

# Crossroads Reports Training Webinar Handout

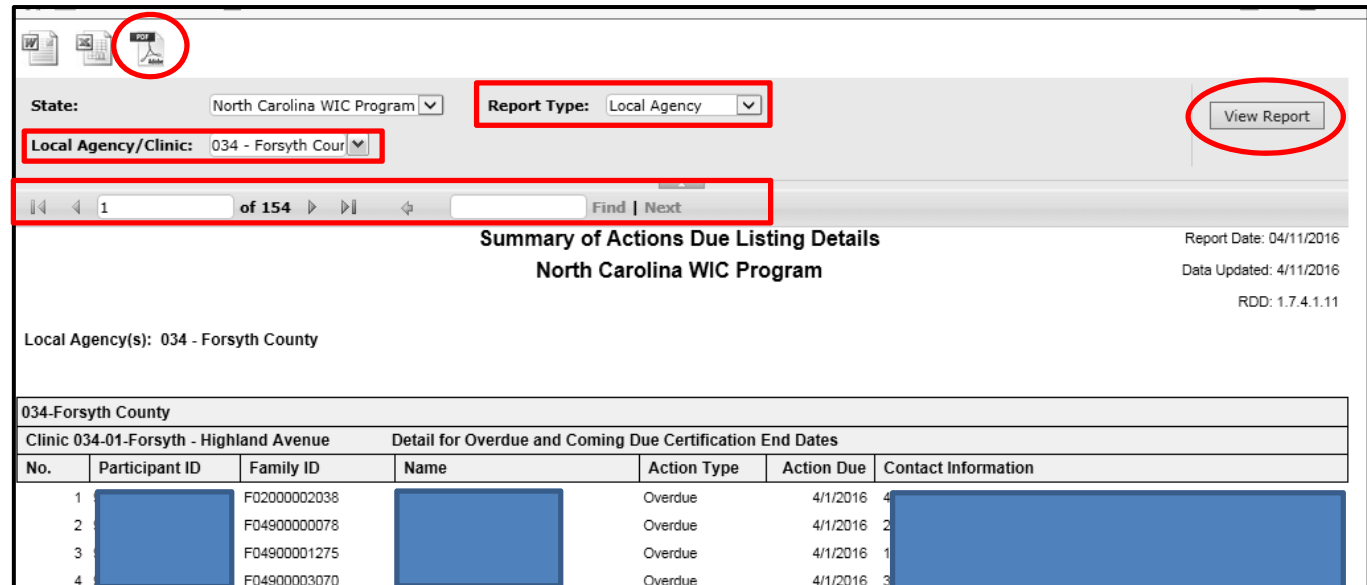
## (1) Summary of Actions Due Listing Details

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.



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.

