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

Objectives:

Upon the completion of this lesson all users will be able to:
•   navigate through screens in the certification area of "Client Processes";
•   access client data from previous certifications;
•   state the flow of common client certification processes in TWIST; and
•   identify the required data for certification completion.

Oregon Policies:

♦   640   Documentation Requirements for Certification in TWIST
♦   641   Documentation Requirements for Certification in the absence of
        TWIST

Overview:

During the WIC certification process, a variety of information is collected for each participant. The TWIST system provides screens to document this information. The screens are grouped together under "Certification" in "Client Processes." Several certification screens have sub-tabs located at the bottom of the screen. Sub-tabs are used to access additional screens to document information.

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

Instruction:

Navigating through the Woman Certification Screens

The starting point for this section is:
        Client Processes ⇨ Certification

Figure 1: "Certification" Drop Down Menu

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

1.   **Select "Woman."**

Figure 2: "Woman" Drop Down Menu

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

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

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

Figure 3: "Medical Data" Screen

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

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

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

The screen is divided into three sections:
- Anthropometry;
- Prenatal; and
- Biochemical Information.

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

Figure 4: "Health History" Screen

- Health history information is documented on this screen using specific questionnaires.
- Previous certification health history information is accessed through the "History" button.
- There are two sub-tabs located in the lower left hand corner: "Questionnaire" and "Risk Factors."
- Clicking on a sub-tab will open the screen. The sub-tab title is bolded to indicate which screen is opened.

- Sub-tabs may include mandatory fields that must be filled out for the certification screen to be marked as completed.
- Risk information is documented on the "Risk Factor" screen.

4.   **Click the "Diet Assessment" tab.**

Figure 5: "Diet Assessment" Screen

- Diet information is documented on this screen using specific questionnaires.
- Previous certification diet assessment information is accessed through the "History" button.
- There are two sub-tabs: "Questionnaire," and "Risk Factors."
- The "Risk Factor" screen displays dietary related risks.
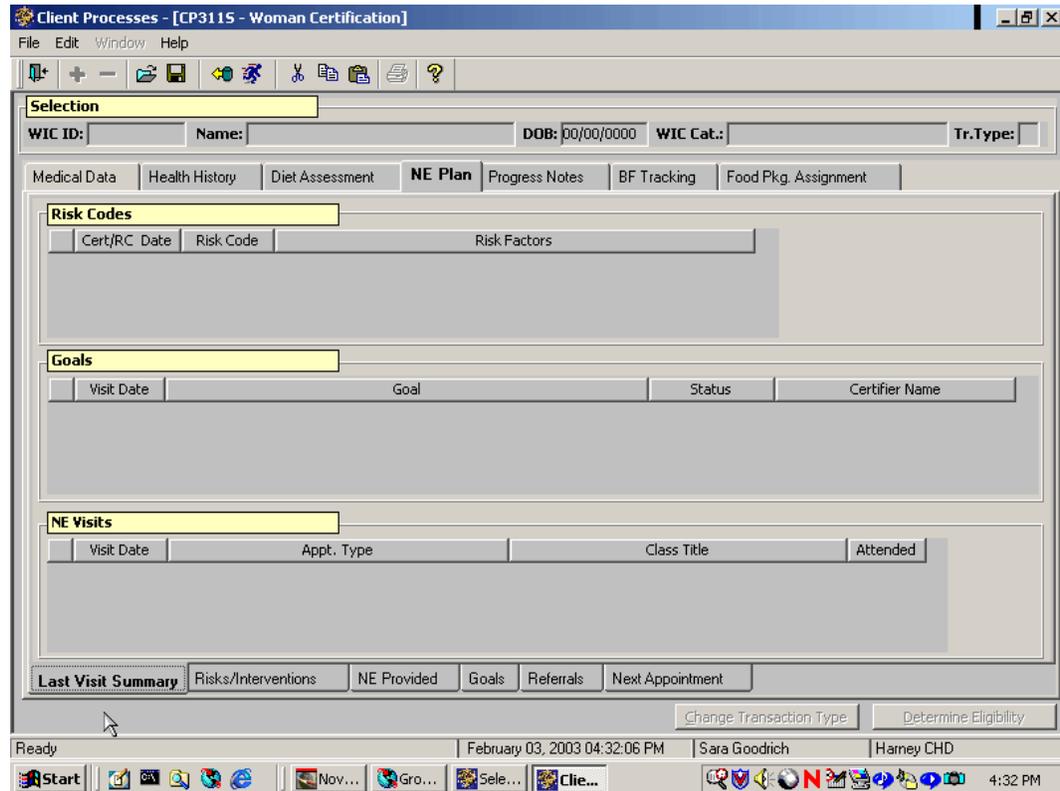
5. **Click the "NE Plan" tab.**

