Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson 806: Category Change

Objectives:

Upon completion of this lesson the user will be able to:
- state the difference between a system generated category change and a manual category change; and
- complete a category change on a woman or infant.

Overview:

During a certification a client may change categories. These category changes may be the result of a birthday, delivery or a change in the breastfeeding status.

TWIST will automatically change a client's category if a birthday occurs. An example of a system generated category change is an infant is enrolled as a "Infant 0 – 3 months;" on the day of the infant's fourth month birthday TWIST changes the category to "Infant 4 – 6 months" during End of Day process. This system-generated change does not require any input from you, but is displayed on the "Intake" and "Food Package Assignment" screens.

If a pregnant woman delivers or a breastfeeding dyad decreases or stops breastfeeding, you must perform a *manual* category change. This type of category change may occur at any time during the certification period. You will need to manually review risk(s), certification end date, nutrition education, and food package information to ensure all information is appropriate for the new category. This manual category change enables you to provide your clients with appropriate food packages and education.

In this lesson you will learn how to perform a manual category change.

Instruction:

Changing Category for a Pregnant Woman After Delivery (before Recertification)

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

1.   **Retrieve the pregnant client for whom you want to change categories.**

2.   **Click "WIC Intake."**

Figure 1: "WIC Intake" Screen

3.   **Click in the "WIC Category" field and select the new category**.

The "**ADD**" field is now enabled.

4.   **Enter the actual delivery date in the "ADD" field.**

The certification end date will change to reflect the new category certification period.

5.   **Save.**

You have successfully changed the category for the duration of this certification.

- A message will pop-up informing you that the category change requires you to assign and save new food modules on the "Food Package Assignment" screen.
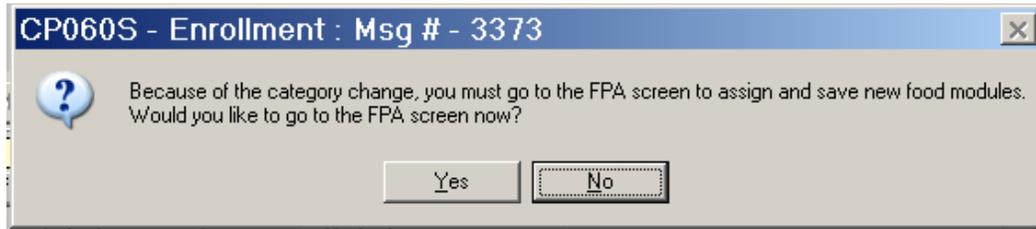
Figure 2: "Category Change" message

6. **Click "Yes" to Fast Path to "Certification, Woman."**

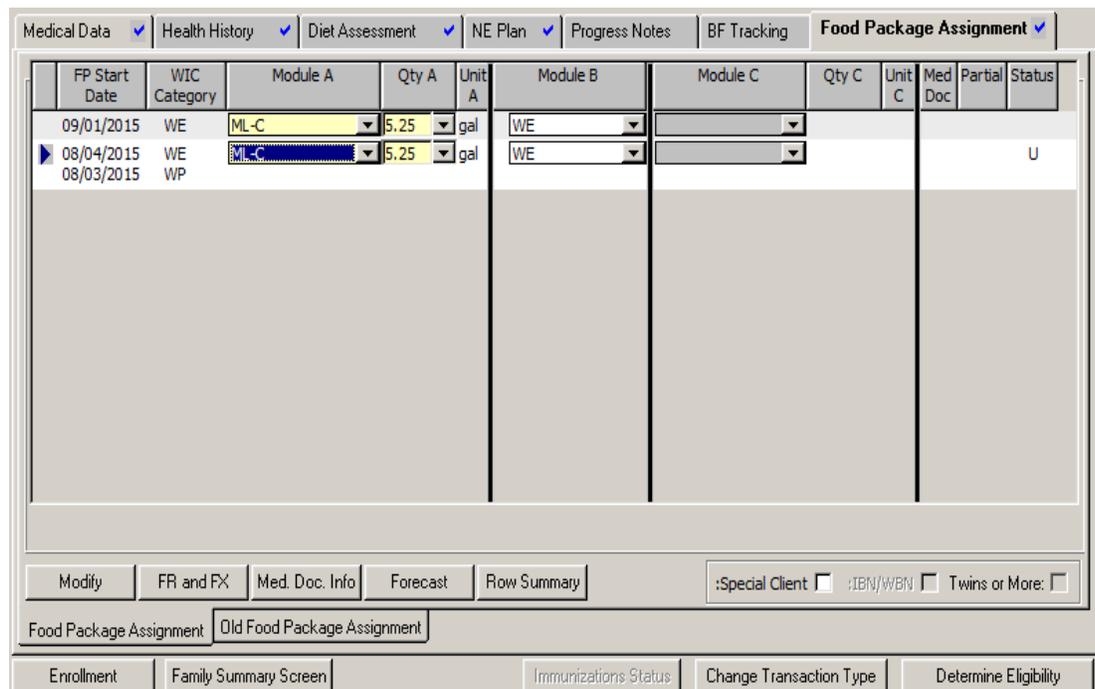7. **Click on the Food Package Assignment tab.**

