Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Breastfeeding Tracking

Objectives:

Upon completion of this lesson the user will be able to:
- utilize the "**BF Tracking**" screens;
- document breast pump issuance; and
- update breast pump issuance record.

Oregon Policies:

- ♦ 707 Breastfeeding: Definition
- ♦ 710 Breastfeeding: Promotion and Support Standards
- ♦ 712 Breastfeeding: Breastpump Distribution Guidelines

Overview:

TWIST has a special set of screens used to collect information on the breastfeeding mother and infant. The "**Breastfeeding Tracking**" screens will assist in educating and supporting breastfeeding moms and babies and are used to track breast pump issuance.

Instruction:

Completing the Questionnaire

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

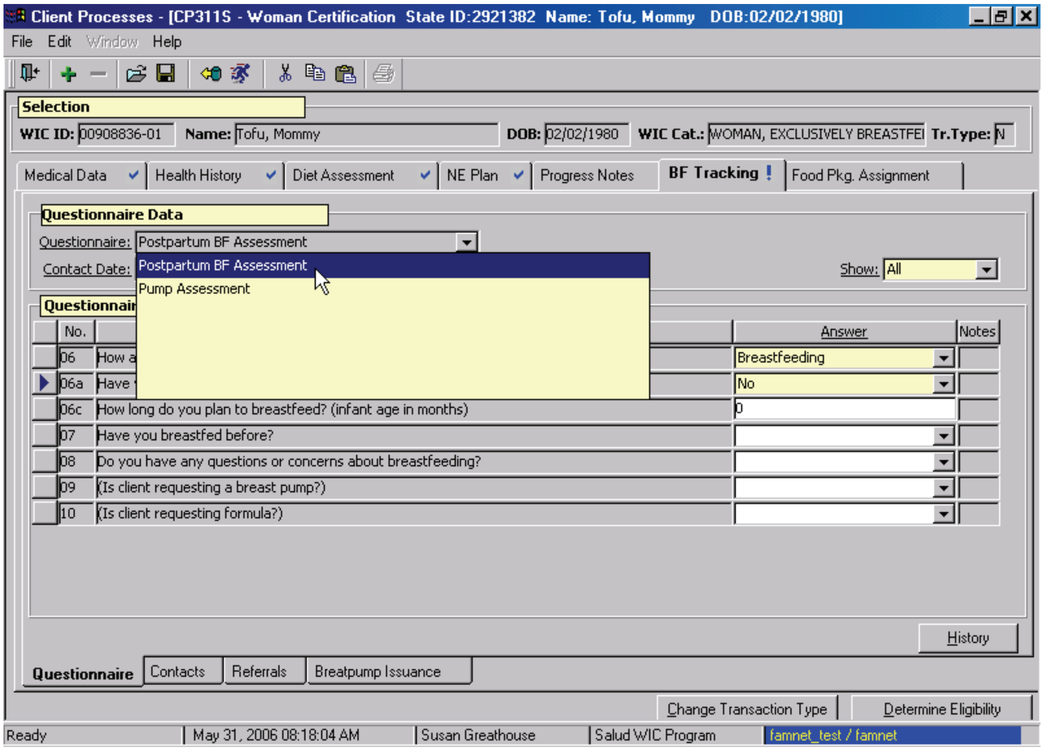

Figure 1: "BF Tracking – Questionnaire" Screen

1. **Retrieve the client for whom you want to enter breastfeeding tracking information.**

2. **From the "Questionnaire" field select the appropriate questionnaire from the drop down list.**

3. **Tab to the "Contact Date" field.**
   - This field defaults to today's date but may be modified.
   - The "**Entered By**" field defaults to the user's login ID.

4. **Tab to the "Show" field.**
   - From this drop down menu you may select to display "**All**" questions or only "mandatory" questions.
   - The questions will be displayed in the "**Questionnaire**" section of the screen.

5. **Enter the appropriate answer for each question.**
   - Answers are entered by selecting from the drop down list or manually entering specific information such as a date.
   - Certain answers may generate additional questions or pop-ups.

- Click in the question field and scroll over to view the entire question.
- Clicking "**OK**" will save the answers and close the pop-up.
- Clicking "**Cancel**" will close the pop-up.

♫ NOTE: Information can be changed the day the contact visit is entered by accessing the screen and modifying the answer.

6. **Double click in the "BF Tracking Notes" field.**

   - This opens the "**Question Notes**" pop-up and allows you to enter a free form note, as needed.
   - A note may be entered for each answer.

7. **Click "OK" to save the note and close the pop-up.**

   - Clicking "**Cancel**" will close the pop-up without saving the note.

8. **Save.**

♫ NOTE: If the baby is certified first, some answers will already be filled in on the mother's questionnaire. If the mother is certified first, some answers will be filled in on the infant's questionnaire.

Accessing Questionnaire History

Previous "Breastfeeding Tracking" questionnaires can be viewed at any time utilizing the "**History**" button.

The starting point for this lesson is:
Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨ Questionnaire

1. **Retrieve the client for whom you want to view breastfeeding information.**

2. **On the "Questionnaire" screen, click the "History" button.**

   The "**Questionnaire History**" pop-up is displayed.

3. **Select the questionnaire you want to view and click "OK."**

   - The questionnaire is displayed.
   - The questionnaire is view only and cannot be modified unless it was created today.

- To close the pop-up without selecting a questionnaire, click "**Cancel**."
- To view another questionnaire, click the "**History**" button and repeat the process.

4. **Exit.**

Completing the "Contacts" Screen

The starting point for this lesson is:
Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

1. **Click on the "Contacts" tab.**

   The "**Contacts Date**" field defaults to today's date but can be modified.

2. **Complete the "Infant's Name" field.**

   - If only one infant/child is linked to the mother the system will populate this field with the infant's name.
   - If multiple children are linked to the mother, you will select the appropriate child from the drop down list.
   - If the infant has not been certified you may leave blank and complete this field later.
   - If the infant is not on WIC you may manually enter the child's name.

3. **Tab to the "Counselor's Name" field and enter the name of the counselor providing the contact.**

4. **Select the type of contact from the drop down list in the "Contact Type" field.**

5. **Click the "Insert" button in the lower left corner to generate a blank row for "Breastfeeding Topics."**

   The "**Contact Date**" defaults to today's date and cannot be modified.

6. **Complete the "Breastfeeding Topic" field by selecting the appropriate topic from the drop down list.**

♫ NOTE: The "**Callback Date**" and "**Resolved Date**" are completed when appropriate.

Completing the "Referrals" Screen

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

1. **Click on the "Referrals" tab.**

   The "**Contact Date**" field defaults to today's date but can be modified.

2. **Tab to the "Organization" field and select the appropriate organization from the drop down list.**

   The "**Phone Number**" will be displayed.

3. **Select the appropriate status from the drop down list.**

   - The "**Date Ended**" will be generated by the system if the "**Status**" is marked "**Completed**."
   - For all other status selection the "**Date Ended**" will be disabled and displayed as **00/00/0000**.

4. **Click the "Insert" icon to add a second row.**

5. **Click the "More Info." button in the lower right corner.**

   - The "**Referrals from WIC**" pop-up is displayed with detail information about the organization.
   - To print the information for the client, click "**Print**."
   - To close the pop-up click "**Close**."

6. **Save.**

Breast Pump Issuance

This sub-tab is used to record what type of breast pump has been given to a woman and tracks the return of hospital grade pumps. Breast pumps must be entered as inventory before they are available on these screens for issuance. For more information see Chapter 8, Lesson 104 *Breast Pump Inventory and Tracking*.

The screen consists of two sections, "**Contact Info**" and the issuance record.

