Chapter 3: Client Processes
Section 1: Intake
Lesson: Applicant Prescreening

Objectives:

Upon completion of this lesson the user will be able to:

- prescreen and enter a client;
- determine if a potential client is eligible and follow the appropriate process;
- differentiate between a Prescreening and an Enrollment transaction;
- complete the Income screen;
- complete the Intake screen;
- complete a wait list transaction; and
- issue and change WIC ID number.

Oregon Policies:

- ♦ 485 WIC Family ID Number and ID Card
- ♦ 540 Proxy System
- ♦ 605 Processing Standards
- ♦ 617 Income Eligibility: Determination of Income Eligibility

Overview:

The first step in the WIC process is screening potential clients for eligibility. In TWIST you can do this by entering or updating preliminary information on the potential client in the Applicant Prescreening window and the Client Primary database. The Applicant Prescreening window is particularly useful when you just want to determine the income eligibility of a potential client who is on the phone or is a walk-in. If the potential client is income eligible you would also use this window to either set up an appointment or put the person on a wait list.

In this lesson you will learn how to screen for eligibility by collecting income information, select the applicant's possible clinic and category, generate a temporary WIC ID number, wait-list an applicant, and record any notes. Using the Client Primary screens is covered in a separate lesson.

Instruction:

Incoming Eligibility

The starting point for this lesson is:

Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

This window is divided into two sections.

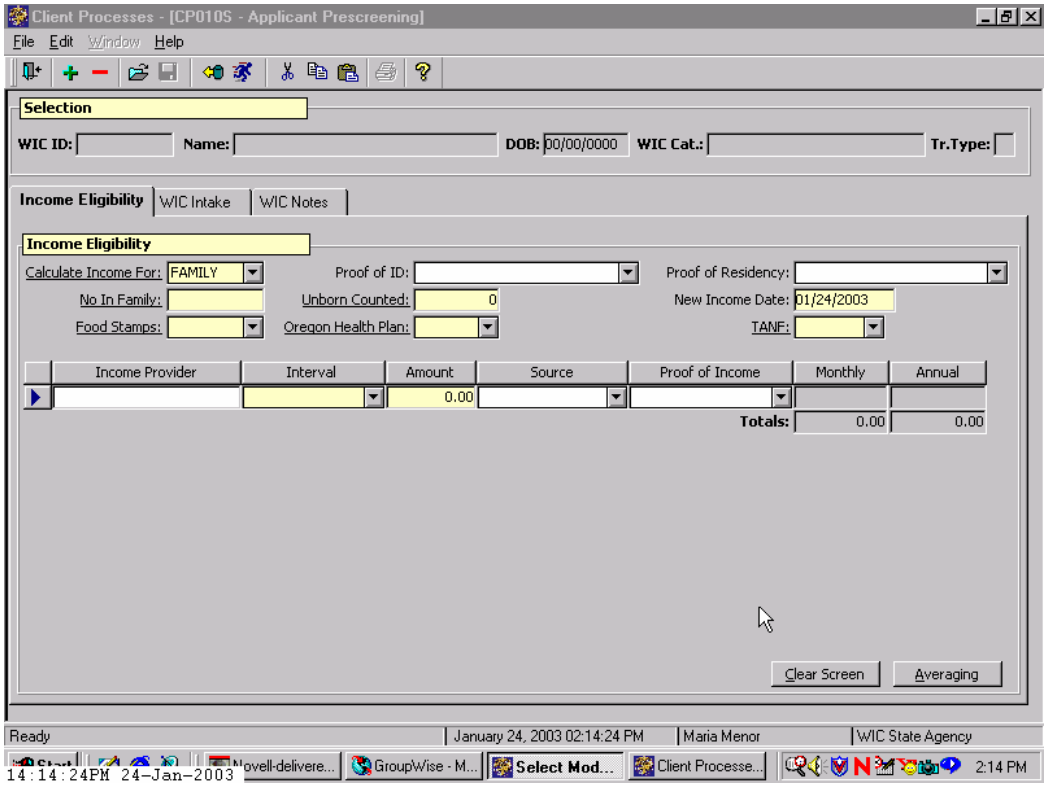

Figure 1: "Applicant Prescreening" Window

- The top part of the window is titled "**Selection**." This section is blank until a client is selected from Client Primary.
- Income information may be entered without selecting a client. To save information a client must be selected.
- The lower section contains 3 tabs - "**Income Eligibility**," "**WIC Intake**" and "**WIC Notes**."

