

**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