Chapter 3: Client Processes
Section 2: General
Lesson: Certification Overview

Objectives:

Upon the completion of this lesson all users will be able to:

- navigate through screens in the “Client Processes” function area;
- identify screens which may share overlapping information;
- access client data from previous certifications;
- state the flow of common client certification processes; and
- identify the required data for certification completion.

Oregon Policies:

- ♦ 640 Documentation Requirements
- ♦ 641 Completion of Certification and Client Forms

Overview:

During the WIC certification process, a variety of information is collected on each client. The client information entered into TWIST is the same information that would be collected on paper and placed in the client’s chart. The TWIST system provides you with several screens to document this information. The screens are grouped together in the “Certification” function “Client Processes.” This allows you easy access to any of the screens and the ability to move quickly from one screen to another. Some certification screens have sub-tabs located at the bottom of the screen. Sub-tabs are used to access screens to document additional information.

In this lesson you will learn how to access the “Certification” function and move through the screens. You will also learn how the screens interact and how to access previous certification information.

Instruction:

Navigating through the Woman Certification Screens

The starting point for this section is:

Client Processes ⇨ Certification

Figure 1: "Certification" Drop Down Menu

On the Certification drop down menu, there are two options: Infant/Child or Woman. Both options display identical drop down menus. Selecting the correct choice will access the certification screens for the appropriate client category.

1. **Select "Woman."**

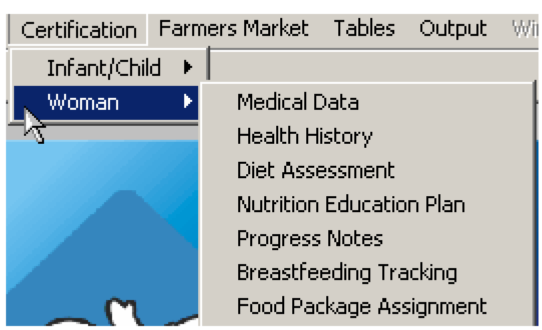

Figure 2: "Woman" Drop Down Menu

- The drop down menu displays all the certification screens.
- You may access any screen at any time.

2. **Click "Medical Data."**

The "Woman Certification" window is displayed. All of the certification screens are displayed within this window.