1. **Tab to the "Calculate Income For" field and choose "Client" or "Family" from the drop down list.**

   This field defaults to "**Family**." You would choose "**Client**" to calculate income for just one person, such as a foster child. Otherwise the income

calculation will be applied to all WIC clients who share the same family ID number.

♫ NOTE: Proof of ID and Proof of Residency are in this screen, but this documentation is neither collected nor required until Enrollment.

2. **Tab to the "No. in Family" field and enter the number of household members.**

Example: If the applicant is a woman who is pregnant with twins and has no other family members in her household, you would enter this value as "1."

3. **Tab to the "Unborn Counted" field and enter the number of babies being carried by a pregnant woman.**

Example: Following the example above you would enter this value as "2" for the pregnant woman's twins.

♫ NOTE: TWIST adds the "**No. in Family**" and "**Unborn Counted**" to calculate total number in family when determining income.

4. **Tab to the "New Income Date" field.**

   The system automatically defaults to today's date.

5. **Tab to the "Food Stamps" field and select yes or no from the drop down list.**

6. **Tab to the "Oregon Health Plan" field and select yes or no from the drop down list.**

7. **Tab to the "TANF" field and select yes or no from the drop down list.**

♫ NOTE: All mandatory fields must be completed before moving on to the "**WIC Intake**" tab. If you selected "**Yes**" for any of the above the client is adjunctively eligible.

8. **Tab to the "Income Provider" field and enter the name of the income provider.**

   This refers to the name of the family member who provides the income amount to be entered.

9. **Tab to the "Interval" field and select the income interval from the drop down list.**

- This refers to how often the family receives the income amount to be entered.
- If "**Annually**" is selected as the income interval TWIST calculates the income amount as one payment per year.
- "**Bi-monthly**" calculates as 6 payments in one year (every two months).
- "**Bi-weekly**" calculates as 26 payments in one year (every two weeks).
- "**Daily**" calculates as 210 payments in one year.
- "**Hourly**" calculates for a 40-hour work week.
- "**Monthly**" calculates as twelve payments in one year.
- "**Quarterly**" calculates as four payments in one year.
- "**Twice a month**" calculates as 24 payments in one year.
- "**Twice a week**" calculates as 104 payments in one year.
- "**Twice a year**" calculates as two payments in one year.
- "**Weekly**" calculates as 52 payments in one year.
- If the client does not match one of these intervals calculate the interval most consistent with the client's work schedule.

Example: If a client works part-time (i.e. 20 hours per week) you would calculate her income based on a "Weekly" income interval.

10. **Tab to the "Amount" field and enter the amount of income the client receives for this interval.**

- TWIST determines income eligibility automatically once the amount for an income interval is entered.
- If the amount of income entered exceeds the guidelines, a message is displayed stating, "*The Client is not Income Eligible. Do you want to print an Ineligibility Notice?*"
- Select "**No**" to close the pop-up without printing the notice.

♫ NOTE: Selecting "**Yes**" will produce a notice even if you have not saved the client's information. Refer to Termination/Eligibility lesson for printing WIC ineligibility letters.

- If the client is over-income and pregnant go back to the "**Unborn Counted**" field and enter the number of babies she is carrying.
- If the client is income eligible, nothing will appear and you may continue.

11. **Tab to the "Source" field and select the source of the income from the drop down list.**

    This refers to the type of income entered.

♫ NOTE: Proof of Income is collected at Enrollment.

12. **Press "Tab" to create another line to enter additional income.**

    - TWIST will automatically calculate the monthly and annual salary amounts based upon the information you entered for each line.
    - Cumulative totals are also calculated for all lines and displayed in the "**Totals**" fields.

