Chapter 2: Client Demographics
Section 1: Client Demographics
Lesson: Special User – Client Search and Demographics

Objectives:

Upon completion of this lesson the user will be able to:
- successfully demonstrate searching for a client;
- correctly demonstrate entering client data on the Client Demographics screens;
- enter and read urgent and non-urgent messages; and
- successfully change client demographic information.

Oregon Policies:

- ♦ 587 Dual Participation
- ♦ 590 Other Participant Abuse

Overview:

FamilyNet Data System has replaced the Women and Children's Health Data System (WCHDS) for WIC, Perinatal, Immunizations, and Babies First. It stores all information common to clients across program applications, such as name, address, phone number and program participation. FamilyNet will serve as the primary interface point for linking WIC data to other DHS systems such as Medicaid and Vital Statistics.

TWIST is one module in FamilyNet. You will not notice much of a change when you move from the WIC application, TWIST, and into the client demographic part of FamilyNet. To avoid duplicate records in the system, and therefore avoid dual participation in WIC, you must always search for a client before you add a new client on WIC or update an existing client's record.

You will enter all client demographic information in a few screens that are accessed easily from TWIST. Once a client's information is entered, these screens are where basic demographic changes are made. Clients may have had demographic information entered or updated by other programs they also participate in. This means WIC benefits from the information entered and updated by these other programs and vice versa.
This lesson will show you how easy it is to search for a client and keep client demographic data up to date. No matter where in TWIST you are working, the search process and client demographics are handled the same way.

Instruction:

Searching for a Client

You may search for a client from many places in TWIST. One common starting spot is when screening a client for possible eligibility on WIC.

1. **Double click on the "Client Processes" icon.**

2. **From the "Enrollment and Intake" menu click on "Applicant Prescreening."**

3. **Click the "Open" icon.**

   The "Client Search" window is displayed.

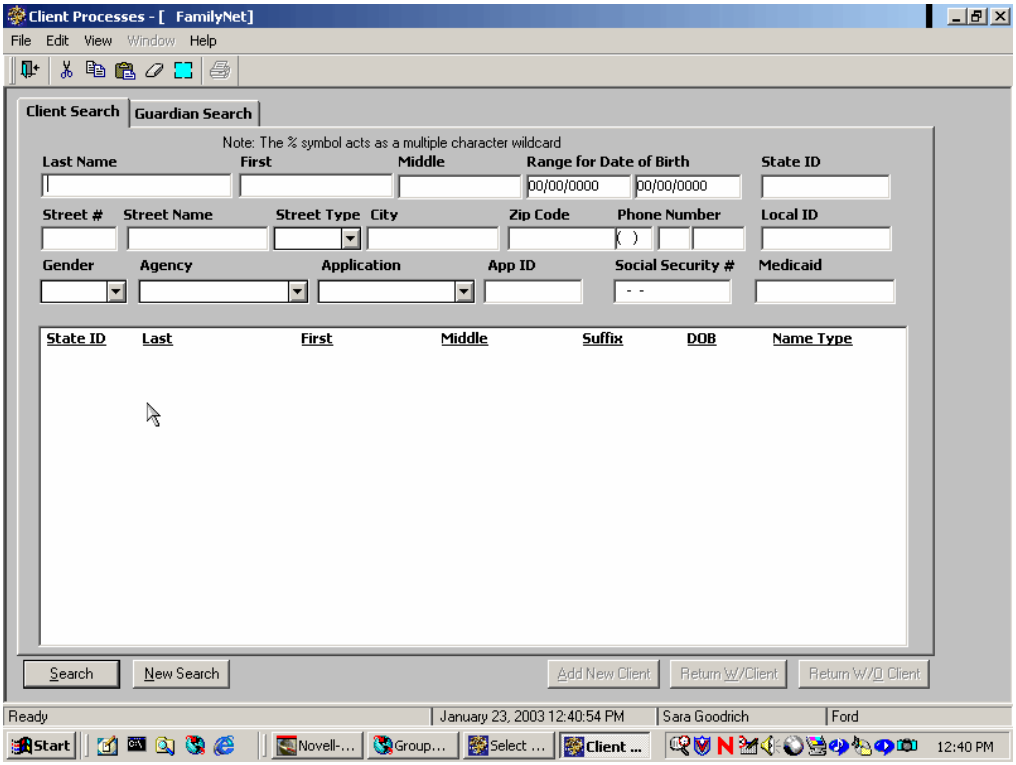

Figure 1: "Client Search" Window

- Two screens, "Client Search" and "Guardian Search," are in this window. The system defaults to the "Client Search" screen.
- Search criteria are shown at the top of either screen.

