Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson: Individual Follow-ups

Objectives:

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

- understand the impact of adding a risk to a client record at a follow-up visit;
- view NE information at a follow-up visit;
- access and print diet assessment summary; and
- explain the purpose of status and date end fields.

Oregon Policies:

- ♦ 625 Nutritional Risk Assessment
- ♦ 661 Competent Professional Authority/High Risk Counseling
- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation

Overview:

Second nutrition education individual follow-ups function almost the same in TWIST as first nutrition education contacts. However, there are some fundamental differences in the types of contact. At the individual follow-up, the information in TWIST serves as a historical reference of previous visits and allows the user to update that information.

With TWIST, the user can update any client information, but the result of updating varies. This lesson provides information on how to update information, provide revised information to the client, and an introduction to situations that are unique to the individual follow-up.

Policy requires that you document any new medical data and topics discussed.

Instruction:

Accessing the "Last Visit Summary" Screen

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

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

2. **Review the client's information on the "Last Visit Summary" screen.**

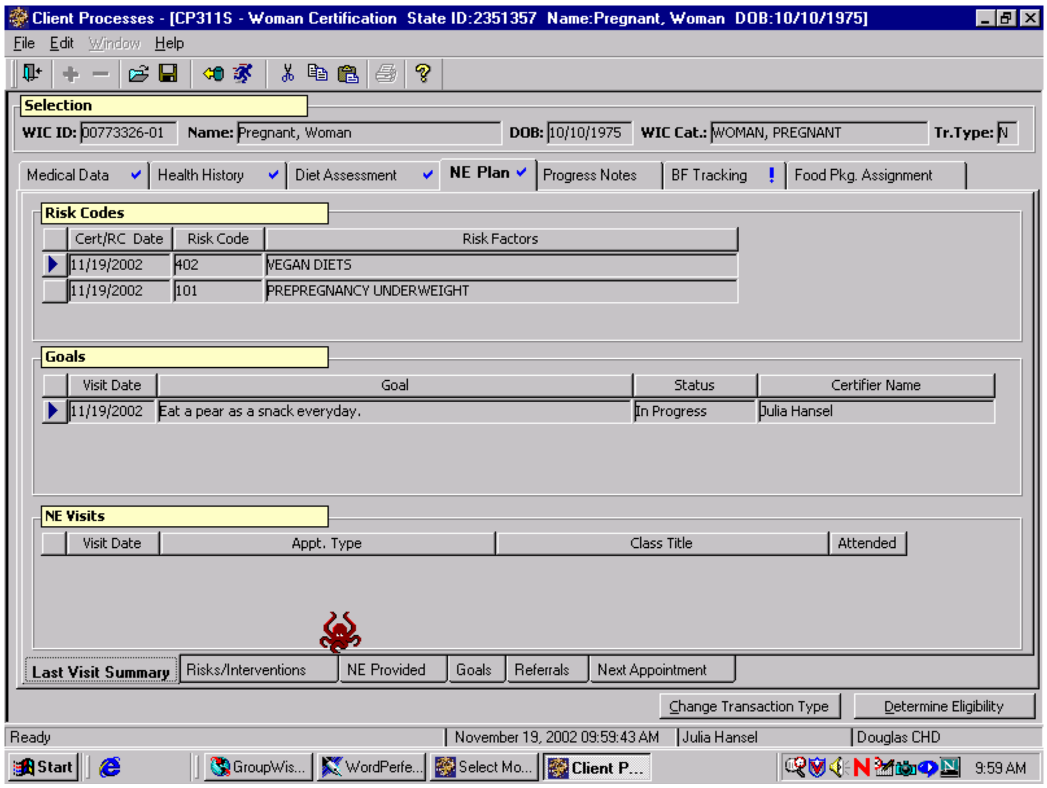

Figure 1: "Last Visit Summary" Screen

This section is populated with the client's information from the last visit but is display only.

♫ NOTE: Information may not be changed on this screen.

Adding a Risk to a Client Record at Follow-Up Visit

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

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

2. **Click on the "Risk/Interventions" tab.**

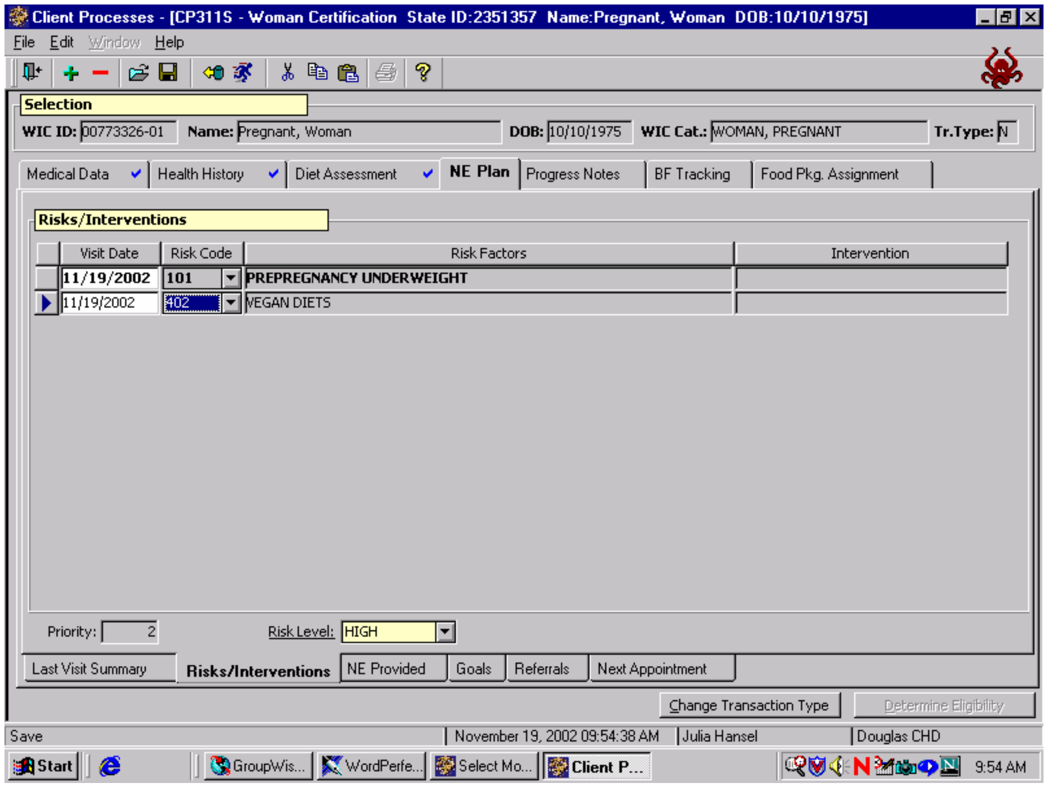

Figure 2: "Risk/Interventions" Screen

- Adding the risk is the same functionality as covered in Chapter 3, Lesson 300 *Risk Criteria and Level*.
- At follow-up visits during mid-certification, the user can add risks to a client's record. Doing this does not cause the client to lose risks.
- The only difference between adding risk(s) at the follow-up visit versus at recertification is that at the follow-up visit the certifier is not assessing risks already assigned and therefore cannot remove any risks.