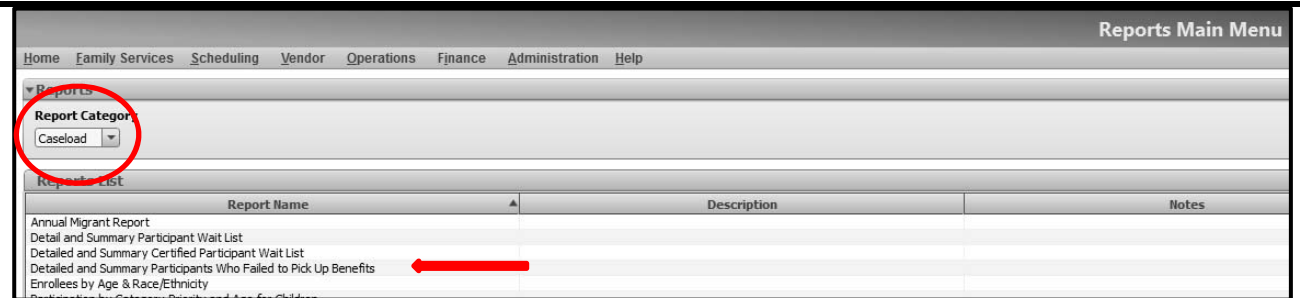
Summary of Actions Due Listing Details							Report Date: 04/11/2016
North Carolina WIC Program							Data Updated: 4/11/2016
Local Agency(s): 034 - Forsyth County							RDD: 1.7.4.1.11
034-Forsyth County							
Clinic 034-01-Forsyth - Highland Avenue							
Detail for Overdue and Coming Due Certification End Dates							
No.	Participant ID	Family ID	Name	Action Type	Action Due	Contact Information	
1	952991628L	F0200002038		Overdue	4/1/2016		
2	953435999S	F0490000078		Overdue	4/1/2016		
3	953982007N	F04900001276		Overdue	4/1/2016		
4	953442130S	F04900003070		Overdue	4/1/2016		
5	952990483P	F04900003241		Overdue	4/1/2016		
6	952341145O	F04900004075		Overdue	4/1/2016		
7	953492328L	F04900004594		Overdue	4/1/2016		
8	953598519L	F04900004649		Overdue	4/1/2016		
9	953421813S	F04900005354		Overdue	4/1/2016		
10	952412925Q	F04900006067		Overdue	4/1/2016		
11	953171556Q	F04900006148		Overdue	4/1/2016		
12	953982296N	F04900007090		Overdue	4/1/2016		
13	953981858L	F04900007139		Overdue	4/1/2016		
14	949299889Q	F04900008074		Overdue	4/1/2016		
15	953983148Q	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	953987543T	F04900006943		Overdue	4/2/2016		
20	953983464N	F04900007494		Overdue	4/2/2016		
21	953995191R	F04900000959		Overdue	4/3/2016		
22	953984941L	F04900001521		Overdue	4/3/2016		
23	953990524T	F04900006482		Overdue	4/3/2016		
24	953984755T	F04900007665		Overdue	4/3/2016		
25	953999006S	F05100000117		Overdue	4/3/2016		

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## (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.

1. From the Crossroads Reports Main Menu screen, select Caseload from the Reports Category dropdown.
2. 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.



State: North Carolina WIC Program Report Type: Clinic View Report

Local Agency/Clinic: 007 / 007-01 - Beaufort Reporting Month: Mar 2016

14 of 13 Find | Next

**Detailed and Summary Participants Who Failed to Pick Up Benefits**  
 North Carolina WIC Program  
 Reporting Month: Mar 2016

Report Date: 04/14/2016  
 Data Updated: 4/14/2016  
 RDD: 1.7.4.1.10

Clinic(s): 007 / 007-01 - Beaufort - Washington

Local Agency: 007 - Beaufort County  
 Clinic: 007-01 - Beaufort - Washington

Category Summation	
Category	Total
Women - P	26
Women - N	13
Women - B	40
Infants	26
Children	197
<b>Total</b>	<b>302</b>

Participant Details															
No. of Days Late	Family ID	Participant ID	Participant Name	Mailing 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
16 Days							Mail	N	C	10/12/2011	02/29/2016	03/29/2016	09/09/2015		10/06/2016
16 Days							Mail	N	C	09/04/2013	02/29/2016	03/29/2016	09/09/2015		09/29/2016

8. A new window will open with the PDF document.

9. Print the report using the print icon on the tool bar.

**Notes:**

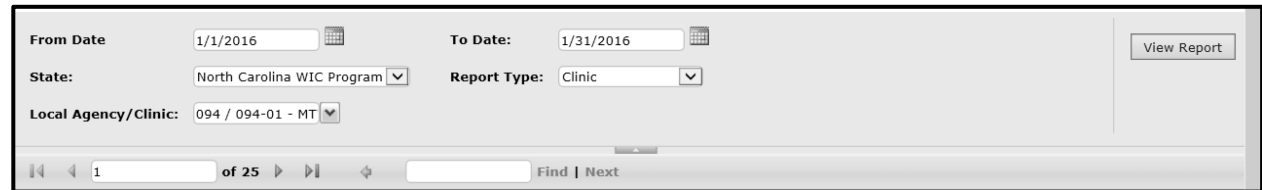
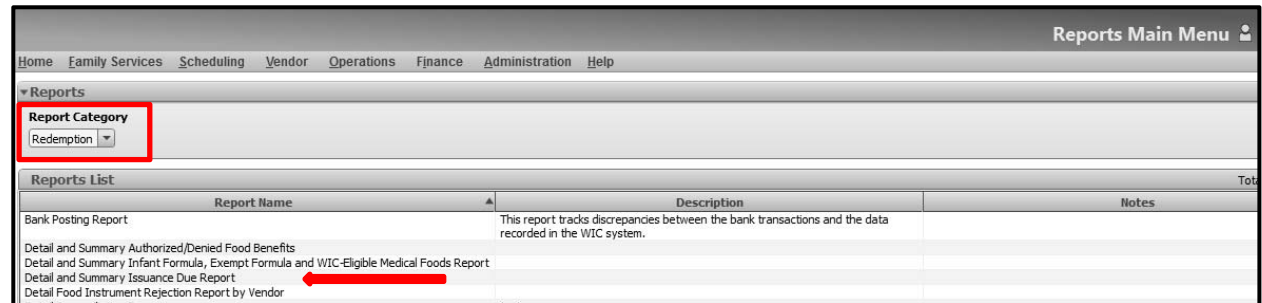
- Default sort order is number of days late.
- Address and phone number are listed to assist in contacting clients.
- Future appointment date, which indicates a scheduled appointment, and certification end date are useful information when deciding whether to contact.
- Investigation of family record 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.

Detailed and Summary Participants Who Failed to Pick Up Benefits														Report Date: 04/11/2016																	
North Carolina WIC Program														Data Updated: 4/11/2016																	
Reporting Month: Mar 2016														RDD: 1.7.4.1.10																	
Clinic(s): 007 / 007-01 - Beaufort - Washington																															
Local Agency: 007 - Beaufort County																															
Clinic: 007-01 - Beaufort - Washington																															
<table border="1"> <thead> <tr> <th colspan="2">Category Summation</th> </tr> <tr> <th>Category</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Women - P</td> <td>29</td> </tr> <tr> <td>Women - N</td> <td>13</td> </tr> <tr> <td>Women - B</td> <td>40</td> </tr> <tr> <td>Infants</td> <td>27</td> </tr> <tr> <td>Children</td> <td>201</td> </tr> <tr> <td><b>Total</b></td> <td><b>310</b></td> </tr> </tbody> </table>																Category Summation		Category	Total	Women - P	29	Women - N	13	Women - B	40	Infants	27	Children	201	<b>Total</b>	<b>310</b>
Category Summation																															
Category	Total																														
Women - P	29																														
Women - N	13																														
Women - B	40																														
Infants	27																														
Children	201																														
<b>Total</b>	<b>310</b>																														
Participant Details																															
No. of Days Late	Family ID	Participant ID	Participant Name	Mailing Address	Telephone	Email Address	Prst. Meth. of Contact	Do Not Contact	WIC Cat	Birth Date	FDTs	LDTs/ Spend Prv FI	Previous Apt. Date	Future Apt. Date	Cert End Date																
13 Days	F00400001147						Mail	N	C	10/12/2011	02/29/2016	03/29/2016	09/09/2015		10/06/2016																
13 Days							Mail	N	C	09/04/2013	02/29/2016	03/29/2016	09/09/2015		09/29/2016																
13 Days	F00400004121						Mail	N	P	08/02/1990	02/29/2016	03/29/2016	01/06/2016		05/29/2016																
13 Days							Mail	N	C	10/25/2012	02/29/2016	03/29/2016	09/30/2015		09/29/2016																
13 Days	F00400004171						Mail	N	P	12/19/1995	02/29/2016	03/29/2016	12/30/2015		08/30/2016																
13 Days	F00400004176						Mail	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																
14 Days							Mail	N	I	03/15/2015	02/29/2016	03/28/2016	10/14/2015		03/14/2016																
14 Days	F00400003861						Mail	N	C	12/20/2014	02/29/2016	03/28/2016	12/22/2015		12/21/2016																
Run Date/Time: 4/11/2016 3:26:20 PM																															
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.



8. A new window will open with the PDF document.

9. Print the report using the print icon on the tool bar.

**Notes:**

- 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.

Detail and Summary Issuance Due Report										
North Carolina WIC Program										
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										
Appointment Date	Appointment Time	Family ID	Family Name	Participant ID	Participant Name	Telephone Number	WIC Category	Last Issuance	Expiration Date	Medical Documentation Required
		F17200003262					Breastfeeding	11/19/2015	9/7/2016	No
		F17200003262					Infant	11/19/2015	9/7/2016	No
1/15/2016	3:00PM	F18500000002					Child	12/21/2015	10/21/2016	No
1/20/2016	10:00AM	F18500000002					Child	12/21/2015	10/21/2016	No
		F18500000003					Child	12/28/2015	7/28/2016	No
		F18500000004					Child	12/17/2015	2/15/2017	No
1/7/2016	2:00PM	F18500000008					Child	12/8/2015	10/28/2016	No
		F18500000009					Child	12/9/2015	2/8/2017	No
		F18500000010					Child	12/22/2015	8/23/2016	No
		F18500000014					Pregnant	7/5/2014	7/2/2016	No
		F18500000014					Child	12/5/2015	3/3/2017	No
		F18500000015					Child	12/17/2015	12/16/2016	No
		F18500000016					Child	12/10/2015	9/10/2016	No
		F18500000016					Child	12/10/2015	2/9/2017	No
		F18500000019					Child	12/19/2015	1/19/2017	Yes
1/8/2016	9:00AM	F18500000020					Child	12/10/2015	4/12/2016	Yes
		F18500000021					Child	12/19/2015	1/18/2017	No
		F18500000022					Child	12/18/2015	1/23/2017	No
		F18500000023					Child	12/11/2015	5/10/2016	No
		F18500000024					Child	9/18/2015	7/23/2016	No
		F18500000025					Child	1/1/2016	8/30/2016	No
		F18500000027					Child	12/20/2015	3/19/2017	No
		F18500000028					Child	12/26/2015	3/24/2017	No

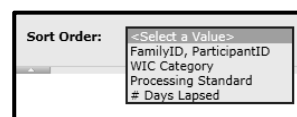
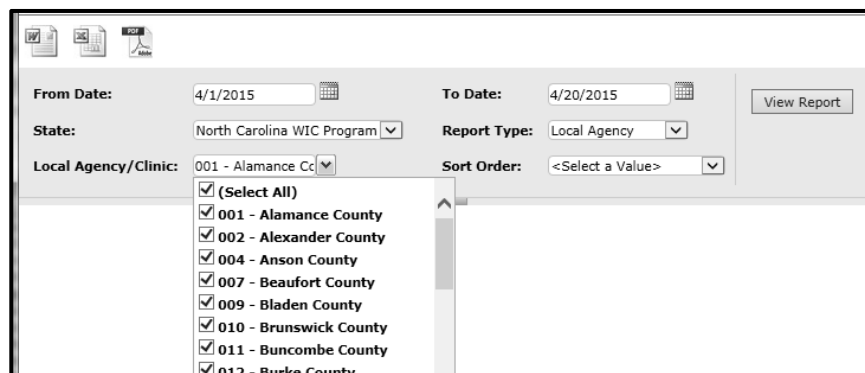
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#### (4)Detail Initial Certification Appointments Made Outside of Processing Standards

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.

1. 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.

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

**Notes:**

- 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.