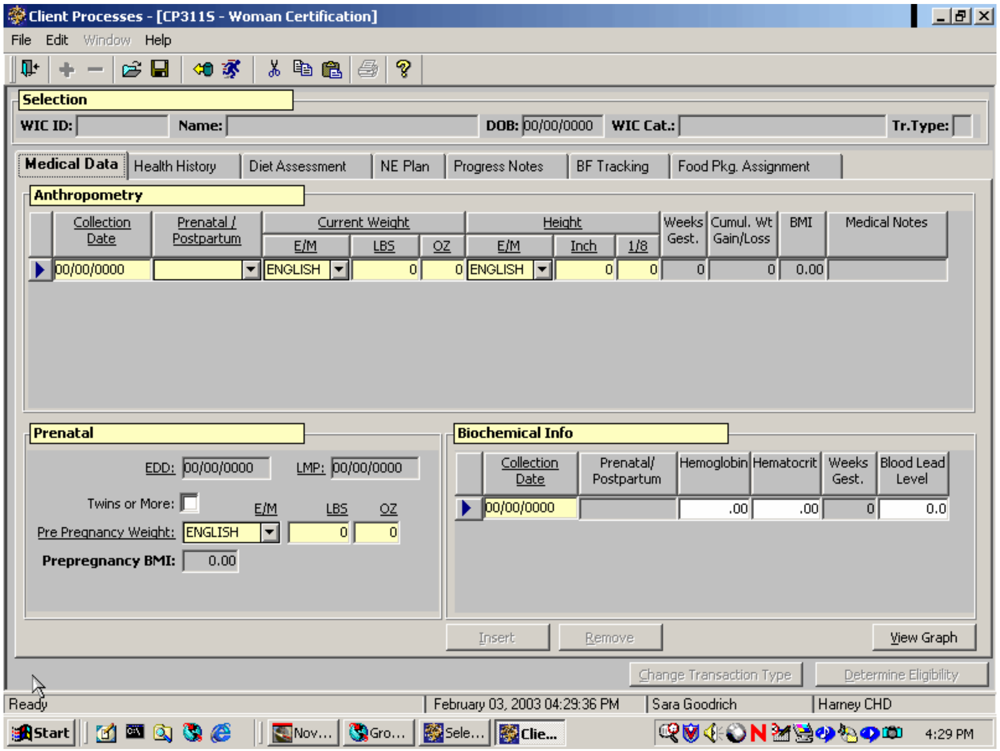

Figure 3: "Medical Data" Screen

- The top section is labeled "Selection." The client's information is displayed in this section once a client has been selected.
- The middle section consists of seven tabs: "Medical Data," "Health History," "Diet Assessment," "NE Plan," "Progress Notes," "BF Tracking," and "Food Pkg. Assignment."
- Clicking on a tab will open the screen. The tab title is bolded to indicate which screen is currently opened.
- Once a screen has been completed a check mark will appear on the tab next to the title.
- The bottom section has two buttons "Change Transaction Type" and "Determine Eligibility" that are present throughout the certification function.

♫ NOTE: Each tab and button will be briefly reviewed in this lesson and explained in detail in future lessons.

The "Medical Data" screen is where anthropometric and biochemical information is entered.

The screen is divided into three sections:

- Anthropometry;
- Prenatal; and
- Biochemical Information.

3. **Click the "Health History" tab.**

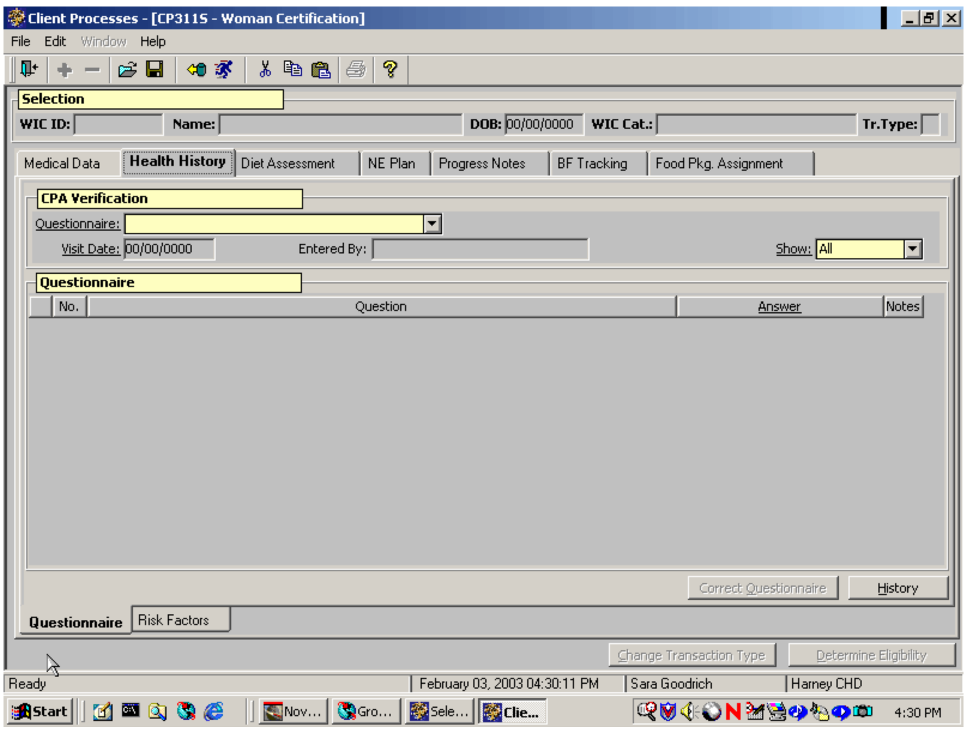

Figure 4: "Health History" Screen

- Health history information is documented on this screen using specific questionnaires.
- Previous certification health history information is accessed through the "History" button.
- There are two sub-tabs located in the lower left hand corner: "Questionnaire" and "Risk Factors."
- Clicking on a sub-tab will open the screen. The sub-tab title is bolded to indicate which screen is opened.
- Sub-tabs may include mandatory fields that must be filled out for the certification screen to be marked as completed.
- Risk information is documented on the "Risk Factor" screen.

