WIC CASELOAD MANAGEMENT STRATEGIES ASSESSMENT

Instructions: Review each area and evaluate if your agency is currently implementing the suggested strategies. In the comments section, include details regarding how your agency is currently implementing or has implemented the strategy in the past. Tally the number of "Yes" responses at the bottom. Identify strategies your agency is not using and consider developing a plan to implement.

A. Participation	Yes/No	Comments

1. Review Monthly Participation and Participation to Enrollment percentages:
   a. Monthly Reports from CNSS
   b. Real Time Participation in Crossroads		

2. Evaluate Data and Assess Trends		

B. Show Rate	Yes/No	Comments

1. Appointment Reminders
   a. Calls
   b. Texts
   c. Autodialer		

2. Evaluate show rates using the Participant Appointment Show Rate Report		

C. Participant Retention	Yes/No	Comments
1. Work the Detailed and Summary Participants Who Failed To Pick Up Benefits Report at least monthly		
2. Work the Summary of Actions Due Listing Details Report monthly		

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	Yes/No	Comments

3. Follow up with Missed Appointments daily
    a. Call
    b. Text
    c. Letters		

D. Scheduling	Yes/No	Comments
1. Utilizing Scheduling Best Practices		
2. Assessing Templates		
3. Accepting Walk-in		
4. Extending Certifications		
5. Utilizing Temporary Eligibility for Pregnant Women		
6. Offer Walk-in Lab Appointments		
7. Overbooking		

E. Waivers and Allowances	Yes/No	Comments
1. Utilize ARPA Waivers		
2. Offer WICHealth.org		
3. Offer mini-lessons via phone		
4. Utilize MyWICPortal		
5. Exhaust allowable proofs and accept digital proofs		

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F. Customer Service	Yes/No	Comments

1. Review the agency's website to ensure it includes:
    a. Correct contact information
    b. WIC service email
    c. Up-to-date WIC Program information
    d. Referral link		

2. Evaluate phone system to ensure participants can easily reach a live person		
3. Respond to text in a timely manner		
4. All staff have access to Teletask		

G. Outreach	Yes/No	Comments
1. Develop Targeted Outreach		
2. Strengthen Internal Referrals		
3. Strengthen External Referrals		
Tally the Number of Yes Responses		