From Date: 1/1/2015 To Date: 3/31/2015 View Report

State: North Carolina WIC Program Report Type: Local Agency

Local Agency/Clinic: 017 - Caswell Cour Sort Order: # Days Lapsed

1 of 1 Find | Next

**Detail Initial Certification Appointments Made Outside of Processing Standards**  
**North Carolina WIC Program**  
**Date Range: 01/01/2015 - 03/31/2015**

Report Date: 04/20/2015  
 Data Updated: 4/20/2015  
 RDD: 1.9.4.1.13

Local Agency(s): 017 - Caswell County  
 Sort Order: # Days Lapsed

Local Agency: 017 - Caswell County  
 Clinic: 017-01 - Caswell - Yanceyville

Family ID	Parent Guardian	Participant ID	Participant Name	WIC Cat.	Method of Appt.	Staff Name	Number of Days Past Processing Standards	Outside of Processing Standards Comment
F01900000145				I	In Person		1	Client request
F01900000153				I	Phone		2	Client request
F019000001715				C	Phone		3	Client request
F01900000228				P	In Person		4	Client request
F019000001717				P	In Person		4	Client request
F019000001722				P	Phone		12	Client request
F01900000030				I	Phone		18	Client request

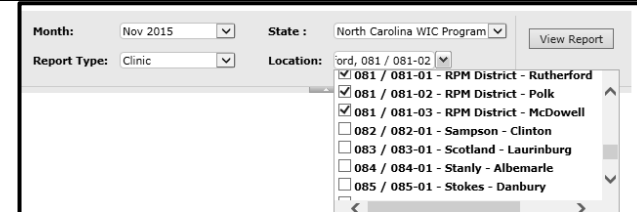
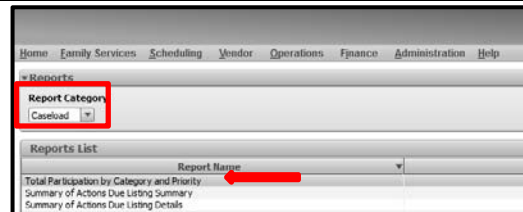
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## (5) Total Participation by Category and Priority

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

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



**Total Participation by Category and Priority**  
North Carolina WIC Program  
Month: Nov 2015

Report Date: 04/13/2016  
Data Updated: 4/13/2016  
RDD: 1.7.4.1.2

Clinic: 081-01 RPM District - Rutherford

Federal Priority	Women				Total	Infants			Total	Children	Total	Totals
	Pregnant	FBF	PBF	Non BFPF		FBF	PBF	FFF				
I	179	55	53	0	287	53	44	253	350	16	653	
	93.2%	87.3%	89.8%	0.0%	60.3%	86.9%	93.6%	74.1%	77.8%	1.7%	35.1%	
II	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%	
III	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%	0.4%	
<b>Totals</b>	192	63	59	162	476	61	47	355	463	950	1889	
<b>%</b>	10.2%	3.3%	3.1%	8.6%	25.2%	3.2%	2.5%	18.8%	24.5%	50.3%	100.0%	