➥ *Practice Activity #1:*

You will be screening a client on the phone for income eligibility.

1. From the "Client Processes" module, click on "Enrollment and Intake."
2. Click on "Applicant Prescreening."
3. Select **Family** for the "Calculate Income For" field.
4. Enter information for "Proof of ID" and "Proof of Residence."
5. Enter the "No. in Family."
6. Enter "Unborn Counted."
7. In the "New Income Date" field, leave the default as today's date.
8. Enter information for the "Food Stamps," "OHP," and "TANF" fields.
9. Enter the "Income Provider" name.
10. Select the income "Interval" from the drop down list.
11. Enter the "Amount" of income received for this interval.
12. Enter the "Source" of income from the drop down list.
13. Select the "Proof of Income" from the drop down list.

Income Averaging

The starting point for this lesson is:
Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

Some clients do not receive the same amount of income at each pay period. TWIST will assist you in calculating the average income for these individuals.

1. **Click the "Averaging" button in the lower right hand corner.**

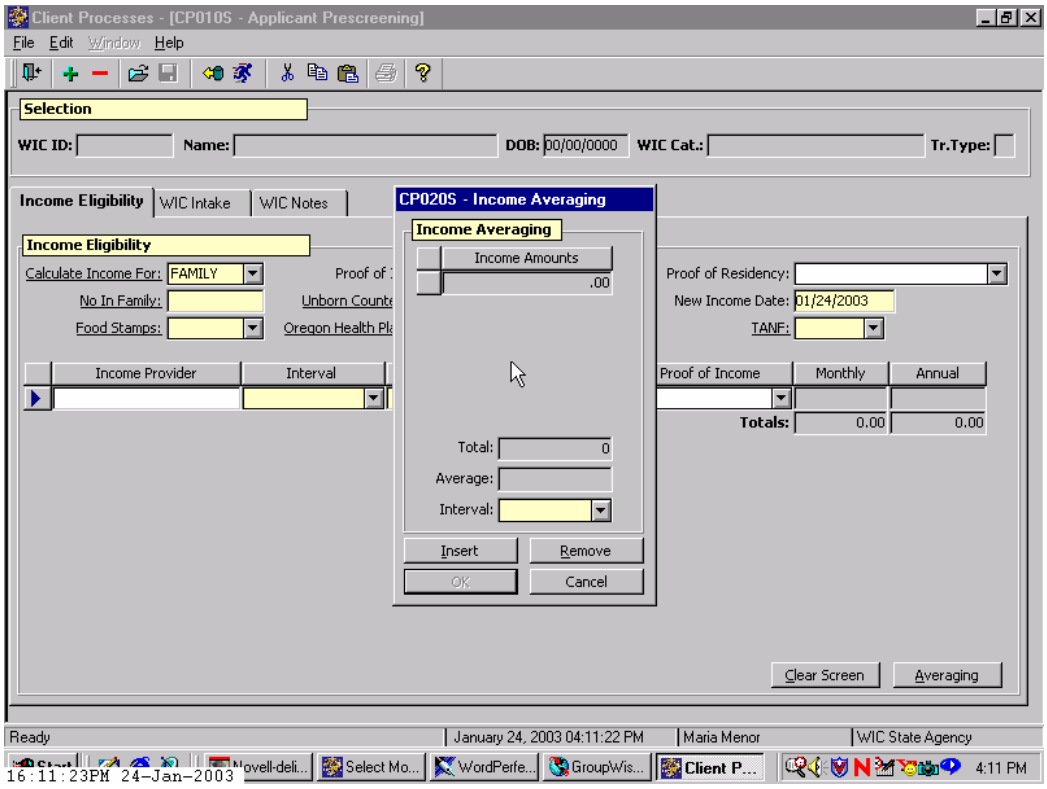

Figure 2: "Income Averaging" Pop-Up

2. **Click in the "Interval" field and select the appropriate pay period interval.**

♫ NOTE: You can average income amounts for only one pay period interval; i.e., you cannot average a monthly income amount with a weekly income amount.