♫ NOTE: You can add new information on any certification screen by clicking on the insert icon.

Viewing Nutrition Education Provided at Past Visits

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

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

2. **Click on the "NE Provided" tab.**

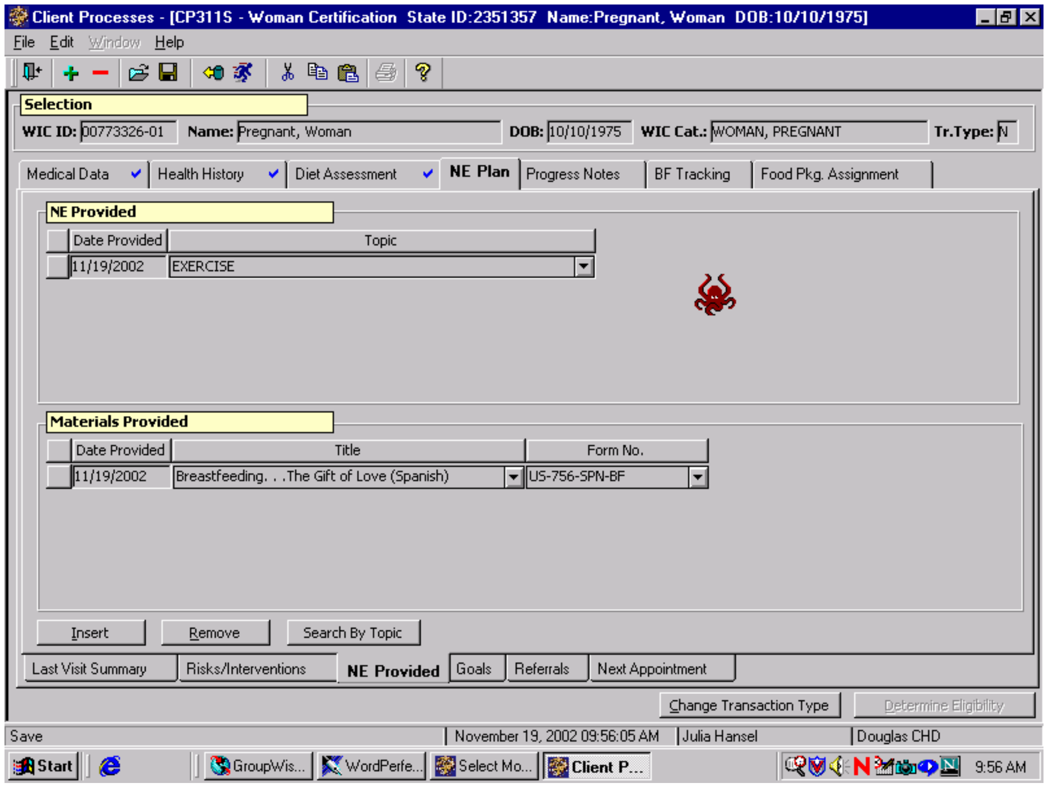

Figure 3: "NE Provided" Screen

- Here you can view nutrition education that was provided in the past.
- Refer to Chapter 3, Lesson 402 *Nutrition Education Provided* for information on how to add nutrition education provided.

Updating Client Goal Status

The starting point for this section is:

Client Processes ➩ Certification ➩ Infant/Child or Woman ➩ Nutrition Education Plan