**Total Participation by Category and Priority**  
North Carolina WIC Program  
Month: Nov 2015

Report Date: 04/13/2016  
Data Updated: 4/13/2016  
RDD: 1.7.4.1.2

Clinic: 081-02 RPM District - Polk

Federal Priority	Women				Total	Infants			Total	Children	Total	Totals
	Pregnant	FBF	PBF	Non BFPF		FBF	PBF	FFF				
I	29	9	10	0	48	8	8	29	45	5	98	
	93.5%	100.0%	100.0%	0.0%	66.7%	88.9%	88.9%	65.9%	72.6%	3.8%	37.1%	
II	0	0	0	0	0	1	1	13	15	0	15	
	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	11.1%	29.5%	24.2%	0.0%	5.7%	
III	0	0	0	20	20	0	0	0	0	95	115	
	0.0%	0.0%	0.0%	90.9%	27.8%	0.0%	0.0%	0.0%	0.0%	73.1%	43.6%	
IV	2	0	0	0	2	0	0	1	1	1	4	
	6.5%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	2.3%	1.6%	0.8%	1.5%	
V	0	0	0	1	1	0	0	1	1	29	31	
	0.0%	0.0%	0.0%	4.5%	1.4%	0.0%	0.0%	2.3%	1.6%	22.3%	11.7%	
VI	0	0	0	1	1	0	0	0	0	0	1	
	0.0%	0.0%	0.0%	4.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	
<b>Totals</b>	31	9	10	22	72	9	9	44	62	130	264	
<b>%</b>	11.7%	3.4%	3.8%	8.3%	27.3%	3.4%	3.4%	16.7%	23.5%	49.2%	100.0%	

**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.

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.

**Total Participation by Category and Priority**  
North Carolina WIC Program  
Month: Nov 2015

Report Date: 04/13/2016  
Data Updated: 4/13/2016  
RDD: 1.7.4.1.2

Clinic: 081-03 RPM District - McDowell

Federal Priority	Women					Infants				Children	Totals
	Pregnant	FBF	PBF	Non BFPP	Total	FBF	PBF	FFF	Total	Total	
I	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%
II	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%
III	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%	0.5%
<b>Totals</b>	127	62	45	105	339	67	33	222	322	665	1326
<b>%</b>	9.6%	4.7%	3.4%	7.9%	25.6%	5.1%	2.5%	16.7%	24.3%	50.2%	100.0%

**Total Participation by Category and Priority**  
North Carolina WIC Program  
Month: Nov 2015

Report Date: 04/13/2016  
Data Updated: 4/13/2016  
RDD: 1.7.4.1.2

Local Agency: 081 Rutherford, Polk, McDowell District

Federal Priority	Women					Infants				Children	Totals
	Pregnant	FBF	PBF	Non BFPP	Total	FBF	PBF	FFF	Total	Total	
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%
II	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%
III	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%
V	2	2	0	1	5	2	0	5	7	431	443
	0.6%	1.5%	0.0%	0.3%	0.6%	1.5%	0.0%	0.8%	0.8%	24.7%	12.7%
VI	0	0	0	15	15	0	0	0	0	0	15
	0.0%	0.0%	0.0%	5.2%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
<b>Totals</b>	350	134	114	289	887	137	89	621	847	1745	3479
<b>%</b>	10.1%	3.9%	3.3%	8.3%	25.5%	3.9%	2.6%	17.8%	24.3%	50.2%	100.0%

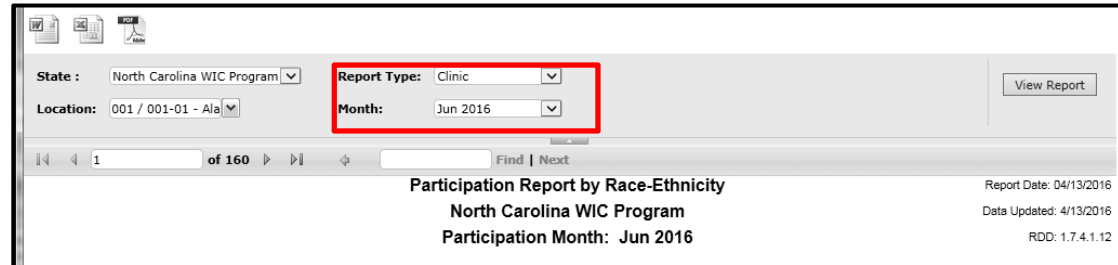
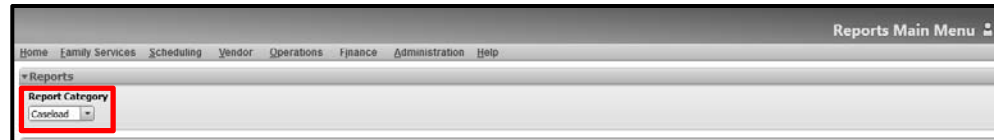
## (6) Participation Report by Race-Ethnicity

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

1. 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.