- Information can be entered in any single field or all fields. The search results will be narrowed by the amount of information entered.
- You can use the % symbol as a search character when you are unsure of the correct spelling of a word.
- The results of the search will be displayed in the large white box in the lower part of the screen.

The recommended way to search for a client is:

- The first 3 letters of the person's last name,
- The first 3 letters of the person's first name; and
- The person's date of birth.

4. **"Client Search" screen fields.**

There are several ways to search for a client. The most common way will probably be by last name. Searches can also be done by gender, age, address, or specific information such as ID, Social Security number, or Medicaid number. None of these fields are mandatory, however at least one data element must be entered into a field for a client search to take place. The more information that is entered into these fields, the more specific your search will be. For a new search, it is better to do a broad partial search to keep errors to a minimum.

♫ NOTE: If all fields are completed when searching for a client, only one client will be retrieved from the database. If only one general field is completed all clients meeting that criteria will be retrieved from the statewide database.

4.1 "**Name**" fields. If only one letter is entered into one of these fields, all names that begin with that letter will be retrieved from the database. If a specific name is entered, the search will be narrower.

Example: If only the letter J is entered in to the "Last Name" field, all last names that begin with J will be retrieved from the database. If the name Johns is entered in to the "Last Name" field, the search will be limited to those clients with the last name Johns and to those whose last name begins with Johns such as Johnson or Johnston.

4.2 "**Range for Date of Birth**" fields. These fields would be completed when searching for a specific age of clients. When the date for only one field is entered, the system will automatically fill the other field in with the same date.

Example: If you wanted to search for all 6-month-old infants you would enter the appropriate dates into these fields.

4.3 "**State ID**" field. This ID is automatically generated when a client is entered into the Family Net system. This ID is different from the WIC ID.

4.4 "**Street #**" field.

4.5 "**Street Name**" field.

4.6 "**Street Type**" field. This is a drop down list of all street types.

4.7 "**City**" field.

4.8 "**Zip Code**" field.

4.9 "**Phone Number**" fields. These fields could be completed if the client's phone number is known and you want to narrow your search. The three fields are for area code, prefix, and final 4 digits of the number.

4.10 "**Local ID**" field. This is an agency entered ID used in counties that have their own numbering system. This ID is different from the WIC ID.

4.11 "**Gender**" field. This is a drop down list to select the client's gender. Unknown might be used for an infant or child that is transferred into the state with little information available.

4.12 "**Agency**" field. This is a drop down list of all WIC agencies in the state. Only use this field when you know this is your agency's client.

4.13 "**Application**" field. This is a drop down list that includes the programs in FamilyNet. If you knew the client participated in another FamilyNet program, you would use this field to select that program.

4.14 "**App Id**" field. In the WIC application, this would be the WIC ID.

4.15 "**Social Security**" field. The client's social security number could be entered if known to narrow the search criteria. The dashes are already included in this field so just the number needs to be entered. If you put the dashes in, the number will not be correct.

4.16 "**Medicaid**" field. The client's Medicaid number could be entered to narrow the search criteria.

