.2% 0 0.0%	Children Total 5 3.8% 0 0.0% 95 73.1%	Report Date Data Update Rd Totals 98 37.1% 15 5.7% 115 43.6%	: 04/1 d: 4/1 DD: 1.
linic: Federal Priority I II II	001-02 RPM Distr Pregnant 29 93.5% 0 0.0% 0 0.0% 2	FBF 9 100.0% 0 0.0% 0 0.0% 0 0.0%	Women PBF 1 10 100.0% 0 0.0% 0 0.0% 0 0.0% 0	Total Parti No 0 0.0% 0 0.0% 20 90.9% 0 0	th Carolin Month: 7011 48 66.7% 0 0.0% 20 27.8% 2 2	y Category a WIC Prog Nov 2015 FBF 8 8 8 8 9 1 11.1% 0 0.0% 0	and Priority gram	FFF 29 65.9% 13 29.5% 0 0.0% 1	Total 45 72.6% 15 24.2% 0 0.0% 1	Children Total 5 3.8% 0 0.0% 95 73.1% 1	Report Date Data Update RI Totals 98 37 1% 15 5.7% 115 43.6% 4	: 04/1 d: 4/1 DD: 1
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linic: Federal Priority I II III IV V	081-02 RPM Distr Pregnant 29 93.5% 0 0.0% 0 0.0% 2 6.5% 0 0 0 0 0 0 0 0 0 0 0 0 0	rict - Polk 9 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0 0	Women PBF 1 100.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%	Total Parti No Non <u>BFPP</u> 0 0.0% 20 90.9% 0 0.0% 20 90.9% 1	cipation by rth Carolin Month: 7004 48 667.% 0 0.0% 20 227.8% 2.2.8% 2 2.8% 1	/ Category a WIC Prog Nov 2015	and Priority rram	FFF 29 65.9% 13 29.5% 0 0.0% 1 2.3% 1	Total 45 72.6% 15 24.2% 0 0.0% 1 1.6% 1	Children Totai 5 3.8% 0 0 0.0% 95 73.1% 1 0.8% 29	Report Date Data Update Ref 98 37.1% 15 5.7% 115 43.6% 4 1.5% 31	:: 04/1 d:: 4/1 DD: 1.
linic: Federal Priority I II III IV V	081-02 RPM Distr Pregnant 93.5% 0 0.0% 2 6.5% 0 0.0%	ret - Polk 9 100.0% 0 0.0% 0 0.0% 0 0.0%	Women PBF 1 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0%	Total Parti No 0.0% 0.0% 20 90.9% 20 90.9% 1 1 4.5%	cipation by rth Carolin Month: 701 48 667% 20 0.0% 20 27.8% 2 2.8% 1 1.4%	r Category a WIC Prog Nov 2015 8 8 8 8 98.9% 1 11.15 0 0.0% 0 0.0% 0.0%	and Priority gram	FFF 29 65.9% 13 29.5% 0 0.0% 1 2.3% 1 2.3% 1 2.3%	Total 45 72.6% 15 24.2% 0 0.0% 1 1.6% 1 1.6%	Children Total 5 3.8% 0 0 0.0% 95 73.1% 1 0.8% 29 22.3%	Report Date Data Update RE 98 37.1% 15 5.7% 115 43.6% 4 1.5% 31 11.7%	:: 04/1 d: 4/1 DD: 1