1. **Retrieve the client for whom you want to update a goal status.**

2. **Click on the "Goals" tab.**

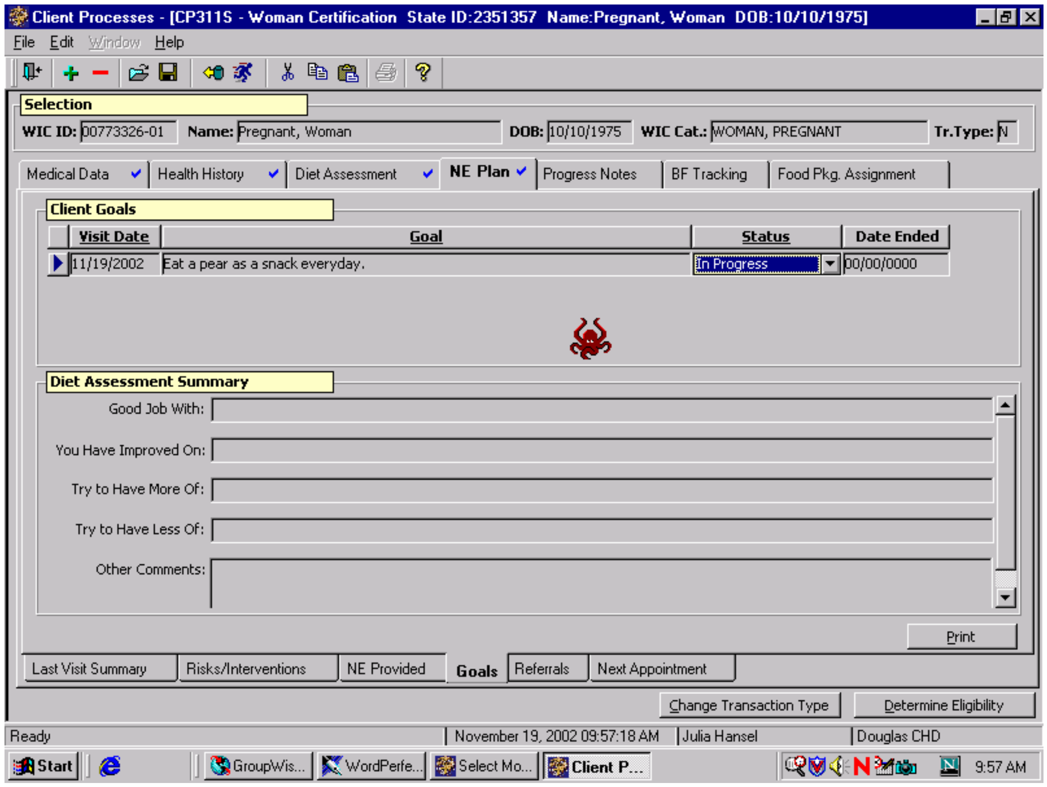

Figure 4: "Goals" Screen

3. **In the "Client Goals" section, tab to the "Status" field.**

   - If the client's goal status has changed since the first visit, there is a drop down menu to change the status.
   - If the status is changed, the "**Date Ended**" field is auto filled with the current date. This date is modifiable.
   - If the goal status is changed to or remains as 'not ready' or 'in progress', the "**Date Ended**" field is grayed out as 00/00/0000 and is not modifiable.

➥ *Practice Activities:*

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

The starting point for this activity is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment

1. Retrieve the client for whom you want to update information.
2. Click on the "Risk Factors" tab.
3. Add a risk to the client's record.
4. Click on the "NE Plan" tab to update the NE plan.
5. Click on the "NE Provided" sub-tab to record the NE provided.

6. Click on the "Goals" sub-tab to update the client's goal.
7. Tab to the "Status" field and change the status of the client's goal.
8. Save.
9. Exit.

✔ *Skill Check:*

Retrieve a certified client from client primary.

Your client has come in for an individual follow up appointment. She has cerebral palsy and recently was hospitalized for leg surgery. Her previous goal was to increase her intake of fruits and vegetables. The assessment today shows that she is now eating 5 servings of fruits and vegetables a day.

Update her risk criteria and goal status. *Print each screen when completed.*

✍ Notes:

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Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson: Documenting Non-WIC Nutrition Education

Objectives:

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

- operate “Schedule Non-WIC NE” button;
- identify when to use “Schedule Non-WIC NE” versus “Schedule Appointment” buttons; and
- document nutrition education provided by an outside agency.

Oregon Policies:

- ♦ 800 Nutrition Education: Introduction and Overview
- ♦ 810 Nutrition Education: Making Education Available
- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation
- ♦ 835 Nutrition Education: Attendance or Refusal
- ♦ 921 Coding WIC Record for Second Nutrition Education Contacts

Overview:

Clients may receive nutrition education from non-WIC organizations. You can document and view this education in TWIST on the **“**Next Appointment**”** screen. In this lesson you will learn how to record and view non-WIC appointments.

Instruction:

Documenting Non-WIC Nutrition Education

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Click on the “Next Appointment” tab at the bottom of the screen.**

2. **Retrieve the client for whom you want to document non-WIC education.**

3. **Click the “Schedule Non-WIC NE” button in the lower right hand corner.**

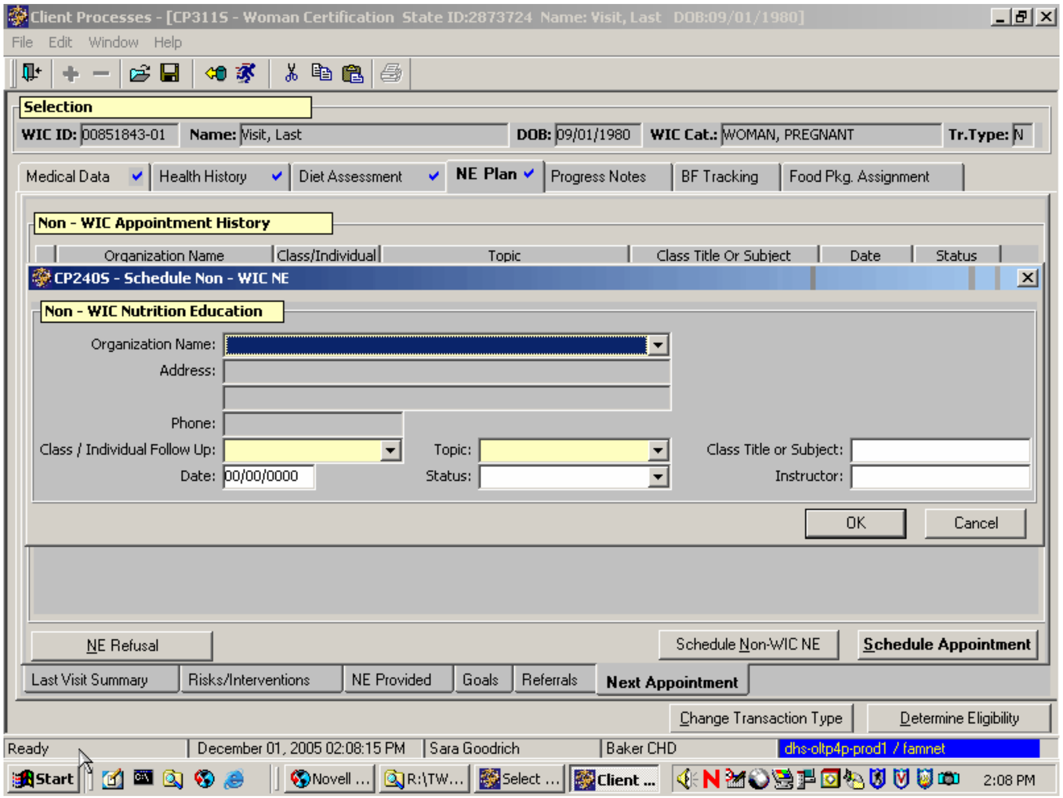

Figure 1: "Schedule Non-WIC NE" Pop-Up

4. **Complete the "Organization Name" field by selecting the appropriate organization from the drop-down list.**

   The name, address and phone number will be populated by the system from the Referral Organizations table in Operations/Management.

5. **Use the drop-down lists to complete the "Class/Individual Follow-Up" and the "Topic" fields.**

6. **Tab to the "Class Title or Subject:" field and enter the appropriate information.**

7. **Enter the date of the education in the "Date" field.**

   This date can be in the past, current, or in the future.