5. **Enter the first 3 letters of the person's last name.**

6. **Enter the first 3 letters of the person's first name.**

7. **Enter the person's date of birth.**

8. **Click the "Search" button or press Enter.**

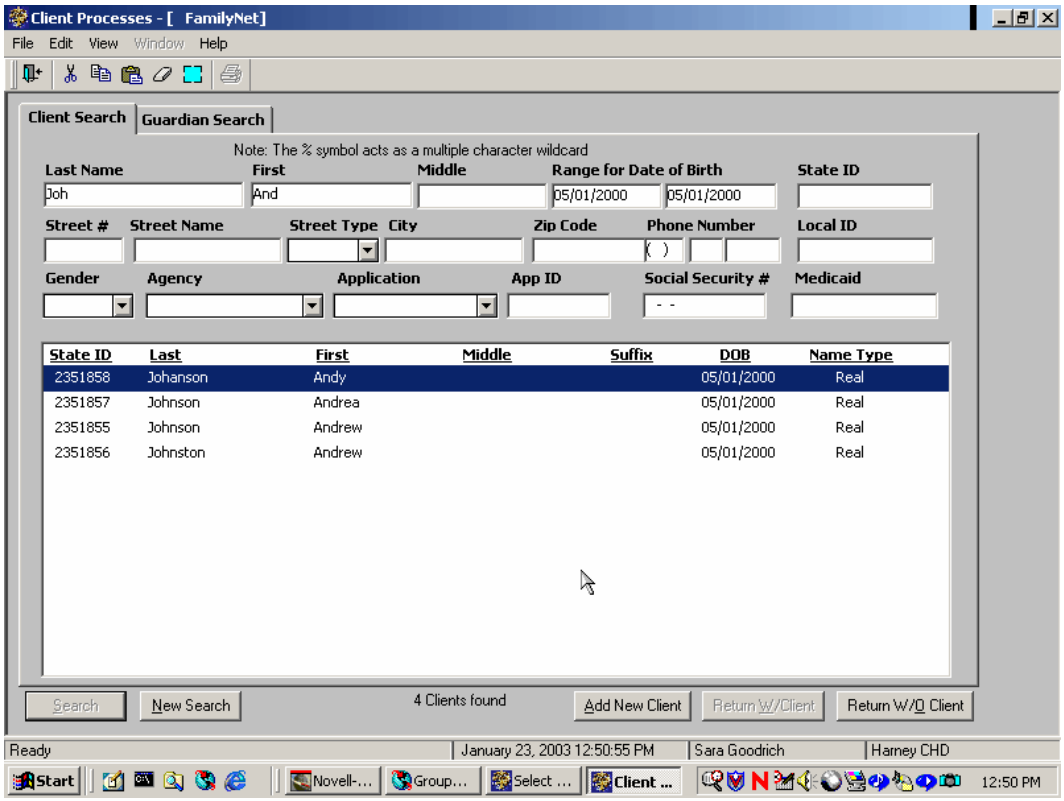

Figure 2: "Client Search" Screen with Search Results

- The clients found in the database matching your search criteria will be displayed alphabetically in the results box.
- A note is generated between the "New Search" and "Add New Client" buttons. This text indicates how may clients were retrieved from the search.
- You may need to scroll down to view all clients listed.
- If there are no clients that match your search criteria, a message pops-up stating "*Sorry, no clients were found that match your query criteria.*" Click the "OK" button to close the pop-up.

- If the list of clients is really long and you want to narrow your search using additional client information, click the "New Search" button to clear the screen and reenter additional client information.
- Clicking on a column heading will resort the results order.

♫ NOTE: To update or add demographic information about the client before returning to the TWIST screen, double click on the appropriate person to go to the "Client Primary" screen.

9. **Return to the TWIST screen.**

From the Client Search, there are several ways to return to TWIST. It will always take you back to the TWIST screen you were on when you initiated the search.

9.1 Single click on the appropriate name and click on the "**ReturnW/Client**" button.

This returns to TWIST with client information.

9.2 Click the "**ReturnW/O Client**" button.

This returns to TWIST with no client information.

9.3 Click the "**Close**" icon.

This returns to TWIST with no client information.

Searching for a Guardian

This search will look for clients that have a particular guardian listed in their file. The search results will tell you the particular clients associated with that guardian name. Guardian fields are optional, but filling them in will make it easier to search for foster children or children whose last names are different from the parent.

Searching for a guardian is similar to searching for a client, however there are not as many ways to search for a guardian as there are for a client. Only the last, middle, or first name can be used for this type of search. The more information that is entered into these fields, the more specific your search will be.

The starting point for this section is:
Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening ⇨ Open icon