3. **Place the cursor in the "Income Amounts" field and enter the first income amount.**

4. **Tab to create a second blank row and enter the second income amount.**

   - You may continue to create additional rows to accommodate all amounts.
   - The "**Insert**" button may also be used to create additional rows.

5. **Click the Remove button to delete a row.**

   A message is displayed asking "*Are you sure you wish to remove this row?*" Select "**Yes**" to remove the row or "**No**" to cancel the request.

♫ NOTE: TWIST calculates the Total and Average amounts as income is entered or removed. It will display the total once you click "**OK**" or tab off the field.

6. **Click "OK" to close the "Income Averaging" pop-up.**

   The "Interval" and "Amount" are inserted into a new line of income information.

7. **Complete the "Source" and "Proof of Income" fields.**

♫ NOTE: The "**Clear Screen**" button in the lower right hand corner will remove all information on the screen.

♫ NOTE: Income information may not be saved until a client has been selected.

➥ *Practice Activity #2:*

Use the information for the client from your ☛ Activity Sheet for this practice. You will be screening a client on the phone for income eligibility.

1. From the "Client Processes" module, click on "Enrollment and Intake."
2. Click on "Applicant Prescreening."
3. Select **Family** for the "Calculate Income For" field.
4. Enter information for "Proof of ID" and "Proof of Residence."
5. Enter the "No. in Family."
6. Enter "Unborn Counted."
7. In the "New Income Date" field, leave the default as today's date.
8. Enter information for the "Food Stamps," "OHP," and "TANF" fields.
9. Click on the "Averaging" button.
10. Select the "Interval" from the drop down list.
11. Enter the "Income Amounts" for the first paycheck.
12. Tab to generate a new row.
13. Enter the "Income Amounts" for the second paycheck.
14. Press the "Insert" button to generate a new row.
15. Enter the "Income Amounts" for the third paycheck.
16. Tab to generate a new row.
17. Click "Remove" to remove the blank row created.
18. Click "OK" to close the "Income Averaging" pop-up.
19. Enter the "Income Provider."
20. Enter the "Source" of income from the drop down list.
21. Select the "Proof of Income" from the drop down list.

WIC Intake

The starting point for this lesson is:
Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

Once preliminary income eligibility has been determined in the "**Income Eligibility**" tab you must select the applicant you wish to prescreen before proceeding to the "**WIC Intake**" tab. This is done using Client Primary.

1. **Retrieve the client whom you want to prescreen.**

   - The client information is displayed in the "**Selection**" section of the window.

♫ NOTE: Please refer to the "Client Search and Client Demographics" lesson for instruction on searching, selecting and entering a client.

2. **Click the "WIC Intake" tab.**

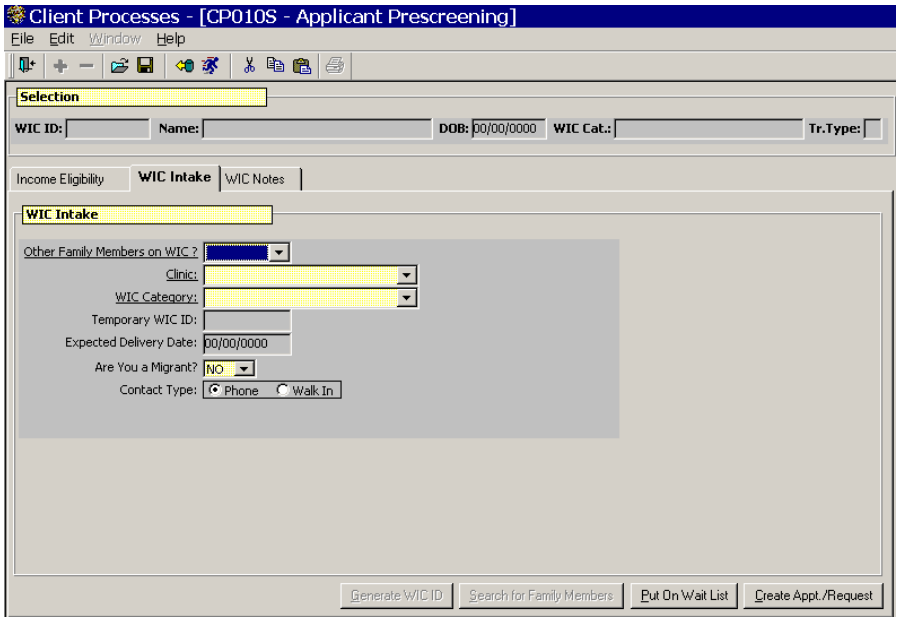

Figure 3: "WIC Intake" Screen

3. **Select "Yes" from the drop down list in "Other Family Members on WIC?" field.**