linic: Federal Priority I II II V V VI	081-02 RPM Distr Pregnant 93.5% 0 0.0% 0.0% 2 6.5% 0 0.0% 0 0.0%	FBF 9 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0 0.0%	Women PBF 1 10 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0	Total Parti No Non BFPP 0 0.0% 0 0.0% 20 90.9% 0 0.0% 1 4.5% 1	cipation by rth Carolin Month: 148 66.7% 0 0.0% 20 27.8% 2 2.8% 2.8% 1.4% 1.4% 1	/ Category a WIC Prog Nov 2015 FBF 88.9% 1 11.1% 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%	and Priority ram Intants PBF 8 8 88.9% 1 11.1% 0 0.0% 0 0.0% 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0.0% 0 0 0 0	FFF 29 65.9% 13 29.5% 0 0.0% 1 2.3% 1 2.3% 0	Total 45 72.6% 15 24.2% 0 0.0% 1 1.6% 1 1.6% 0	Children Total 5 3.8% 0 0.0% 595 73.1% 1 0.8% 29 22.3% 0.8%	Report Date Data Update RI Totals 98 37, 1% 15 5, 7% 115 43, 6% 4 1, 5% 31 11, 7% 1	:: 04/1 d: 4/1 DD: 1.
linic: Federal Priority I II II V V	001-02 RPM Distr Pregnant 299 933.5% 0 0.0% 2 6.5% 0 0.0% 0 0.0% 0 0.0%	tet - Polk FBF 9 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0%	Women PBF 1 10 100.0% 0 0.0% 0	Total Parti No 0 0.0% 0 0.0% 20 90.% 20 90.% 1 4.5% 1 4.5%	Cipation by rth Carolin Month: 48 66.7% 0 0.0% 20 27.8% 2 2.8% 1 1.4% 1 1.4%	/ Category a WIC Prog Nov 2015 8 88.9% 1 11.1% 0 0.0% 0 0.0% 0 0.0% 0 0.0%	and Priority iram PBF 8 8 8 9 9 1 1 1 0 0.0% 0.0%	FFF 29 65.9% 13 29.5% 0 0.0% 1 2.3% 1 2.3% 0 0.0%	Total 45 72.6% 15 24.2% 0 0.0% 1 1.6% 1 1.6% 0 0.0%	Children 5 3.8% 0 0.0% 95 73.1% 1 0.0% 29 22.3% 0 0.0%	Report Date Data Update Rd Totals 98 37.1% 15 5.7% 115 43.6% 4 1.5% 31 11.7% 1	c 04/1 d: 4/1 DD: 1
linic: Federal Priority I II III V V VI Totals	081-02 RPM Distr 29 33.5% 0 0.0% 2 6.5% 0 0.0%	ret - Polk 9 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 9	Women PBF 1 100.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0.	Total Parti No 0 0.0% 20 90.9% 0.0% 1 4.5% 2 1 4.5%	cipation by rth Carolin Month: Total 48 667% 20 27.8% 2.8% 2.8% 1 1.4% 1 1.4% 72	/ Category a WIC Prog Nov 2015 PBF 8 8 8 9 9 1 11.1% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 9	Infants Infants PBF 8 8 8 9 9 11 11 15 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0.0% 0 0 0.0% 0 0 0 0 0 0 0 0 0 0 0 0 0	PFP 29 65.9% 13 29.5% 0 0.0% 1 2.3% 1 2.3% 0 0.0% 44	Total 45 72.6% 15 24.2% 0 0.0% 1 1.6% 1 1.6% 0 0 0.0% 62	Children Total 5 3.8% 0 0.0% 95 73.1% 1 0.8% 22.3% 0 0.0% 130	Report Date Data Update RI Totals 98 37.1% 15 5.7% 115 43.6% 4 1.5% 31 11.7% 31 11.7% 264	:: 04/1 d: 4/1 DD: 1.