1. **Click on the "Guardian Search" tab.**

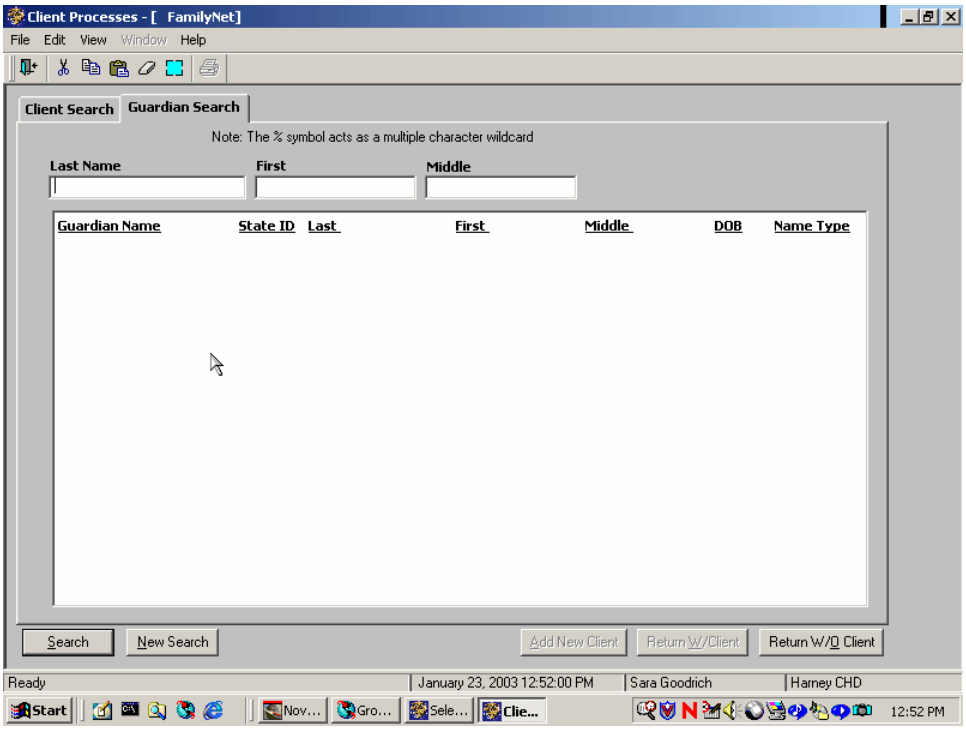

Figure 3: "Guardian Search" Screen

2. **Enter the name of the guardian you are searching for.**

   If only the first letter of the last name is entered into this field, all names that begin with that letter will be retrieved from the database.

3. **Click the "Search" button or press Enter.**

   - All guardians that match your search criteria will be displayed in the results box, along with the state ID, the client's name, date of birth, and name type.
   - If there are no guardians that match your search criteria, a message pops-up stating "*Sorry, no clients were found that match your query criteria.*" Click the "OK" button to close the pop-up.
   - Click the "New Search" button to clear the fields to begin another search.

4. **Return to the TWIST screen.**

   From the Guardian Search, there are several ways to return to TWIST from wherever you came from.

4.1 **Select the appropriate name and click on the "Return W/Client" button.**

This returns to TWIST with client information.

4.2 **Click the "Return W/O Client" button.**

This returns to TWIST without client information.

4.3 **Click the "Close" icon.**

This returns to TWIST without client information.

➥ *Practice Activity #1:*

Use the information from your ☛ Activity Sheet for this practice. You will be entering information to search for a client.

1. Open "Client Processes."
2. From the "Enrollment & Intake" menu select "Applicant Prescreening."
3. Click on the "Open" icon.
4. Enter the first three letters of the last name into the "Last Name" field.
5. Enter the first three letters of the first name into the "First Name" field.
6. Enter the date of birth in the first "Range for Date of Birth" field.
7. Click on the "Search" button.
8. Scroll down until you select the appropriate client.
9. Select the appropriate client and click the "Return W/Client" button to return to "Applicant Prescreening."

Entering a New Client

Before a new client can be added to the database, a client search using the preferred search method must be completed. This helps prevent having duplicate clients in the system. A new client cannot be entered from a guardian search.

The starting point for this section is:
Client Processes ⇨ Enrollment & Intake ⇨ Enrollment

1. **Click the "Open" icon.**

   The "Add New Client" button is not enabled.

2. **Perform a search as described earlier.**

♫ NOTE: The recommended way to search for a client is the first 3 letters of the person's last name, first name, and date of birth.

3. **Click the "Search" button or press Enter.**

   3.1 The "Add New Client" button is now enabled.

   3.2 Review the results area to see if the client is there.

   3.3 If the client is there, double click on the name to go to the "Client Primary" screen.

   3.4 If the client is not in the results area, move on to the next step.

4. **Click the "Add New Client" button.**

   This displays the "Client Primary" screen.

