

Compass Reports

Report Location	Report Name	Report Type	Description	Steps information requested	Comments
NA	Educator Caseload Report	State Office Standard Report	Shows the number of participants assigned to the individual educator.	This report will be sent out monthly (mid month) to those agency that assign educators caseload.	<p>Considerations:</p> <p>In order for this report to be useful to the Local Agency, staff must assign an Educator to the family on the Family panel. Please note the following with regards to this report:</p> <ol style="list-style-type: none"> 1. If an educator is not assigned to the family, the family is listed as belonging to Unknown. 2. If an educator never assigns themselves to any family, that educator will not show up on the report. 3. If a participant is transferred and staff do not update the educator field, the educator from the other clinic will show up on the report.
Administrative Reports	Participation with Benefits Report	Compass Report	Local Agency and clinic WIC participation numbers	Generate report	<p>Considerations:</p> <ol style="list-style-type: none"> 1. This report will not be accurate until all your participants have Compass checks.
Food Benefits Reports	No Food Benefits Pickup Report	Compass Report	This report shows the name and phone numbers of participants who have not received checks, do not have a next appointment, and are about to be terminated for no food benefit pickup.	Generate report	<p>Considerations:</p> <p>Participants who appear on this report meet the following criteria:</p> <ol style="list-style-type: none"> 1. The client's CEED (Categorically Eligible End Date) has not expired 2. The client does not have a future appointment 3. Today – FDTU (of the last set of checks) > 30 days.
Scheduler	Appointment Summary	Compass Report	Appointment show rates (kept, no shows, reschedules, cancelled)	<p>Generate report</p> <p>There is an error in this report that is being fixed. Once this error is fixed then the following calculation can be done to obtain rates of Kept appointments and No Show appointments:</p> <p>In order to obtain Kept appointments and No Show appointment rates, the following equation must be calculated: Kept appointments + No Show appointments = Total appointments. To get the Kept appointment rate divide the number of Kept appointments by the number of total appointments.</p> <p>Reason why calculation is needed: Please note that the percentages in the current report include the reschedule, cancelled and mass rescheduled appointments and therefore must not be used. The number of reschedules and cancels are the total number of times a staff person has reschedule or cancelled an appointment. The appointment that is being reschedule may or may not be within the Start Date and End Date.</p>	A change idea has been entered to change the design for how rescheduled and cancelled appointments are calculated.
Assessment & Education Reports	Nutrition Education Contacts by Staff Member	Compass Report	The percentage of high risk clients that were seen by the RD for each clinic in the Local Agency.	<p>Generate report</p> <p>View the "% Total with Contacts" for the High Risk clients for the appropriate Educator.</p>	<p>Considerations:</p> <ol style="list-style-type: none"> 1. Clients who were identified as High Risk <30 days from CED may still be within the timeframe to complete a HR contact. The system would see the the participant was identified as HR in the certification and did not received a HR contact prior to the CED date. They may still be within the required timeframe to complete a HR appointment. <p>For example: Client A (CED November 30) was identified as HR at her November 15 follow-up appointment. She is coming back into the clinic to be recertified on December 5. She will see the HR counselor at that appointment. Client A is still within the required timeframe for her HR contact, however if the November Nutrition Education Contacts Report was run, she would not be counted toward the percentages of seen high risk participants.</p>
Assessment & Education Reports	Nutrition Education Contacts by Staff Member	Compass Report	For those clinics that assign educators a caseload - The number of high risk clients on the educator's caseload that received a high risk contact.	<p>Generate report</p> <p>View the "% Total with Contacts" for the High Risk clients for the appropriate Educator.</p>	<p>Considerations:</p> <ol style="list-style-type: none"> 1. Clients who were identified as High Risk <30 days from CED may still be within the timeframe to complete a HR contact. The system would see the the participant was identified as HR in the certification and did not received a HR contact prior to the CED date. They may still be within the required timeframe to complete a HR appointment. <p>For example: Client A (CED November 30) was identified as HR at her November 15 follow-up appointment. She is coming back into the clinic to be recertified on December 5. She will see the HR counselor at that appointment. Client A is still within the required timeframe for her HR contact, however if the November Nutrition Education Contacts Report was run, she would not be counted toward the percentages of seen high risk participants.</p>
Client Services Reports	Zip Code Report	Compass Report	The zip codes for all the participants receiving benefits within the specified local agency.	Generate report	

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NA	Nutrition Education Contacts	Not Available	The report would indicate whether the participant obtained the required number of nutrition education contact.	There is no report that shows this information. The information must be obtained manually by completing the following: You may run a report that lists all participants such as the Zip Code or Outreach Report and review individual records to determine whether the participant has had the appropriate number of nutrition education contacts.	Side Note: The Nutrition Education Contact Report by Staff Person does appropriately determine whether participants received the required number of nutrition education contacts. It is important to note that the Nutrition Education Contact Report by Staff Person cannot be used to determine whether the appropriate number of nutrition education contacts occurred for those participants with certifications longer than 6 months (infants, pregnant women, BF women) because the system is only looking for two nutrition education contacts. In addition, an active participant may not have shown up for an appointment yet they are still counted in the percentages giving a disadvantage to the clinic.
