

Identify Who to Visit and When

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Use the reports listed on this page to help plan home visits.

Providers Due Reviews Report

The Providers Due report lists all providers who must be visited, as well as the days and meals you should visit.

1. Click the **Reports** menu, select **Reviews**, and click **Providers Due Reviews Report**. The Provider Filter window opens.
2. Check the **Review Due By** box, and enter a date in the corresponding box. This is typically the end of the month, but you can set any date that meets your business needs. This ensures the report includes those providers who were scheduled for a visit before this date. You could also check the **After** box and set a date after which reviews are due. This allows you to swap visit schedules.
3. Set additional filters, as needed. For example, if your agency is larger and you have multiple Monitors, it may be useful to check the Monitor box and filter by specific Monitors.
4. When finished, click **Continue**. The Provider Nested Sort Order dialog box opens.
5. Click the **First Sort By** drop-down menu and select the first sort for the report. This defaults to Name. It may be useful to sort primarily by Zip Code or Map Location Identifier. Then, click the **And Then By** drop-down menu and select a secondary sort. For example, if you sorted by Zip Code, you can then sort by Name.
6. Click **Continue**. The report is generated (PDF).

This report contains the following information:

- **Last Claim Received:** The last claim you have on file for the given provider. If the month listed here is several months old, then the provider is not actively claiming with your agency, so there is no need to visit the provider.
- **Last Review Date:** The date on which you last conducted a home visit to the provider. If this date is very recent, this may be a sign that the provider required a follow-up visit for some reason. The Sponsor Review Worksheet should provide more information on this subject.
- **Review Due Date:** The date from the Next Review Req box in the Provider Information Other tab. Note that the month is generally the important part of this date (instead of the actual day). Plan your visits in such away to make them convenient based on the geographic distribution of your providers. In some cases, you can plan around whether weekend or holiday visits are allowed.
- **Review Type Needed:** This is determined by information available in Minute Menu HX.
 - First, Minute Menu HX looks at the last four (4) months of claim data. Each meal claimed by the provider is then added to this report. As long as you have attendance data in the database, this report also checks to see if Saturdays or Sundays were claimed. If no claims exist for a provider, this report looks at the provider's meal approval schedule in the Provider Information Meals tab.

- Next, Minute Menu HX looks at the last 12 months' worth of reviews for each provider included in the report. Any meals that have been visited are crossed off the list and removed from the output. Additionally, if a provider claimed a Saturday or Sunday and a visit in the last 12 months was done on one of these days, that is removed from the report, as well. You can also set this to review only meals visited in the current fiscal year (**Preference R.032**).
- The result of this analysis displays in the Review Type Needed column so you know exactly what meals **should** be seen, and whether you need to make a Saturday or Sunday visit. You would then locate other providers in the same geographic area who have meals that must be seen. This allows you to plan your days more efficiently.

Providers Claiming Special Days Report

Special visits are needed for certain cases. This includes visits on weekends, holidays, dinners, evening snacks, and visits specifically designed to see when a provider serves a meal in two shifts. To help determine when these special trips are needed, print the Providers Claiming Special Days report. This report identifies all providers who are claiming any of the special situations noted above for a given month.

Note: This report runs based on meal and attendance data in your database. This means that manual claims cannot be analyzed with this report.

To print this report:

1. Click the **Reports** menu, select **Reviews**, and click **Providers Claiming Special Days Report**. The **Select Month** dialog box opens.
2. Click the **Select Month** drop-down menu and select the month for which to run the report.
3. Click **Continue**. The **Provider Filter** window opens.
4. Set filters, as needed. For example, if your agency is larger and you have multiple Monitors, it may be useful to check the **Monitor** box and filter by specific Monitors. You could also filter by providers who must be visited in the next month.
5. When finished, click **Continue**. The **Select Mode** dialog box opens.
6. Select the **Attempted by the Provider** option or the **Paid to the Provider** option.
7. Click **Continue**. The **Provider Nested Sort Order** dialog box opens.
8. Click the **First Sort By** drop-down menu and select the first sort for the report. This defaults to Name. Then, click the **And Then By** drop-down menu and select a secondary sort, if needed.
9. Click **Continue**. The report is generated (PDF).

This report's output shows each day a provider claimed given the special situation. For example, a provider who consistently claims on Saturday has each Saturday in the month listed. Any time the special situation is being claimed, and three (3) or more day care children are present, the date is noted with an exclamation point (!). Use this report to further refine the visits you plan on conducting in the coming month.