4. **Click the “Diet Assessment” tab.**

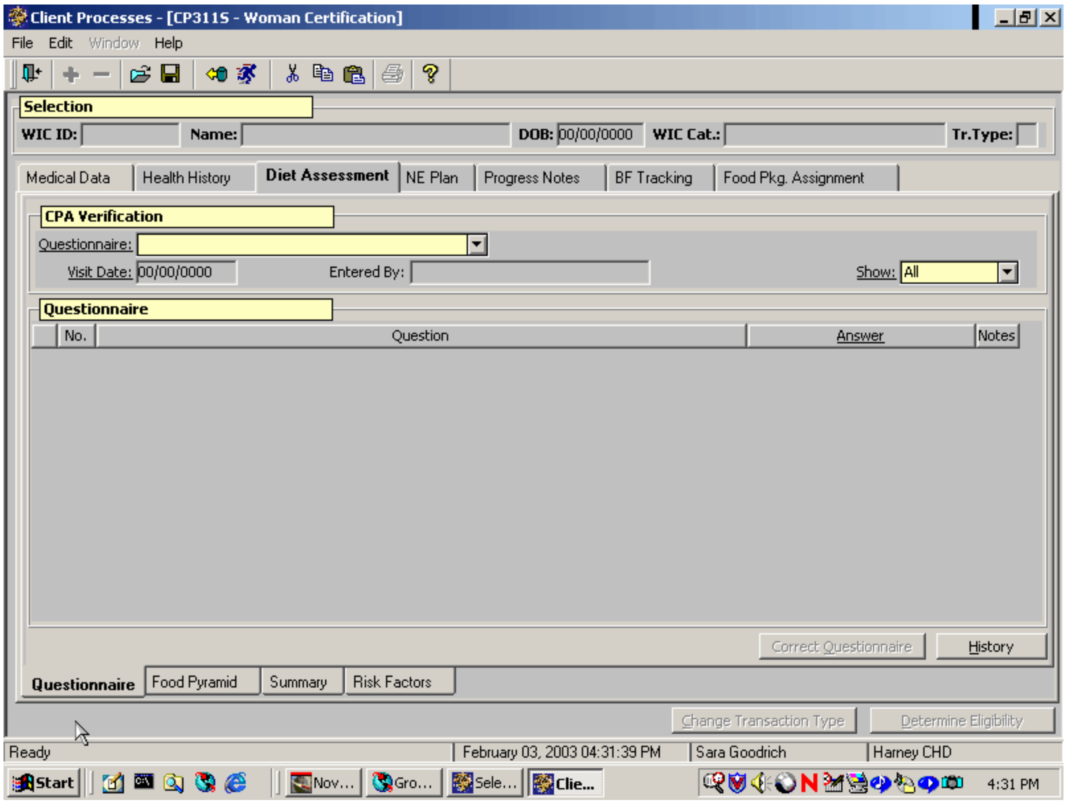

Figure 5: “Diet Assessment” Screen

- Diet information is documented on this screen using specific questionnaires.
- Previous certification diet assessment information is accessed through the “History” button.
- There are four sub-tabs: “Questionnaire,” “Food Pyramid,” “Summary” and “Risk Factors.”
- Diet assessment scores are entered on the “Food Pyramid” screen.
- A summary evaluation is displayed on the “Summary” screen.
- The “Risk Factor” screen displays dietary related risks.

5. **Click the "NE Plan" tab.**

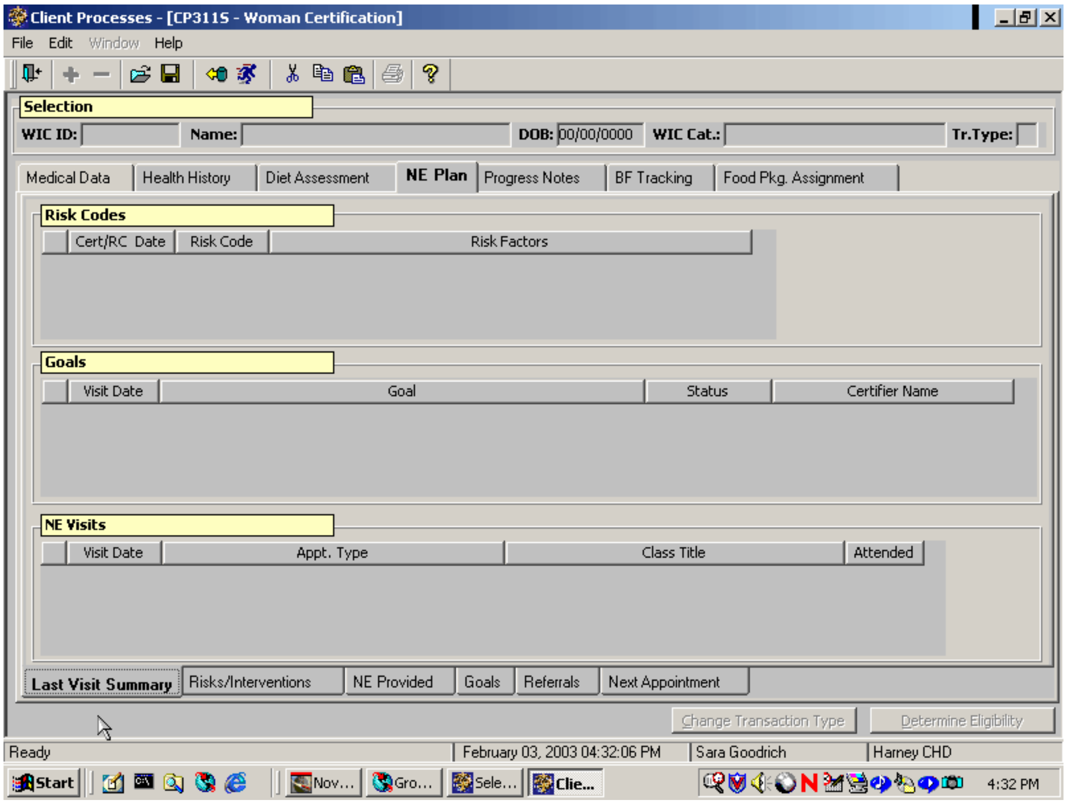

Figure 6: "NE Plan" Screen

- Information about the client's risk, goals and nutrition education visits are documented on this screen.
- There are six sub-tabs: "Last Visit Summary," "Risk/Interventions," "NE Provided," "Goals," "Referrals" and "Next Appointment."
- Each sub-tab is used to document information related to the client's nutrition education.

6. **Click the "Progress Notes" tab.**

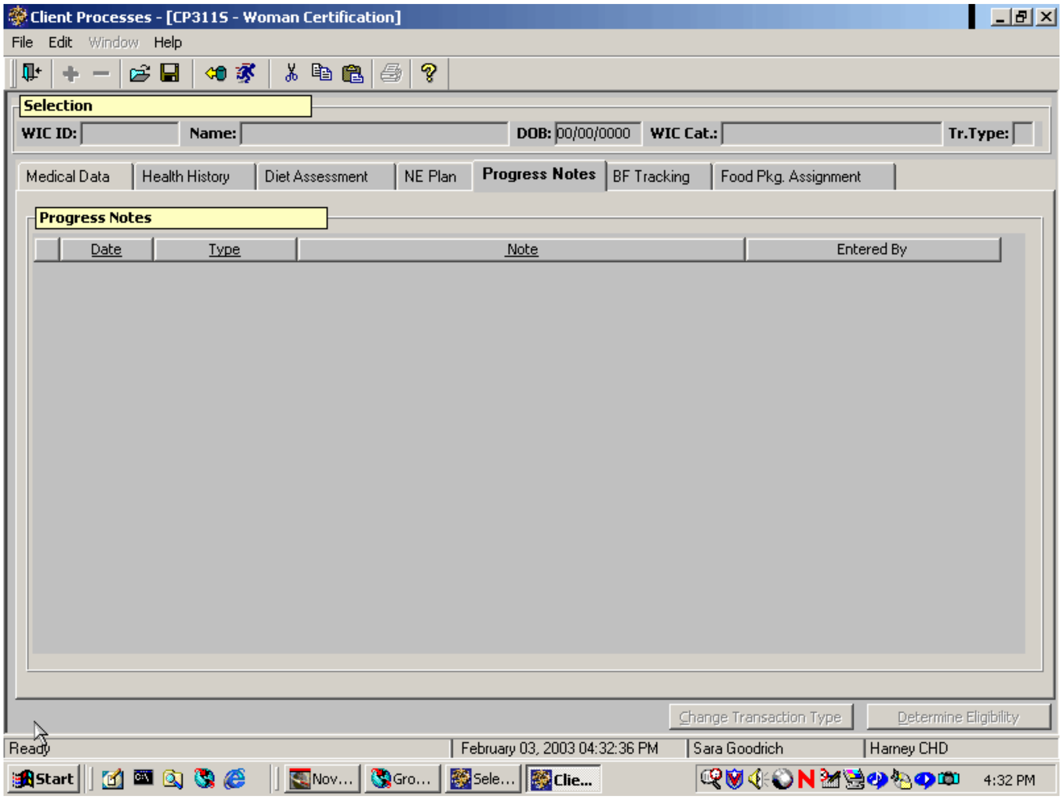

Figure 7: "Progress Notes" Screen

- Notes regarding the client's progress are entered and viewed on this screen.