8. **Tab to the "Status" field and select the correct status from the drop-down list.**

9. **Enter the instructor's name in the "Instructor" field.**

10. **Click “OK” to save your work and close the pop-up, or “Cancel” to close the pop-up without saving the information.**

    The information is displayed on the “Non-WIC Appointment History” screen.

11. **Save.**

12. **Exit.**

✂ *Tips and Shortcuts:*

- If you discover that you need to change the information in the **“**Non-WIC Appointment History**”** screen, double click on the row you wish to modify. This will open the pop-up and allow you to make changes.

- A client who attends a Non-WIC nutrition education activity will need to come to the WIC clinic to pick up their FIs.

➥ *Practice Activity:*

The starting point for this section is:

Client processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

Use the ☛ Activity Sheet to complete this activity.

1. Select the client for whom you want to document non-WIC nutrition education.
2. Click the “Schedule Non-WIC Nutrition Education” button.
3. Select La Leche League as the “Organization Name.”
4. Tab to the “Class/Individual Follow-Up” field.
5. Select “Class” from the drop-down.
6. Tab to “Topic.”
7. Select a breastfeeding topic.
8. Tab to the “Class Title or Subject.”
9. Enter “Breastfeeding is great!”
10. Enter tomorrow’s date in the “Date” field.
11. Mark the “Status” as “Booked.”
12. Leave the “Instructor” field blank.
13. Click “OK” to save your work and close the pop-ups.
14. Exit back to the “Client Processes” window.

✍ **Notes:**

Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson Plan: Nutrition Education Refusal

Objectives:

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

- appropriately document refusal of second NE contact.

Oregon Policies:

- ♦ 835 Nutrition Education: Attendance and Refusal

Overview:

To meet its goal of providing nutrition education, WIC requires that participants be offered a second nutrition education (NE) contact sometime during their certification period. In order to encourage participation in nutrition education activities, food instrument (FI) issuance is coordinated with WIC participant attendance at a second NE. TWIST has the flexibility to do this in several ways. Participants cannot be denied their FIs if they are unable to attend a scheduled second NE contact. When a participant is unable to attend their second NE contact, reschedule them for another NE contact within the same month. If it is not possible to reschedule them within the same month, the participant, parent, caretaker or proxy can come to the clinic to pick up one month of FIs and be rescheduled for the second NE contact the following month. The procedure for rescheduling a second NE contact is explained in Chapter 4, Lesson 501 "Reschedule an Appointment."

A WIC participant can also refuse to attend a second NE contact. This refusal must be documented in TWIST and FIs must be held for pick-up for a specified month.

Instruction:

Documenting Second NE Contact Refusal

The starting point for this section is:

Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

♫ NOTE: This process would usually be done right after you offer the participant a second NE contact during the certification visit. You can also go directly to the "Family Appointment Record" screen to document second NE refusal.

1. **Click on the "NE Refusal" button to open the "NE Refusal Pop-up."**

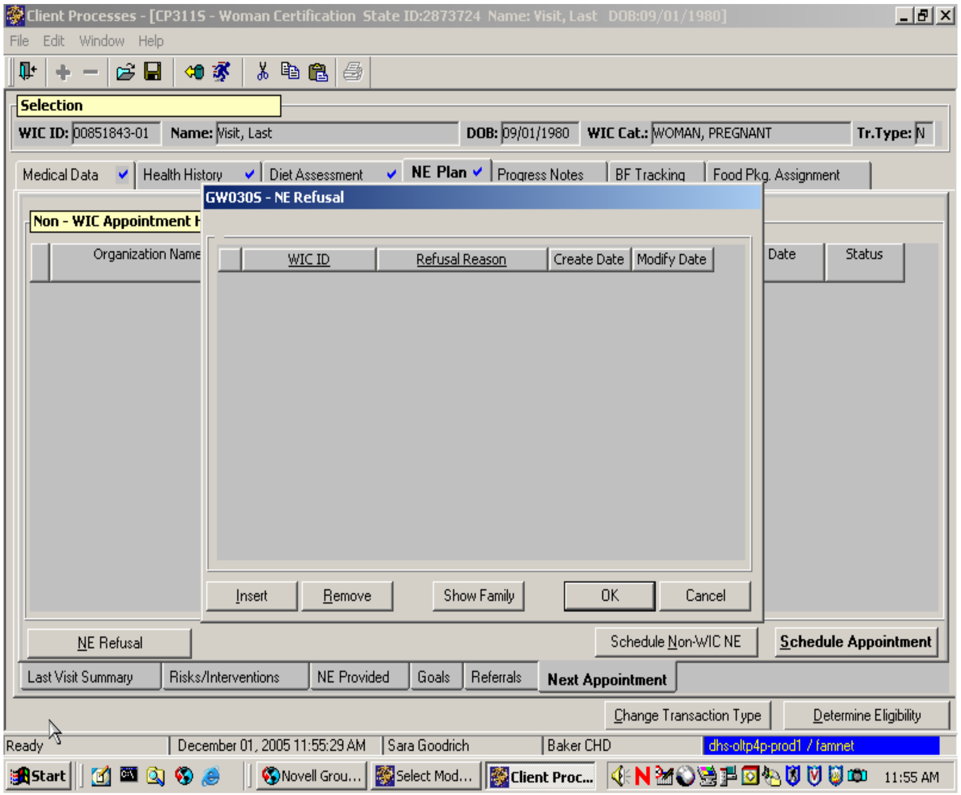

Figure 1: "NE Refusal Pop-Up"

2. **Click the "Insert" button to insert a new row on the pop-up.**

3. **Click on the "WIC ID" field and select your client's ID number.**

   - If you want to indicate a refusal for multiple family members, click on the "**Show Family**" button to display all family members.

4. **In the "Refusal Reason" field, select the appropriate reason from the drop down list.**

5. **The "Create Date" and "Modify Date" fields are system generated and display only.**

6. **Click "OK" to close the pop-up and save the information.**

7. **Click "Cancel" if you want to exit without saving.**

✂ Tips and Shortcuts:

- You can also go directly to the “Family Appointment Record” to document a second NE refusal.

➥ Practice Activity:

Use information from your ☛ Activity Sheet for this practice.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

1. Click on the “NE Refusal” button.
2. Indicate the second nutrition education contact was refused.
3. Click “OK” to close the pop-up and save the information.

✓ Skill Check:

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

During the certification visit for her child, your client indicates that she cannot attend the second nutrition education contact because of her work schedule. Take appropriate steps to document this in TWIST.

