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TO: Oregon WIC Staff

FROM: Diane Arnold
Oregon WIC State Office
Department of Human Services
Office of Family Health



SUBJECT: TWIST Training Manual Update

EXPLANATION:

- The following **TWIST Training Manual** materials have been updated to match current or newly released TWIST functionality.
- This TWIST training manual update is now available on the WIC staff page of the website at <http://egov.oregon.gov/DHS/ph/wic/training.shtml>
- The website will always have the most current version of all materials. They are in PDF format and can be downloaded.
- If you need hard copies of these updates, please contact Diane Arnold at diane.arnold@state.or.us or 971-673-0081.
- If you use hard copies of the TWIST training manual in your program, please update them with this new information.

TWIST Manual Lesson Updates	What's New
Table of Contents	Updated
Ch. 2, Sect. 1, Lesson 100: Client Search and Demographics	Updated screen print
Ch. 3, Sect. 1, Lesson 100: Applicant Prescreen	Updated with migrant and contact type information
Ch. 3, Sect. 6, Lesson 601: Infant Certification – Temporary Newborn	Change of title and removed question mirroring information
Ch. 5, Sect. 1 Lesson 108: Reprint	Deleted as function is no longer available

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October 24, 2008

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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.**

Note: The % symbol acts as a multiple character wildcard

State ID	Last	First	Middle	Suffix	DOB	Name Type
2351858	Johanson	Andy			05/01/2000	Real
2351857	Johnson	Andrea			05/01/2000	Real
2351855	Johnson	Andrew			05/01/2000	Real
2351856	Johnston	Andrew			05/01/2000	Real

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 many 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.**