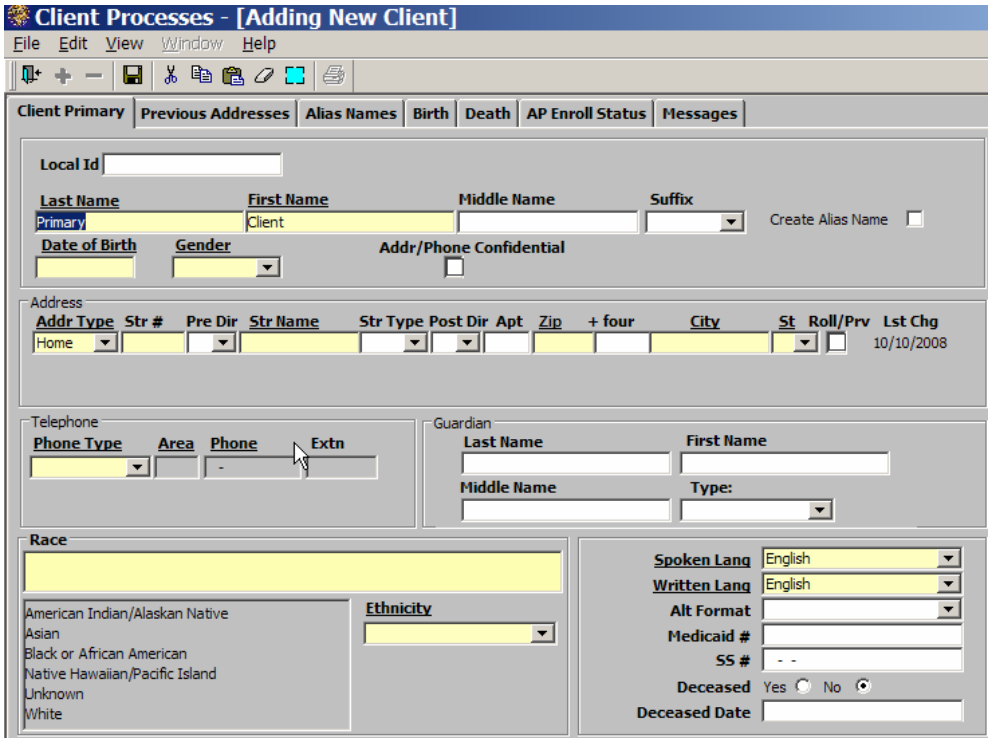

Figure 4: "Client Primary" Screen

5. **Complete the fields in the "Client Primary" screen.**

5.1 "**Local Id**." This is an agency-entered ID. This will mostly be used in agencies that have their own automated system. This ID can be used in addition to the State ID at the local level.

5.2 "**Name**." If a person's last name is hyphenated, the system will automatically generate possible alias names associated with that person due to the hyphenation.

Example: If the client's last name is Jones-Smith, the system will generate Jones, Smith, and Smith-Jones as alias names for this client. Alias name is a search tool only and the system will show the client's real name on all screens in TWIST.

5.3 "**Suffix**." The suffix field is a drop down list of name suffixes.

5.4 "**Create Alias Name**." This box is checked to indicate the initial name entered is now an alias. This field would not be used when initially entering a client into FamilyNet. More information about this function will be in the Changes and Additions to Client Demographics section.

5.5 "**Date of Birth**." The date is entered numerically in month/day/year format. All four digits of the year must be entered.

5.6 "**Gender**." This is a drop down list to select the client's gender.

5.7 "**Addr/Phone Confidential**." Click on this box to indicate the client's address and phone number are confidential. When this box is checked, the address and telephone area headers become bold and confidential requests are in parentheses when the screen is saved.

5.8 **"Address" Section.**

- "Address Type" is a drop down list. If Homeless or Unknown is selected from the list, none of the fields in this section are mandatory.
- "Street Number"
- "Pre Dir" is a drop down list for the street direction.
- "Street Name"
- "Street Type"
- "Post Dir"
- "Apt #"

- "Zip" For certain areas, when the zip code is entered, the city and state will automatically fill in. When there is more than one city connected to a zip code, after the zip code is entered a list of cities displays. You can then select the correct city.
- "City"
- "State"

5.9 "**Roll/Prv**." This heading stands for Roll to Previous. This field would not be used when initially entering a client into FamilyNet. You would use the "Roll/Prv" feature any time you need to have a record of the previous address, since there will be no other record if you simply make the address change. More information about this function will be in the Changes and Additions to Client Demographics section.

5.10 "**Last Chg**." This is a place to find out who actually entered a client's address change. When you double click on the Last Change date, a "Display Address Modification" pop-up box displays. The date the original address was created, who created it, the date the address was modified and who modified it is contained in the box.

5.11 "**Telephone**" Section.

- "Phone Type" is a drop down list to indicate the type of phone.
- If "No Phone" is selected, the phone number is no longer mandatory.
- To add more than one type of phone, click on the plus icon while in this area.
- "Area", "Prefix", 'Number", and "Extension"
- Only a "Home" phone type will show up on the "Daily Clinic Schedule" report, to make reminder phone calls.

5.12 "**Guardian**" Section.

- The last, first and middle name of the client's guardian can be entered.
- This section is only used for infants and children.
- "Type" is a drop down list to select the type of guardian.