✍ Notes:

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Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson: Individual Follow-ups

Objectives:

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

- understand the impact of adding a risk to a client record at a follow-up visit;
- view NE information at a follow-up visit;
- access and print diet assessment summary; and
- explain the purpose of status and date end fields.

Oregon Policies:

- ♦ 625 Nutritional Risk Assessment
- ♦ 661 Competent Professional Authority/High Risk Counseling
- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation

Overview:

Second nutrition education individual follow-ups function almost the same in TWIST as first nutrition education contacts. However, there are some fundamental differences in the types of contact. At the individual follow-up, the information in TWIST serves as a historical reference of previous visits and allows the user to update that information.

With TWIST, the user can update any client information, but the result of updating varies. This lesson provides information on how to update information, provide revised information to the client, and an introduction to situations that are unique to the individual follow-up.

Policy requires that you document any new medical data and topics discussed.

Instruction:

Accessing the "Last Visit Summary" Screen

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

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

2. **Review the client's information on the "Last Visit Summary" screen.**

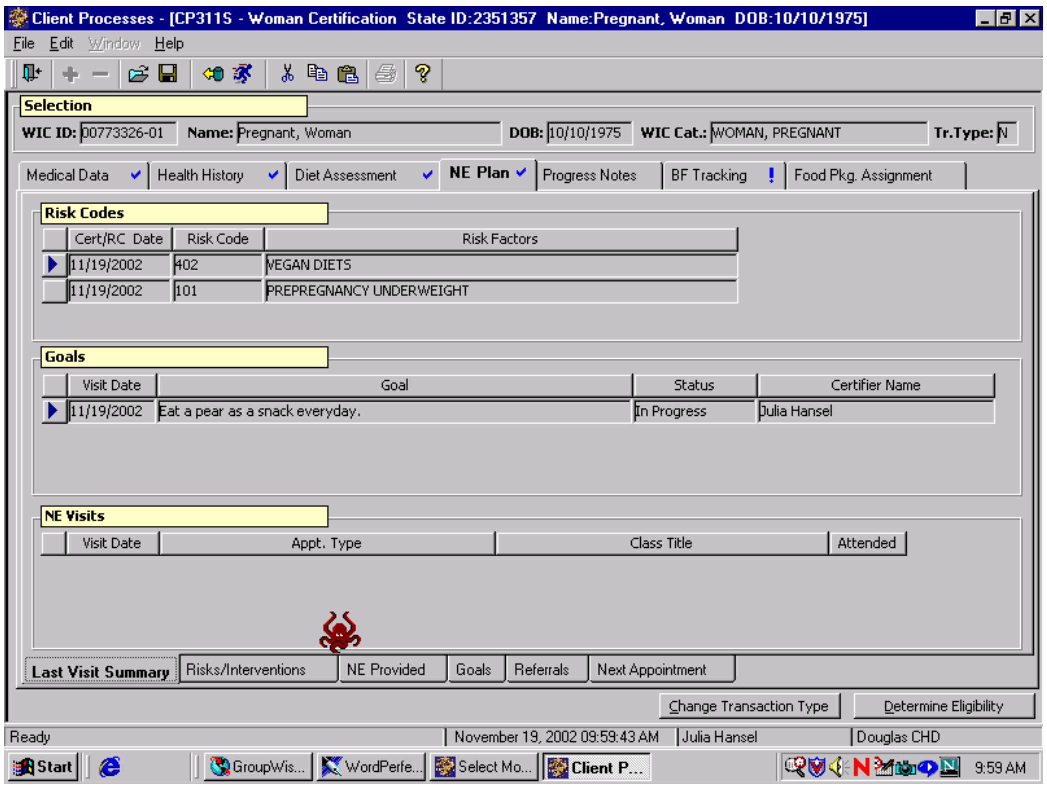

Figure 1: "Last Visit Summary" Screen

This section is populated with the client's information from the last visit but is display only.

♫ NOTE: Information may not be changed on this screen.

Adding a Risk to a Client Record at Follow-Up Visit

The starting point for this section is:

Client Processes ➩ Certification ➩ Infant/Child or Woman ➩ Nutrition Education Plan

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

2. **Click on the "Risk/Interventions" tab.**

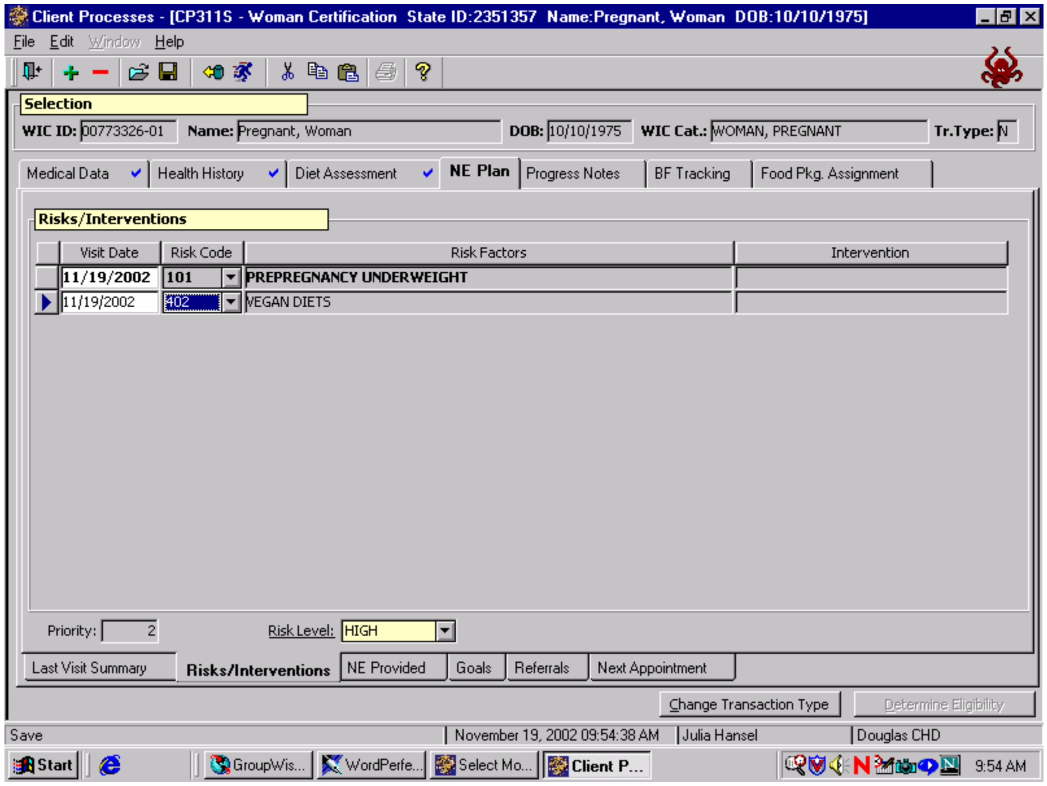

Figure 2: "Risk/Interventions" Screen

- Adding the risk is the same functionality as covered in Chapter 3, Lesson 300 *Risk Criteria and Level*.
- At follow-up visits during mid-certification, the user can add risks to a client's record. Doing this does not cause the client to lose risks.
- The only difference between adding risk(s) at the follow-up visit versus at recertification is that at the follow-up visit the certifier is not assessing risks already assigned and therefore cannot remove any risks.