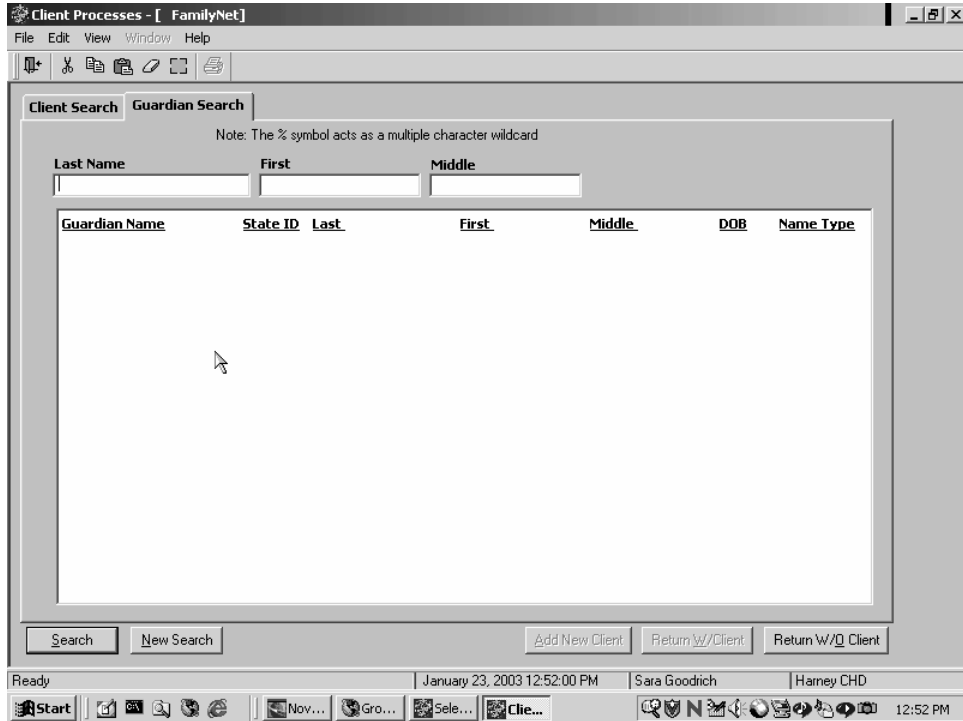


Figure 3: “Guardian Search” Screen

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.**

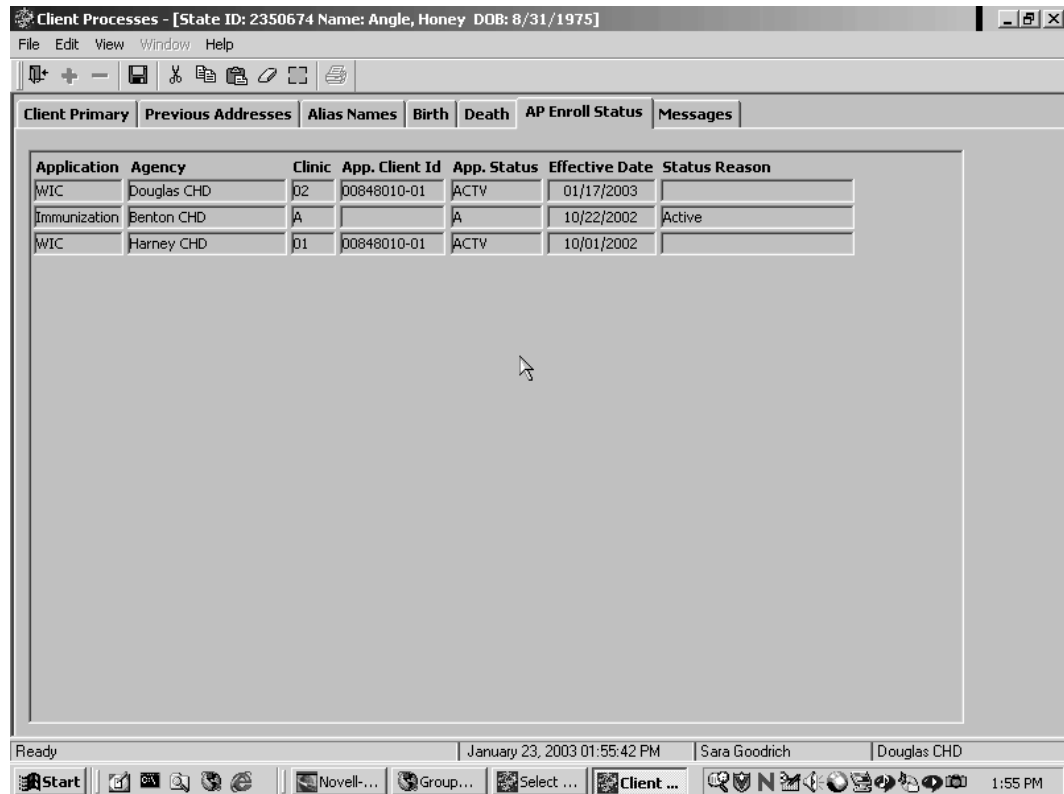


Figure 5: “AP Enroll Status” Screen

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 lightning 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 you 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:**