   - Selecting "**Yes**" allows family WIC ID numbers to be linked.
   - See the ♫ NOTE after step 8 if "**No**" is selected for "**Other Family Members on WIC?**"

4. **Tab to the "Clinic" field and select the appropriate clinic from the drop down list.**

   The "**Search for Family Members**" button at the bottom of the screen is enabled.

5. **Click the "Search for Family Members" button.**

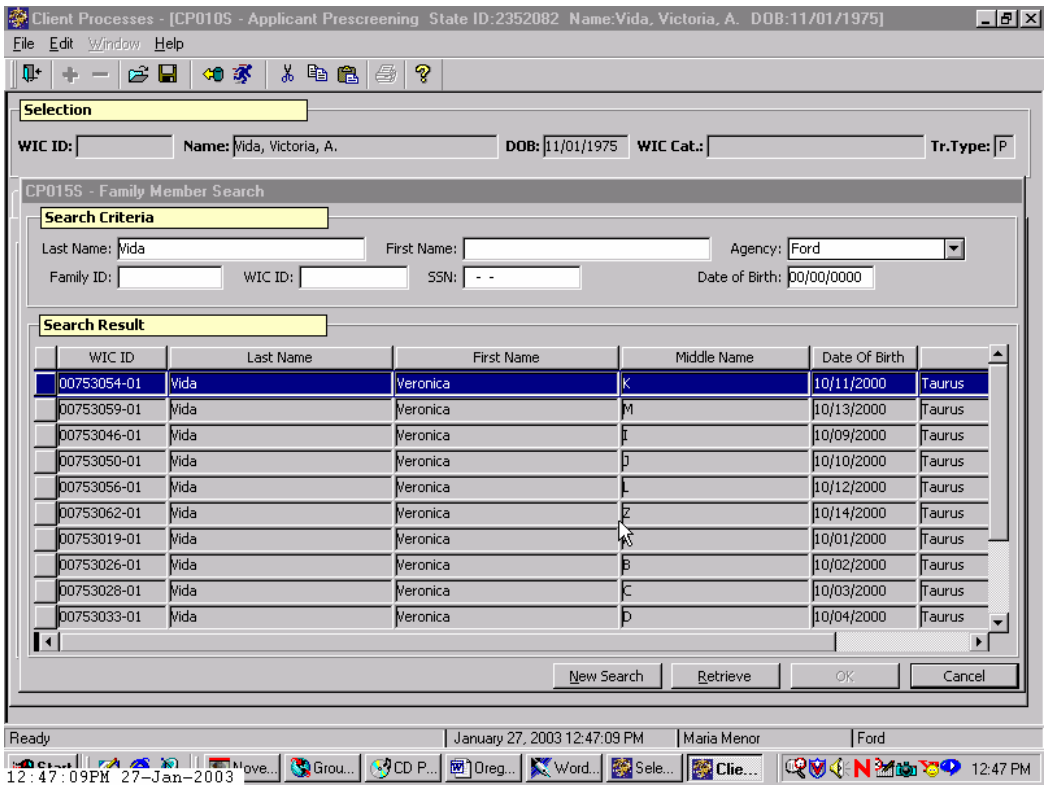

Figure 4: "Family Member Search" Pop-Up

6. **Enter the search criteria.**

   - One or more fields may be completed.
   - The search is narrowed as more fields are completed.

7. **Click the "Retrieve" button to display all possible matches in the Results section.**

8. **Select the appropriate match and click "OK" to close the pop-up.**

   8.1 Clicking "**Cancel**" will close the pop-up and the "**Temporary WIC ID**" field will not be populated.

8.2 Clicking the "**New Search**" button will clear the screen and allow you to enter new search criteria information.

8.3 If previous income information existed, a message is displayed, "*Do you wish to keep existing data?*" If "**Yes**" is selected, the income information you entered will be saved and replace the old income for the entire family.

8.4 If a family member was selected, the "**Temporary WIC ID**" number field is populated once the pop-up is closed.

- The "**Temporary WIC ID**" system-generated number is a WIC-only identifier that TWIST assigns to each applicant.
- If a family member was selected the "**Temporary WIC ID**" number will correspond with the applicant's family ID.
- Once an applicant is actually enrolled TWIST removes the "**T**" from the front of the "**Temporary WIC ID**" number, which then becomes the client's WIC ID number.

♫ NOTE: If "**No**" was selected for "**Other Family Members on WIC?**" the "**Generate WIC ID**" button is enabled, and clicking the "**Generate WIC ID**" button will populate the "**Temporary WIC ID**" field.

9. **Tab to the "WIC Category" field and select the appropriate category for this client from the drop down list.**

- If the client is a pregnant woman, tab to the "**Expected Date of Delivery**" field and enter the appropriate date.
- This field is grayed out for all other categories.

10. **Tab to the "Are you a migrant?" field.**

- The default answer is "No". Change the answer to "Yes" if the potential participant is a migrant.

11. **Tab to the "Contact type" radio buttons.**

- The default selection is "Phone", assuming that most potential participants are calling for an appointment. If the participant is physically in your office, select "Walk in."

12. **Save.**

- The selection section of the screen on the top part of the screen is populated.
- This enables the "**Put on Wait List**" and "**Create Appt/Request**" buttons.
- Creating an appointment request will be covered in a future lesson.

➥ *Practice Activity #3:*

Use the information for the client from your ☛ Activity Sheet for this practice. You will be screening a client on the phone for eligibility.

The starting point for this lesson is:
Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

1. Select **Family** for the "Calculate Income For" field.
2. Enter information for "Proof of ID" and "Proof of Residence."
3. Enter the "No. in Family."
4. Enter "Unborn Counted."
5. In the "New Income Date" field, leave the default as today's date.
6. Enter information for the "Food Stamps," "OHP," and "TANF" fields.
7. Click the "Open" icon to access "Client Search."
8. Search for the client you are prescreening.
9. If the client is not found, enter the client's demographic information on the "Client Primary" screen.
10. Save the information.
11. Click the "Return with Client" button.
12. Click the "WIC Intake" tab.
13. Select Yes for the "Other Family Members on WIC?"
14. Select the appropriate "Clinic" from the drop down list.
15. Click the "Search for Family Members" button.
16. Enter the client information and click the "Retrieve" button.
17. Select the appropriate match and click "OK" to close the pop-up.
18. Select the "WIC Category" from the drop down list.
19. Enter the EDD, if applicable.
20. Click the "Generate WIC ID" button to create a temporary WIC ID number.
21. Save this information.

Wait Listing an Applicant

Applicants may be put on a wait list if no appointments are available, or you may create an appointment request (appointment requests will be handled in another lesson).