View Report

Rutherford Polk

McDowell

rinhı

7. To print the report, click the Adobe PDF icon. A new window will open with the PDF document.

Notes:

- The second illustration is for the same local agency, but run as local agency for the report type. Therefore it provides a one-page report that includes data from all three clinics. When summed, totals for the three clinics equal the local agency total (1889+264+1326=3479).
- Use the report to evaluate, track, and project participation against base caseload.
- Compare data to other population statistics such as Medicaid numbers, birth rate, and population at risk.
- Use data to plan and evaluate outreach activities.
- The figures found on this report usually match, but do not serve as a substitute for, those provided by the NSB.
 Participation figures published by the NSB are the official count.

v

VI

Totals

%

2

0

1.5%

0.0%

134

3.9%

0

0

0.0%

0.0%

114

3.3%

1

0.3%

5.2%

289

8.3%

15

2

0

0.6%

0.0%

350

10.1%

				Total Part No	ticipation b orth Carolir Month:	y Category Ia WIC Prog Nov 2015	and Priorit	У			Report Date: 04/ Data Updated: 4/ RDD: 1
Clinic:	081-03 RPM Distr	ict - McDow	vell Women				Infante			Children	
Federal Priority	Pregnant	FBF	PBF	Non BFPP	Total	FBF	PBF	FFF	Total	Total	Totals
1	113	59	39	0	211	61	30	182	273	9	493
	89.0%	95.2%	86.7%	0.0%	62.2%	91.0%	90.9%	82.0%	84.8%	1.4%	37.2%
	0	0	0	0	0	4	1	35	40	0	40
	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	3.0%	15.8%	12.4%	0.0%	3.0%
	0	0	3	101	104	0	0	0	0	487	591
	0.0%	0.0%	6.7%	96.2%	30.7%	0.0%	0.0%	0.0%	0.0%	73.2%	44.6%
IV	14	2	3	0	19	1	2	3	6	0	25
	11.0%	3.2%	6.7%	0.0%	5.6%	1.5%	6.1%	1.4%	1.9%	0.0%	1.9%
v	0	1	0	0	1	1	0	2	3	169	173
	0.0%	1.6%	0.0%	0.0%	0.3%	1.5%	0.0%	0.9%	0.9%	25.4%	13.0%
VI	0	0	0	4	4	0	0	0	0	0	4
	0.0%	0.0%	0.0%	3.8%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Totals	127	62	45	105	339	67	33	222	322	665	1326

	Total Participation by Category and Priority North Carolina WIC Program Month: Nov 2015									Report Da Data Upda	
_ocal Agency:	081 Rutherford, P	olk, McDow	/ell Distric	t							
Federal Priority			Women				Children				
	Pregnant	FBF	PBF	Non BFPP	Total	FBF	PBF	FFF	Total	Total	Totals
I	321	123	102	0	546	122	82	474	678	30	1254
	91.7%	91.8%	89.5%	0.0%	61.6%	89.1%	92.1%	76.3%	80.0%	1.7%	36.0%
Ш	0	1	0	0	1	11	5	133	149	0	150
	0.0%	0.7%	0.0%	0.0%	0.1%	8.0%	5.6%	21.4%	17.6%	0.0%	4.3%
ш	0	0	7	273	280	0	0	0	0	1282	1562
	0.0%	0.0%	6.1%	94.5%	31.6%	0.0%	0.0%	0.0%	0.0%	73.5%	44.9%
IV	27	8	5	0	40	2	2	9	13	2	55
	7 7%	6.0%	4.4%	0.0%	4.5%	1.5%	2.2%	1.4%	1.5%	0.1%	1.6%

2

0

1.5%

0.0%

137

3.9%

0

0

89

0.0%

0.0%

2.6%

5

0

0.8%

0.0%

17.8%

621

7

0

0.8%

0.0%

847

24.3%

5

15

0.6%

1.7%

887

25.5%

443

15

12.7%

0.4%

3479

100.0%

431

0

24.7%

0.0%

1745

50.2%

(6)Participation Report by Race-Ethnicity

This report provides participation figures and percentages for each category by race and ethnicity. It is available for local agency and clinic levels.

- From the Reports Main Menu screen, select Caseload from the Report Category dropdown.
- 2. Select Participation Report by Race-Ethnicity.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. local agency or clinic report type
 - b. local agency or clinic(s)
 - c. reporting month

Note: This report automatically opens with the defaults of clinic for report type and latest month for which issuance has occurred for month. User should change to desired selections.

5. Click View Report.

Reports Main Menu 🛔

State : North Carolina WIC Program Report Type: Clinic Location: 001 / 001-01 - Ala Month: Jun 2016	View Report
4 4 1 of 160 ▷ ▷	
Participation Report by Race-Ethnicity	Report Date: 04/13/2016
North Carolina WIC Program	Data Updated: 4/13/2016
Participation Month: Jun 2016	RDD: 1.7.4.1.12

- 6. The screen refreshes to display the report.
- 7. To print the report, click the Adobe PDF icon. A new window will open with the PDF document.

