Chapter 3: Client Processes
Section 11:   Family Cardholder
Lesson: Family Cardholder Screen

Objectives:

Upon completion of this lesson the user will be able to:
- issue an eWIC card to a family;
- add a second cardholder to a family;
- replace an eWIC card; and
- change cardholder information.

Oregon Policies:

♦   510   eWIC Cardholder Requirements

Overview:

The eWIC card is an electronic benefits card. Foods that the participant may buy are added to an electronic account and the eWIC card is used in the grocery store to debit those foods from their account. Every family is issued at least one eWIC card and has one designated cardholder. Families have the option of a having a second card and cardholder.

The *Family Cardholder* screen is one of several "Family" screens in TWIST. All family members will show on this screen. This screen is used to assign eWIC cards to the family. Once the family has an eWIC card, you can use the eWIC card and the card reader to quickly fast path to any participant screen needed. It is also used to deactivate or replace cards and change cardholders. You can view the history of the family's eWIC cards from this screen.

Instruction:

Accessing the Family Cardholder Screen

The *Family Cardholder* screen can be accessed in several different ways.

- Fast Path to the screen from Certification, Enrollment or Appointment Scheduler screens.

- Go directly from Client Processes ⇨ Lookup ⇨ Family Cardholder

The *Family Cardholder* screen has four sections:
- **First Cardholder**: To enter information about the first cardholder.
- **Second Cardholder**: To enter information about the second cardholder.
- **Fastpath** [MKO1]**Family Members**: To select a family member before using fast path.
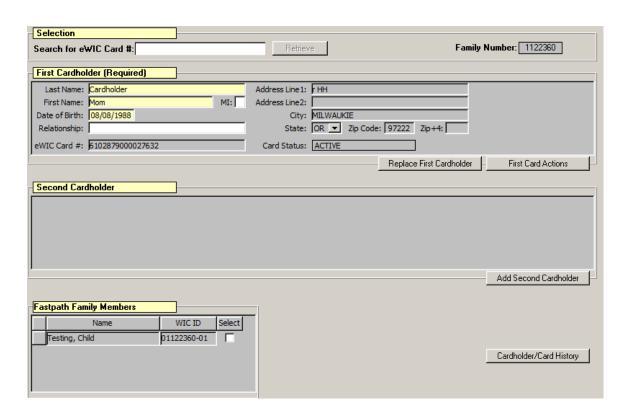- **Cardholder & Card Action buttons**: To replace cards or cardholders.

Figure 1: *Family Cardholder* Screen

Assigning an eWIC Card to the First Cardholder

The starting point for this lesson is:
> Client Processes ⇨ Lookup ⇨ Family Cardholder Screen

1.   Search for the family for whom you want to assign a card.
- The family's WIC ID will display in the top right corner and the First Cardholder fields will be activated.
- The family's address will be displayed from the Client Master. The family must have a valid address type (not homeless or unknown) to be assigned an eWIC card.
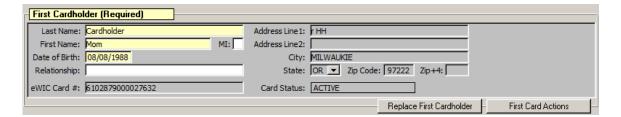
Figure 2: *First Cardholder* Fields

2.   Identify who in the family will be the primary cardholder. Enter this person's information into the First Cardholder section.

- The family is required to have a primary cardholder. Second cardholders are optional. The first cardholder can choose to assign a second cardholder.
- The cardholder information is used for card and account security.
- The relationship field can be used to enter how the cardholder is connected to the participant.

3.   To enter the eWIC Card #:

- Slide a new eWIC card through the card reader, or
- Type the eWIC card number in the field.

4.   Save.

- The card is now assigned to the first cardholder.
- The card status shows as active.

Using the eWIC Card to Search for a WIC Family

Once a family is assigned an eWIC card, it can be used to search for the family in TWIST.

The starting point for this lesson is:
Client Processes ⇨ Lookup ⇨ Family Cardholder Screen

1. To retrieve a family using the *Family Cardholder* screen:

- **Swipe the eWIC card through the card reader, or**
- **Enter the eWIC card number in the card number retrieve field.**

- If the card number is valid for a family in your agency, it will display the family information.
- If the card number is not valid or the family is not from your agency, you will get a pop telling you the status of that card and participant.

2. **To go to another screen, select the participant from the *Family Members* section.**
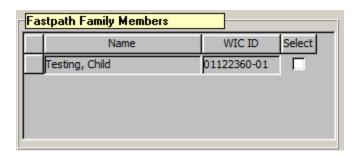

Figure 3: *Family Members* Section

3. **Use the Fast Path icon to fast path to another screen.**

Add a Second Cardholder

1. **After the First Cardholder is assigned, click the Add Second Cardholder button.**
   - The Second Cardholder fields will be activated.

Figure 4: Add Second Cardholder Button

2. **Identify who will be the second cardholder. Enter this person's information into the Second Cardholder section.**
   - If the second cardholder's address is the same as the First Cardholder's address, use the "Copy First Cardholder Address" button.
   - This information is used for card and account security.

3. **To enter the eWIC Card #:**
   - Slide a new eWIC card through the card reader, or
   - Type the eWIC card number in the field.

4. **Save.**
     - The card is now assigned to the second cardholder.
     - The card status shows as active.

Changing or Removing Cardholders

There are times when a cardholder needs to be removed or replaced. There are several buttons to help with these actions.

♫ NOTE: You do not need to use the cardholder buttons if a current cardholder has a name change. The change can be made in the cardholder name fields.