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.

**Notes:**

- 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											Report Date: 04/12/2016		
North Carolina WIC Program											Data Updated: 4/12/2016		
Participation Month: Nov 2015											RDD: 1.7.4.1.12		
Local Agency(s): 043 - Harnett County													
043 - Harnett County													
Race	Category									Ethnicity			
	Fully BF Infants	Partially BF Infants	Fully Formula Fed Infants	Infant Totals	Children	Pregnant Women	BF Women	Non-BF PP Women	Women Totals	Race Total Count	Race Total %	Hispanic or Latino	Non-Hispanic or Non-Latino
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	88	203	954	31.67 %	16	853
White	62	51	350	463	1011	185	117	157	459	1933	64.18 %	258	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
<b>Local Agency Totals</b>	<b>72</b>	<b>74</b>	<b>592</b>	<b>738</b>	<b>1600</b>	<b>281</b>	<b>146</b>	<b>247</b>	<b>674</b>	<b>3012</b>		<b>275</b>	<b>2086</b>
<b>% Totals</b>	<b>2.39 %</b>	<b>2.46 %</b>	<b>19.65 %</b>	<b>24.5 %</b>	<b>53.12 %</b>	<b>9.33 %</b>	<b>4.85 %</b>	<b>8.2 %</b>	<b>22.38 %</b>		<b>100 %</b>	<b>9.13 %</b>	<b>69.26 %</b>

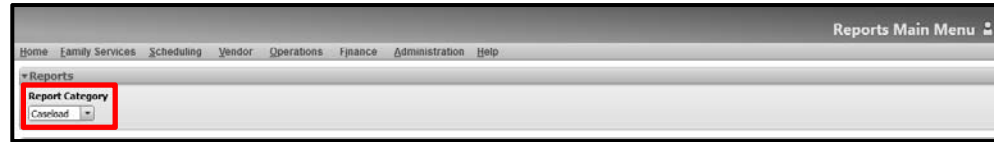
## (7) Participation by Category, Priority, and Age for Children

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.
6. To print the report, click the Adobe PDF icon. A new window will open with the PDF document. (This step is not shown.)
7. Use data about current participation characteristics and changes over time in program evaluation and planning.



Month: Nov 2015 State: North Carolina WIC Program View Report

Report Type: Local Agency Local Agency/Clinic: 026 - Cumberland

1 of 1 Find | Next

**Participation by Category-Priority and Age for Children**  
**North Carolina WIC Program**  
**Report Month: Nov 2015**

Report Date: 04/18/2016  
 Data Updated: 4/18/2016  
 RDD: 1.7.4.1.16

Local Agency(s): 026 - Cumberland County

026 - Cumberland County							
Priority Levels	Infants			Children			Totals
	0-5 mos.	6-11 mos.	Total Infants	Age 1	Age 2 to 5	Total Children	I + C
Priority I	1404	1184	2588	68	0	68	2656
Priority II	226	222	448	0	0	0	448
Priority III	1	1	2	1509	2440	3949	3951
Priority IV	21	40	61	24	0	24	85
Priority V	39	110	149	622	1886	2508	2657
Priority VI	0	0	0	0	0	0	0
<b>Totals</b>	<b>1691</b>	<b>1557</b>	<b>3248</b>	<b>2223</b>	<b>4326</b>	<b>6549</b>	<b>9797</b>

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## (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.