♫ NOTE: You can add new information on any certification screen by clicking on the insert icon.

Viewing Nutrition Education Provided at Past Visits

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

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

2. **Click on the "NE Provided" tab.**

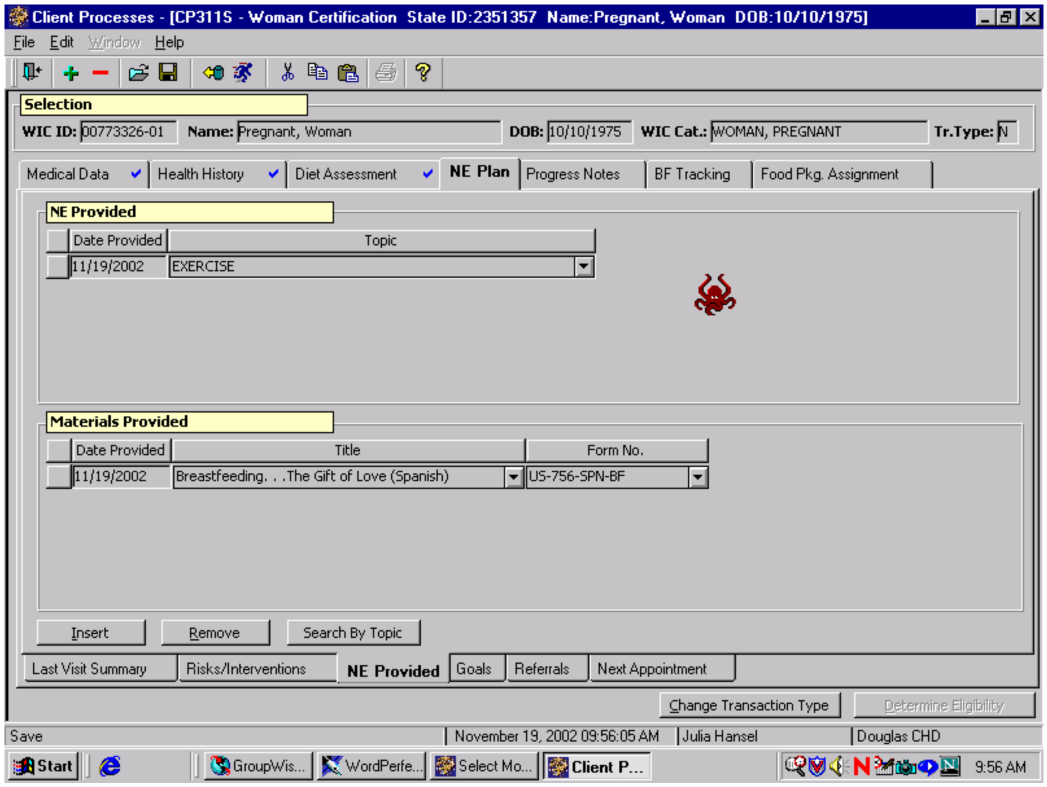

Figure 3: "NE Provided" Screen

- Here you can view nutrition education that was provided in the past.
- Refer to Chapter 3, Lesson 402 *Nutrition Education Provided* for information on how to add nutrition education provided.

Updating Client Goal Status

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Retrieve the client for whom you want to update a goal status.**