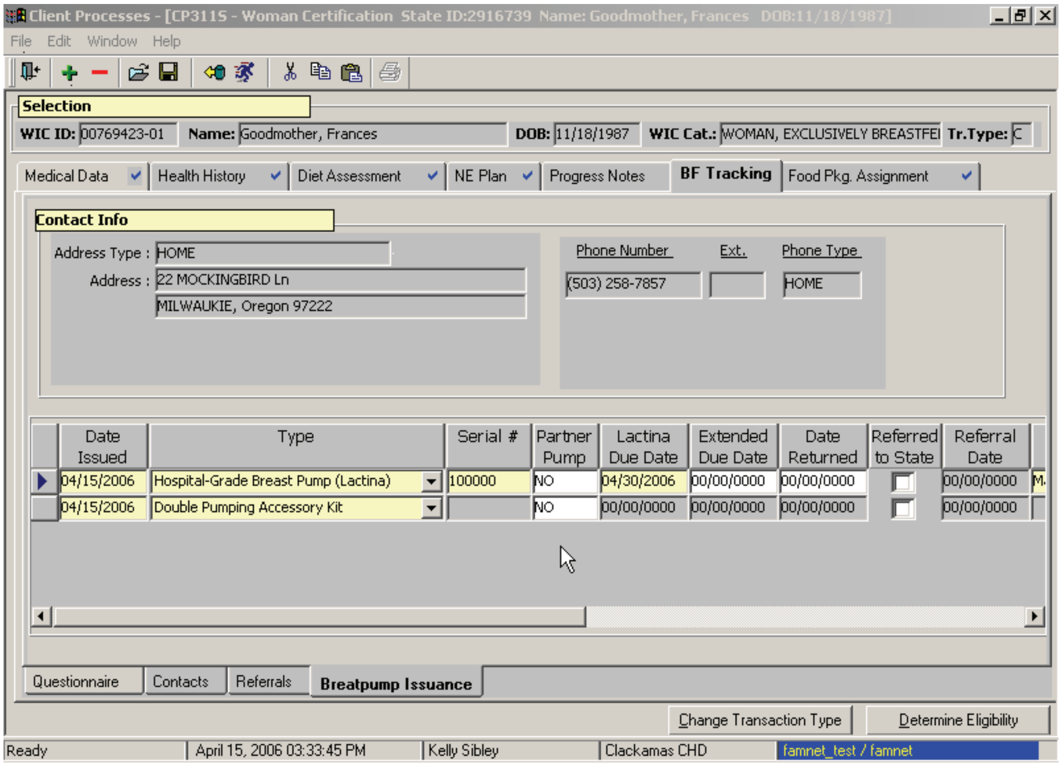

Figure 2: "Breast Pump Issuance" Screen

Contact Info will be auto-filled from Client Master with the address type, address, and phone number, and phone number type.

Issuing a Hospital Grade Pump

Figure 3: Lactina Issuance

1. **The "Date Issued" field defaults to today's date but can be modified.**

2. **Select "Lactina" from the drop down list in the "Type" field.**

3. **Enter the "Serial #". Type in the 6-digit serial number stamped on the Lactina.**

4. **Enter the date the Lactina is due to be returned by the client in the "Lactina Due Date" field. This field can be modified at any time.**

♫ NOTE: The "**Extended Due Date**" field is optional. Using this field allows the user to retain the original "**Lactina Due Date**" information.

Alternate Contact	Alternate Contact Relationship	Alternate Contact Phone	Notes
Mary Goodfriend	Friend	503-254-9454	

Figure 4: Alternate Contact Information

5. **Complete the "Alternate Contact" field with the alternate contact's first and last name.**

6. **Complete the "Alternate Contact Relationship" field with the relationship of the alternate contact to the WIC client.**

7. **Complete the "Alternate Contact Phone" field with the phone number of the alternate contact.**

8. **Double click in the "Notes" field to open the "Breast Pump Issuance Notes" field and enter a free form note.**

9. **Once "Save" is preformed the "Partner Pump" field will display "Yes" if the pump belongs to a WIC Breast Pump Partner or "No" if the pump belongs to your agency.**

Issuing Other Breast Pumps

Date Issued	Type	Serial #	Partner Pump	Lactina Due Date
04/15/2006	Hospital-Grade Breast Pump (Lactina)	100000	NO	04/30/2006
04/15/2006	Double Pumping Accessory Kit		NO	00/00/0000

Figure 5: Pump Issuance

1. **The "Date Issued" field defaults to today's date but can be modified.**

2. **Select the desired pump or pump accessory from the drop down list in the "Type" field.**

♫ NOTE: Issuance of a Lactina or Pump-In-Style will be indicated on the "Family Summary Screen". See Chapter 3, Lesson 1100 *Family Summary Screen* for more information.

♫ NOTE: To add an additional row, click the "**Insert**" icon. To remove a row, click the **"Remove"** icon. Once **"Save"** is preformed the row cannot be removed.

Entering a Return Date for Lactina Pumps

1. **Complete the "Date Returned" field when a Lactina is returned. Entering a date in this field will remove the "Lactina Due Date" reminder box in the "Family Summary Screen."**

Referring an Overdue Lactina to the State

1. **Click in the "Referred to State" field to place a check mark in the box.** Refer to Policy 712 in the WIC Program and Policy Manual for more information on referring a client with an overdue pump to the State WIC office.

2. **Type in the date the overdue Lactina breast pump was referred to the State WIC office in the "Referral Date" field.** This field becomes mandatory when the "Referred to State" field is completed.

➥ *Practice Activities:*

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨ Questionnaire

1. Click the "Open" icon to access "Client Search" and select a client for whom you want to enter Breastfeeding Tracking information.
2. Click the "Return with Client" button.
3. Select the appropriate questionnaire.
4. Leave "Contact Date" as today's date.
5. Tab to the "Show" field and select All.
6. Complete all answers to the questions using any information you want.
7. Save your work.
8. Click the "Contacts" tab and add a contact with today's date.
9. Leave the "Infant Name" field blank and add yourself as the counselor.
10. Select "Home Visit" as the contact type.
11. Add a breastfeeding topic of your choice with today's date.
12. Leave the "Callback Date" and "Resolved Date" blank.
13. Click the "Referrals" tab and add a referral with today's date.
14. Select an organization of your choice and select "Completed" for the status.
15. Save your work and exit the screen.

✍ *Notes:*

Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Temporary Newborn Infant Certification

Objectives:

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

- complete a Temporary Newborn Certification of one or more infants;
- modify a mother's food package during a Temporary Newborn Certification;
- describe the policies concerning the issuance of FIs for the newborn who is not present at time of the certification completion; and
- complete a certification with a participant with multiple infants.

Oregon Policies:

- ♦ 506 Exceptions for Mailing FIs
- ♦ 601 Physical Presence
- ♦ 645 Certification Periods
- ♦ 713 Breastfeeding: Use of Supplemental Formula

Overview:

Having a baby can be a very busy and stressful time. TWIST helps you eliminate some of the stress for the participant by allowing a "Temporary Newborn Certification" to be completed. This certification is a quick process where minimal information is collected from the participant and entered into the system. TWIST then creates a limited certification period of six weeks from the infant's date of birth rounded to the end of the month. This allows you to issue FIs for the baby for at least one month without requiring mom to bring her baby and all the necessary documentation into the clinic. Temporary Newborn Certifications may even be completed over the phone and FIs mailed to the participant. After the Temporary Newborn Certification period has expired you must enter all the necessary data into TWIST to complete a certification.

In this lesson you will learn how to complete the Temporary Newborn Certification process and change the mother's food package if necessary.

NOTE: The Temporary Newborn Certification process should not be used if you plan to see the infant in the month of their birth. TWIST will not allow you to certify an infant that has been enrolled using the Temporary Newborn Certification process until the month they turn 6 weeks old.

Instruction:

Enrolling a Temporary Newborn

The starting point for this section is:

Client Processes ⇨ Enrollment & Intake ⇨ Enrollment ⇨ Intake

1. **Retrieve the woman for whom you want to add a newborn.**

2. **Click the "Fast Path" icon and select "Certification, Temporary Newborn."**

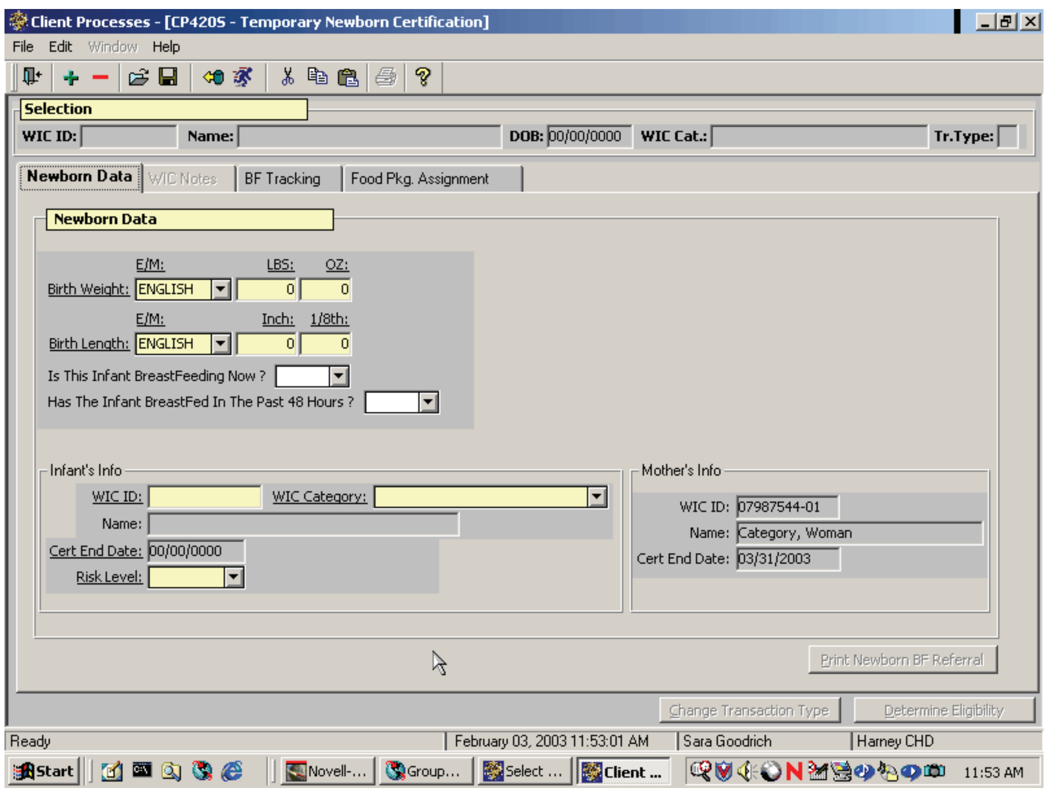

Figure 1: "Temporary Newborn Certification – Newborn Data" Screen

- The "**Selection**" section contains the participant information.
- There are four tabs: "**Newborn Data**," "**WIC Notes**," "**BF Tracking**" and "**Food Pkg Assignment**."
- "**Newborn Data**" and "**Food Pkg Assignment**" must be completed to enroll the newborn.
- "**BF Tracking**" is an optional tab to assist the certifier or peer counselor with breastfeeding counseling.
- When the screen is completed a blue check mark will be displayed next to the tab title.

- The “**Mother’s Info**” section on the “**Newborn Data**” screen displays the mother’s “**WIC ID**,” “**Name**” and “**Cert End Date**.”

3. **Search for the infant you want to add.**

♫ NOTE: Remember, you must search for a participant before they can be added to the database.

3.1 Click the “**Add New Client**” button if the infant is not in the database.

- This takes you to the “**Client Primary**” screen.
- Refer to Chapter 2, Lesson 100 *Client Search and Demographics* to enter client primary information.

3.2 If the infant is already in the database, continue on to the next step.

NOTE: You CANNOT perform a Temporary Newborn Certification on an infant that has already been prescreened for WIC. Infants that have been prescreened must be enrolled using the normal procedure with all certification screens completed.

4. **Click on the “Return w/Client” button to return to “Temporary Newborn Certification - Newborn Data” screen.**

- The baby’s name, date of birth and transaction type will be displayed in the “Selection” section.
- The “**Infant’s Info**” section displays the “**WIC ID**” and “**Name**.”
- The “**Cert End Date**” and “**Risk Level**” have been generated.
- The “**Cert End Date**” is the date the mother’s pregnancy certification will end.

♫ NOTE: The “**Cert End Date**” will be adjusted automatically by the system based on baby’s actually birth date once the temporary newborn enrollment is complete.

5. **Enter the birth weight.**

6. **Enter the birth length.**

7. **Answer the breastfeeding questions using the drop down list.**

7.1 The “**WIC Category**” will be populated in the “**Infant’s Info**” section with “Newborn, Non-breastfeeding,” if both questions are answered “**No**.”

7.2 If you answered "**Yes**" to one or both questions you must select the appropriate category from the drop down list in "**WIC Category**." Answering "**Yes**" will also enable the "**Print Newborn BF Referral**" button.

NOTE: TWIST will not allow you to select **Mostly** or **Some** Breastfeeding as the category for a newborn in the month of their birth. WIC does not allow issuance of formula to a breastfeeding infant under one month of age.

8. **Save.**

   The "**WIC ID**" and "**WIC Cat**." fields in the "**Selection**" section are populated.

9. **Click the "WIC Notes" tab and complete the screen if appropriate.**

10. **Click the "BF Tracking" tab and complete the screen if appropriate.**

11. **Click the "Food Pkg. Assignment" tab and complete.**

12. **Save.**

♫ NOTE: To enroll more than one infant for a woman with twins or more, continue to search for and enter the information for each infant before you exit.

13. **Exit.**

You will return to the woman's screen with the mother's information displayed.

Modifying the Mother's Information

Once the temporary newborn has been enrolled, TWIST will update information on the mother's "**Intake**" screen. The mother's new postpartum category and the ADD will display. You will need to go to the mother's "**Food Package Assignment**" tab and change her food package to match her new category. Please refer to Chapter 3, Lesson 502 *Change Food Package Mid-Certification* for information on changing food packages.

Completing a Temporary Newborn Certification

After a temporary newborn has been enrolled, the infant's record should be accessed through the regular enrollment or certification screens, not the "**Temporary Newborn Certification**" screen. When an infant is enrolled using the temporary newborn process, only the "**Medical Data**" and "**Food**

Package Assignment" tabs will have check marks. The remaining tabs will receive check marks once the certification is completed at their first appointment.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Infant/Child ⇨ Enrollment

1. **Retrieve the enrolled temporary newborn infant for whom you want to complete the certification.**
2. **Click the "Change Transaction Type" button.**
3. **Select "Recertification."**
4. **Click close.**

Please refer to Chapter 3, Lesson 700 *Recertification* for information on completing the certification.

✂ *Tips and Shortcuts:*

- From the "Temporary Newborn Certification" window you may fast path to:
    - "Enrollment"
    - "Family Appointments"
    - "Manage Print Queue"
    - "Family Summary Screen"
- Once a temporary newborn has been enrolled, you will access the record through the regular infant certification screen. You do not access the record through Temporary Newborn. You will access the record from the Enrollment or Certification screens once the temporary newborn is enrolled.
- For a woman with multiple births, the same process for enrolling a temporary newborn is followed.
- A category change must be done for breastfed infants now receiving formula.

➥ *Practice Activities:*

The starting point for this activity is:
Client Processes ⇨ Certification ⇨ Enrollment

1. Retrieve the participant for which you wish to add a newborn.
2. Click on "Fast Path" icon and select "Temporary Newborn Certification."
3. Retrieve the newborn you wish to add.
4. Enter 7 lbs. 8 oz. for the birth weight.

5. Enter 20 and ⅜ inches for birth length.
6. Answer “No” to both breastfeeding questions.
7. Select the appropriate category from the drop down list in “WIC Category.”
8. Click “Food Pkg. Assignment” tab to verify the food package assignment is correct.
9. Exit the screen.

✍ **Note**

Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Certification Data Entry Document

Objectives:

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

- state the appropriate use of the paper certification form.

Oregon Policies:

- ♦ 405 TWIST Disaster Management
- ♦ 641 Documentation Requirements in the Absence of TWIST

Overview:

There are a few normal circumstances when you will certify a client without access to TWIST as home visits or satellite clinics without computer equipment. There may also be instances when you are not able to access TWIST in your regular clinic, yet WIC operations can otherwise continue. When these situations arise, certification data can be collected on a Certification Data Entry Document and then entered into TWIST when it is accessible. To fully collect all mandatory data for a certification, the Certification Data Entry Document must be accompanied by completed health history and diet assessment questionnaires and an assessed diet recall.

In this lesson you will learn how to complete a Certification Entry Document and when it should be used.

Instruction:

Completing the Certification Data Entry Document

In TWIST, a certification cannot be completed and FIs cannot be printed until information has been entered into all mandatory fields. Appointments cannot be scheduled for a client until the certification is complete. The information collected on the Certification Data Entry Document will be used to complete mandatory fields in TWIST. The form is two sided and needs to be signed and dated when complete.

The following sections comprise the Certification Data Entry Document.

- Client Primary
- Transaction Type

- Income Eligibility
- WIC Intake
- Medical Data - Woman, Infant & Child
- Other Medical Data
- NE Plan
- Appointments
- Food Package

There are many optional fields in TWIST that are not included on the form. If you need to document additional information use the health history questionnaire or the margin of the certification data entry document.

☺ See Job Aid "Certification Data Entry Document" for more information.

When to Use the Certification Data Entry Document

Most of the time, data will be entered directly into TWIST. The Certification Data Entry Document is not intended to be used on a regular basis to collect certification information and then enter it later into TWIST. It is to be used when TWIST is unavailable. Information from the Certification Data Entry Document needs to be entered into TWIST within two working days.

The following are appropriate situations for using the Certification Data Entry Document.

- Field nurses who conduct home visits may use the Certification Data Entry Document with the understanding that data collected on the form must be entered into the TWIST system within two business days.
- Satellite sites that do not have a laptop or other method for conducting a certification using TWIST will use the Certification Data Entry Document.
- Local agencies must use the Certification Data Entry Document in the event that certification with TWIST is not available due to a disaster or equipment failure.

Example: An agency network system is shut down for three hours due to a brown out. During this period, certifications would be completed using a Certification Data Entry Document. Once the brown out is resolved, certifications would continue utilizing TWIST. The information from the certifications completed during the three hour brown out would need to be entered into TWIST within two business days as per policy.

➥ *Practice Activities:*

Take the next 5 minutes to talk about your Local agency and when it would be appropriate to use the Certification Data Entry Document and when it would not. Use the notes section to write down your responses.

✍ *Notes:*

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