# Track Your Caseload

There are five additional reports that are particularly useful in keeping track of your home visit caseload.

## Home Visit Status Report

This report lists providers and provides a 12-month picture of visits.

When generating this report, choose the last month of a 12-month window to examine. That could be the current calendar month, or it could be the last month in the current fiscal year, current calendar year, or any other month you choose. The provider filter also displays, so you can limit the output of the report to focus on one subset of your providers (such as a Monitor's caseload), if needed.

Each review is noted in the calendar on the report, and a key displays at the bottom to help you better interpret the results. If there were two or more visits completed in the same month for a provider, the last review displays.

In addition to other information, visit counts are listed in the following columns:

- **#U:** The number of unannounced visits that were completed within the last 12-month window examined. The provider was actually home for these visits.
- **#S:** The number of successful visits, meaning that the provider was home.
- **#T:** The total number of visits attempted.

The last page of this report provides summary counts of each of these three columns, which should help you determine whether you are meeting the minimum review requirements, especially in light of review averaging regulations.

# Providers Not Reviewed Report

The Providers Not Reviewed report lists all providers not visited within a specific time frame. Federal regulations require that you visit all providers no less than once every six (60 months or once every nine (9) months, if your agency averages reviews. Use this report to ensure that providers are being visited often enough. When filtering providers for this report, you should typically choose a start date about six months before the current date and set an end date in the current month.

The following fields in the report are of some importance:

- **CACFP Start Date:** A Provider whose CACFP Start Date was in the last 30 days might not have been visited yet. If a provider appears on the report but this date is very recent, that is probably not an issue.
- **Last Review Date:** This shows when the provider was last reviewed, prior to the start date specified when generating the report. If this is blank, the provider has never been visited (according to the data in the Minute Menu HX database).
- **Next Review Date:** This notes when the provider was supposed to have been visited next.
- **Last Claimed Date:** This notes the month of the last claim. If this is several months in the past, the provider has gone inactive, and it probably okay that the provider has not been visited. If this is blank, the provider has never claimed (based on the data in the Minute Menu HX database).

# Claim and Review Comparison Report

This report helps you ensure that you remain in compliance with your requirement to monitor meals and weekends in the same proportion that they are claimed. It is designed to compare the percentage of meals your providers have claimed with the percentage of those meals that are seen at home visits. Likewise, the report show cases the percentage of meals claimed at a weekend or holiday with the percentage of visits done on a

weekend or holiday. Skip to the end of this report to ensure you are generally consistent in total. Remember that while you do not need to be exact, the percentages should be relatively close.

You may wish to filter this report to look t it for only one monitor, your own caseload, or the entire agency.

# Projected Visit Dates Report

In most cases, planning an entire year's worth of visits is not a good idea, as visit schedules must be changed due to various discoveries you make during a home visit. However, it is still useful to help plan upcoming visits, especially when trying to ensure that visits to a specific geographic area are all done at roughly the same time. Print this report to list all reviews coming in the next 12 months, so you can make any necessary broad adjustments to the provider's scheduled reviews.

# Children Not Seen at Reviews Report

Many sponsors want to know about children who are enrolled in a provider's home and are consistently missed during a home visit. Print this report to list all children not seen at a certain number of visits over a certain date range. When generating the report, choose the starting date for analysis. The ending date should be the current date.

Every review between the date selected and the current date is analyzed. You can then set the review count threshold (it defaults to two). If less than two (2) reviews are conducted for a provider during this period, the provider is ignored. For any provider that has at least two reviews, any child that is not seen at two or more reviews is listed in the report. An asterisk (*) displays for any child actually claimed during that month (but this is only known on automated claims from KidKare, scannable forms, or Direct Entry).