5.13 "**Race**" is a federal reporting requirement. To select a race, click on the appropriate race in the race list. More than one race can be selected. To remove an assigned race, click on the highlighted race in the race list.

5.14 "**Ethnicity**" is a federal reporting requirement. Use the drop down list to select the client's ethnicity.

5.15 "**Spoken Language**" will default to English. You can use the drop down list to select the client's preferred spoken language.

5.16 "**Written Language**" will default to English. You can use the drop down list to select the client's preferred written language.

5.17 "**Alt Format**." If the client needs materials in an alternate format, this drop down list can be used to identify the client's preferred format. Only one format can be chosen. If "other" is identified it should be explained in the "Messages" screen.

5.18 "**Medicaid #**." The client's medicaid number can be entered here if applicable.

5.19 "**SSN #**." The client's social security number can be entered here if known.

5.20 "**Deceased**" field will not be used for a new client enrollment.

5.21 "**Deceased Date**" field will be left blank unless the client is deceased.

6. **Click on the "AP Enroll Status" tab.**

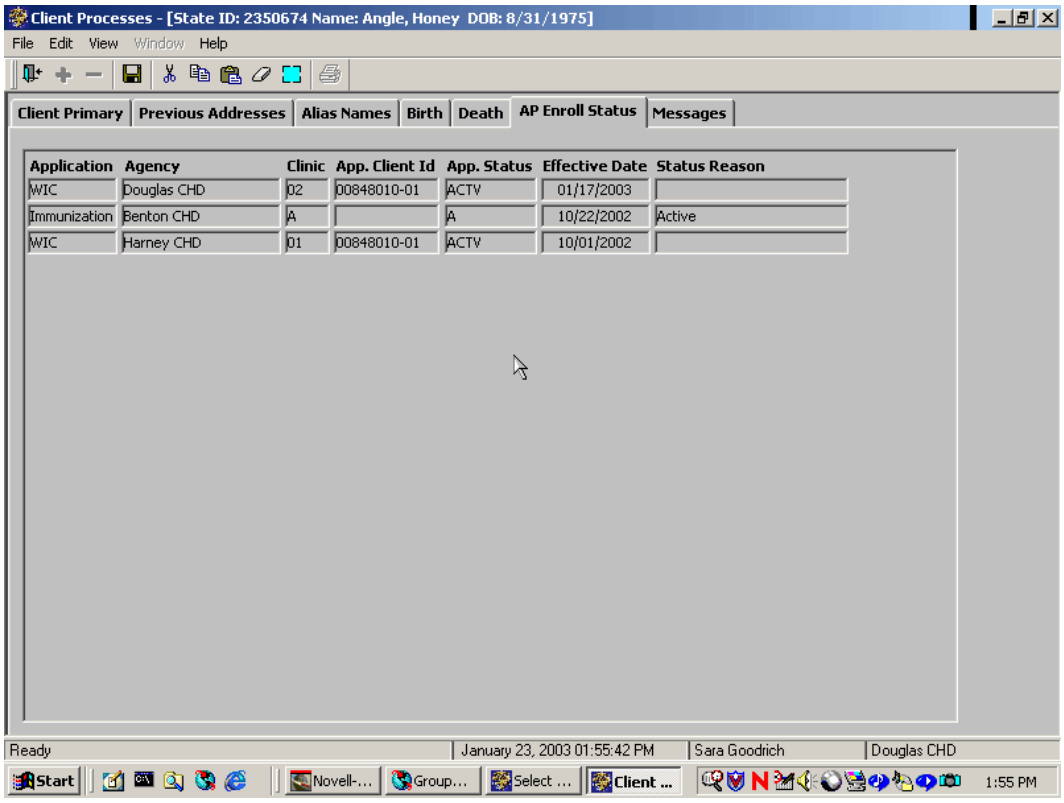

Figure 5: "AP Enroll Status" Screen

The information on this tab, application enrollment, is display only. It will show what other programs or applications the client participates in the FamilyNet system, the agency, clinic, and current status. The information on this tab will be useful when clients transfer from one agency to another.

7. **Click on the "Messages" tab.**

If you need to provide information about a client that other staff should know, it would be entered on this screen.