Figure 6: "NE Plan" Screen

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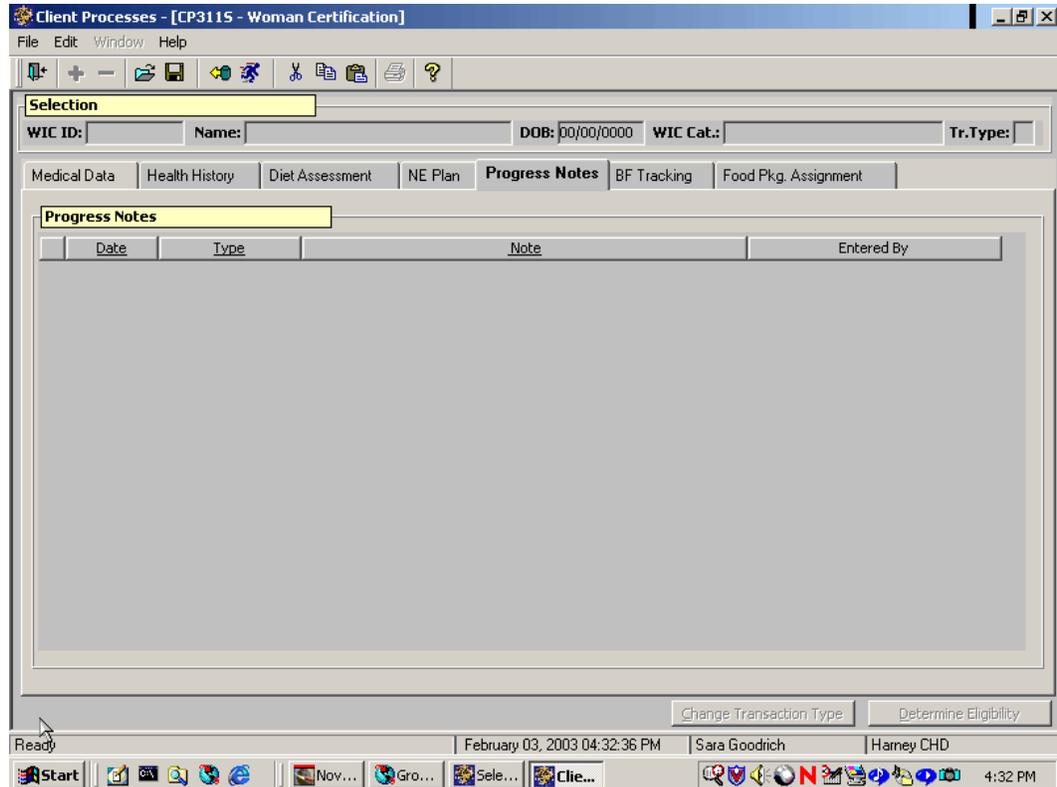
6.   **Click the "Progress Notes" tab.**

Figure 7: "Progress Notes" Screen

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

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

Figure 8: "BF Tracking" Screen

- Breastfeeding information is documented on this screen using specific questionnaires.
- There are four sub-tabs: "Questionnaire," "Contacts," and "Referrals" and Breast Pump Issuance
- Each sub-tab is used to document information related to the participant's breastfeeding status.

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

Figure 9: "Food Pkg. Assignment" Screen

- Detailed information about the client's food package is documented on this screen.

- Medical documentation for special medical foods and formulas is documented on the "Med Doc Info" pop-up.

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

Navigating through the Infant/Child Certification Screens

The starting point for this section is:
         Client Processes ⇨ Certification

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

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

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

Figure 10: "Medical Data" Screen

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

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

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

Determine Eligibility Button

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

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

1. **Click the "Determine Eligibility" button.**
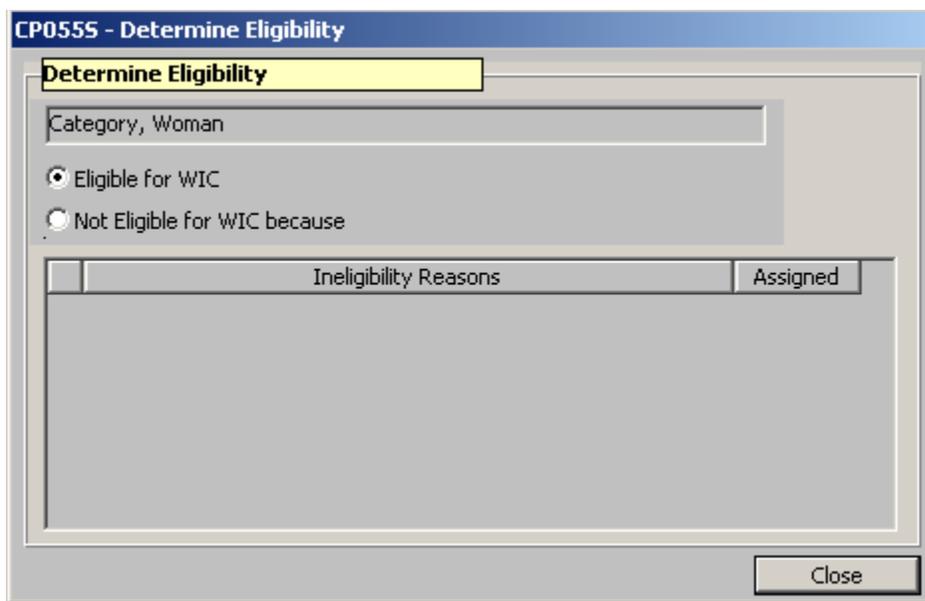
Figure 11: "Determine Eligibility" Pop-Up

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

✂ Tips and Shortcuts:

- The "BF Tracking" screen is only completed for woman who are breastfeeding.

- The Enrollment and Family Summary Screen buttons provide shortcuts to those areas.
- The "Change Transaction Type" button is enabled when a client has been selected. Clicking the button opens the "Change Transaction" pop-up and allows you to change the transaction type.

↪ **Practice Activity:**

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

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

✓ **Skill Check:**

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

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

    ✎

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

    ✎

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

    ✎

4.   When is the "Determine Eligibility" button enabled?

🖉

5.   How many modules are located on the "Food Pkg. Assignment" screen?

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✍ **Notes:**

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