♫ NOTE: You will not be able to give a previously issued card to a new cardholder.
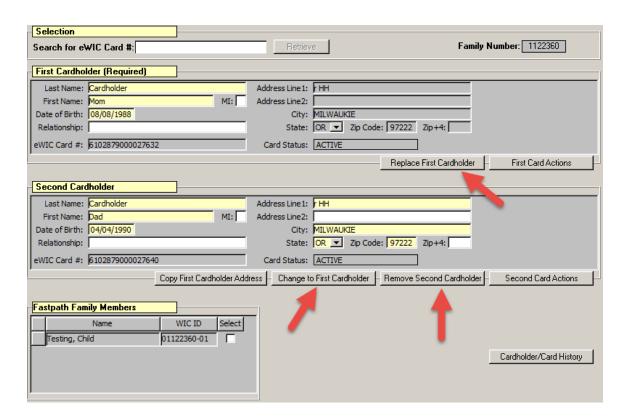

Figure 5: Buttons Used to Change Cardholders

"Replace First Cardholder" Button

- Removes the First Cardholder and makes their eWIC card inactive.
- Allows you to issue a new eWIC card to the new First Cardholder.

1.   **Click the "Replace First Cardholder" button.**
2.   **Enter the new First Cardholder information and new eWIC card number.**
3.   **Save.**

"Change to First Cardholder" Button

- Removes the First Cardholder and makes their eWIC card inactive.
- Allows you move the Second Cardholder and their card into the First Cardholder position.

1. **Click the "Change to First Cardholder" button.**
2. **Click "OK" in the pop-up.**
3. **Save.**
     o   The Second Cardholder will continue to use their current card.
     o   When changed, the cardholder assumes the family address from client master. This may need to be updated for the family.

♫ NOTE: To add a new second cardholder use the "Add Second Cardholder" button.

"Remove Second Cardholder" Button

- Removes the Second Cardholder and makes their eWIC card inactive.
- Allows you to issue an eWIC card to a new Second Cardholder.

1. **Click the "Remove Second Cardholder" button.**
2. **Click "OK" in the pop-up.**
3. **Save.**

Replacing eWIC Cards

There are times when the eWIC card needs to be replaced – for example when the card is lost, stolen or damaged. There are two buttons to help with these actions.
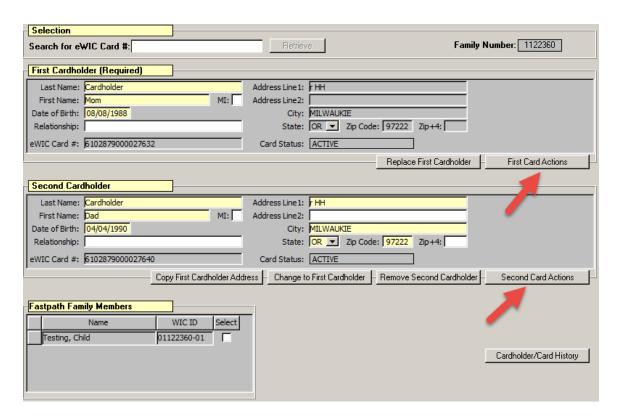
Figure 4: Buttons Used to Replace eWIC Cards

"First Card Actions" Button

Use this button to "Deactivate Card" or to "Deactivate and Replace Card" for the First Cardholder.

1. **Click the "First Card Actions" button.**
2. **Enter the reason for Deactivation.**
3. **If replacing card, enter the new eWIC card number.**
   - If found later, the deactivated card cannot be used.

"Second Card Actions" Button

Use this button to "Deactivate Card" or to "Deactivate and Replace Card" for the Second Cardholder.

1. **Click the "Second Card Actions" button.**
2. **Enter the reason for Deactivation.**
3. **If replacing card, enter the new eWIC card number.**
   - If found later, the deactivated card cannot be used.

Updating Cardholder Addresses

To update the first cardholder address, fast path to the Client Master Demographics and make the necessary changes. This updates the first cardholder's address, but does not update the second cardholder address, even if it had been the first cardholder address originally.

To update the second cardholder address, you can either click the "Copy First Cardholder Address" button, or type in the new address.

Other Cardholder Buttons

"Cardholder/Card History" Button

This button opens the *Cardholder History* pop-up which shows the history of cardholders and eWIC card status from the last 6 months.
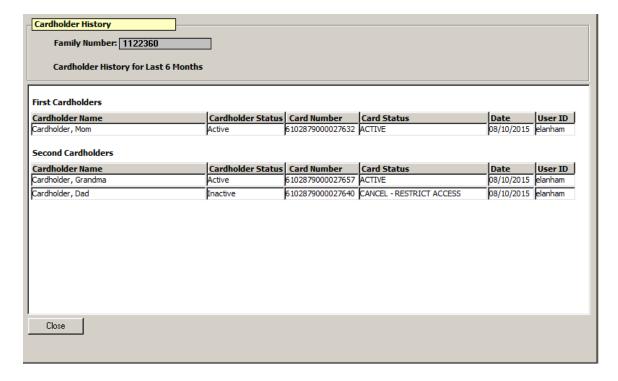

Figure 5: Cardholder History

Cardholder Status:
- **Active**: This is an authorized cardholder. The cardholder can be active even if their card is inactive.
- **Inactive**: This cardholder is not authorized to use the eWIC card.

Card Status:
- **Active**: This is an active eWIC card.
- **Inactive**: This card cannot be used.
- **Cancel – Restrict Access:** An inactive card because the cardholder is no longer authorized to use the card.

Notes: