

Crystal WIC Reports – Local Agency

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❖ Administrative Management

- **Benefits Mailed – Last Full 12 months**– Use this report to monitor adherence to federal guidelines and WOM policies regarding food instrument accountability. Review volume of FI mailed versus caseload and the timeliness of issuance. Unjustified high volumes may indicate issues at the LWP. Review MOWINS for a sampling of participant records to assure LWP is providing proper documentation of reason for mailing.
- **Enrolled vs Served and No Show Percentages** - This report provides data by agency and shows the number of households and participants enrolled; the number of households and participants served; and the no show percentages. The report is summarized by month within each federal fiscal year (FFY). Each household and/or participant can be counted in more than one month, but only once per month. The report also contains an unduplicated total for the FFY of the number of households and participants enrolled, and the number of households and participants served. FFY 2012 is the oldest data available.
- **Initial Contact – Date of Visit** - This report will be used to monitor adherence to federal guidelines for serving new participants and assess same-day Prescreening. "New" is defined for the purposes of this report only as an individual whose record was added into MOWINS through the Prescreening process for the current certification period. This report is filtered to show prenatals and infants who were certified more than ten (10) calendar days after contact with the WIC program to request service, and children who were certified more than twenty (20) calendar days after contact with the WIC program. Additionally, this report will show all "new" prenatals, infants, and children who are certified the same date they were Prescreened into MOWINS.
- **Participants with \$0/\$1 Income** - Provides the State WIC staff with a detailed list of clinic participants that have claimed \$0.00 or \$1.00 income (weekly, monthly or annually) during an income assessment. This report excludes participants who were less than 31 days old when certified if the mother was adjunctively eligible. State WIC staff should check for affidavit for participants with \$0.00 income. State WIC staff should provide technical assistance to Local WIC Providers with \$1.00 income (weekly, monthly, or annually) entries, as entering \$1.00 to indicate zero income was a previous HANDS system requirement.
- **Race/Ethnicity** – This report is used for civil rights compliance and outreach. LWP staff will compare the race/ethnicity recorded for WIC participants on this report to census/demographic information for the service area. Multi-race is the designation for anyone with two or more races. A no-show percentage by race is shown. Please note the counts in this report will not match the participation data because this report looks at: 1.) The current site of participation, not the site at which food instruments were issued (in the case of transfers); 2.) The participant's current WIC status as of the day the report was run; 3.) Participants whose certification is valid as of the date the report was run. You can enter the month & year of the data that you would like to see. No data is available for this report prior to September 2010. You will not be able to see current month data until the following month. Example: You will not be able to view November 2010 data until on or after December 1, 2010
- **UserIDs Active in Agency Detail** - This report shows the active MOWINS Userids at each agency. This report shows the active MOWINS User IDs with associated operational roles at each agency. Local WIC Providers should monitor this list to ensure only active employees have access to MOWINS and that their access level (role) is correct. State WIC staff will view this list to identify current MOWINS users and their roles.
- **UserIDs by Tasks Performed – Detail** - This report can be used for WIC clinic management. It provides a count of the number of certain activities completed in MOWINS by each user per month. Activities counted include the creation/addition of income contacts, demographic screens, height/weight/bloodwork measures, VENA contacts, food prescriptions, and sets of food instruments issued (including replacement checks). Counts are available for the last three months. Please note that if an individual works for more than one agency, the counts shown are for all agencies, not any single one. A second purpose for this report is to ensure that employees are performing only the tasks they should.

❖ Breastfeeding/Breast Pumps

- **Breast Pump Detail** - The breast pump report will serve to track breast pumps loaned out to participants and help if an agency needs to triage the pumps. This report is sorted by pump issue date within each agency. If the pump is issued to any one of the following, it will be highlighted: WIC Category C, N, or P. BF Amount Not Applicable or Partially BF > Max.
- **Breastfeeding Initiation – Duration Report** - This report shows breastfeeding initiation and duration at 1, 3, 6 and 12 months for each agency site. The state breastfeeding initiation and duration is also listed for comparison. This report can be used for local WIC agencies to evaluate the effectiveness of the breastfeeding interventions they have implemented.
- **Breastfeeding Women Detail** - The Breastfeeding Women Report provides a list of breastfeeding women, their infants, mother's contact information and infant breastfeeding amount. This report can be used to make targeted phone contacts to breastfeeding women to provide assistance during critical times that mothers may need extra support. It is possible for the infant data to be blank on this report and the possible reasons are there is not a link to or from the infant's record, the link from the mother's record is to a child's record in the household instead of the infant's, the actual delivery data on the mother's record is different than the date of birth of the infants, or the mother's delivery date is blank due to being an out of state transfer. If the report shows a mother with two infants with the same name, this means that the infant's record was linked twice. Corrections made to a record will be available the next day on this report.
- **Prenatals by Due Date Detail** - This report lists all prenatal participants for an agency, including the participant's contact information and EDC date and is sorted by EDC date. The purpose of this report is to provide targeted phone contacts to women so breastfeeding education and support can be provided right before and after their infant is delivered.

