Managing “No Activity”

**Note: Cascades reports haven’t been validated yet; these are interim steps agencies can take until we can get validated reports.**

1. Managing notifications daily will decrease the no activity you’ll have to manage later. As participants get reminders, they’re less likely to miss an appointment.

2. Run the **Daily Appointments to be Rescheduled Detail** report (Appointment report category) weekly to catch any participants who missed their appointments and don’t have another scheduled.

   * Note: We noticed inaccuracies in the data when going back more than one week for the report criteria; so we recommend running this report at least weekly to catch any missed appointments that you have not yet rescheduled in the Master Clinic Calendar.

3. Run the **Summary of Actions Due Listing Details** report. This report shows upcoming certification actions due. It’s important to look at this report to see if you have the participant scheduled before their certification expires or see if you need to extend the certification by one month. Once the certification is expired, you can’t extend the certification.

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**Daily Appointments to be Rescheduled Detail**
Washington State WIC Nutrition Program
Date Range: 04/29/2020 - 05/06/2020

Clinical(s): L01 / L01C01 - Adams CHD-Othello
Steps for managing “No Activity” in Cascades

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**Management Information**

**Reports**

**Report Category**

- Caseload

**Reports List**

- Annual Migrant Report
- Detail and Summary Participant Wait List
- Detailed and Summary Certified Participant Wait List
- Detailed and Summary Participants Who Failed to Pick Up Benefits
- Enrollees by Age & Race/Ethnicity
- Monthly State Caseload Target
- Monthly WIC Participation Report
- Participation by Category-Priority and Age for Children
- Participation Report by Race-Ethnicity
- Potential Eligibles Data
- Report of Participants certified outside their Neighborhood
- Risk Factor Summary
- State / Local Agency / Clinic Caseload Summary Report
- State / Local Agency / Clinic Participant Profile
- Summary of Actions Due Listing Details
- Summary of Actions Due Listing Summary
- Total Participation by Category and Priority
- Unduplicated Enrollment Report

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**State:** Washington State WIC Nutrition Program

**Report Type:** Local Agency

**Local Agency/Clinic:** L01 - Adams County Health Dept

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**Summary of Actions Due Listing Details**

**Washington State WIC Nutrition Program**

Local Agency(s): L01 - Adams County Health Dept

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<table>
<thead>
<tr>
<th>No.</th>
<th>Participant ID</th>
<th>Family ID</th>
<th>Name</th>
<th>Action Type</th>
<th>Action Due</th>
<th>Contact Information</th>
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<tbody>
<tr>
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<td></td>
<td></td>
<td>Cert End</td>
<td>5/31/2020</td>
<td></td>
</tr>
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<td>Cert End</td>
<td>5/31/2020</td>
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<td>Cert End</td>
<td>5/31/2020</td>
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<td>4</td>
<td></td>
<td></td>
<td></td>
<td>Cert End</td>
<td>5/31/2020</td>
<td></td>
</tr>
</tbody>
</table>
4. Compare the **Detail and Summary Issuance Due Report** with the **Detail Clinic Daily Appointment Schedule**. Once you have both reports open, you can look up appointments from the Daily Appointment Schedule and compare to the appointment field in the summary of issuance due report. You can then focus on scheduling just those participants who need benefits.

a. Get the **Detail and Summary Issuance Due Report** in Cascades:

![Image of the Detail and Summary Issuance Due Report]

b. Once you select the report, a new window opens. Enter the “From Date” and “To Date”, “Clinic” report type and Local Agency/Clinic of your choice, and click the “View Report” button on the right side of the criteria (not shown). Entering the current date for both “From Date” and “To Date” criteria will help identify participants who need benefits. This appears to be the best representation of your current active participant population.
c. Export the report to Excel by clicking on the spreadsheet icon (circled in green above) and open the report in Excel. Click the “enable editing” button once it opens and save the report as an excel workbook with the .xlsx extension to your computer.

d. In the spreadsheet, change the format of column A to date format.
   i. Highlight all of column A by clicking on the letter A in the column header.
   ii. Click on the Home menu button (highlighted in yellow); then
   iii. Click on the drop down arrow to select “Short Date” (highlighted in yellow).
e. In Cascades reports, select the Detail Clinic Daily Appointment Schedule report.

f. Select dates as shown below, select “Clinic” for Report Type, and your clinic in the Local Agency/ Clinic drop down box. Then click “View Report” (button to the right of the criteria is not shown in the picture) and export to excel and save following instructions in step c.