1. **Click the "Put on Wait List" button.**

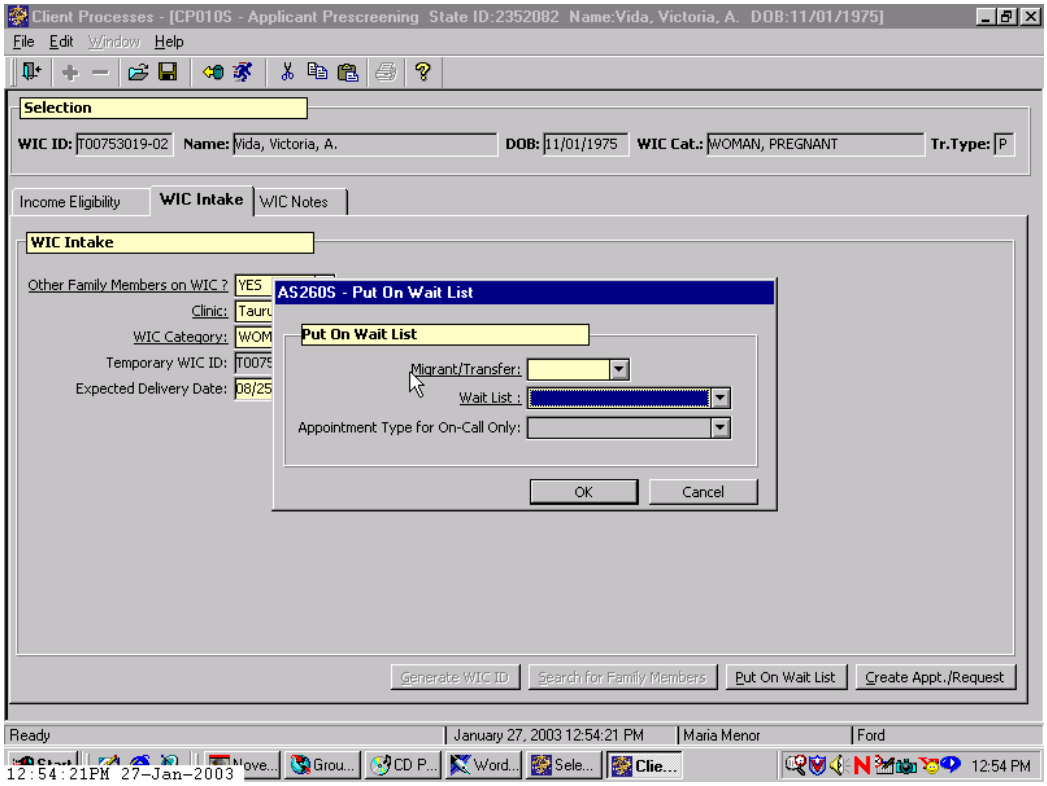

Figure 5: "Put on Wait List" Pop-Up

2. **Select either "None," "Migrant" or "Transfer" from the drop down list in the "Migrant/Transfer" field.**

3. **Tab to the "Wait List" field and select either the "Appointment Needed Wait List" or the "Priority Ineligible Wait List."**

4. **If the "Appointment Needed Wait List" is selected, you must select the Appointment Type from the drop down list.**

5. **Click "OK" to close the pop-up.**

   This will add the applicant to the Wait List.

   - Click "**Cancel**" to close the pop-up without adding the applicant to the Wait List.

♫ NOTE: You can place an applicant on a Wait List **or** create an appointment request, not both.

➥ *Practice Activity #4:*

Use the information for the client from your ☛ Activity Sheet for this practice. You will be continuing the prescreening from the previous Practice Activity.

The starting point for this lesson is:

Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

1. Click on the "WIC Intake" tab.
2. Click the "Put on Wait List" button.
3. Select the appropriate response for the "Migrant/Transfer" field.
4. Select the appropriate wait list in the "Wait List" field.
5. Click "OK" to close the pop-up.

WIC Notes

The starting point for this lesson is:

Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening ⇨ WIC Intake

1. **Click on the "WIC Notes" tab.**

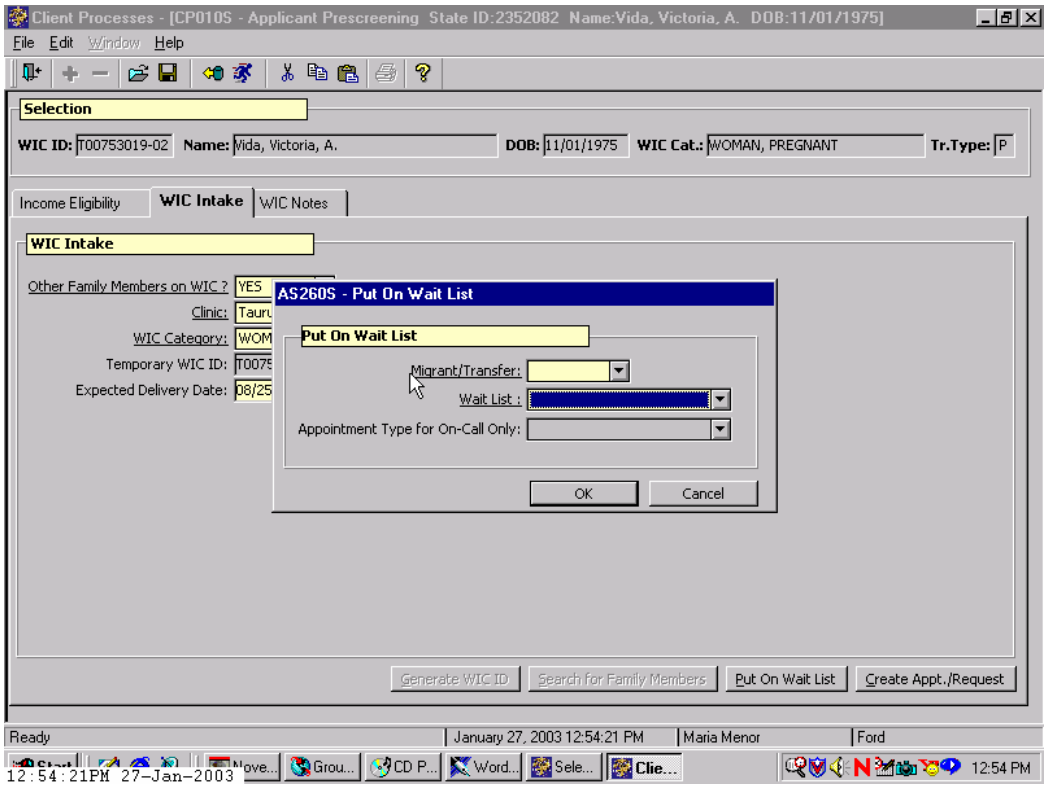

Figure 6: "WIC Notes" Screen

- The cursor will be in the "**Date**" field.
- This field defaults to today's date but may be changed.

2. **Double click in the "Notes" field to display the "WIC Notes" pop-up.**

3. **Enter the information you want included in the note.**

   - The note is entered in free-form text.
   - Once a progress note has been entered, the screen is flagged with a "blue note" as a visual reminder to the user.
   - The screen also has a confidentiality feature that hides the text of the note until accessed if the information is marked "sensitive."
   - To mark a note as sensitive, click the "**Reminder**" box in the lower right hand corner.
   - When a sensitive note has been recorded, the blue note turns red and the user must double click on the field to review the note.

4. **Save.**

➥ *Practice Activity #5:*

Use the information for the client from your ☛ Activity Sheet for this practice. You will be continuing the prescreening from the previous Practice Activity.

The starting point for this lesson is:
Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

1. Click on the "WIC Notes" tab.
2. Double click in the "Notes" field. The "Notes" pop-up is open.
3. Enter a short free form note.
4. Click the "Reminder" box.
5. Click "OK" to close the pop-up.
6. Save this information.

✂ *Tips and Shortcuts:*

- Information may be saved at any time after a client has been selected by using the "**Save**" icon on the toolbar.
- Once a WIC ID has been generated, information is saved automatically when you move from tab to tab.
- You will be prompted to save information before you leave a window if changes have not been saved manually or automatically.

- You will NOT be prompted to save information if you use the "**Clear Screen**" button and information has not been saved manually or automatically.
- You do not need to use the "**Applicant Prescreening**" process if you are going to enroll the participant immediately. Participants can be enrolled without using the "**Applicant Prescreening**" window.
- The "**Are you a migrant**?" and "**Contact type**" fields will help you determine the appropriate appointment to give to the participant based on processing standards. See Policy 605.

✓ *Skill Check:*

Use the information for the client in the Skill Check section of your ☛ Activity Sheet for this practice.

A client calls on the phone to see if she qualifies for WIC. Complete her presceening. You will not need to schedule an appointment for her at this point in the training.

Do a screen print of the "WIC Intake" screen after you have completed the prescreening.

✍ *Notes:*

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