❖ Caseload Management

- **Clinic Transaction Activity – Summary** - This report can be used for WIC clinic management or caseload management. The report contains counts of certain MOWINS transactions by clinic and/or the agency as a whole. Transactions counted include prescreenings, new certifications, recertifications, terminations, education contacts, and a count of sets of food instruments (FIs) that were printed, voided, or marked as lost or stolen. Please note that sets of FIs that were voided or marked as lost or stolen only include whole sets; a partially voided set, such as for formula replacement, will not be included.
- **FI Pick-Up/No Show Detail** - This report will assist with follow-up of participants who have not received checks recently, based on the expiration date of the last check issued. The report includes participants with a certification period still in effect, and is grouped by last check expiration month. Within the month, records are sorted by household ID. If the participant's MOWINS record was marked as terminated, the reason will be given (for example, pending proof of residency or failure to pick up). The termination reason field is blank for active participants.
- **Participant List Detail** - This report shows the current active participants. It is grouped by household ID, then sorted by last name. The report includes participant contact information, as well as the most food instruments issued and the certification end date. Please remember not to share information with outside persons and organizations that would identify WIC participants.
- **Participants Who Were Issued FI's by Selected Month/Year – Detail** - This is a detail report of participants who received food instruments for a given time period. The reporting time period is by month. This report is, in effect, the opposite of the no-show detail report.
- **Participation Count with Year To Date Totals** - This document is caseload for the current Federal Fiscal Year. On the first of each month, the previous month totals will show the initial count for that month. On the first of the following month, those totals will be updated to reflect the 30 day totals for that month. You must enter your agency number along with clinic site numbers in the range fields to pull the umbrella totals along with the clinic totals. You must also enter the federal fiscal year (example: 2011), then click on OK for the report to run.
- **Recertification Due Detail** - This is a list of participants sorted by upcoming recertification due date. A list of months will appear to the left of the report so you can choose to view the report information for that given month (for example: only June's recerts due). The report is grouped by Household ID number, so that you can see if members of the same household have recertification due dates spaced closely enough that

they could be worked together. The report also shows the Last Date to Use (LDTU) of the last set of food instruments the household received. Please note that the LDTU for fully breastfed infants will be blank.

- **Transaction Activity Termination Report** - Use the Clinic Transaction Activity Termination Detail to help explain changes in participation numbers from one month to another by providing detailed explanations for all recent terminations emphasizing potential areas for increased outreach. The report shows data from the previous full month.

❖ End of Month Reports

- Current Federal Fiscal Year Reports
 - The reports listed below are updated each month (BF Cert Periods Report is Quarterly) and are located in its respective folder.
 - **BF Certification Periods** - This is a quarterly report. The Breastfeeding Certification Periods is an analysis of the length of time breastfeeding women are enrolled as a 'B' category. The report totals the number of women certified as breastfeeding who also have a pregnancy certification versus the number of women certified as breastfeeding that do not have a pregnancy certification.
 - **Formula Supplementation of BF Infants** - The Formula Supplementation of Breastfed Infants is an analysis of the amount of formula used by infants. All infants eligible to receive food instruments are included in the report (i.e. all certified infants).
 - **Medicaid Adjunctive Eligibility at Certification by Category/Age** - The Medicaid Adjunctive Eligibility is an analysis of completed certifications and Medicaid certifications within the specified date ranges. The report is by Agency, service site, and category. Additional age group attributes are included to give a total for the number of children 1 to 2 years old, children 2 to 3 years old, children 3 to 4 years old, and children 4 to 5 years old. A total for Completed Certifications, Medicaid Certifications, and percent of Medicaid Certifications to Completed Certifications is printed for each Agency and service site.
 - **Participation Processing Statistics** - The Participation Processing Statistics is a statistical summary of enrollment totals, reported participation and redeemed participation.
 - **Redeemed FI Expenditures** - The Redeemed Food Instruments/Expenditures summarizes the redemption and disposition of food instruments for the reported month.
 - **Special Formula** - The Special Formula report is a state level report that shows the total number of participants that have been issued special formula food items. All participants that are in a valid certification period and were issued special formula during the reported month are included in the report. If a participant is issued multiple types of special formula, the participant is counted in the total for each type of special formula. A participant can be counted more than once.

❖ Food Instrument Reconciliation

- **Void/Lost/Stolen FI's** - This report shows all FI's in an agency that have been issued - keyed as void, lost, or stolen - and later redeemed. For Void FI's - LWP staff must research and submit to the state office details on how the void checks were released for redemption, and how they will assure the action will not happen again. This report will be used by local WIC provider (LWP) and state staff to identify patterns, trends, and training needs of staff who key an excessive amount of FI's as void.
- **Void/Lost/Stolen FI's - Redeemed & Not Redeemed - Summary** - This report for clinic management and/or state technical assistance gives a total of checks issued during the reporting period, the number of checks voided, the number of checks marked as lost, and the number of checks marked as stolen. High proportions of FIs marked as void, lost, or stolen could be cause for concern. See the detail report for more information. Time Period: Last 3 full months.

❖ Food/Formula

- **Gluten Free Rice Chex Issuance** - This report shows participants with a current food prescription for gluten free Rice Chex. Use this report to determine if Rice Chex was issued appropriately. The username is the local agency staff person who entered the food prescription.
- **Infants, 0-1 month, # cans formula** - Excel Version of - The report shows infants 0-1 month old in the last 3 months, the amount of breastfeeding and the amount of formula issued. Breastfeeding infants receiving

any amount of formula in the first month should always be partially BF > max. Fully breastfeeding infants should never receive any amount of formula unless it is issued at a later date than mothers fully breastfeeding checks.

- **Participants with Inactive Food Items** - This reports all participants who are in a current certification and list Inactive Food Items on their most recent Food Prescription.
- **Prorated Food Packages Overridden to Full Provision** - This report, grouped by household, shows food packages issued that should have been prorated packages but were overridden to a full package. The days difference and the prorated package size (1/4, 1/2, or 3/4) show what should have been issued. A bug in the system currently prevents the override reason from being shown. If the user name is not a CPA, the record should include an explanation in a general note.
- **Rx Issued by Certifier** - This report shows food prescriptions inappropriately entered by a WIC Certifier in the past twelve months. Inappropriate prescriptions include those with exempt formulas, medical foods, formula for partially breastfed infants, tailored packages to address special dietary needs of women or children, and food for homeless participants.
- **Special Formula Prescription Expiration – Detail** - Use this report to follow up on formula prescriptions that are due during the month. The certification end date and the staff person who established the food prescription most recently are included on the report. This report does not include foods that require medical documentation, only formulas.
- **Specialty Food/Formula Req Med Doc I-C** - This report shows infants and children in a current certification receiving specialty food or formula that requires medical documentation. The food/formula is identified, along with the staff person who entered the food Rx. Note: Children receiving a standard contract formula who have turned 1 year old and have not yet recertified will show on the report.
- **Specialty Food/Formula Req Med Doc Women** - This report shows women in a current certification receiving specialty food or formula that requires medical documentation. The food/formula is identified, along with the staff person who entered the food Rx. Note that women who are fully breastfeeding multiples may appear on the report with an appropriately prescribed food package.