<table>
<thead>
<tr>
<th>Clinic(s): L01 / L01C01 - Adams CHD-Othello</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Local Agency: L01 - Adams County Health Dept</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic: L01C01 - Adams CHD-Othello</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appointment Date</th>
<th>Appointment Time</th>
<th>Appointment Type</th>
<th>Family ID</th>
<th>Participant ID</th>
<th>Participant Name</th>
<th>Phone Number</th>
<th>Interpreter/Language</th>
<th>Resource (if applicable)</th>
<th>Comments</th>
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<tbody>
<tr>
<td>5/6/2020</td>
<td>11:30 AM</td>
<td>Subsequent</td>
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<td>Food Benifit Issuance</td>
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<tr>
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<td></td>
</tr>
</tbody>
</table>
g. In order to look up appointments in the **Detail Clinic Daily Appointment Schedule** using a formula, we have to make sure we have one header row and the Participant ID, the field we will use for the look up formula, needs to be in column A. To do this, we will either need to delete or move the information in rows 1-12. Deleting makes it easier to work with the data, but you’ll lose information about report criteria. I chose to delete the rows.

![](image1)

h. Next, in order for our lookup formula to work properly, we need to make sure the participant ID field (unique value) is in the left column. We’ll right click on the letter E above the Participant ID header and select “Cut”.

![](image2)
Steps for managing “No Activity” in Cascades  

5/7/2020

i. Then, we will Insert Cut Cells by right clicking on the letter A above “Appointment Date” selecting the option for “Insert Cut Cells” and save the spreadsheet as an Excel Workbook (*.xlsx).

j. Now that we have our Participant ID field in the far left column in our spreadsheet, we can go to the Summary of Issuance Due spreadsheet and insert the formula to look up the appointment from the Detail Daily Clinic Appointment Schedule sheet.

You can view both spreadsheets side by side by clicking the “View” menu and the “Arrange All” button to see both sheets side by side, or snap the windows to your screen, whichever works best for you.
k. Now we are ready to enter our VLOOKUP formula in column A, row 11 of the **Detail and Summary Issuance Due** report. There are four pieces of information that you will need in order to build the VLOOKUP formula in cell A11 of the **Detail and Summary Issuance Due Report**:

- The value you want to look up, also called the lookup value – For us, this is the **participant ID** in cell E11 of the **Detail and Summary Issuance Due Report**.

- The range where the lookup value is located. Remember that the lookup value should always be in the first column in the range for VLOOKUP to work correctly. The range we want to select is the entire **Detail Daily Clinic Appointment Schedule Spreadsheet** (all of the cells that have data). They are the Highlighted cells from the detail daily clinic appointment schedule.

- The column number in the range that contains the return value. We started our range selection with column A which contains the participant ID, so our appointment date is in column B or #2 and the time is in column C or #3.

- For the last part of the formula, specify **FALSE** to get an exact match for your lookup value (Participant ID). Specifying **TRUE** or leaving this part blank returns an approximate match so you’ll get errors in appointment dates.

Now put all of the above together, the formula looks as follows:

```
=VLOOKUP(E11, Highlighted cells from the detail daily clinic appointment schedule, 2, FALSE)
```

Here is an example of what the formula looks like in Excel with reports side by side:
Here are the results shown in cell A11 once we press the enter button after entering the formula:

![Excel screenshot showing cell A11 with the formula result]

- If you forgot to format column A to a date format (see step d), you will see a number instead of a date. You can go ahead and format the column now to see the actual date.


1. To populate the rest of column A (Appointment Date) click on cell A11 and double click on the small box in the lower right hand corner of the cell. After you have done this, scroll down to make sure the formula has copied all the way to the bottom. If it hasn’t, double click the small box at the lower right of the last cell that has data in it and repeat until all of the rows in that column have data or #NA. The #NA means that Excel wasn’t able to find any appointment information for that participant ID in the appointment schedule table.

2. To get data for column B, Appointment Time, repeat the steps k. through l. using the following formula:

   =VLOOKUP(E11, highlighted cell range from the Detail Daily Clinic Appointment Schedule report, 3, FALSE)
***Note: You can also copy and paste the formula from cell A11 and change the column number from 2 to 3 and cell F11 to E11.

To filter the data:

- Select the entire Summary of Issuance Due table. You can do this by clicking on the Ctrl key and End key on your keyboard at the same time. This takes you to the last cell in your table. Then, scroll all the way back to the top without clicking anywhere in the spreadsheet. If you accidentally click inside the sheet, you will have to start the selection of the table over again. Then press on your Shift key and select cell A10. This selects your usable table area so you can filter the data.
- Now that you’ve selected your table, go to your Data menu and click on the Filter icon in your menu bar. It should look like this:

![Filter Icon]

- Once you see the down arrows in each box in row 10, you are ready to identify participants who don’t have an appointment scheduled. If you notice that some headers in row 10 don’t have the arrows, repeat previous steps for filtering data.
• To see who doesn’t have appointments scheduled, click the down arrow in cell A10 and click the “select all” check box to deselect all options and select #NA by clicking that checkbox to put a check mark in it. It should look like this:

![Image of Excel spreadsheet with #NA selected]

Congratulations for making it to this point and seeing whom you need to contact to schedule an appointment!