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.**

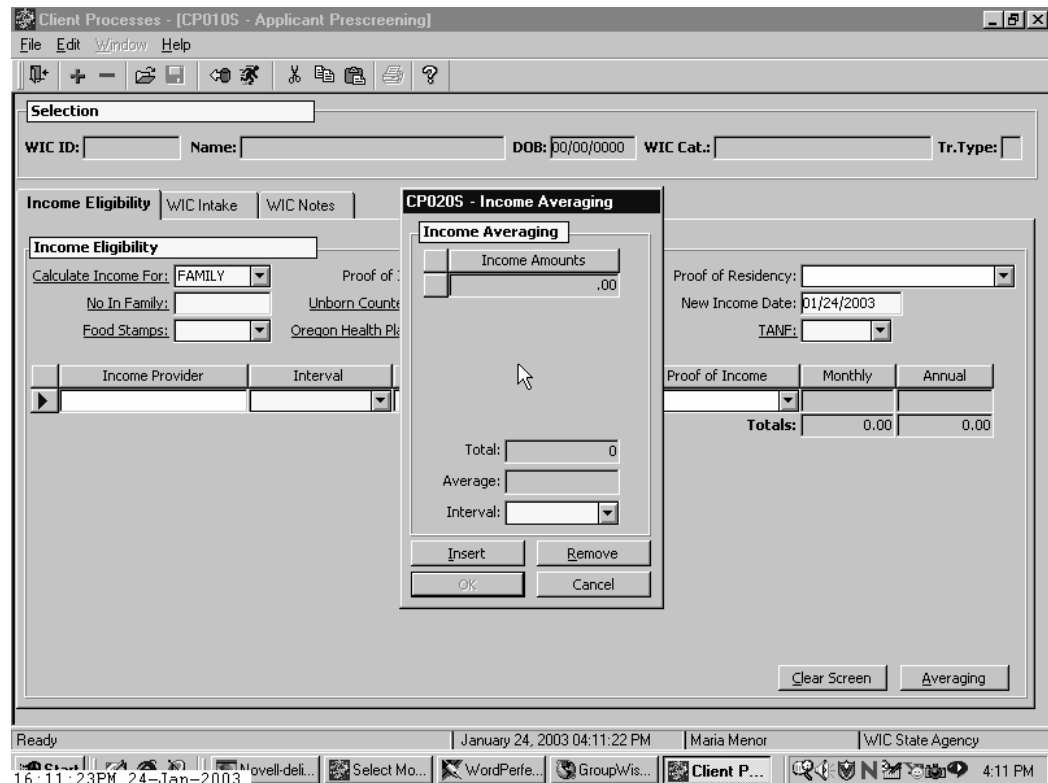


Figure 2: “Income Averaging” Pop-Up

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

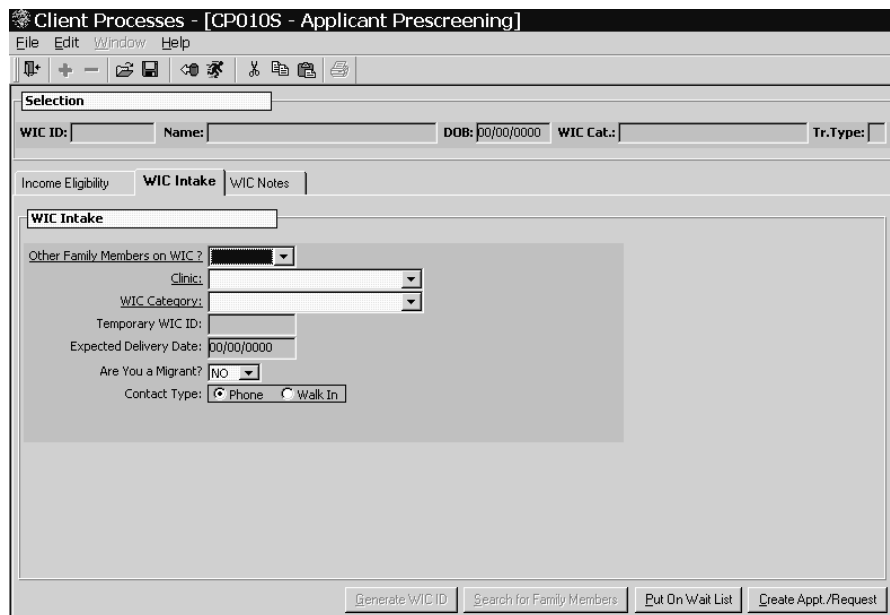
Once preliminary income eligibility has been determined in the “**Income Eligibility**” tab you must select the applicant you wish to prescreen before proceeding to the “**WIC Intake**” tab. This is done using Client Primary.

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.**



The screenshot shows the 'Client Processes - [CP010S - Applicant Prescreening]' window. The 'Selection' section at the top contains fields for WIC ID, Name, DOB (00/00/0000), WIC Cat., and Tr.Type. Below this are three tabs: 'Income Eligibility', 'WIC Intake' (which is selected), and 'WIC Notes'. The 'WIC Intake' section includes a dropdown for 'Other Family Members on WIC?', a 'Clinic' dropdown, a 'WIC Category' dropdown, a 'Temporary WIC ID' field, an 'Expected Delivery Date' field (00/00/0000), an 'Are You a Migrant?' dropdown (set to 'NO'), and 'Contact Type' radio buttons for 'Phone' and 'Walk In'. At the bottom of the window are four buttons: 'Generate WIC ID', 'Search for Family Members', 'Put On Wait List', and 'Create Appt./Request'.