❖ Nutrition Education

- **Infant Education and Blood Work** - This report shows all infants in a current certification, the secondary nutrition education contacts received, and blood work completed. If blood work delay was inappropriately checked or an exception reason selected, that is shown. Review for two education contacts each 6 months of the infant certification, for appropriate education topics, and for infant blood work completed between 9-11 months. This report can be used as a self-monitoring tool.
- **No Show and Refused Coded for Nutrition Education** - This report shows the number of times "no show for nutrition education" and "client refused nutrition education" was coded for each participant during the current and immediate previous certification. If either of these two topics were coded multiple times in the certification by different staff, all userids of staff who coded are listed on the same line. If the same person coded each time, the userid is listed once.
- **Nutrition Education Coded by Peer Counselor** - This report shows nutrition education coded by the peer counselor, including the topic, whether it was group or individual, if it was a primary or secondary contact, the date, and the individual who coded the education. Use this report to assure policy compliance. Persons with a dual system role, for example, someone with both clerk and peer counselor access, will not show up on this report. Note: Peer counselors should document individual contacts in participant activities.
- **Nutrition Education Follow-Up – Detail** - This report shows participants in a current certification who have not yet received 2 nutrition education contacts, and high risk participants who have not received a high risk contact. It also shows if the local agency documented that the participant refused nutrition education. Participants on this report have not yet met policy requirements for nutrition education. Use the cycle and last date to use information for each household member to schedule nutrition education. The first six months and second six months of infants and breastfeeding moms certifications are reported separately. The second six months columns should be complete for infants and breastfeeding women, but blank for children, prenatals and non-breastfeeding women. The code "nutritionist not available" is not recognized as a contact.
- **Nutrition Education Follow-Up – Summary** - The nutrition education summary report looks at the most recent completed certification for compliance. It shows the number and percent of participants who did not

receive the required two nutrition education contacts and high risk participants who did not receive a high risk contact. Use this report to evaluate how well your agency is doing at providing the appropriate minimal requirement for nutrition education.

- **Nutritionist Not Available Coded Nutrition Ed – Detail** - Monitor the use of the codes Nutritionist Not Available and No Show for Nutrition Education in the past 12 months with this report. The date the code was used and who coded is provided. When the cert start date column is blank, the code was used at a secondary nutrition education contact. When the cert start date is shown, the code was used at certification.
- **Secondary NE Coded to Each Participant** - This report shows all secondary nutrition education topics coded to each participant in the most recent 4 months. The report is grouped by household. Review to determine if appropriate staff coded nutrition education and if topics are appropriate for the category. The cert start/cert end date column is blank if nutrition education was coded through the folder tab and not at certification.

❖ Risk Factor/Medical

- **Children with Risk Factor 113-114 Detail** - This report shows children age 2-5 with RF 113 or RF 114 in the current certification and/or immediate previous certification period. Use this report to track improvement or worsening of the child's risk factor. Use the race and ethnicity fields to address health disparities. Use the number of nutrition education contacts to provide appropriate nutrition education.
- **Cycle, Risk Factor, UserID** - This report of participant cycle, risk factor(s), and userid has multiple uses. 1. Select high risk records for monitoring review. 2. Select records of infants or children of a certain age or with specific risk factors for monitoring review. 3. Review cycle assignment based on age, category, and risk factors. A limitation of using this to determine if cycle assignment is correct is that the report shows only the current cycle. 4. Identify if risk factors 401, 428, or 501 were assigned by a WIC Certifier (working outside of scope).
- **High Risk Participants – Detail** - This alphabetical list of high risk participants shows the participant's category, their high risk risk factor(s), number of nutrition education contacts and if they have received a high risk contact, and their certification start and end dates.
- **Postpartum Blood Work-Less than 4 weeks – Detail** - This report shows participants whose postpartum blood work was collected prior to 4 weeks postpartum and the blood work result. Each LWP site list is sorted by the number of weeks postpartum (0-3) when the blood was collected. Use this to identify LWPs not meeting policy requirements. This report does not include participants whose blood work was never collected during the certification period, only those whose blood work was collected too early.
- **Reason Blood Work Not Collected** - This report shows all participants in an agency with no blood work value for the current certification period and the exception reason documented by the LWP. The username included in the report is the staff person who entered the blood work exception. Review this report to determine if exceptions are used appropriately.
- **Risk Factor 142 – Premature Infants – Detail** - This report shows infants in a current active certification with risk factor 142, prematurity. Use this report to assure that each infant has at least one high risk nutrition education contact coded by the nutritionist in the first six months, and at least one coded in the second six months. If there is no date in the column NeContactDt, it means that high risk nutrition education has not been coded. If "High Risk Contact (see SOAP notes)" or "High Risk Infant Nutrition" is coded, the contact date will appear on a separate row for each contact. This report does not show any nutrition education other than high risk. The lbs and oz columns show the infant's birth weight. This can be used for counseling and as a clinic management tool to identify possible data entry errors. An infant with a normal birth weight may indicate that the EDC was not updated in the mother's record. The report is grouped by the cert due date (month/year).
- **Smoking Status of Prenatals – Detail** - This report shows prenatal smoking behavior at certification. It tells if the participant increased, decreased, tried to stop, or started, and how much they are smoking. Data is as of the previous day that you run the report. It does not show participants who stopped smoking.