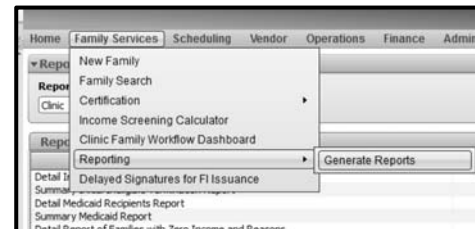
1. From the Reports Main Menu screen, select Clinic from the Report Category dropdown. (Alternate path: From Home screen, go to Family Services > Reporting > Generate Reports.)
2. Select Detail Initial Ineligible/Termination Report.
3. A new browser window opens accessing the report server.
4. Select
  - 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.

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



-OR-



From Date:  To Date:

State:  Report Type:

Local Agency/Clinic:  Category: Both

View Report

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

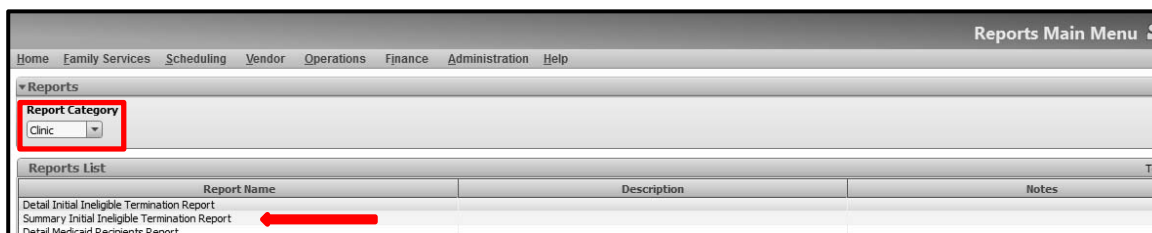
<p style="text-align: center;"><b>Detail Initial Ineligible Termination Report</b>  <b>North Carolina WIC Program</b>  <b>Date Range: 01/01/2016 - 03/31/2016</b></p>							Report Date: 04/13/2016
<p>Local Agency(s): 001 - Alamance County            Category: Ineligible / Terminated Participants</p>							Data Updated: 4/13/2016
<p>LocalAgency: 001-Alamance County            Clinic : 001-01-Alamance - Burlington</p>							RDD: 1.1.12.1.19
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

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## (9) Summary Initial Ineligible/Termination Report

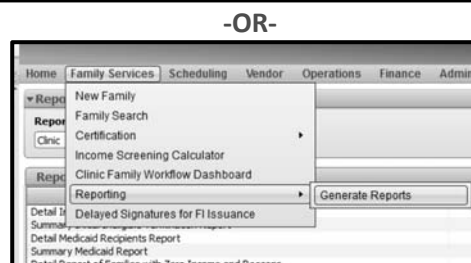
This report provides summary information about the number of individuals who were determined to be ineligible or terminated during the selected time period. It includes the count and percentage by reason for ineligibility or termination. The report is available by local agency or clinic.

1. From the Reports Main Menu screen, select Clinic from the Report Category dropdown. (Alternate path: From Home screen, go to Family Services > Reporting > Generate Reports.)



2. Select Summary Initial Ineligible/Termination Report.

3. A new browser window opens accessing the report server.



4. Select
- dates to cover the desired time period
  - local agency or clinic report type
  - local agency or clinic(s)
  - 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.

5. 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.

Summary Initial Ineligible Termination Report			Report Date: 04/12/2016
North Carolina WIC Program			Data Updated: 4/12/2016
Date Range: 01/01/2016 - 03/31/2016			RDD: 1.1.12.1.19
Local Agency(s): 001 - Alamance County			
Category: Ineligible / Terminated Participants			
Local Agency Name: 001-Alamance County			
Ineligible/Terminated Reason	Count	Percent of Total	
10-Stopped Breastfeeding After Six Months Postpartum	5	13%	
17-EDC change by more than 4 weeks	1	3%	
1-No Longer Categorically Eligible	20	50%	
2-No Longer Income Eligible	1	3%	
3-Income Ineligible - Total amount exceeds Guidelines	1	3%	
4-Moved Out of State	12	30%	
<b>Total Agency:</b>	<b>40</b>		