8. **Click on the "Insert Record" icon and type a sample message.**

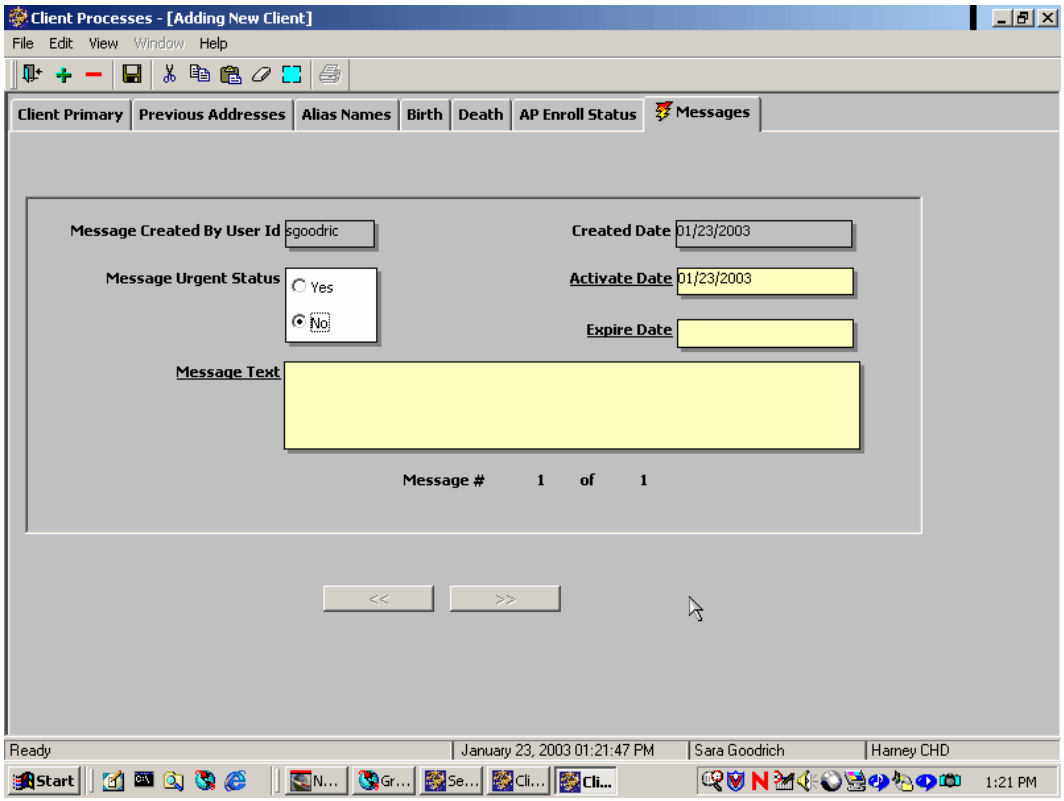

Figure 6: "Messages" Screen

- After a message has been entered and saved, a lightening bolt appears on the "Messages" tab to indicate there is a message.
- You must enter an activate date and an expiration date.
- The activate date defaults to the current date.
- If the message status is urgent, click yes.
- When the message status is urgent, the system immediately takes you to the "Messages" tab.
- If you have more than one urgent message, you need to scroll through them. The system will not automatically display more than one urgent message.

9. **Click on the "Save" icon.**

10. **Click on the "Close" icon to return to the "Client Search" screen.**

11. **Return to the "Enrollment" screen by clicking the "Return W/Client" button.**

➥ *Practice Activity #2:*

Use the information from your ☛ Activity Sheet to enter a client into the data system.

1. Open "Client Processes."
2. From the "Enrollment & Intake" menu select "Enrollment."
3. Click on the "Open" icon.
4. Enter the first three letters of the last name into the "Last Name" field.
5. Enter the first three letters of the first name into the "First Name" field.
6. Enter the date of birth in the first "Range for Date of Birth" field.
7. Click the "Search" button.
8. Click the "Add New Client" button.
9. Enter the client's last name into the "Last Name" field.
10. Enter the client's first name into the "First Name" field.
11. Enter the client's date of birth into the "Date of Birth" field.
12. Select the client's gender from the drop down list in the "Gender" field.
13. Enter the client's complete address information.
14. Enter the client's complete telephone information.
15. Enter the client's guardian's name in the "Last Name" and "First Name" fields.
16. Select the guardian type from the drop down list in the "Type:" field.
17. Select the client's race from the drop down list in the "Race" field.
18. Select the client's ethnicity from the drop down list in the "Ethnicity" field.
19. Select the client's spoken language from the drop down list in the "Spoken Lang" field.
20. Select the client's written language from the drop down list in the "Written Lang" field.
21. Enter the client's Medicaid number in the "Medicaid #" field.
22. Enter the client's social security number in the "SSN" field.
23. Save.
24. Click the "Messages" tab.
25. Enter a message.
26. Save.
27. Click "Close."