2. **Click on the "Goals" tab.**

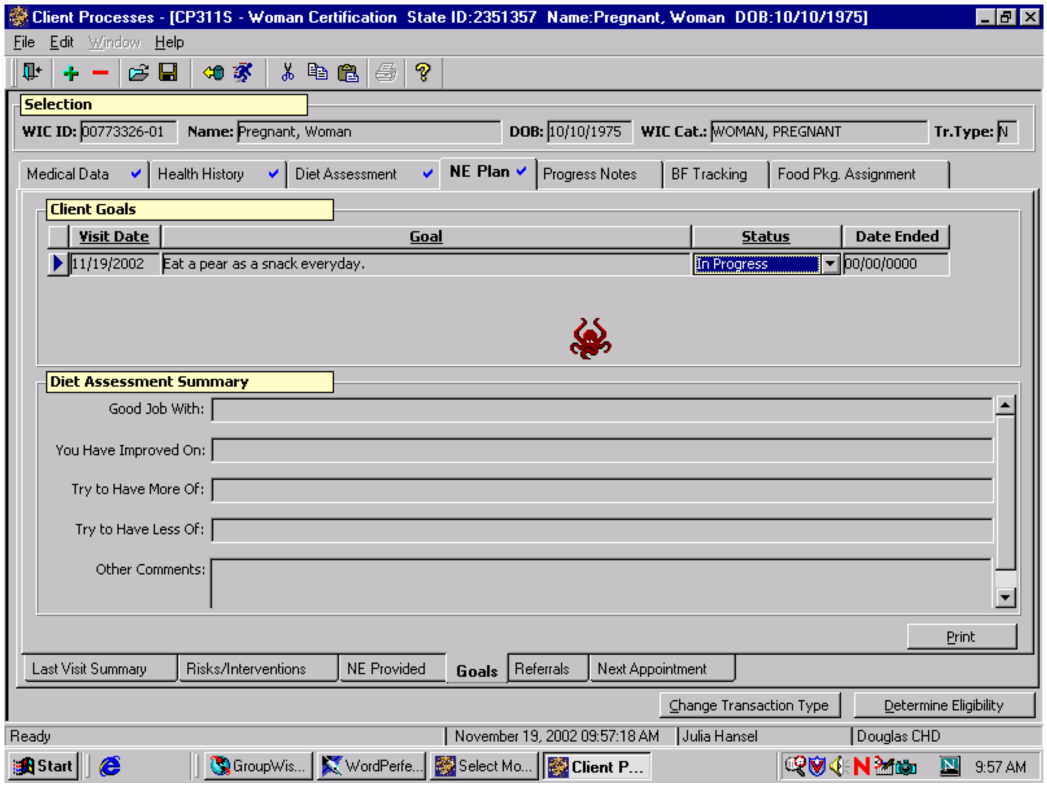

Figure 4: "Goals" Screen

3. **In the "Client Goals" section, tab to the "Status" field.**

- If the client's goal status has changed since the first visit, there is a drop down menu to change the status.
- If the status is changed, the "**Date Ended**" field is auto filled with the current date. This date is modifiable.
- If the goal status is changed to or remains as 'not ready' or 'in progress', the "**Date Ended**" field is grayed out as 00/00/0000 and is not modifiable.

➥ *Practice Activities:*

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

The starting point for this activity is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment

1. Retrieve the client for whom you want to update information.
2. Click on the "Risk Factors" tab.
3. Add a risk to the client's record.
4. Click on the "NE Plan" tab to update the NE plan.
5. Click on the "NE Provided" sub-tab to record the NE provided.

6. Click on the “Goals” sub-tab to update the client’s goal.
7. Tab to the “Status” field and change the status of the client’s goal.
8. Save.
9. Exit.

✓ *Skill Check:*

Retrieve a certified client from client primary.

Your client has come in for an individual follow up appointment. She has cerebral palsy and recently was hospitalized for leg surgery. Her previous goal was to increase her intake of fruits and vegetables. The assessment today shows that she is now eating 5 servings of fruits and vegetables a day.

Update her risk criteria and goal status. *Print each screen when completed.*

✍ Notes:

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Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson: Documenting Non-WIC Nutrition Education

Objectives:

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

- operate "Schedule Non-WIC NE" button;
- identify when to use "Schedule Non-WIC NE" versus "Schedule Appointment" buttons; and
- document nutrition education provided by an outside agency.

Oregon Policies:

- ♦ 800 Nutrition Education: Introduction and Overview
- ♦ 810 Nutrition Education: Making Education Available
- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation
- ♦ 835 Nutrition Education: Attendance or Refusal
- ♦ 921 Coding WIC Record for Second Nutrition Education Contacts

Overview:

Clients may receive nutrition education from non-WIC organizations. You can document and view this education in TWIST on the **"**Next Appointment**"** screen. In this lesson you will learn how to record and view non-WIC appointments.

Instruction:

Documenting Non-WIC Nutrition Education

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Click on the "Next Appointment" tab at the bottom of the screen.**

2. **Retrieve the client for whom you want to document non-WIC education.**

3. **Click the "Schedule Non-WIC NE" button in the lower right hand corner.**

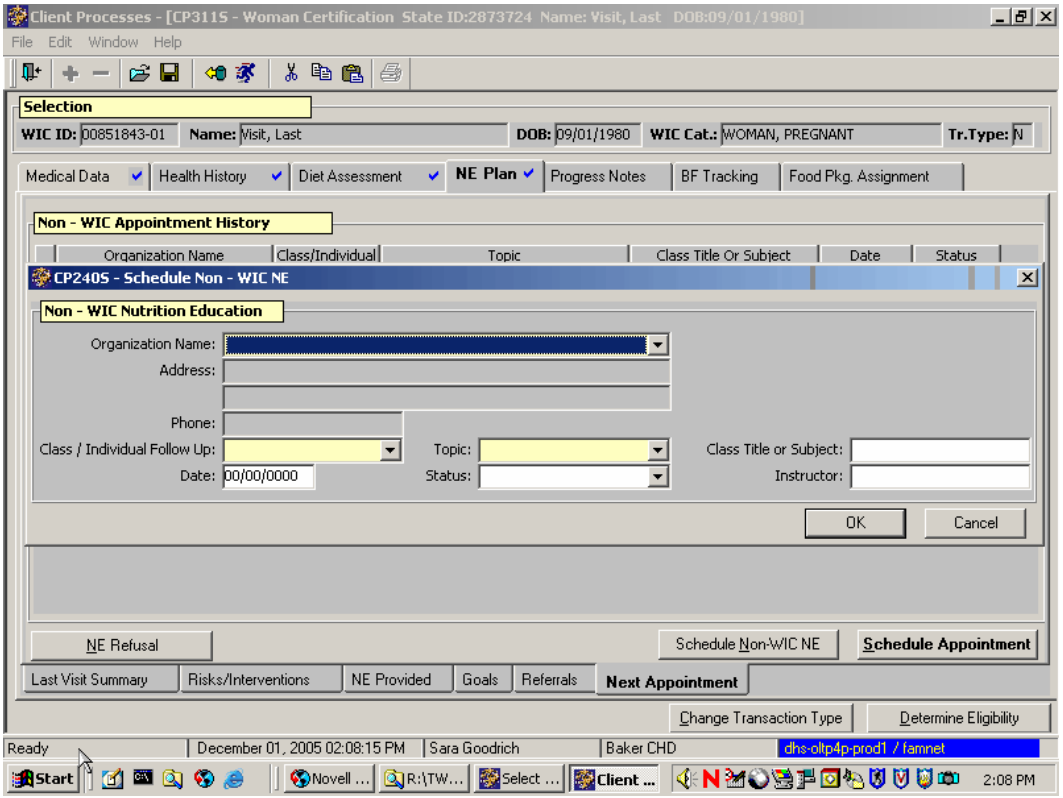

Figure 1: "Schedule Non-WIC NE" Pop-Up

4. **Complete the "Organization Name" field by selecting the appropriate organization from the drop-down list.**

   The name, address and phone number will be populated by the system from the Referral Organizations table in Operations/Management.

5. **Use the drop-down lists to complete the "Class/Individual Follow-Up" and the "Topic" fields.**

6. **Tab to the "Class Title or Subject:" field and enter the appropriate information.**

7. **Enter the date of the education in the "Date" field.**

   This date can be in the past, current, or in the future.

8. **Tab to the "Status" field and select the correct status from the drop-down list.**

9. **Enter the instructor's name in the "Instructor" field.**

10. **Click "OK" to save your work and close the pop-up, or "Cancel" to close the pop-up without saving the information.**

    The information is displayed on the "Non-WIC Appointment History" screen.

