

☺ Job Aid: Choosing the Appropriate Transaction Types

Chapter 3: Client Processes

Section 8: Other Client Processes

Lessons: Re-activate and Re-instate, Transaction Types

Following are examples of when to use the three “R” Transaction Types.

Recertify

Today’s date is within 30 days (1 month) before or after the certification end date.

⇒ Certification end date: 5/31/2009

Use Recertification transaction type beginning 5/1/2009 and up to 6/30/2009.

⇒ Exception: Pregnant to postpartum – Can recertify any time from enrollment through certification end date (six weeks past EDD rounded to the end of the month). Must always change category, add an ADD and then select the Recertification transaction type.

⇒ Do not use Recertification transaction type if a woman participant comes in to be certified for a new pregnancy.

This transaction type will clear all checkmarks on the certification tabs and add new rows for mandatory fields on certification screens. The transaction type will display as a “C” after the recertification is complete.

Reactivate

Client is terminated but in a current certification period.

⇒ Certification period: 12/11/2009 – 05/31/2010. Client is terminated.

Use Reactivate transaction type anytime within the certification period. Certification period listed above is restored as active.

⇒ Do not use Reactivate if a woman participant comes in to be certified for a new pregnancy.

This transaction type will display as a “C” after the Reactivate is saved.

Reinstate

Any category of client is terminated and beyond 30 days past the most recent certification end date.

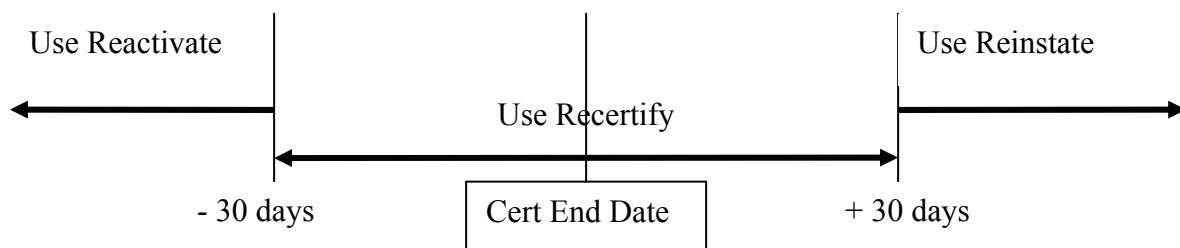
- ⇒ Most recent certification end date: 05/31/2009. Today is 07/01/2009.
Client is terminated.
Use Reinstate transaction type to establish a new certification period.
New certification period will begin with today's date – 07/01/2009 – 12/31/2009.

Woman client who may or may not be in a current cert period and comes in to be certified for a new pregnancy.

- ⇒ Postpartum woman comes in to the clinic with a new pregnancy and is in a current postpartum certification period.
Use Reinstate transaction type to establish a new certification period for the new pregnancy.
- ⇒ Postpartum woman comes in to the clinic with a new pregnancy and is not currently in an active certification period.
Use Reinstate transaction type to establish a new certification period for the new pregnancy.
- ⇒ Pregnant woman who is still in a current pregnant certification period has miscarried and comes in to be certified for a new pregnancy.
Use Reinstate transaction type to end her current pregnant certification and to establish a new pregnant certification period.

This transaction type will display as an “X” until the income and intake screens are complete. The transaction type will change to an “R” on the certification screens. Once the Reinstate is complete, the transaction type will display as a “C.”

Example Transaction Type Timeline



Note: Use **Reinstate** anytime a woman that is or has been on WIC comes in for a new pregnancy