Chapter 3: Client Processes
Section 7: Recertification
Lesson: Recertification

Objectives:

Upon completion of this lesson the user will be able to:
- Complete a recertification.

Overview:

As clients' certifications come to an end they will need to be recertified to determine if they are eligible to continue receiving WIC benefits. An active client may be recertified within 30 days before or after their certification end date. This lesson will teach you how to recertify a client.

Instruction:

Recertifying a Client

The starting point for this lesson is:
Client Processes ⇨ Enrollment & Intake ⇨ Enrollment

1.   **Select the client for whom you want to recertify.**

2.   **Select the new category for the client, if needed.**

3.   **Click on the "Change Transaction Type" button.**

4.   **Select "Recertification."**

♫ **NOT**E: When recertifying a woman from pregnant to postpartum, the initial steps are different because it may be more than 30 days from her certification end date. You will first need to go to the "**Intake**" screen and change the category to breastfeeding or postpartum, enter the ADD, then change the transaction type to "**Recertification**."
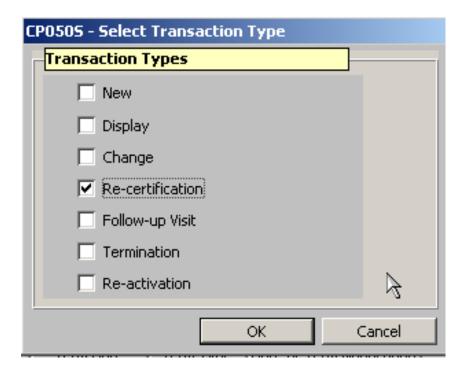
Figure 1: "Select Transaction Type" Pop-Up

5.   **Click "OK".**

All the check marks that represent completion of a screen for the certification process are removed.

6.   **Complete the "Income Eligibility" screen.**

♫ **NOTE**: Refer to Chapter 3, Lesson 102 *Enrollment* for information on how to complete this screen.

7.   **Click the "WIC Intake" tab.**

- A new row will appear in the "**Certification Dates**" section with appropriate start and end dates based on the current information.
- Once information has been completed on the "**WIC Intake**" tab, the certification start and end date may change to reflect the new data.
- Start and End dates may be modified.

8.   **If there are no changes to the "WIC Intake" tab, check the "Check if no changes" box and save your work.**

9.   **If there are changes to the "WIC Intake" tab, enter the changes and save.**

10.   **Click on the "Fast Path" icon and select "Infant/Child Certification" or "Woman Certification."**

- The "**Medical Data**" screen automatically displays.
- New rows are added in the "**Anthropometry**" and "**Biochemical Info**" sections.

11.   **Enter the new medical data.**

♫   NOTE: Refer to Chapter 3, Lesson 301 *Anthropometric / Biochemical for a Woman* or Chapter 3, Lesson 302 *Anthropometric / Biochemical for an Infant/Child* for information on how to complete this screen.

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

13.   **Click on the "Insert" icon to create a new Health History Questionnaire.**

14.   **Select the appropriate questionnaire from the drop down list.**

15.   **Complete the questionnaire.**

16.   **Click on "Risk Factors" and review and complete the screen.**

♫   NOTE: Refer to Chapter 3, Lesson 303 *Health History* for information on how to complete this screen.

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

18.   **Click on the "Insert" icon to create a new Diet Assessment Questionnaire.**

19.   **Select the appropriate questionnaire from the drop down list.**

20.   **Complete the Diet Assessment Questionnaire.**

21.   **Click on "Risk Factors" and review and complete the screen.**

♫   NOTE: Refer to Chapter 3, Lesson 304 *Diet Assessment* for information on how to complete these screens.

22.   **Click the "NE Plan" tab.**

23.   **Complete the screen and sub-tabs.**

♫   NOTE: Refer to Chapter 3, Lesson 201 *Interaction with Client*; Chapter 3, Lesson 401 *Interventions*; Chapter 3, Lesson 402 *Nutrition Education Provided*; Chapter 3, Lesson 403 *Goals*; Chapter 3, Lesson 404 *Referrals*; and Chapter 3, Lesson 900 *Individual Follow-ups* for information on how to complete these screens.

24.   **Click the "Progress Notes" tab.**

25.   **Enter any notes, if needed, and save.**

♫   NOTE: Refer to Chapter 3, Lesson 405 *Progress Notes* for information on how to complete this screen.

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

27.   **Complete the screen, if applicable.**

♫   NOTE: Refer to Chapter 3, Lesson 600 *Breastfeeding Tracking* for information on how to complete this screen.

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

•   The food package will default to an appropriate food package based on the category of the client.

•   The food package can be changed if needed.

29.   **Complete the screen.**

♫   NOTE: Refer to Chapter 3, Lesson 500 *Assigning and Forecasting Food Packages* or Chapter 3, Lesson 501 *Modifying Food Packages* for information on how to complete this screen.

30.   **Save and exit.**

NOTE: You must go to the "Family Summary" screen to issue the benefits. This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.

✂ *Tips and Shortcuts:*

- A recertification may be performed 30 days prior to the end date of the current certification.
- If the user tries to recertify the client prior to 30 days then the user will need to end the current certification (a termination date will be placed in the Termination Date Field) prior to starting the recertification process.
- Recertification is separate from Category Change. For a pregnant to postpartum woman a recertification process will occur once the 6-week postpartum period has been completed.

✓ *Skill Check:*

Use the information from your ☞ Activity for this skill check. A client comes in to the WIC office 3 weeks before her certification ends and needs to be recertified. Recertify her using the information on your ☞ Activity Sheet.

Answer the following question.

1. If a client needs a recertification more than 30 days before the current certification ends, what must you do before you can recertify?

   ✎

✎ *Notes:*

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