

## Using Advanced Search in WIC MIS

### Advanced Search might be useful for:

- Caseload Management: Following up with active participants without benefits.
- Breastfeeding follow-up: 9-month calls and 2 contacts the first week after birth.
  - Refer to NPS Breastfeeding and NPS Documenting Notes in WIC MIS
- Targeted quality assurance or outreach: Chart review for documenting WIC notes; outreach to targeted participant categories.
- Note: An alphabetical list of participants can be printed by selecting **Print List (1)** located at the bottom left of the search screen. Data will not print the way it is “sorted”. Recommend printing a screenshot for sorted data.

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### 1. Search specific participant categories:

- a. In this example, we searched for all active pregnant women by selecting the desired **local agency / clinic name (1)**, appropriate **category (2)**, **active only (3)**, and **return maximum (4)** for the search criteria.

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2. Select a column to **sort**:
  - a. Caseload Management: in the example below, we sorted by **BVT Date** (1) to determine who is active without benefits. This search was conducted 9/2/20 and shows participants with BVT dates prior to the search date.

The screenshot shows the I-WIC software interface with a search results table. The table is sorted by BVT Date. A red box highlights the 'BVT Date' column header, and a red arrow points to the first row of data.

Last Name	First Name	MI	Birth Date	HOH Last Name	HOH First Name	Cat	BVT Date	Cert Start	Cert End	Term Date	M/F	Household ID	Partic ID
PG	5/7/2020	2/7/2020	11/4/2020								F		
PG	5/10/2020	2/12/2020	9/16/2020								F		
PG	5/12/2020	2/12/2020	10/3/2020								F		
PG	5/13/2020	2/21/2020	10/16/2020								F		
PG	5/20/2020	2/20/2020	9/28/2020								F		
PG	5/25/2020	3/9/2020	10/30/2020								F		
PG	6/1/2020	2/25/2020	11/19/2020								F		

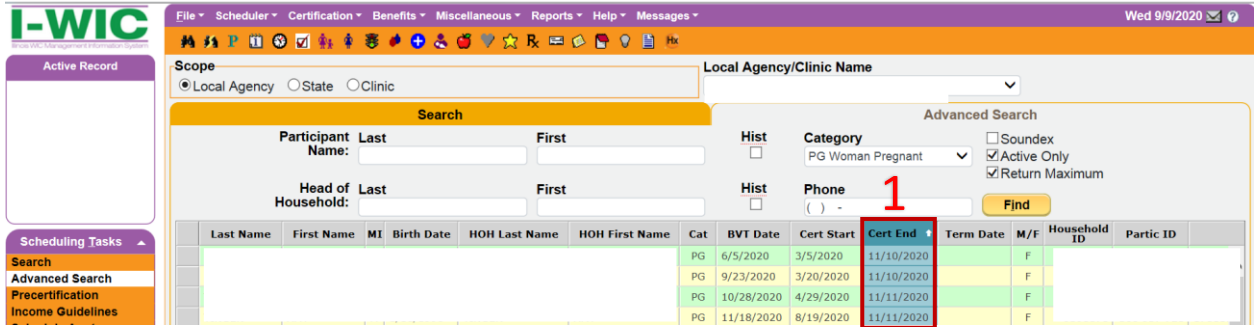
- i. Staff can also run the **Clinic Appointment List** report for a specific time frame to view specific appointment types, determine next appointment, and BVT dates for selected categories.

The screenshot shows the I-WIC software interface with the Reports menu open. The 'Clinic Appointment List' report is highlighted with a red circle.

Reports menu items:

- Caseload Mgmt
- Certification
- Clinic Activations By User/Date
- Clinic Searches By User/Date
- Nutrition
- Operations
- Participant Certification Expiration Report
- Scheduling
- SCH 7.2 - Appointments Kent vs. Missed Summary Report
- SCH 7.6, 7.7, 7.10, 7.11 - Clinic Appointment List
- SCH 7.7 - List of Cancelled Appointments
- SCH 7.8, 7.9 - NE Classes

- b. Prenatal follow-up: In the example below, we sorted by **Cert End** (1) date to determine prenatal participants close to delivery:
- i. Note: the Cert End date for prenatal participants is EDD + 6 weeks minus 1 day.
    1. It will be helpful for staff to forecast 8-10 weeks from the search date to determine which participants are close to delivery.
      - a. In the example below, the search was ran 9/9/20. Participants with a Cert End date in November are likely due to deliver sometime in September.



- c. Breastfeeding follow-up: Sort by **Birth Date** (1) to determine breastfeeding participants that may need follow-up contacts:
- i. In the example below, we sorted by the most recent birth date for exclusively breastfed infants.