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.**

WIC ID	Last Name	First Name	Middle Name	Date Of Birth	
00753054-01	Vida	Veronica	K	10/11/2000	Taurus
00753059-01	Vida	Veronica	M	10/13/2000	Taurus
00753046-01	Vida	Veronica	I	10/09/2000	Taurus
00753050-01	Vida	Veronica	J	10/10/2000	Taurus
00753056-01	Vida	Veronica	L	10/12/2000	Taurus
00753062-01	Vida	Veronica	Z	10/14/2000	Taurus
00753019-01	Vida	Veronica	S	10/01/2000	Taurus
00753026-01	Vida	Veronica	B	10/02/2000	Taurus
00753028-01	Vida	Veronica	C	10/03/2000	Taurus
00753033-01	Vida	Veronica	D	10/04/2000	Taurus

Buttons: New Search, Retrieve, OK, Cancel

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.

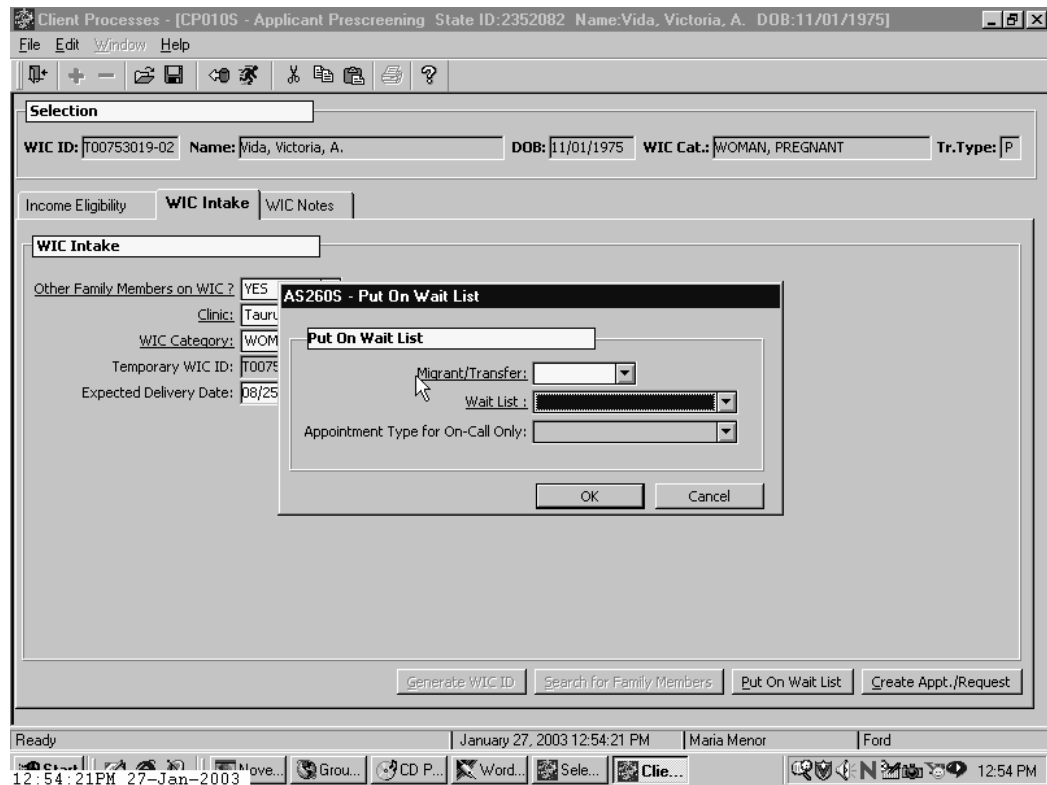


Figure 5: “Put on Wait List” Pop-Up

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.**

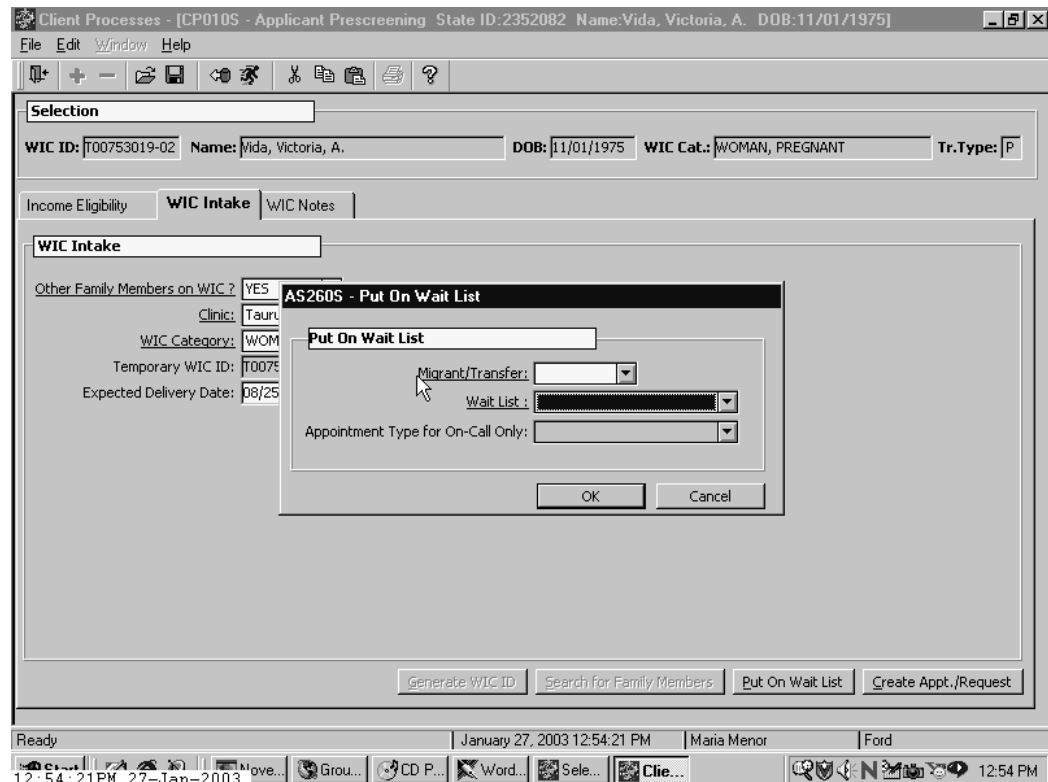


Figure 6: “WIC Notes” Screen

- 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 prescreening. 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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Chapter 3: Client Processes

Section 6: Certification Variables

Lesson: Infant Certification – Temporary Newborn

Objectives:

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

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

Oregon Policies:

- ◆ 650 Infant Certification

Overview:

Having a baby can be a very busy and stressful time. TWIST helps you eliminate some of the stress for the client by allowing a "Temporary Newborn Certification" to be completed. This certification is a quick process where minimal information is collected from the client and entered into the system. TWIST then creates a limited certification 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 client. After the enrollment certification end date has expired you must enter all the necessary data into TWIST to generate a complete certification.

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

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 client 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 client 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.

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 “TNB, NOT BREASTFEEDING, RECEIVING FOR,” 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.

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 multiple births, 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 adjust the mother’s food package if she is exclusively breastfeeding. Please refer to Chapter 3, Lesson 500 *Standard Food Packages* for adjusting food packages.

For mothers who are partially breastfeeding or not breastfeeding at all, no food package modification is required.

Completing a Temporary Newborn Certification

After a temporary newborn has been enrolled, the infant’s record should be accessed through the regular infant certification process, not the temporary newborn screen. For a temporary newborn enrolled, only the “**Medical Data**” and “**Food Pkg. Assignment**” tabs will have check marks. The remaining tabs will receive check marks once the certification is complete.

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”
 - “Print On Demand”
- 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 ⇒ Infant/Child ⇒ Enrollment

1. Retrieve the client 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 $\frac{3}{8}$ 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.

Notes