- Rows denote race categories, including a row for participants designating more than one race.
- Columns designate participant categories with subtotals for infants, children, and women.
- Total participation as reported on this report (see red box) will likely vary slightly from the official NSB total.
- Ethnicity totals are in the two far right columns. They do not add to 100%, however testing indicates Non-Hispanic total is correct and can be subtracted from race total to derive the Hispanic total.
- Use data about current participation characteristics and changes over time in program evaluation and planning.

Participation Report by Race-Ethnicity North Carolina WIC Program Participation Month: Nov 2015

Report Date: 04/12/2016 Data Updated: 4/12/2016

RDD: 1.7.4.1.12

Local Agency(s): 043 - Harnett County

D43 - Harnett County													
		Category										Ethnicity	
Race	Fully BF Infants	Partially BF Infants	Fully Formula Fed Infants	Infant Totals	Childre n	Pregnant Women	BF Women	Non-BF PP Women	Women Totals	Race Total Count	Race Total %	Hispanic or Latino	Non- Hispanic or Non-Lating
American Indian or Alaskan Native	0	0	1	1	6	2	0	1	3	10	0.33 %	0	7
Asian	0	1	4	5	8	1	1	0	2	15	0.5 %	0	15
Black or African American	6	20	214	240	511	90	27	86	203	954	31.67 %	16	853
White	62	51	350	463	1011	185	117	157	459	1933	64.18 %	256	1134
Native Hawaiian or Pacific Islander	1	0	0	1	5	1	0	0	1	7	0.23 %	1	3
Multi-Race	3	2	23	28	59	2	1	3	6	93	3.09 %	2	74
Local Agency Totals	72	74	592	738	1600	281	146	247	674	3012		275	2086
% Totals	2.39 %	2.46 %	19.65 %	24.5 %	53.12 %	9.33 %	4.85 %	8.2 %	22.38 %		100 %	9.13 %	69.26 %

(7)Participation by Category, Priority, and Age for Children

This report provides monthly participation figures for children by category, priority, and age at the local agency level.

- 1. From the Reports Main Menu screen, select Caseload from the Report Category dropdown.
- 2. Select Participation by Category, Priority, and Age for Children.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. reporting month
 - b. report type-local agency
 - c. local agency

Note: This report is not available at the clinic level.

- 5. Click View Report. The screen refreshes to display the report.
- To print the report, click the Adobe PDF icon. A new window will open with the PDF document. (This step is not shown.)
- Use data about current participation characteristics and changes over time in program evaluation and planning.

								Reports Main Men	
Home	Eamily Services	Scheduling	Vendor	Operations	Finance	Administration	Help		
* Rep Rep	orts ort Category load								



(8)Detail Initial Ineligible/Termination Report

This report provides a list of individuals who were determined to be ineligible or terminated during the selected time period. Dates and reasons for termination or ineligibility are listed. It is available at local agency and clinic level.

- From the Reports Main Menu screen, select Clinic from the Report Category dropdown. (Alternate path: From Home screen, go to Family Services > Reporting > Generate Reports.)
- 2. Select Detail Initial Ineligible/Termination Report.
- 3. A new browser window opens accessing the report server.
- 4. Select
 - a. dates to cover the desired time period
 - b. local agency or clinic report type
 - c. local agency or clinic(s)
 - d. category (ineligible, termination, or both)

Note: Selecting terminated only may not return any results, however terminations are included in when both is the selection for category.

 Click View Report. The screen refreshes to display the report. (This step is not shown.)



6. To print the report, click the Adobe PDF icon. A new window will open with the PDF document.

Use this report to:

- conduct internal quality assurance activities
- determine if the correct reasons for ineligibility/termination are being selected
- determine if participants found ineligible or terminated get the required notifications
- make sure transferring participants are getting VOCs and notices
- examine whether records are correctly completed

			Detail Dat	Initial Ineligible Termination Report North Carolina WIC Program e Range: 01/01/2016 - 03/31/2016			Report Date: 04/13/2016 Data Updated: 4/13/2016 RDD: 1.1.12.1.19						
Local Agency(s): 001 - Alamance County													
Category: Ineligible / Terminated Participants													
LocalAgency: 001-Alamance County													
Clinic : 001-01-Alamance - Burlington													
Family ID	Family Name	Participant Id	Participant Name	Address	Phone	Ineligible/ Terminated Date	Ineligible/Terminated Reason						
F00100000101						2/16/2016	1-No Longer Categorically Eligible						
F00100000437						2/8/2016	1-No Longer Categorically Eligible						
F00100002126						3/23/2016	1-No Longer Categorically Eligible						
F00100002136						3/24/2016	10-Stopped Breastfeeding After Six Months Postpartum						
F00100002679						2/8/2016	4-Moved Out of State						
F00100002797						2/19/2016	17-EDC change by more than 4 weeks						
F00100003352						3/2/2016	1-No Longer Categorically Eligible						
F00100003371						3/1/2016	1-No Longer Categorically Eligible						
F00100003890						2/4/2016	1-No Longer Categorically Eligible						
F00100003950						3/3/2016	1-No Longer Categorically Eligible						
F00100003975						1/15/2016	1-No Longer Categorically Eligible						
F00100004025						1/12/2016	1-No Longer Categorically Eligible						
F00100004133						3/18/2016	1-No Longer Categorically Eligible						
F00100004156						1/29/2016	4-Moved Out of State						
F00100004156						1/29/2016	4-Moved Out of State						
F00100004190						2/17/2016	1-No Longer Categorically Eligible						
F00100004197						2/9/2016	4-Moved Out of State						
Run Date/Time: 4/1	13/2016 8:33:59 PM	1					Page 1 of 3						

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(9) Summary Initial Ineligible/Termination Report

This report provides summary information about the number of individuals who were determined to be ineligible or terminated during the selected time period. It includes the count and percentage by reason for ineligibility or termination. The report is available by local agency or clinic.

1. From the Reports Main Menu Reports Main Menu screen, select Clinic from the Report Category dropdown. Reports (Alternate path: From Home Report Catego -Clinic screen, go to Family Services > **Reports List** Reporting > Generate Reports.) Report Na Descripti Detail Initial Ineligible Termination Report Summary Initial Ineligible Termination Repor 2. Select Summary Initial -OR-Ineligible/Termination Report. Family Services Schedul New Family • Repo Family Search 3. A new browser window opens Certification Cinic Income Screening Calculator accessing the report server. Clinic Family Workflow Dashboard Reporting Generate Reports Detail Delayed Signatures for FI Issuance Detail Medicaid Recipients Report Summary Medicaid Report 4. Select dates to cover the desired time period b. local agency or clinic report Summary Initial Ineligible Termination Report Report Date: 04/12/2016 type North Carolina WIC Program Data Updated: 4/12/2016 c. local agency or clinic(s) Date Range: 01/01/2016 - 03/31/2016 RDD: 1 1 12 1 19 d. category (ineligible, Local Agency(s): 001 - Alamance County termination, or both) Category: Ineligible / Terminated Participants **Note:** Selecting terminated only may not return any results, however terminations are included in when Local Agency Name: 001-Alamance County Ineligible/Terminated Reason Count Percent of Total both is the selection for category. 5 13% 10-Stopped Breastfeeding After Six Months Postpartum 3% 17-EDC change by more than 4 weeks 1 5. Click View Report. The screen 20 50% 1-No Longer Categorically Eligible refreshes to display the report. 2-No Longer Income Eligible 3% 1 (This step is not shown.) 3-Income Ineligible - Total amount exceeds Guidelines 3% 1 4-Moved Out of State 12 30% 6. To print the report, click the Total Agency: 40 Adobe PDF icon.