Figure 3: "Food Package Assignment" Screen

8. **On the "Food Package Assignment" screen, verify the new package is correct.**
   - The current month will show a split row, with the row for the old category grayed-out and the row for the new category mandatory.

- If the participant had a standard food package in their old category, TWIST will assign a standard food package in their new category.
- If the participant had a non-standard food package in their old category, verify <u>that </u>the new package TWIST assigned is correct.
- TWIST adjusts the food quantities for the new category and previous benefits spent.

9.   **If needed:**
   - Select a non-standard template, or
   - Modify the new food package (See Chapter 3, Lesson 501, Modifying Food Packages).

10.   **If a non-standard food package is assigned for the current month, forecast the food package for future months.**
   - See Chapter 3, Lesson 500, Assigning and Forecasting Food Packages for more information.
   - If a "modified" food package is assigned, manually change the food package for all future months.

11.   **Save.**

12.   **Go to the "Family Summary Screen" to issue the new benefits**.

   This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.

Completing a Category Change on a Breastfeeding Dyad

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

1.   **Retrieve the breastfeeding woman for whom you want to change categories.**

2.   **Click "WIC Intake."**

Figure 3: "WIC Intake" Screen

3.   **Click in the "WIC Category" field and select the new category.**

The new category is displayed.
The certification end date may change as a result of the category change.

4.   **Save.**

You have successfully changed the category for the duration of this
certification.
- A message will pop-up informing you that the category change
  requires you to assign and save new food modules on the "Food
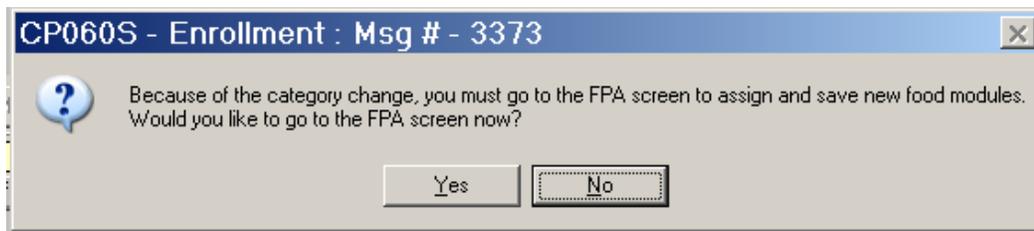 Package Assignment" screen.

Figure 4: "Category Change" Message

5.   **Click "Yes" to Fast Path to "Certification, Woman."**

6.   **Click on the Food Package Assignment tab and complete as described in steps 8 – 13 in the previous section.**

7.   **Save.**

♪ NOTE: You must change both mom and baby's category before issuing benefits. The *Family Summary Screen* will show "M" in the status field for the mom, indicating that the mom and baby's category are a mismatch.

8.   **Exit.**

9.   **Retrieve the breastfeeding infant.**

10. Click "WIC Intake."

11. Click in the "WIC Category" field and select the new category.

12. Save.

13. Fast Path to "Certification-Infant."

14. **Click on the Food Package Assignment tab and complete as described in steps 8 – 13 in the previous section.**

♪ NOTE: Adjust the formula quantity if needed.
- For non-breastfeeding infants (IN), the system will automatically assign the *maximum* amount of formula for their age.
- For some or mostly breastfeeding infants (IB), the system will automatically assign the *minimum* amount of formula for their age.

15.   **Save.**

16.   **Go to the "Family Summary Screen" to issue the new benefits.**

This screen is described in Chapter 3, Lesson 110, *Family Summary Screen*.

✂ *Tips and Shortcuts:*

If a participant changes to a new category after spending benefits she is no longer eligible to receive, TWIST will remove the unspent remainder of that food. The spent amount will show on the modify screen.

✍ **Notes:**