

**Indiana WIC Program  
Indiana State Department of Health**

**Caseload Management**

**Policy**

Each local agency will be assigned a caseload upon which the annual contracted budget is based. The coordinator is responsible for monitoring and maintaining the caseload at the contracted level.

**Authority**

7 CFR Part 246.4(a)(5)(i)

Indiana WIC – Allocation of Caseload policy (Financial Management)

**Procedure**

- I. Caseload assignment
  - A. Local agencies whose caseload over a rolling 12 month period falls below the assigned caseload level may receive a decrease in their caseload assignment.
  - B. Local agencies that exceed their assigned caseload may need to request additional funds (i.e. staff and clinic hours).
- II. Caseload monitoring
  - A. The local agency must monitor reports that reflect caseload activities to determine the need to adjust scheduling of participants, staffing and clinic hours. These include:
    - 1. Closeout Enrollment
    - 2. Closeout Participation
    - 3. Percent Caseload
    - 4. No Show
    - 5. Kept vs. Missed Appointments
  - B. The Indiana WIC office will review information from the biennial clinic audits on:
    - 1. Local agency follow up on missed appointments
    - 2. Publicity and Outreach done by the Local Agency
    - 3. Clinic procedures that support working parents
    - 4. Needs identification for rural participants
    - 5. Needs identification for migrant participants