11. **Save.**

12. **Exit.**

✂ *Tips and Shortcuts:*

- If you discover that you need to change the information in the **"**Non-WIC Appointment History**"** screen, double click on the row you wish to modify. This will open the pop-up and allow you to make changes.

- A client who attends a Non-WIC nutrition education activity will need to come to the WIC clinic to pick up their FIs.

➥ *Practice Activity:*

The starting point for this section is:

Client processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

Use the ☛ Activity Sheet to complete this activity.

1. Select the client for whom you want to document non-WIC nutrition education.
2. Click the "Schedule Non-WIC Nutrition Education" button.
3. Select La Leche League as the "Organization Name."
4. Tab to the "Class/Individual Follow-Up" field.
5. Select "Class" from the drop-down.
6. Tab to "Topic."
7. Select a breastfeeding topic.
8. Tab to the "Class Title or Subject."
9. Enter "Breastfeeding is great!"
10. Enter tomorrow's date in the "Date" field.
11. Mark the "Status" as "Booked."
12. Leave the "Instructor" field blank.
13. Click "OK" to save your work and close the pop-ups.
14. Exit back to the "Client Processes" window.

✍ *Notes:*

Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson Plan: Nutrition Education Refusal

Objectives:

Upon completion of this lesson the user will be able to:
- appropriately document refusal of second NE contact.

Oregon Policies:

♦ 835 Nutrition Education: Attendance and Refusal

Overview:

To meet its goal of providing nutrition education, WIC requires that participants be offered a second nutrition education (NE) contact sometime during their certification period. In order to encourage participation in nutrition education activities, food instrument (FI) issuance is coordinated with WIC participant attendance at a second NE. TWIST has the flexibility to do this in several ways. Participants cannot be denied their FIs if they are unable to attend a scheduled second NE contact. When a participant is unable to attend their second NE contact, reschedule them for another NE contact within the same month. If it is not possible to reschedule them within the same month, the participant, parent, caretaker or proxy can come to the clinic to pick up one month of FIs and be rescheduled for the second NE contact the following month. The procedure for rescheduling a second NE contact is explained in Chapter 4, Lesson 501 "Reschedule an Appointment."

A WIC participant can also refuse to attend a second NE contact. This refusal must be documented in TWIST and FIs must be held for pick-up for a specified month.

Instruction:

Documenting Second NE Contact Refusal

The starting point for this section is:

Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

♫ NOTE: This process would usually be done right after you offer the participant a second NE contact during the certification visit. You can also go directly to the "Family Appointment Record" screen to document second NE refusal.

1. **Click on the "NE Refusal" button to open the "NE Refusal Pop-up."**

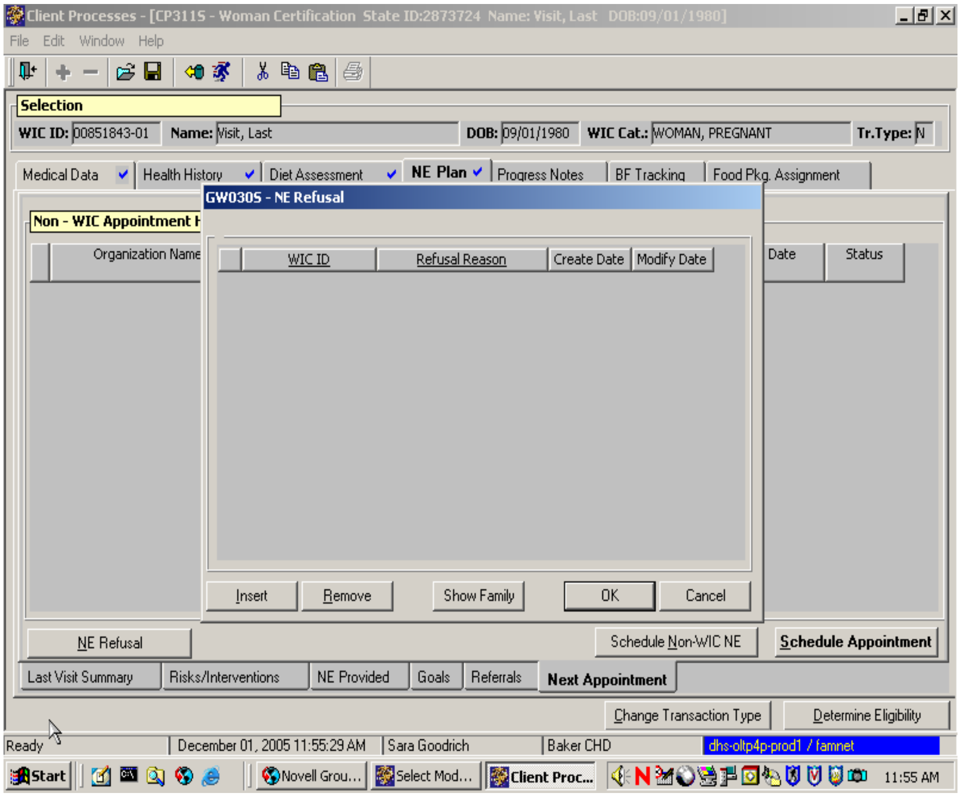

Figure 1: "NE Refusal Pop-Up"

2. **Click the "Insert" button to insert a new row on the pop-up.**

3. **Click on the "WIC ID" field and select your client's ID number.**

   - If you want to indicate a refusal for multiple family members, click on the "**Show Family**" button to display all family members.

4. **In the "Refusal Reason" field, select the appropriate reason from the drop down list.**

5. **The "Create Date" and "Modify Date" fields are system generated and display only.**

6. **Click "OK" to close the pop-up and save the information.**

7. **Click "Cancel" if you want to exit without saving.**

✂ Tips and Shortcuts:

- You can also go directly to the "Family Appointment Record" to document a second NE refusal.

➥ Practice Activity:

Use information from your ☛ Activity Sheet for this practice.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

1. Click on the "NE Refusal" button.
2. Indicate the second nutrition education contact was refused.
3. Click "OK" to close the pop-up and save the information.

✓ Skill Check:

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

During the certification visit for her child, your client indicates that she cannot attend the second nutrition education contact because of her work schedule. Take appropriate steps to document this in TWIST.

✍ Notes: