# MI-WIC Reports for Management Evaluations

| Report title/source | Purpose | Review/Comments |
|---|---|---|
| Active Record Review | | |
| **Clients by Cert End Date** (Clinic/partic/clients by cert end date) | Identify clients who will be completing a cert period soon for record review. | Date range should be in future. Dates are cert ending dates. |
| **WIC Ineligible Client Report** (Clinic/participation/WIC ineligible client report) | Monitor if clients are receiving Ineligibility Notice when determined ineligible. | Report based if ineligibility status is assigned on Client Info screen or Cert Action. Review quarterly. Date of Ineligibility. |
| **Expiring Short Certs Report** (Clinic/participation/expiring short certs) | Monitor clients who were short certified to follow-up on required documentation. | Enter Termination Dates. Do regularly-wkly/bi-wkly/ monthly for reminder phone calls. |
| **Local Agency/State User Roles Report** (admin/Roles Reports/ Local Agency-State User Roles) | Lists staff with MI-WIC access. Use to check who has MI-WIC access and credentials for CPA & RD. | Review restricted roles for credential and training requirements per Policy 1.07. |
| **Formula Usage Report** (Clinic/participation/Formula Usage) | Identify clients who have been assigned a Class I, II, or III formula food pkg for record review. | Previous month and use last button: All Class I (excluding infants), II & III. Review Monthly/bimonthly |
| **High Risk Report** (Clinic/nutr & health summary/High risk report) | Identify clients who are high risk/received high risk services for record review. Determine if clients are being consistently offered/provided RD services.<br><br>For Care plan monitoring, select records with different risks and categories, with CP Open Date recorded and CP Not Needed Date is blank. | **CP Open Date** -when Care Plan is documented.<br>**CP Not Needed Date** -date box is checked and rationale in Assessment.<br>**CP Closed Date** -when the RD checked box w/ rationale on Follow-up tab.<br>**Declined-** client declined RD services.<br>**Non-WIC RD-** client is seeing other RD. |
| **WIC Dual Enrollment Report** (Clinic/partic/WIC Dual Enrollment) | Identifies potential dual (WIC/WIC) enrollees for review and follow up. | Review to determine if agency resolves within 45 days of identification of dual enrollment. |
| **Client Compliance Log** (Clinic/participation/client compliance log) | Monitors compliance activities. | Ensure complaints are followed up and resolved promptly. Date of complaint. |
| **Overdue Loaner Breast Pump Report** (Clinic/breast pumps/overdue loaner BP Report) | Monitors Breast Pumps due back to agency and allows for follow up. | Monitor overdue multiuser breast pumps and required monthly follow ups. |
| **Client List by Breast Pump Model Issued** (Clinic/breastpumps/client list by breastpump model issued) | Lists clients issued breast pumps by model. | To review signed breast pump release and return receipts and 1-2 day follow-up on pump. |
| Administration | | |
| **10/20 DAY REPORT** (Clinic/Scheduler/Outside 10/20-day report) | For cert/Pcert clients, indicates whether scheduled within required time period for cert. | Dates: Appt date range Review at least monthly. Original appt listed. |

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| **Incoming Referral Work Queue** (Clinic/scheduler/Incoming Referral Work Queue) | Review ISD Referrals for timely contact/scheduling. | |
| **Formula Acceptance & Action Log** (Miscellaneous/Formula Acceptance-Action Log) | Review returned formula storage, log completion, & Review Notes | Verify flagged lines are routinely reviewed (check Pending Review). |
| **Breast Pump Inventory Details** (Admin/Breast Pumps/Inventory Details) | Review if completing quarterly breast pump inventory. | By pump model. |
| **Hemoglobin Daily Summary Report** (Clinic/Nutr & health summary/Hgb daily summary report) | Monitor clients tested during specified period to insure retest if <8 g/dL. | Assess whether required testing & retesting is completed. NOTE: State retest policy <8 g/dL. |
| **Single Certifier Report** (**admin**/reports/roles reports/single certifier report) | Report lists clients who were certified by a single staff member. | Monitor 100% IFF/IBP and 20% of remaining records for required scanned documents. |
| **Lead Test Billing Report** (Clinic/admin/lead testing report) | Provides list of clients who had Lead testing done in WIC. | Does LA apply reimbursement to WIC program if WIC staff performs testing? |
| **MIHP Billing Report** (Clinic/MIHP Billing report) | List PG & I clients who received MIHP & WIC services during same visit for MA billing. | Assess how agency reflects staff time if MIHP services are performed *in* WIC. Must check box. |
| **Caseload Management Report** (Clinic/caseload/caseload management report) | Utilize to monitor caseload. | If migrant caseload assigned look at non-migrant assignment and compare %. |
| Certification | | |
| **Communications** (Print Docs) (At Family level-Miscell/Communications) | Lists what documents were provided for Family by Date. | Verifies required documents (Client Agreement, NE Plan and VOC) are provided. |
| Outreach & Referrals | | |
| **Families Count by Primary Language** (Clinic/partic/families count by language) | Number whose primary language is not English for determining need for interpreters. | Requires input of primary and secondary languages. |
| **Local Agency Directory** (Admin/administration/LA directory) | Lists LA address(es) and contacts. | |
| Recordkeeping and Accountability | | |
| **Benefit Over-Issuance Detail Report** Admin/EBT Reports/benefit over issuance | Monitor clients who received additional benefits. | Check if reason documented. |
| **Benefit Re-Issuance** Admin/EBT Reports/benefit re-issuance by staff | Monitor clients who have been re-issued benefits by staff name. | Monthly |
| **Clients Eligible for Benefits** (Clinic/partic/clients eligible for benefits | Contact list for clients with no benefits or ending soon. | Dates=BVT |
| **Online NE Completed** (Clinic/education & referrals/online NE completed) | Identifies clients who completed a wichealth.org lesson during dates entered. | Resource for issuing benefits after education completed. |