Vendor Management	Local Agency Redemption	Compass Report	This report is a list of monthly redemption information including checks redeemed, amount redeemed, average amount per check by local agency and clinic, including cumulative amount for fiscal year to date.	Generate report	Considerations: 1. This report does not break down the Food Instruments redeemed per participant category. 2. This report does not include ASPENS redemption data. When viewing this report for the selected month, all participants must have Compass checks. The report also gives the Fiscal Year numbers, these numbers will be inaccurate until the Local WIC Agency has been on Compass for an entire Fiscal Year.
Administrative Reports	Unduplicated Participation by LA for the Calendar Year (Jan. 1 - Dec. 31) Unduplicated Participation by LA for the FFY (Oct. 1 - Sept. 30) Unduplicated Participation by County	Compass Report	Shows the total number of unduplicated participants	Generate report	
Food Benefits Reports	FI Activity by Local Agency	Compass Report	This report provides the number of checks issued, voided, not redeemed/or rejected.	Generate report	Considerations: 1.This report includes the ASPENS check issuance information, but not the ASPENS checks redemption data which will make the number inaccurate. In addition, please note that the calculations per vendors are not necessarily kept together. 2. If you want to view the numbers for one vendor (vendors may be listed multiple times over several pages), you must add the vendor's numbers all together.
Breastfeeding Reports	BFPC Contacts Detail by Topic	Compass Report	This report shows the number of times a BF topic was discussed for each BFPC during a specified time frame.	Generate report	Uses of this report: 1. May be used as a reference for the BF PC coordinator and other management staff to understand how peer counselors are documenting the topics discussed with mothers and referrals made to lactation specialists during the prenatal and postpartum periods. For example, a BF PC who rarely makes referrals to clinic lactation specialists or rarely discusses a topic such as "exclusive breastfeeding." Note: This report should be exported into Excel. Once this is complete individual agencies will be listed under each Excel tab.
Breastfeeding Reports	Breastfeeding Equipment Due	Compass Report	Identifies participants (endorser name, Family ID, phone number) who currently have serialized breastfeeding equipment assigned due prior to or within the current calendar month.	Generate report	Considerations: 1.This report only lists the pumps that need to be returned to the clinic in the current month or pumps that are overdue (needed to be returned prior to the current month). This report does not include future months. Note: During the last week of the month, the data for the following month will also be pulled for the report. Policy Considerations: According to the Colorado WIC Program Manual, participants issued pumps should be followed up on monthly. If the Contact/Return Date in the BF Equipment panel is set at 1 month out, then the report will always contain all those participants with pumps.
N/A	Breastfeeding initiation and duration rates	Not Available - Undergoing Development	Breastfeeding initiation and duration rates	This report is not available in Compass. Jennifer Dellaport, Colorado Breastfeeding Coordinator is working with CDC and the other states to rewrite the requirements for this report. It is a high priority change. We do not have prevalence information at this time.	

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	BF Duration by BFPC Contacts	Compass Report	This report describes the breastfeeding duration of an infant whose mother had a prenatal and/or postpartum contact with a BF PC. The report is broken down per BFPC by the number of BF PC contacts the participant received (during the prenatal and postpartum period), the date of the initial visit, and the duration in weeks the infant has breastfed for and the number of cans of formula they received in the most recent food package	Generate report	Uses: May be used to view formula issuance to breastfed infants whose mothers have/had contact with a BFPC. Staff would need to keep in mind #2 when they look at the duration column. Considerations: 1. This report counts contacts of "No Answer" and "Other." 2. The duration may reflect the age of the infant at the time of the report. For example, if report is run for January 1 – December 31 and an infant is born December 1, their breastfeeding duration may show 3 weeks. This does not mean they stopped at 3 weeks. 3. This report does not include women who had contact with a BFPC and didn't initiate breastfeeding. 4. This report does not separate the type of contact the BFPC had with the mother 5. This report does not show the reasons some mother's request formula or show information for why mother's may have stopped breastfeeding.
Breastfeeding Reports	Reasons ceased BF Report	Compass Report	This reports shows the number of breastfed infants and children and the reasons why breastfeeding ceased. This report is also broken down by the age.	Generate report	Uses: 1. May be used to review the reasons women offer for why they stop breastfeeding, and to train staff to use anticipatory guidance with specific breastfeeding cease trends. For example, if the majority of women in a clinic are stopping breastfeeding by 2 weeks postpartum because of "Milk supply/mom perceives poor quantity/quality," review with staff how to talk about milk supply late in the prenatal and early postpartum periods.
Client Services Reports	Outreach Report	Compass Report	A report that lists all pregnant women and breastfeeding women, their addresses and phone numbers	Generate Report Report can be exported into Excel. Then a filter can be created so you can filter only on the Breastfeeding or Pregnant category.	
Scheduler Reports	High Risk Missed Appointment Report	Compass Report	This report lists the High Risk participants that do not have the "High Risk follow-up Appointment" box marked and that have missed their appointments within the date range specified. It also shows the participant's last kept appointment and next appointment.	May be used to view High Risk participants that have not been seen by the RD/RN and to ensure their next appointment is with the RD/RN.	Nutrition Education panel "High Risk Follow-up Appointment" box is not checked for those participants that show up on this report. This report will not be useful until everyone is recertified in Compass. Even if a participant received a HR visit in ASPENS, they will show up on this list because the "High Risk Follow-up Appointment" box was not checked in Compass.
Scheduler Reports	Interpreter Needs Report	Compass Report	This report lists participants that need an interpreter and their scheduled appointments.	May be used to ensure clinic has appropriate interpreting services for these participants prior to the scheduled appointment.	In order for the participant to show up on this report, the Family panel "Interpreter Needed" box must be checked.
Scheduler Reports	Missed Appointment Report	Compass Report	This report lists all participants who have cancelled or did not show up for an appointment within the selected dates and who do not have a subsequent appointment with a status of "Seen," "Arrived" or "Rescheduled" or where the Nutrition Education Class Appointment status is "Attended."	May be useful to call these participants back to reschedule especially pregnant woman.	All columns within the state will show up, however you will only see those that apply to your local agency in the report. This report lists those participants that have missed an appointment in the selected timeframe, however please note that some of the participants listed may have a subsequent appointment with a status of "Scheduled." -If staff mark the appointment "No Show" and a new appointment is created on a different day with the status of "Scheduled" then this participant will still show up on the report. -If staff mark the appointment "No Show" and then right click that same appointment to reschedule, then paste the appointment to the new date then this participant will not show up on the report. -If a staff person marks the appointment as "Cancelled" and a new appointment is created on a different day with the status of "Scheduled" then this person will show up on the report. Enhancement: This report should show those participants that have missed an appointment where no subsequent appointment was made with a status of "Seen", "Arrived" or "Scheduled".
Scheduler Reports	Mass Rescheduling Report	Compass Report	This report lists the participants that have been mass rescheduled.	May be used for unintentional mass rescheduling of clients.	Not likely to be used.
Scheduler Reports	Processing Standards Non-Compliance Report	Compass Report	This report lists the participants that were not scheduled within processing standards and the reason this occurred.	May be used to ensure processing standards are being met and for troubleshooting when they are not being met.	When a participant is first entered into Compass, staff must not only enter their name, but must also complete the Contact/Address panel in order for this report to be accurate.
Administrative Reports	Clinic Activity Report by Staff Person		This report shows the number of certifications, reinstates, transfers, and terminations done by the staff person working with the client.	May be used to view the number of certifications, reinstates, transfers and terminations completed by individual staff members.	The termination column is the number of participants that the staff person has manually terminated. It does not include those that were terminated by the system (e.g., child turning 5). These types of terminations are listed under Staff Person column as System System. This report is the same as the Clinic Activity Summary Report except that it does not break down the clinic by Staff Person.

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Administrative Reports	Clinic Activity Summary Report	Compass Report	This report shows the number of certifications, reinstates, transfers, and terminations within the clinic.		May be useful to view the number of participants being added to the agency vs. those that are leaving the agency (certifications vs. termination and transfers). The termination column is the number of participants that the staff person has manually terminated. It does not include those that were terminated by the system (e.g., child turning 5). These types of terminations are listed under Staff Person column as System System. This report is the same as Clinic Activity Report by Staff Person except that it is not broken down by staff person.
Administrative Reports	Duplicate Records Report	Compass Report	This report lists participants who have had a record created for the Pregnancy, Blood, Athropometrics, or Certification panels on the same day by two different staff members.		Uses of this report are to be determined.
Administrative Reports	Enrollment Report	Compass Report	This report shows the total number of all active participants. The report also lists the number or participants by category and breastfeeding status/description.	May be used to see the number of participants' enrolled (active participants) and their breastfeeding status/descriptions in the local agency and clinic.	This number is higher than the participation number. For participation numbers, refer to the Participation with Benefits report. This is the same report as Enrollment by Priority except that this report does not include priorities.
Administrative Reports	Enrollment by Priority Report	Compass Report	This report shows the total number of active participants by priority, category and breastfeeding status/description.	May be used to see the number of participants' enrolled (active participants) and their breastfeeding status/descriptions in the local agency and clinic.	This is the same report as the Enrollment Report except that this report is broken down into participant categories.
Administrative Reports	Ineligible by Income Report	Compass Report	This report lists all endorsers/families who were determined over income with the specified date range. The families are either marked with a status of Ineligible with a reason of over income, or Terminated with a reason of over income.	May be used to contact people to inform them that they may be eligible when income guidelines increase.	
Administrative Reports	Ineligible Report	Compass Report	This report lists all participants that were made ineligible and their reason for ineligibility during the specified date range.	Uses of this report are to be determined.	
Administrative Reports	Participation with Benefits Report by Priority	Compass Report	This report shows the participation for the specified month. Categories are also broken down into breastfeeding status/description as well as priority.	May be used to see the participation as well as their priority and breastfeeding status/description.	This report is the same report as the Participation with Benefits Report except that this report is also broken down into priorities. This report will be accurate approximately 3 months after your agency's Compass rollout when participants no longer have ASPENS checks.
Administrative Reports	Termination by System Report	Compass Report	This report lists participants that have been terminated by the system in the selected month.	May use this report to follow up with those that have been terminated due to not picking up benefits, failure to provide proof, etc.	
Administrative Reports	Termination by System Pending Report	Compass Report	This report lists participants that will be terminated within the selected month due to categorical ineligibility, expiring certification, or provisionally certified.	Uses of this report are to be determined.	The participants listed in the report may or may not have an appointment to be recertified. Enhancement: This report would be better if it only showed those participants who's CED is in the month selected but NOT their CEED, and only those participants who do not have an appointment scheduled.
Administrative Reports	Transfer Out Report	Compass Report	This report lists all participants that have transferred to another Colorado clinic within the specified dates.	Uses of this report are to be determined.	
Assessment & Education Reports	Class Attendance Report	Compass Report	This report shows the total number of participants who attended each clinic's nutrition education class with the specified date range.	May be used to determine more popular classes and/or class times, etc.	

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Assessment & Education Reports	Follow-up Nutrition Risk Assessment Report	Compass Report	This reports lists both the high risk participants and the participants that have the "Additional Assessment Needed" check box marked during the specified date range & if a High Risk follow up was completed in the date range specified. Note: The date of the High Risk identification must be within the specified date range and the HR f/u must be within the specified date range in order for YES to appear in the "HR Follow-up" column.	May be used to view participants identified as High Risk within the specified date range. This list may be used to review individual participant records within Compass to ensure the participant received high risk counseling with the RD/RN.	A High Risk follow-up is noted as completed when the RD/RN checks the "HR F/u" radio button on the Nutrition Education panel <u>and</u> the Additional Assessment Needed box is checked on the Risk panel. The report indicates that the majority of participants have not had a High Risk follow-up. This report only pulls those participants who were identified as high risk within the specified date range, and do not have the high risk follow up box marked along with the Additional Assessment Needed box marked within the specified date range. Please note that many of these high risk participants may still be within appropriate timeframe for high risk counseling per policy. Staff would still need to review each participant record to ensure a high risk follow-up was completed or has been scheduled within the appropriate timeframe per policy. NOTE: This report is similar to the High Risk Nutrition Education follow, High Risk Factor Report by Next Appoint, High Risk Factor Report by Person ID. With enhancement to the High Risk Factor Nutrition Education Report, I'm not sure how this report will be needed.
Assessment & Education Reports	High Risk Factor Report by Next Appointment Date	Compass Report	This report list active high risk, the participant's NRFs and the participant's next appointment. The list is sorted by next appointment date.	May be used to view high risk participants. This list may be used to review individual participant records within Compass to ensure the participant received high risk counseling with the RD/RN.	The participants listed in this report are different than in the Follow-up Nutrition Risk Assessment Report. The participants in this report are all active high risk clients, and not just high risk clients that were determined to be high risk during a risk assessment within the specified date range as is the case with the Follow-up Nutrition Risk Assessment Report. NOTE: This report is similar to the High Risk Nutrition Education follow, Follow Up Nutrition Risk Assessment Report, High Risk Factor Report by Person ID. With enhancement to the High Risk Factor Nutrition Education Report, I'm not sure how this report will be needed.
Assessment & Education Reports	High Risk Factor Report by Person ID	Compass Report	This report lists all active high risk participants, the participant's NRFs and the participant's next appointment. The list is sorted by Peron ID number.	May be used to view high risk participants. This list may be used to review individual participant records within Compass to ensure the participant received high risk counseling with the RD/RN.	This report is the same as the High Risk Factor Report by Next Appointment Date except that it is sorted by Person ID vs. by the next appointment date. The participants listed in this report are different than in the Follow-up Nutrition Risk Assessment Report. The participants in this report are all active high risk clients, and not just high risk clients that were determined to be high risk during a risk assessment within the specified date range as is the case with the Follow-up Nutrition Risk Assessment Report. NOTE: This report is similar to the High Risk Nutrition Education follow, High Risk Factor Report by Next Appoint, Follow Up Nutrition Risk Assessment Report. With enhancement to the High Risk Nutrition Education Report report, I'm not sure how this report will be needed.
Assessment & Education Reports	Nutrition Education Contacts Report by Staff Person	Compass Report	This report shows the total number of participants terminating in the month selected that have had two nutrition education contacts within their certification period. For the high risk participants, they must have at least 2 nutrition education contacts where at least one is a high risk nutrition education contact (check box called "High Risk Follow-Up Appointment was checked on the Nutrition Education panel). Numbers and percentages are broken down into HR and not HR participants.	Use of this report to be determined	This report only counts those participants whose certifications are ending within the month selected. It is important to note that from this report, it cannot be determine whether the appropriate number of nutrition education contacts for infants were completed because the system is only looking for two nutrition education contacts. Therefore, this will inaccurately display the "% Total with contacts" because infants are included. In addition, an active participant may not have shown up for an appointment yet they are still counted in the percentages giving a disadvantage to the clinic.

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Assessment & Education Reports	Nutrition Education Contacts Summary Report	Compass Report	This report shows the total number and percent of participants (active or those with a certification end date at the end of the month selected) that have had a least one nutrition education contact in the specified month. Numbers and percentages are broken down into HR and not HR participants.	Uses of this report are to be determined.	It is important to note that this report does not show whether participants have had the appropriate number of nutrition education contacts. This report solely lists those participants that received a nutrition education contact within the specified month.
Assessment & Education Reports	High Risk Nutrition Education Report	Compass Report	This report lists the names of all high risk participants with a certification start date in the selected date range and their next appointment type and date along with the status of the appointment.	May be used to view high risk participants. This list may be used to review individual participant records within Compass to ensure the participant received high risk counseling with the RD/RN.	It is important to note that not all high risk participants will have a next appointment type of "High Risk" after identified as high risk at their certification or recertification appointment. The participant may see the RD/RN for high risk counseling the same day as their certification or recertification making the next appointment more likely to be another appointment type besides a "High Risk" appointment. Enhancement: Need to add HR NRF, HR f/u "Yes" or "No" and HR f/u date. Total number of participants in report, and total number of participants marked with YES for the HR f/u. Note: HR F/U column is in the report called Follow-up Nutrition Risk Assessment.
Assessment & Education Reports	Prevalence of Nutrition Risk by LA and County Report	Compass Report	This report shows the total number and percentages of active participants with each NRF.	May be used to review the number and percentage of certain NRFs (i.e., BMI >95%).	This report looks at the latest (newest) risk record for the active participant. Enhancement: This report only has an Effective Date. This reports needs a Start Date and End Date so that staff can compare number between the months and years (e.g., comparing the number of children assigned with NRF overweight).
Breastfeeding Reports	BFPC Contacts Summary Report	Compass Report	This report lists participants in the BFPC program and the type of communication (telephone support, clinic visit, no answer, etc.) that the participant has received.	May be used as a reference for the BF PC coordinator and other management staff to understand how peer counselors are contacting mothers. May be useful to learn how BFPCs reach out to mothers and compare clinics and agencies. Data may also help identify staffing needs and caseload determinations.	Enhancement: Remove all participant names and provide individual BFPC summary data. That way if the BFPC Coordinator can see the types of communications utilized by the BFPC staff.
Breastfeeding Reports	Breastfeeding Equipment Issued	Compass Report	This report identifies the type (e.g., Lactina select, Harmony, WIC-in-Style) and amounts of breastfeeding equipment issued by the clinic and agency.	May be used to see how many pumps are issued each month (how much time staff spend issuing pumps).	Compass does not compute the total number of pumps that are added or issued. Agencies will need to maintain a breastfeeding equipment tracking/ inventory system separate from Compass. The status of the pumps (issued, lost, and available) is available on the Serialized Inventory under Operations.
Breastfeeding Reports	Breastfeeding Prevalence Report	Compass Report	Under redevelopment		
Breastfeeding Reports	BF Duration by BFPC Contact	Compass Report	This report describes the breastfeeding duration of an infant whose mother had a prenatal and/or postpartum contact with a BF PC. The report is broken down per BFPC by the number of BF PC contacts the participant received (during the prenatal and postpartum period), the date of the initial visit, and the duration in weeks the infant has breastfed for and the number of cans of formula they received in the most recent food package	May be used to view formula issuance to breastfed infants whose mothers have/had contact with a BF PC.	It is important to note the following when reviewing this report: - This report counts contacts of "No Answer" and "Other." - The duration may reflect the age of the infant at the time of the report. For example, if report is run for January 1 – December 31 and an infant is born December 1, their breastfeeding duration may show 3 weeks. This does not mean they stopped at 3 weeks. - This report does not include women who had contact with a BFPC and didn't initiate breastfeeding. - This report does not separate the type of contact the BFPC had with the mother - This report does not show the reasons some mother's request formula or show information for why mother's may have stopped breastfeeding.
Breastfeeding Reports	Breastfeeding Prevalence with BFPC Contacts Report	Compass Report	Under redevelopment		
Breastfeeding Reports	Breastfeeding Prevalence by Equipment Issuance	Compass Report	Under redevelopment		
Breastfeeding Reports	Breastfeeding Prevalence by Maternal Characteristics	Compass Report	Under redevelopment		

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Breastfeeding Reports	Exclusive Breastfeeding and Formula Issuance Report	Compass Report	This report shows formula issuance trends for exclusively, primarily exclusive/no formula package and primarily exclusive/complementary food for breastfeeding infants through their first birthday. This report identifies infants who had a description of one of the categories of exclusively breastfeeding infants at their first visit and tracks them and identifies when they first receive powdered formula and the quantity (in cans) of formula provided.	May be used to track when mothers who exclusively breastfeed begin receiving supplemental formula from WIC. This report may be used to answer the question, "What portion of infants start of exclusively breastfeeding in our clinic and receive a full formula package by 6 months of age?"	
Breastfeeding Reports	Formula First Introduced Report	Compass Report	Under redevelopment		
Breastfeeding Reports	Reason Ceased Breastfeeding Report	Compass Report	This reports shows the number of breastfed infants and children and the reasons why breastfeeding ceased. This report is also broken down by the age.	May be used to review the reasons women offer for why they stop breastfeeding, and to train staff to use anticipatory guidance with specific breastfeeding cease trends. For example, if the majority of women in a clinic are stop breastfeeding by 2 weeks postpartum because of "Milk supply/mom perceives poor quantity/quality," review with staff how to talk about milk supply late in prenatal and early postpartum periods.	
Client Services Reports	Disqualified Participants Report	Compass Report	This report shows the names of disqualified participants. The report includes the start date of the disqualification, end date and reason for disqualification.	May be used to review those participants that have been disqualified and to ensure appropriate policies and procedures were followed prior to disqualification.	Disqualifying a participant is an extremely rare circumstance.
Client Services Reports	Immunization Report	Compass Report	This report shows a list of the infant and children that are not up-to-date on their DTaPs.	May be used to target counseling and referral to those infants that are not up-to-date on their immunizations	
Client Services Reports	Referral Detail Report	Compass Report	This report shows a count and a list of the organizations that are referring to WIC and the organizations that WIC is referring its participants to. This report also lists the names of the participants that were associated with the referral.	May be used in determining the number and types of outgoing and incoming referrals from different agencies.	
Client Services Reports	Referral Summary Report	Compass Report	This report shows a count and a list of the organizations that are referring to WIC and the organizations that WIC is referring its participants to.	May be used in determining the number and types of outgoing and incoming referrals from different agencies.	This report is similar to the Referral Detail Report, however the Referral Summary report does not list participant names.
Food Benefits Reports	Voided FI that have been Redeemed or Rejected Report	Compass Report	This report shows food instruments that have been redeemed but were voided in the system.	Used by Supervisors to determine if WIC staff and/or participant counseling is appropriate: • WIC Participants- if checks reported as lost or stolen were cashed, participants need to be counseled (or a determination made otherwise). WIC staff- if checks reported as damaged, exchanged, or re-issued, additional training is needed for staff to more effectively alter food issuance.	
Food Benefits Reports	Formula Issuance Report	Compass Report	This report lists participants that are on selected formulas, when a prescription is due, and the reason for the special formula issuance.	May be used when a formula recall happens. The local agency would be able to contact these participants on the recalled formula.	
Food Benefits Reports	Food Package Modification Report	Compass Report	This report lists tailored food packages and their contents along with the staff member who printed the tailored package	Useful for state staff to consider making additional model food packages.	
Inventory Operations Reports	Non-Serialized Inventory Order Received Summary Report	Compass Report	This report is used to track the amount of non-serialized inventory received at the clinic.	The State Office is not fulfilling orders through Compass as this time.	
Inventory Operations Reports	Non-Serialized Inventory Received Detail Report	Compass Report	This report is used to track the total amount of serialized inventory received at the clinic.	The State Office is not fulfilling orders through Compass as this time.	
Inventory Operations Reports	Serialized Inventory Report	Compass Report	This report shows the type and serial number of all the serialized inventory (breast pumps) items in the local agency/clinic and when they were added into Compass.	May be used to view the total number, serial number and date the pump was added to Compass.	Serialized Inventory is maintained through Operations – Non-Serialized Inventory- Serialized Inventory
Monitoring Operations Reports	Clinic Profile Report	Compass Report	This report calculates: -Ratio of FTE (professional and paraprofessional) to participants. -Ratio of FTE (professional and paraprofessional) to High Risk participants -Ratio of FTE (professional and paraprofessional) to Low Risk participants	May be used to determine average caseload per clinic and per FTE type.	This report is using participation not enrolled.

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Monitoring Operations Reports	C&A (Combined & Average) Tailored Package Usage Report	Compass Report	This report shows the names of participants that were issued a tailored food packages that used combine and average food items.	May be used to determine if the correct food packages have been assigned. i.e., are staff giving only one month of the C&A, and then giving a "regular" month package, which would result in too much of one type of food and too little of another over a two month span.	
Monitoring Operations Reports	Family Customer Service Log Report	Compass Report	This report provides a detailed list of the customer services and civil rights complaints and their resolutions.	May be used to monitor the status of complaints and as a Compass log of all civil rights and customer service complaints.	It is important to note that there will still need to be a central file for civil rights complaints. The use of the Civil Rights/Customer Service Complaint Reporting form must still be used in cases of civil rights complaints.
Monitoring Operations Reports	Interstate Dual Participation Report	Compass Report	Show a list of possible dual from other states on an MPSC system, CSFP, WIC Indian networking Data System Nebraska, WINDS Wyoming, UTE, and Arizona.	May be used to identify dual between the states on the MPSC system.	SO Note: There is nothing in the Source drop down – this is a drop down of available input files which were loaded by the batch process. If there is nothing in the dropdown, then nothing was loaded by the batch process. The batch process checks nightly to see if a file has been put on the server. It will not do anything unless it gets a file from one of the sending rates.
Monitoring Operations Reports	LA Eligibility Performance Report	Compass Report	This report shows the number of women, infant and children that are eligible and the number of women, infant and children that are participating on WIC.	Uses of this report are to be determined.	SO Note: Eligibility data is gathered from the Finance screen called caseload. It is not calculated, somebody typed it in. Participation is calculated once monthly by the participation batch job. There are no time parameters in this report because eligibility is based on the last non experimental caseload record added. Participation is calculated on the average of the last 12 months.
Monitoring Operations Reports	Local Agency Profile	Compass Report	This report provides the number of FTE and staff type to participant ratios, clinic and local agency participants, percentage of participants to enrolled and the cost per participant.	May be used to view participation, staff to participant ratios, enrolled to participants and cost per participant.	
Monitoring Operations Reports	No Show	Compass Report	This report shows the total number of appointment types, the number of no shows and the percentage of no shows to total appointments.	May be used to review and compare the no show percentage for different appointment types as well as compare a particular agency's percentages to other local agencies.	
Time Study Authorizations	Time Study FTE Report	Compass Report	This report shows the number of FTEs and hours spent within Client Services, Nutrition Education, Breastfeeding and Administrative operations. Report also lists out individual staff names and their hours spend in each area.	May be useful to document time studies.	Training has not been provided on documentation of time studies within Compass. Local Agency's do not have access at this time to set up time studies in System Administration.
Time Study Authorizations	Time Study Payroll Report	Compass Report	This report shows the percentage of hours per staff member for each of the time study areas (client services, nutrition education, breastfeeding, administration)	May be used in reviewing the amount of time a staff person spends in each time study area.	Training has not been provided on documentation of time studies within Compass. Local Agency's do not have access at this time to set up time studies in System Administration.
Time Study Authorizations	Non-Scheduled Activity Report	Compass Report	This report shows the variety of non-scheduled activities that consume staff time.	May be used in reviewing the activities where staff spend their time.	Training has not been provided on documentation of time studies within Compass. Local Agency's do not have access at this time to set up time studies in System Administration.
WIC Outreach Operations	WIC Outreach Operations	Compass Report	This report shows the outreach activities that were completed over the last 12 months.	May be used to look at outreach events over the year.	A local agency must enter information into the Outreach Log in Operations in order to generate this report.
WIC Outreach Operations	WIC Outreach Mailing Labels	Compass Report	This report formats outreach agency addresses so that it can be saved to an Excel Spreadsheet.	May be used to create mailing labels.	The address listed is the physical address and not the mailing address if one is listed in the Contact/Address panel. Enhancement: Both the mailing address and physical address should be listed.
WIC Outreach Operations	WIC Outreach Organization Listing	Compass Report	This report lists all your agency's outreach organizations.	May be used to review all the agency's outreach organizations and ensure list is complete.	This list includes all the agency organizations. You cannot narrow the search to select only the clinic's organization. Enhancement: Include clinic as a parameter so the search can be narrowed.
Vendor Management	Authorized Vendor Report	Compass Report	This report is a list of WIC-authorized vendors in the chosen location including address and phone number.	Provides a listing of authorized stores and locations which may be provided to clients.	
Vendor Management	Vendor Authorization Actions Scheduled & Completed	Compass Report	This report is a list of the steps in the retailer authorization process that a retailer has been scheduled and for and completed.	Provides a window for the local retailer coordinators to see where stores are at in the WIC authorization process.	
Vendor Management	Vendor Mailing Labels	Compass Report	This report is a list of authorized stores and addresses in a label-friendly format.	Can be saved out to an excel spreadsheet for importing into various label making software.	
Vendor Management	Vendor Farmers	Compass Report	This report is a list of WIC-authorized farmers and their contact information.	Provides a listing of authorized farmers and locations which may be provided to clients.	