7. **Click the "BF Tracking" tab.**

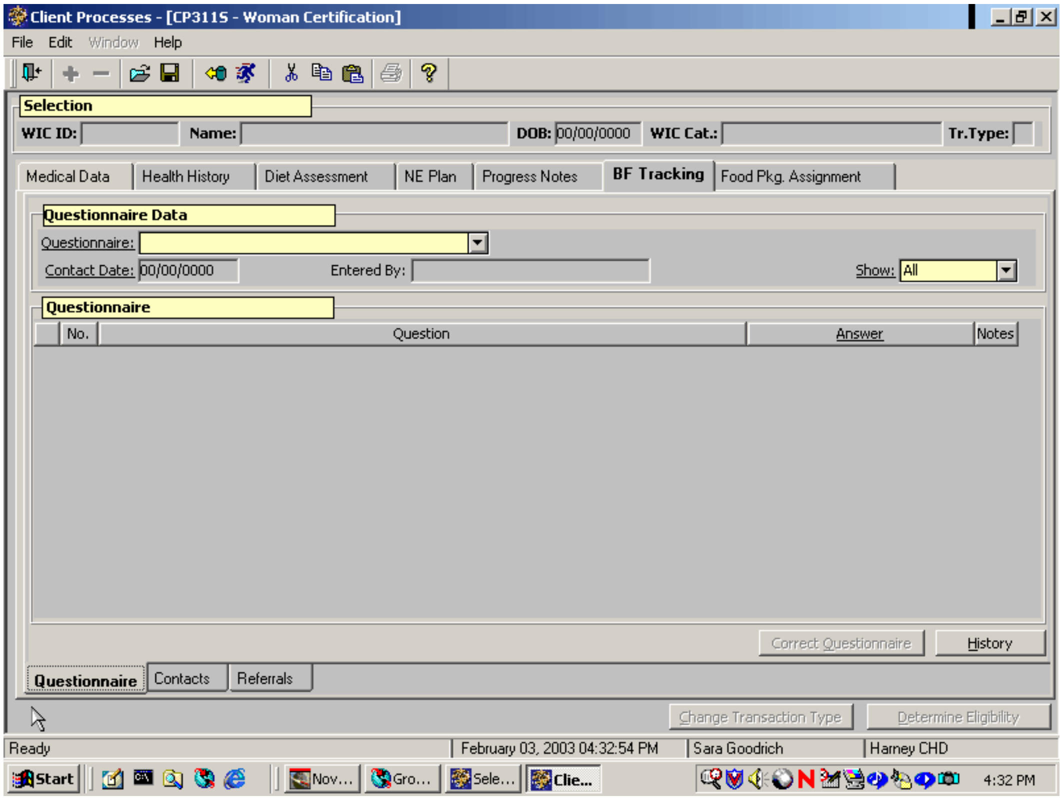

Figure 8: "BF Tracking" Screen

- Breastfeeding information is documented on this screen using specific questionnaires.
- There are three sub-tabs: "Questionnaires," "Contacts," and "Referrals"
- Each sub-tab is used to document information related to the client's breastfeeding status.

8. **Click the "Food Pkg. Assignment" tab.**

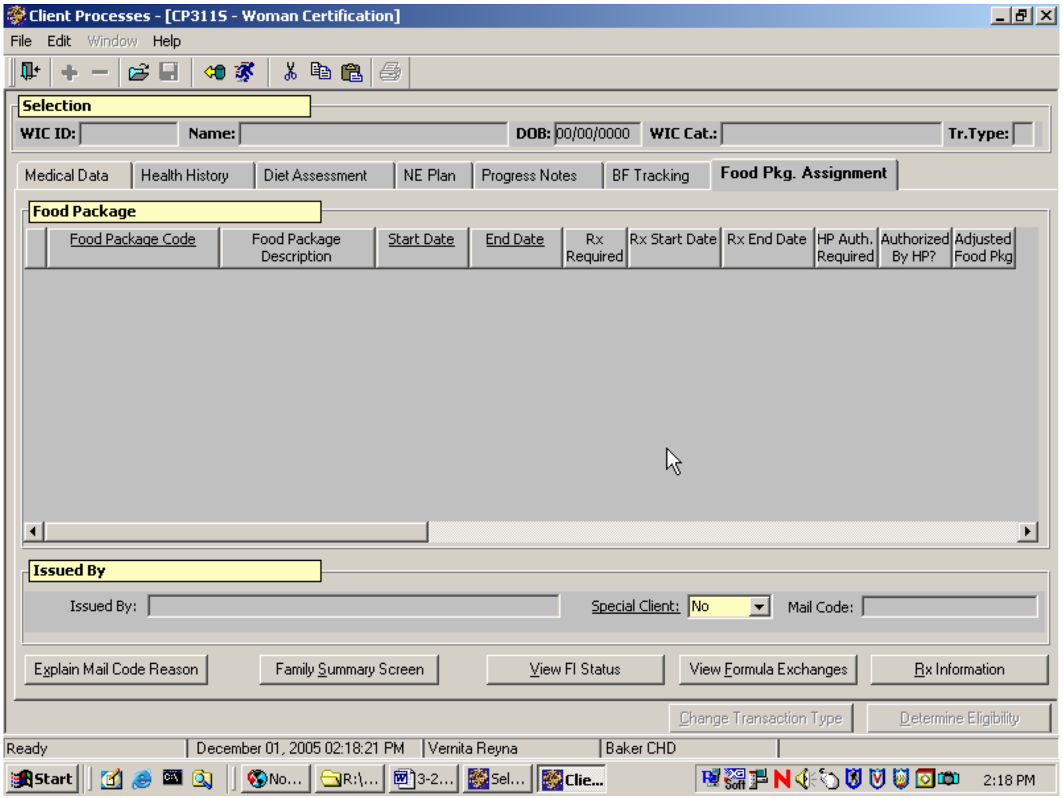

Figure 9: "Food Pkg. Assignment" Screen

- Detailed information about the client's food package is documented on this screen.
- All food package information from previous certifications is documented and available on this screen.
- Formula exchange information is documented on the "Formula Exchange" pop-up.
- Formula prescription information is documented on the "Rx Information" pop-up.

9. **Exit back to the "Select Modules" screen.**

Navigating through the Infant/Child Certification Screens

The starting point for this section is:

Client Processes ⇨ Certification

1. **Click "Infant/Child."**

  - The drop down menu displays all the certification screens.
  - You may access any screen at any time.

2. **Click "Medical Data."**

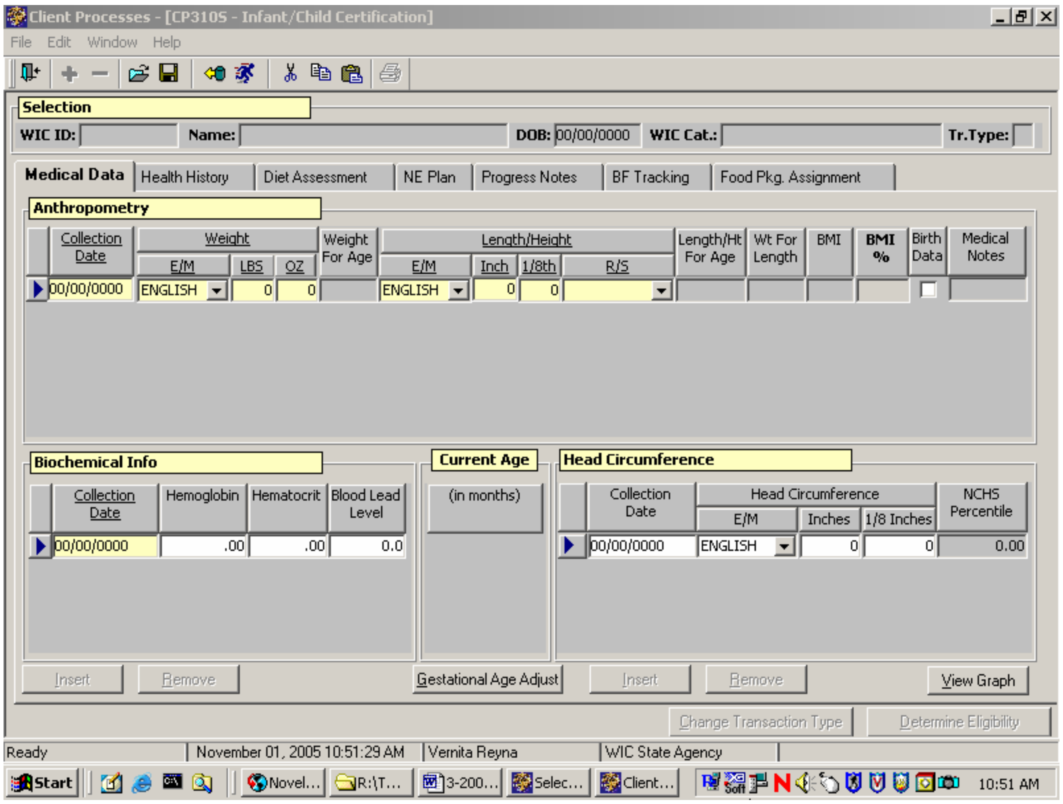

Figure 10: "Medical Data" Screen

  - The window is very similar to the "Woman Certification" window.
  - The "Selection" section will display the client's information once a client has been selected.
  - The section below the "Selection" section consists of several tabs.
  - The tabs' titles are identical to the ones found in the "Woman Certification" window.
  - Moving between screens is identical to the navigation in the "Woman Certification."
  - The certification screens are similar, but with fields and questions specific to infants and children.

3. **Click on the various tabs to review the different "Infant/Child Certification" screens.**

4. **Exit back to the "Select Modules" screen.**

Determine Eligibility Button

When the "Medical Data," "Health History," "Diet Assessment" and "NE Plan" tabs have all received checkmarks, the "Determine Eligibility" button is enabled.

Up to this point, if no risks have been assigned to the client, a message pops-up stating, "The Certification is Complete but the Client is still In-eligible. Click on Determine Eligibility Button to view reasons." Click "OK" to close the pop-up.

1. **Click the "Determine Eligibility" button.**

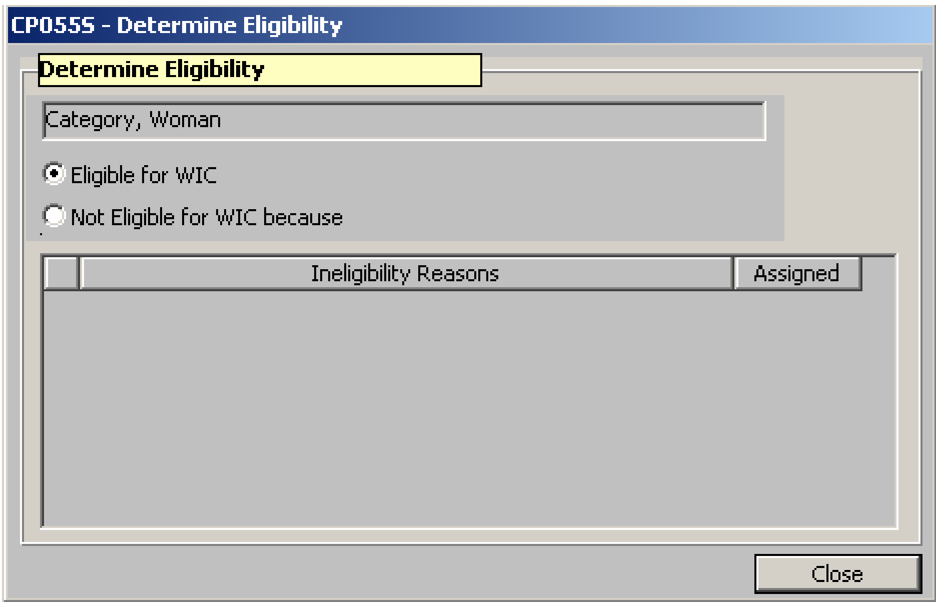

Figure 11: "Determine Eligibility" Pop-Up

- Eligibility information displays in the pop-up.
- If the client is not eligible for WIC, the ineligibility reasons are listed.
- The information is display only.
- Click close to close the pop-up.

✂ Tips and Shortcuts:

- The “BF Tracking” screen is only completed for woman and infants who are breastfeeding.
- When previous health history or diet assessment information have been selected you can then view previous certification nutrition education information and progress notes by clicking on the appropriate tab.
- The “Change Transaction Type” button is enabled when a client has been selected. Clicking the button opens the “Change Transaction” pop-up and allows you to change the transaction type.

➥ Practice Activity:

Use the information from your ☛ Activity Sheet for this practice.

1. Open “Client Processes.”
2. Select “Certification.”
3. Select “Woman.”
4. Select “Health History.”
5. Click on each tab and sub-tab to open each screen.
6. Review each screen.
7. Exit back to “Select Modules” screen.

✓ Skill Check:

For this exercise you will be accessing the “Infant/Child Certification” window. Once you have opened the window do a screen print. Then answer the following questions.

1. How do you know which screen is opened in the “Certification” window?

✎

2. How do you know a screen has been completed?

✎

3. How many sub-tabs are located on the “NE Plan” screen?

✐

4. When is the “Determine Eligibility” button enabled?

✐

5. How many buttons are located on the “Food Pkg. Assignment” screen?

✐

✍ Notes:

Chapter 3: Client Processes
Section 2: General
Lesson: Interaction with Client

Objectives:

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

- state what they will tell clients about TWIST during the first few days of using TWIST in clinic;
- list which programs have access to TWIST data; and
- use "interviewing" skills to enter TWIST data.

Overview:

Your job is changing because of TWIST and the way you interact with your clients is changing also. This lesson will give you the opportunity to practice some of the new interactions you will have with the clients.

Instruction:

The First Few Days of TWIST

You're likely to feel nervous, apprehensive, scared, and/or excited the first time you see a real client using TWIST in your clinic. All of these feelings are normal! Other WIC staff who have started using new computer systems have said that the first days weren't as bad as they had anticipated. The hardest part, for them, was working slowly at a job that they could do quickly in the past. Here are some things that will make the first few days pass smoothly.

Clinic Schedule

Local agency coordinators have been asked to reduce the number of clients normally seen each day for the first few days. This will give you more time to spend with each client while you are getting used to using TWIST.

Practice

TWIST training is designed to allow time to practice each section during the training session. Use your training time! Practice, practice, practice! This is a "safe" time to practice.

On-site Help

During the first week of using TWIST in clinic, you will have "coaches" from the state WIC office available to answer questions and help you work through problems.

Clients

Other WIC agencies have reported that clients have been extremely nice and patient during the first few months of using the new computer system.

What You Can Tell Clients

Don't feel you have to pretend that you are an expert on the system during the first few days (weeks) of using TWIST. Here are some things you may want to tell your clients.

- We're now using computers to keep our records instead of paper files.
- This is my first day using the computer. I'm still getting used to using it.
- At check in: This is our first day using computers, so your appointment may take a little bit longer today.
- We have some special people walking around the clinic today to help us use our new computer system.
- I'll have some special things to show you today on our new computer.

➥ *Practice Activity #1:*

Take the next ten minutes to talk together about how you feel about the first few days of TWIST. Assign one person to take notes about your decisions.

Try to answer the following questions as a group.

- What do you see as potential issues with on-line entry? What are possible solutions?
- How will your clinic handle the first few days?
- What will check in staff tell clients?
- What changes in clinic flow have been made that clients will need to know?
- How will the clinic supervisor or local agency coordinator be able to monitor how staff are feeling?
- How are you setting up your office to keep clients engaged as you enter information into the computer?

Addressing Clients' Fears about Computers

Some clients may be concerned about personal information being stored on the computer. Other states have found that this fear is more common with clients who are not US citizens. You can help these clients by first acknowledging their concern and by assuring them that WIC information is not shared with INS.

Client demographic data is shared with other FamilyNet programs (e.g. Immunizations), but WIC specific data is shared only with other WIC staff. WIC information can be transferred to other WIC agencies in Oregon and some WIC information will be provided to other states if a client transfers out of Oregon. At this time, WIC information is not shared with other DHS programs..

➥ *Practice Activity #2:*

Find a partner. Practice what you might say to a client who is concerned about personal information being stored on the computer. In the notes section of this lesson, write down what you said so you can refer to it later if needed.

Can We Function Without Paper?

TWIST is designed so that clients no longer have to fill out pages of paperwork before coming to their appointment (or while they wait). At the clinic, clients can be asked the questions and the information is entered directly onto the TWIST screen.

Asking clients questions and entering the information directly onto the computer will feel awkward at first, but after practice, you should find that it is faster. It also helps open communication with the client. The appointment becomes less about reading a paper with information on it, and more about talking to the client.

Some people have concerns that the computer will be a barrier between the staff and the client. Here are some ways to help prevent that from happening.

- Allow the client to see what it being entered on the screen.
- Set up workstations so clients can answer questions in privacy.
- Make eye contact with the client when asking questions.

➥ *Practice Activity #3:*

Find a partner. Ask your partner the following questions, pretending that you are reading them from a computer screen. Pretend to type in the answers. After finishing the questions, switch and have your partner ask you the questions. Feel free to make up answers, if you wish.

Last Name:
Middle Initial:
First Name:

Address:
City:
ZIP:

EDD:
Are you taking any medications:
Do you have any medical problems:

✍ ***Notes:***

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