Changes and Additions to Client Demographics

Changes and additions to client demographics will be made in the "Client Primary" screen. Generally, when changes are made to existing client information, the old information is not retained. The exception to this is client name and address changes.

The starting point for this section is:

Client Processes ⇨ Enrollment & Intake ⇨ Enrollment

1. **Click the "Open" icon.**

2. **Perform a search as described earlier.**

3. **Click the "Search" button.**

4. **Double click on the appropriate person to go to the "Client Primary" screen.**

5. **Change the client's first name.**

6. **Click on the "Create Alias Name" box to now make the initial name entered an alias.**

Example: If the client's initial first name entered into the database is Robert and he goes by Bobby, you would click on the "Create Alias Name" box to make Robert an alias name and enter Bobby as the real name. Robert becomes an additional way to search for the client in the database.

♫ NOTE: To change a client's name without creating an alias, do not check the "Create Alias Name" box.

7. **Change the client's address.**

   For families with more than one person on WIC, when a telephone change is made for one family member, TWIST will automatically make the same change for the remaining family members.

8. **Click on the "Roll/Prv" box.**

   If your are updating a client's address change information and you want to retain the client's previous address, you would click this box in order to save it. If you just type over the address, the previous address will not be saved. Only one previous address can be kept for each home, work, and mail address. You would use the "Roll/Prv" feature any time you need to have a record of the previous address, since there will be no other record if you simply make the address change.

9. **Click anywhere in the telephone section.**

10. **Click the insert icon to add another phone type and number.**
    For families with more than one person on WIC, when a telephone change is made for one family member, TWIST will automatically make the same change for the remaining family members.

11. **Click save.**

12. **Click on the "Previous Addresses" tab.**

    This is display only and is linked back to the address fields on the "Client Primary" screen.

13. **Click on the "Alias Names" tab.**

    This is where alias names for a client are entered, deleted, and viewed. Use the "Insert Record" icon to add additional rows to enter alias names. Use the "Remove Record" icon to remove rows of alias names.

14. **Click on the "Birth" tab.**

    In a later phase of development, this tab will be used to downlink information from vital statistics. At this time, only the mother's maiden name would be entered. This information will be used primarily by Immunizations.

15. **Click on the "Death" tab.**

    This is another link to Vital Statistics. In a later phase of development, it will be functioning.

16. **Exit**.

✂ *Tips and Shortcuts:*

- When satellite clinic information has been downloaded, client primary data will still be available in the permanent clinic system.
- An alias name is a search tool only and the system will show the client's real name on all TWIST screens.
- When only one date of birth field is completed in the "Range for Date of Birth" fields, the system will automatically fill in the other date of birth field with the same date.
- When you are searching for a client from "Applicant Prescreen" and they have already been enrolled in WIC, a message will pop-up stating, "The Client selected already has enrollment information." Do you wish to go to the Enrollment Screen?" Click yes to close the message pop-up and return with the client to "Enrollment." Click no to close the pop-up and return to "Applicant Prescreen" without the client.
- If you enter different spoken languages for different family members, the auto scheduler may have difficulty scheduling appointments together for that family.

- When a duplicated record is entered in the WIC application, type "Duplicate" after the person's first name, e.g. John Duplicate. Never touch a duplicate record from another program area. Call Application Support for assistance with duplicate records.

➥ *Practice Activity #3:*

Use the information from your ☛ Activity Sheet to change client demographic information in TWIST.

1. Open "Client Processes."
2. From the "Enrollment & Intake" menu select "Enrollment."
3. Click on the "Open" icon.
4. Enter the first three letters of the last name into the "Last Name" field.
5. Enter the first three letters of the first name into the "First Name" field.
6. Enter the date of birth into the first "Range for Date of Birth" field.
7. Click the "Search" button.
8. Double click on the appropriate client.
9. Change the client's first name.
10. Click the "Create Alias Name" box.
11. Change the client's address.
12. Click the "Roll/Prv" box.
13. Click anywhere in the telephone section.
14. Click the insert icon to add another phone type and number.
15. Save.
16. Do a screen print of the "Previous Addresses" and "Alias Names" screens.

✓ *Skill Check*

Use the information from your ☛ Activity Sheet for this Skill Check.

You will be adding a new client's demographic information into TWIST. Remember to search for the client first.

Do a screen print of the "Client Primary" screen after the information has been entered.

✍ *Notes:*